

# Ultra CallAnalyst Installation Notes

## Setting Up the CA Scheduler as a Service

The CA Scheduler also has the ability to run as a service like CDM on Windows NT and Windows 2000.

1. Select **Start - Programs - NEC CallAnalyst - Tools - Install Scheduler Service**.
2. After installation, the **CA Scheduler service** is set to start automatically upon powering up the computer.
  - Please note that when running Scheduler as a service the timer icon will no longer appear in the system tray (by default, located in the lower right corner of your Windows Desktop).
  - When running Scheduler in this mode, do not use the **Schedule** button on the automation configuration screens in Ultra CallAnalyst.
  - After adding or modifying your automation profiles choose **Save** and the scheduler will refresh on its own.

## User Name and Password Settings

The default setting is such that the User Name and Password (case sensitive) is not activated. You can set the user name and password after opening Ultra CallAnalyst for the first time. To do this, start Ultra CallAnalyst and click on **Setup - Set New Login Parameters**.

## Anti-Virus Program Settings

The default settings of an anti-virus program could cause it to eliminate the Ultra CallAnalyst license key files. Please ensure that the options are not set to destroy any files with extensions found in the Ultra CallAnalyst directory, especially all the file extensions that start with ca.\* (that includes hidden files like \*.ent, \*.rst, \*.key, \*.41s, \*.ckn).

## License Locked

In certain instances, the Ultra CallAnalyst licenses may become locked up (power failure, improperly shutting the PC down, etc.). In this case, on starting Ultra CallAnalyst, you may be prompted with a message that you have exceeded the number of users that can access the program. If you know all the available licenses for clients are not in use, then click **Start - Programs - NEC CallAnalyst - Tools - Release License Lock**. You should then be able to start the Ultra CallAnalyst program.

Ultra CallAnalyst is an easy to use, graphically oriented software package that allows you to monitor and analyze phone calls, understand phone usage and cut costs. CallAnalyst tracks both incoming and outgoing calls accurately as well as the date and time of each call. If you need to track the incoming phone call with name and/or telephone numbers, CallAnalyst requires Caller ID services from the local phone company.

Ultra CallAnalyst increases productivity, facilitates billing and helps detect toll fraud and phone abuse. It also has powerful tabular (text) and graphical report generating capabilities. Reports include extension/line summaries, date/time and department summaries, longest/most expensive calls, most frequently called numbers, and other commonly used summaries. These reports can be used to analyze your telephone as a critical business communication tool, thereby, improving its effectiveness and helping you to reduce your telephone related costs. CallAnalyst keeps track of:

- The date and time calls were made or received.
- The duration of each call.
- Which extension made or received the call.
- The CID/ANI, DNIS of the caller.
- The trunk or line numbers which handled the call.
- Account codes and authorization codes used for the call.

## Minimum PC Requirements

- PC with Pentium Processor
- 256 MB RAM
- VGA monitor 800 x 600 resolution (recommended SVGA 1024 x 768)
- Windows Operating Software - 95/98/ME, NT-SP 3 or later, 2000, XP
- 500 MB of free hard drive space
- CD-ROM drive (for software installation)
- Available serial port and RS-232 cable
- Printer (if required to print reports)

## **! IMPORTANT !**

***The time and date on the phone system must match to the minute the time and date on the PC running the Ultra CallAnalyst software. The PC time can not lag behind the phone system time more than 1 minute or the date reported by Ultra CallAnalyst will roll back to the previous day.***

## Connecting the Phone System

For CallAnalyst to receive call information from your telephone system, you must connect a serial cable between the SMDR port on your phone system and a serial port on your PC. CallAnalyst uses the Call Data Manager (CDM) communications program to read the call information at the serial port on the PC. The following steps must be taken in order for CDM to track your calls:

1. Connect an RS-232C cable from the serial port on the PC to the phone system's SMDR port.
2. Program your phone system with following features:
  - Enable SMDR output.
  - Enable Caller ID for incoming calls in the SMDR (if required).
  - Disable the SMDR output for station-to-station calls (if required).
  - Configure the phone switch to produce SMDR output for both inbound and outbound calls.

*Refer to your telephone system's hardware and software manuals for complete details on connecting and programming the system for SMDR.*

***DS1000/2000 Users:*** Due to the telephone system operation, CallAnalyst will not show a call until the next call is completed due to the position of the carriage return. This means the call records will always be one call behind.

***Aspire Users:***

- If the system is programmed to display the date (Program 35-02-14=1), the date will be displayed regardless of the setting for display of trunk name (Program 35-02-03). any trunk information is ignored. For example, if trunk port "049" has a trunk name of "PRI Ch1", if Program 35-02-03 = 0 (name) and 35-02-14 = 1 (display date), then SMDR will show "8/19 049." However, if Program 35-02-14 = 0 (date not displayed), the SMDR will show "PRI Ch1".
- For proper handling of DNIS calls, the name field (Program 22-11-03) must be the same as the received DNIS digits (Program 22-11-01). If this is not set, CallAnalyst will not be able to track transferred calls since the system displays the DNIS number when a call is received and displays the DNIS name for transferred calls. This setting has no impact on outgoing calls, which display the trunk name instead of the DNIS name.

***i-Series Users:*** In order for Ultra CallAnalyst to report transferred DID and DNIS calls correctly, the SMDR option to print DID/DNIS numbers must be turned off (Program 0404:6, Item 10 = 0) Otherwise, once the call is transferred, it will be registered as a separate call.

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### Installing Ultra CallAnalyst

**Note:** It is recommended that the Ultra CallAnalyst software be installed on a separate PC, however other applications may be installed. The performance of CallAnalyst depends on the other application's need for memory and processing. During the installation process, the PC may need to be restarted several times in order to update files required by the Ultra CallAnalyst software.

1. Close all applications running on your system.
2. Load the NEC CallAnalyst CD-ROM into your CD-ROM drive.
3. The Setup program will start automatically. If it does not start, follow the next step, otherwise skip the next step.
4. On the Windows Desktop, choose **Start - Run**; run the **Setup** program by entering **F:\Setup.exe** (where F: is your CD-ROM drive).

### Choose From Five Available Options For Installation

1. **Ultra CallAnalyst** - Ultra Call Analyst has a powerful and extensive array of reporting and billing functionality packaged with report automation features and much more.
2. **Ultra CallAnalyst Network Client** – This allows you to run CallAnalyst from the convenience of your own workstation, providing you have purchased one or more client licenses.
3. **Ultra CallAnalyst FraudAlert!** - This provides you with the tools to detect telephone abuse and provides alerts on calls like 911, 900, etc. This tool is installed on the CallAnalyst server or on a client PC over a TCP/IP network.
4. **Internet Explorer 6.0** - CallAnalyst Help files require Microsoft Internet Explorer 4.0 or later to be installed for viewing.
5. **Adobe Acrobat Reader 5.0** - CallAnalyst manuals require Adobe Acrobat Reader to be installed for viewing.

### CallAnalyst Stand-Alone/Server Installation

1. Select Ultra CallAnalyst. Follow the setup wizard to complete the software installation.

### Network Client Installation

After installing the Ultra CallAnalyst, you can install a network client which allows you to run Ultra CallAnalyst from the convenience of your own workstation, **if you have purchased a license enabling one or more network clients**.

1. Map a network drive to the CallAnalyst installation folder on the Network Server (usually, C:\Program Files\NEC CallAnalyst) from the PC running the Network Client.
2. Make sure the client login has read/write (Full) access to the CallAnalyst folder on the Ultra CallAnalyst server.
3. Close all applications running on your system.
4. Load the **NEC CallAnalyst CD-ROM** into your CD-ROM drive.
5. The Setup program will start automatically. If it does not start, follow the next step, otherwise skip the next step.
6. On the Windows Desktop, choose **Start - Run**; run the **Setup** program by entering **F:\Setup.exe** (where F: is your CD-ROM drive).
7. Select Ultra CallAnalyst Network Client.
8. Setup will prompt you to browse to the location of the Ultra CallAnalyst server. Browse to the location of your mapped drive and select the "ca.exe" file.
9. After installation, choose **Start - Programs - NEC CallAnalyst - Ultra CallAnalyst Client** to start the client program.

### Acquiring a License

1. Start Ultra CallAnalyst.
2. Press **Enter** on your keyboard within three seconds of starting CallAnalyst. This step should display the **Ultra CallAnalyst License Configuration** dialog box.

*If Ultra CallAnalyst is displayed instead of the license configuration dialog box, that means you did not press **Enter** soon enough. You will need to close CallAnalyst and restart from Step 1 again.*
3. Once the license configuration dialog box appears the Site Code will be displayed. Write this number down for future reference. Click on the **Ultra CallAnalyst Registration** link to go to the web site **http://ultracallanalyst.triviumsys.com**.
4. Enter the information requested in the form to acquire the appropriate license.

*This information includes customer information, dealer information, the phone system type to which the Ultra CallAnalyst is connected, and the license information. For the Serial Number, enter the 10 digit alpha-numeric code printed on the Ultra CallAnalyst CD. The Site Code is the 18 digit alpha-numeric code displayed in the Ultra CallAnalyst License Configuration window (the window which is displayed in Step 2). Updating the software with additional network clients or from the Lite to Full version can not be licensed through the web site. You must contact NEC America in order to license your software.*
5. Click the **Submit** button.
7. The Site Key number will be displayed. Write this number down for your records and copy and paste this number into the Site Key field in the **Ultra CallAnalyst License Configuration** dialog box.
6. Once entered click the **Validate** button.
5. After installation, start Ultra CallAnalyst by choosing **Start - Programs - NEC CallAnalyst - CallAnalyst**.

*The web site can only issue a Site Key number for each serial number once. Should the software need to be reinstalled due to a PC problem (hard disk failure, formatted hard drive, etc), you must contact NEC America.*

### Transferring a License

If you re-install Ultra CallAnalyst in a different directory or on a different computer, then you need to transfer your license.

1. To move a license between two computers, first make sure there is a copy of this program on each computer.
2. In the unlicensed copy, select **Transfer Into Computer** from the **License Configuration** window. Insert a floppy disk into the computer's disk drive, and enter the path of the floppy disk (for drive A, this is "A:\"). Press OK
3. Take the floppy disk to the licensed computer. Select **Transfer Out of Computer** from the **License Configuration** window and enter the path to the floppy disk.

*If there is a significant time delay between the time when the **Transfer Out of Computer** is started and the time it can be completed, you can push **Continue Transfer Later**. When you are ready to continue, select **Transfer Into Computer** again from the **License Configuration** window and follow the instructions on the screen.*
4. Take the disk back to the original computer and select **Continue Transfer** from the dialog box. If you chose to exit the program and continue the transfer later, select **Transfer Into Computer** from the **License Configuration** window again. You will be asked if you want to continue the existing transfer. Click **Yes** and enter the path to the floppy disk.

*One license should now have been transferred from the licensed copy to the unlicensed copy. If there was only one license for the original program (this is usually the case), the originally licensed copy will no longer run.*

### Setting Up the Call Data Manager (CDM)

The Call Data Manager (CDM) captures call information from your telephone system. In Windows 95, Windows 98, and Windows ME, during the installation process, CDM is added in the **Start - Programs - Startup** folder and starts when Windows starts up. To start CDM in Windows 2000 and Windows NT select **Start - Programs - NEC CallAnalyst - Call Data Manager (CDM)**. In CDM, information can be found about the manufacturer and model of your telephone system, as well as the specifics about the communication settings and data record formats.

1. Verify that the CDM is started and disabled. If this condition is met, a red telephone icon should appear in your system tray (lower right corner of the screen). If there is no telephone icon in your system tray, start the CDM by selecting the **Start - Programs - NEC CallAnalyst - CDM** menu item. If the telephone icon is green, disable the CDM by right clicking on the CDM icon in the system tray and selecting the **Disable CDM** menu item.
2. Display the **CDM Setup** window by right clicking on the CDM icon in the system tray and selecting the **Setup** menu item.
3. **Telephone system:** Select the correct type for your telephone system (i.e., NEC 28i/124i/384i/704i, DS1000/2000, etc. and not the model of the telephone) from the drop-down list.
4. **Port:** Specify the COM port on your PC that is connected to the serial cable used to send data from the telephone system to your PC. (Usually this is COM1, but often it is COM2, and very rarely 3 or 4.)
5. **Communication settings:** The proper settings for these settings are documented in your telephone system manual and are configurable by telephone system programming. Whether or not the COM port settings are known, it is recommended that if you are setting up the CDM for the first time, that you click **Configure** to enter the test window and ensure proper functioning of the COM port. Check the **Help File** in Ultra CallAnalyst to learn how to configure CDM for different data sources.
6. After all settings are correct, select the **Save** button and exit the CDM setup to enable the CDM.

### Advanced Administration Options

Make sure all configurations are done and the modules are working in the normal application mode before switching to a service. Remember, you will not have a user interface to the modules when running as a service.

#### Setting up Call Data Manager (CDM) as a Service

The Call Data Manager (CDM) has the ability on Windows NT and Windows 2000 PCs to run as a service. This allows the CDM to run when users are logged out of the computer as well as the ability to start and stop the CDM remotely. Select **Start - Programs - Ultra CallAnalyst - Tools - Install CDM Service**. After installation, the Call Data Manager service is set to start automatically upon powering up the computer. To start and stop the service, go to **Services** within the Windows Control Panel. This is where startup options can be configured as well. Please note that when running CDM as a service, the telephone icon will no longer appear in the system tray (by default, located in the lower right corner of your Windows Desktop).

#### Procedure to Configure the CDM

To configure the CDM after installing it as a service, do the following:

1. Stop **Call Data Manager** service within the Windows Control Panel (**Start - Settings - Control Panel - (for Windows 2000) Administrative Tools - Services**).
2. Go to **Start - Programs - NEC CallAnalyst - Tools - Configure CDM**. Choose one of the options (if you have a rough idea of your port settings, then use the second option) and proceed to **Test Configuration**.
3. Once you have determined the test is successful, choose **Save Parameters** and **Exit**.
4. Start the **Call Data Manager** service within the Windows Control Panel (**Start - Settings - Control Panel - (for Windows 2000) Administrative Tools - Services**).