



UNIVERGE[®] SV9100

SV9100 MyCalls Installation Manual

Version 1.0 for MyCalls 4.5.0.8



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What is MyCalls

MyCalls is a range of call management solutions that are easily expanded and upgraded as a business grows.

MyCalls Basic

A single user entry-level application that helps provide a real-time snapshot of all calls. Free for the first 12 months.

MyCalls Call Manager

A more sophisticated version for businesses providing a full complement of call management information.

MyCalls Desktop

Provides Desktop users with the with instant Customer Relationship Management (CRM) information such as screen-pops, and much more.

MyCalls Console

A feature rich Operator Console allowing calls to be delivered professionally and efficiently.

MyCalls Enterprise

Enables easy call management and reporting across multiple sites such as main offices and branch offices.

MyCalls Call Centre / Agent Control

An essential application for any contact centre and specialist call centres.

MyCalls Call Recorder

Equips MyCalls Call Manager and MyCalls Call Centre with full call recording capability. Calls are recorded securely, encrypted and easily accessed.

Note there is a separate installation manual available for MyCalls Call Recorder.

Any combination of the products can be used together on a single installation.

There is an end user guide available for MyCalls which is available in the Start > Programs > NEC Infrontia > MyCalls Menu when MyCalls is installed.

Requirements

The same MyCalls software will always be installed regardless of which MyCalls product you are using. It is the license that determines the features that are available in the application. By default the MyCalls databases are stored in SQL Server Express 2008 R2. This will allow a maximum database size of 10GB which is approximately 50 million call records. If there is a requirement to store more data than 10GB worth of data then SQL Server 2008 R2 can be used.

Telephone System

MyCalls 4.5.0.8 will run on an SV9100 PBX running version 2 system software or greater.

MyCalls PC Specification

The MyCalls server is the PC that is responsible for communicating with the PBX and holding the MyCalls databases. MyCalls clients can be installed on users PC's so that they can use the features of the MyCalls application. A dedicated PC is strongly recommended for the MyCalls Server.

Minimum Hardware Specification

Intel Dual Core 2.0 GHz / Intel i3 Processor 2GB RAM Min 20GB of available Hard Disk Space *see note1

Operating systems:

Windows Server 2003 SP2 – 32 BIT only Windows Vista Business, Ultimate and Enterprise 32 BIT only Windows 7 Professional, Ultimate and Enterprise 32 and 64 BIT Windows Server 2008 / R2 – 32 and 64 BIT Windows 8 Professional and Enterprise 32 and 64 BIT Windows Server 2012 / R2

MyCalls clients should be of the same minimum specification as the MyCalls server above.

*Note 1. MyCalls is installed automatically on the 'C' drive the install will fail if a 'C' drive isn't available. Sites that have high call volumes should use a PC higher than the minimum hardware specification.

Thin Client and Virtualised Environments:

MyCalls is supported in some thin client environments, when installed in this way the MyCalls server must be installed on a dedicated PC and then a MyCalls client should be installed for deployment on the thin client server. Supported thin client environments are Terminal Services running on a Windows Server 2008 and Citrix. Call playback is not supported in a thin client environment.

MyCalls is also supported on Hyper V running on a Windows Server 2008 / Windows Server 2012.

The PC Specification for running MyCalls Call Recorder and MyCalls Enterprise model is different, refer to the separate MyCalls Call Recorder installation manual or the <u>Enterprise</u> section of this manual for details.

Network Requirements

MyCalls uses TCPIP to communicate to the PBX and MyCalls client installations use DNS to communicate to the MyCalls server. Both of these services need to be available before installing MyCalls.

Installation Overview

MyCalls requires two TCP connections to the SV9100 in order to work, SMDR and P Commands. SMDR is used to provide call information after calls have completed. P Commands are used to display real time information such as extension status and calls in queue information. The output can be collected from the Ethernet port on the CCPU or from the IPL.

All of the SV MyCalls products require a license to be installed on the SV9100 before they can work, details on licensing is available in the <u>Licensing</u> section of this manual. After the MyCalls application is installed, it will detect the license that is installed in the SV9100 and enable the associated features in the application. Once the application is licensed then the configuration import tool will start, the config import tool will program the required items in the SV9100. After configuring the SV9100, the config import tool will download key information required for MyCalls such as extension / DDI names and numbers.

Installing the MyCalls Server

The MyCalls server is the PC that will be responsible for collecting the SMDR and P commands from the PBX and storing it in the MyCalls database. It is possible to install other MyCalls clients that can connect to the MyCalls server to us the MyCalls application.

From the folder that MyCalls was unzipped to, run setup to start the installation wizard.



The installation wizard will begin



At the Welcome screen click next



Carefully read the license agreement and click I accept, then next.

License Agreement			
Please read the following license agree	ement carefully.		
MyCalls License Agreement			-
Please carefully read the for the license of the pr ("Licensed Program") prod Corporation ("The Company	e following licer coduct MyCalls so duced by NEC Infr 7"). The Company	nse agreement oftware contia grants to you	
with the terms specified this Licensed Program, yo become a party of this Ag	ensed Program ir in this document ou consent to be greement.	accordance . By installing bound by and	•
with the terms specified this Licensed Program, yo become a party of this Ag	ensed Program ir in this document ou consent to be greement. ment	a accordance . By installing bound by and Print	•
with the terms specified this Licensed Program, yo become a party of this Ag I accept the terms in the license agree I do not accept the terms in the license	ensed Program ir in this document ou consent to be greement. ment agreement	a accordance By installing bound by and Print	•
with the terms specified this Licensed Program, yo become a party of this Ag I accept the terms in the license agree I do not accept the terms in the license stallShield	ensed Program ir in this document ou consent to be greement. ment aggreement	a accordance . By installing bound by and <u>Print</u>	•

Select Complete and click next. A complete installation will install SQL server 2008 R[°] express and all of the components required to make MyCalls work. Instructions for installing MyCalls with SQL server 2008 R2 are available in the <u>Using MyCalls with SQL 2008</u> R2 section of this manual.

🙀 MyCalls - Ins	stallation Wizard			×
Setup Type Choose the s	etup type that best suits	; your needs.		14
Please select	a setup type.			
• Complet	te			
1 1 1	All program features	will be installed. (Req	uires the most disk	space.)
C Client				
r 😫	Install only the client	applications.		
O <u>S</u> erver				
1	Install only the serve	r components.		
🔿 <u>E</u> mail Co	ollector			
15	Install only the email (collector		
C Cu <u>s</u> tom	É.			
r 🚝	Choose which progra will be installed. Reco	m features you want mmended for advanc	installed and where ed users.	e they
InstallShield				
		< <u>B</u> ack	<u>N</u> ext >	Cancel

Next, enter a name for PBX, select your country and enter your area code.

! Note: The area code is used for determining the local calls in MyCalls. Enter the correct area code.

LOCACIO	n			
If this ti maximu PBX nar calls will installed Please er Please so	ne first installation, you m). Note that if there a nes must be unique. The be local calls. If the bo I, or the existing values nter the PBX Name Head Office elect your country	u need to choose a name are several MyCalls instal le area code that you en ixes have been disabled s (not shown) are being u	for your PBX (16 cha ations in your compar ter will help in determ then either a databas ised.	racters ny, all of the ining which se is not being
•	United Kingdom	•		
Please e	nter your area code			
191	01509			

Finally, click Install to start the installation process.

🖗 MyCalls - Installation Wizard	×
Ready to Install the Program	4
The wizard is ready to begin installation.	
Click Install to begin the installation.	
If you want to review or change any of your installation settings, clici exit the wizard.	k Back, Click Cancel to
InstallShield	
< <u>B</u> ack Insta	Cancel

Post Installation License Check

After the installation process has completed click finish. After clicking finish the license check window will open. At this point, the MyCalls license will already need to be installed on the SV9100 and the free license will need to be disabled else MyCalls will not be able to read the license from the switch. If the license manager is closed without reading the license from the switch then it can be manually started at any time.

When prompted, enter the IP Address of the SV9100 and click check license. The License check will then make sure that the free license is disabled on the SV9100 and that there is a MyCalls license installed on the SV9100.

icense Check		
To continue with the confi icense. Enter the switch check license button. Clic	guration of the system, the switch P address and modify the port if n k Close to cancel the post install c	must now be checked for a ecessary and then click the configuration.
witch IP Address 0.0.0.100	<u>P</u> ort 6080 _ ●	Check License

Once the license has been detected in the PBX, click 'OK' and the license manager will start.



When the license manager is opened, check the IP address is correct and click 'Read License.'

🌽 S¥8100 License Installa	tion	×
SV8100 License In	stallation	
To license the application IP address and modify th then be displayed. This li Request menu option, th	n, firstly the license must be read fro e port if necessary. Click the read li cense needs to be registered using en the validated return license need	om the switch. Enter the switch cense button. The license will g the Generate Registration ds to be installed.
<u>S</u> witch IP Address	<u>P</u> ort	
10.0.0.100	6080 🚖	Read License
		<u>C</u> lose

Reading the license out of the switch can take a few minutes, click 'Yes' when prompted.

5¥8100 L	cense Installation
2	Reading the license from the switch can take over 5 minutes and during this time the application will not respond to any commands. This operation will not affect the switch, but cannot be cancelled. Are you sure you want to continue?
	Yes No

Once the license has been read out from the switch, click yes to install the license.



You will be notified that the license will need to be registered. The license that is read from the switch will work



The license read from the switch will run for 15 days during this period the license will need to be registered. Either follow the on-screen instructions or see the <u>Registration</u> section of this manual for further details.

If the post installation license check is cancelled or closed at any time the license manager can be started manually at any time and is available in Start / Programs / NEC Infrontia / MyCalls further details are available in <u>Reading the License from the SV9100</u>.

Configuration Import

This step will program the SV9100 ready for MyCalls and download key data from the PBX ready to send into MyCalls. After the license manager has been closed down click OK and the Configuration Import Tool will be opened. MyCalls has a scheduled config import feature which means it will synchronise data between MyCalls and the SV9100. The Configuration Import Tool can be started manually at any point and is located in the Start / Programs / NEC Infrontia menu.



When prompted, enter the IP Address of the PBX and click download

SV8100 Configuration D	ownload
To simplify the installation proces can be downloaded from the swi Address of the switch in the box b Download button. Note that this p	ss, the switch configuration tch. To do this, enter the IP below and click the process can take a while.
Switch IP Address	
	Doumland
10.0.0.100	Download

If the SV9100 is not configured as required for MyCalls you will be asked if you would like MyCalls to configure the SV9100 for you Click Yes to continue. You may be prompted to enter a user name and password for the SV9100 if the defaults values have been changed. A list of the commands set by MyCalls are available below, the settings changed are the same as what is set by the MyCalls v5 script.

2) The	some the second second second				
V the ad	switch settings are not comp se settings are modified. Woul isted?	atible with MyC d you like the s	alls. Configurat ettings in the s	on download cannot contir witch to be automatically	iue unless
			1		

If there is a value set by MyCalls that needs to be changed, this can be done using PC Pro / Web Pro after MyCalls has set it. For example, all extensions are enabled for SMDR output, if there was a requirement for a particular extension not to output SMDR this would manually need to be changed back after MyCalls had enabled it.

The table below explains all of the commands that are set in the SV9100 by the configuration import tool.

PRG Cmd	Easy Edit Command	Value	Description / Purpose
10-20 Device 1	Applications / MyCalls / General	8181	Set CTI Port for MyCalls Desktop
10-20 Device 2	Applications / MyCalls / General	4000	Set P Command Port
10-20 Device 5	Applications / MyCalls / General	4001	Set SMDR Port
10-20 Device 10	Applications / MyCalls / General	4002	Set Agent Control Port
11-16-09	System Numbering Plan / Service Codes / Single Digit Code	6	Set single digit voicemail access code to 6 (used by MyCalls Desktop)
41-01-03	-	LAN	Enable P Command Output
41-01-05	-	8 Digit	Enable 8 Digit P Command Output
35-01	Additional Devices / SMDR / Setup / SMDR Service Options	LAN	Set SMDR Output for LAN
35-02	Additional Devices / SMDR / Setup / SMDR Output Options	-	Set Various SMDR options for MyCalls.
14-01-06	Additional Devices / SMDR / Setup / SMDR Output for Trunks	Enable	Enable SMDR Ouput for all trunks.
20-11-11	COS / Automatic On-Hook Transfer	Disable	Disable On-Hook transfer, used for MyCalls desktop.
15-01-03	Additional Devices / SMDR / Setup / SMDR Output for Extensions	Enable	Enable SMDR output for all extensions
15-01-14	Additional Devices / SMDR / Setup / SMDR Output for Extensions	Enable	Enable Internal SMDR (outbound)
15-01-15	Additional Devices / SMDR / Setup / SMDR Output for Extensions	Enable	Enable Internal SMDR (inbound)

Once the SV9100 is configured and ready for MyCalls the the config import tool will be populated.

Progress		

Click OK when prompted.

¥8100 Co	onfiguration Download
Ų	The download completed successfully. Please check the configuration is correct and then click the 'Save Configuration' button.

The data that is displayed in the config import tool should be reviewed before its saved. A description of the data that is imported is below.

Items	Description
Account Codes	Account codes that are configured in the SV9100 will be imported into MyCalls as account codes.
Callers (Abb Dial)	The speed dial list in the SV9100 will be sent into MyCalls. There are two areas where the callers are send to – Callers and the System Address book. Callers are used for alpha tagging CLI's in reports and the System Address Book is used with MyCalls desktop. The number and the name are both imported.
Carriers	If an LCR code is being used, the number is added to the SMDR that is output by the SV9100. MyCalls will remove the LCR code from the SMDR record to show the correct CLI in the application.
DID's	DDI Numbers and names will be retreived from the SV9100. If there are multiple entires in the DDI table, only the first entry found will be displayed in the config import tool.
Extensions	The extension Number, Name, Type and group membership are identified. When InMail is used the voicemail ports are identified and set a voicemail ports in MyCalls.
Extension Groups	If department groups are being used on the SV9100 in PRG 16-02 or Easy Edit / Department Groups then these groups are created. The extensions identified in the extensions page above are put into the appropriate groups in MyCalls.
Pilot Numbers	If ACD is being used then programmed ACD groups are available in MyCalls.
Service Codes	MyCalls desktops uses service codes to perform certain functions such as transfer to voicemail and Day / Night mode.
General	The General Page is populated with configuration items on the SV9100
Trunks	Trunk numbers, names and trunk types are listed here

The data in the config import tool can be reviewed and its possible to 'de select' items if they should not be imported into MyCalls.

Configuration Import
- 87 Account Codes
🏹 Callers (ABB Dial)
- 🕼 DIDs
Extensions
- 🗊 Extension Groups
- 🜀 Pilot Numbers
- 87 Service Codes
🎁 General
🕂 🎢 Trunks

Drag a col	umn header here	to group by that colum
Selected	Number	🔺 Name
~	150	Sales
V	151	Support
	152	Web

Once you are happy with the data in the config import tool, click the disk icon to import the configuration into MyCalls.

Cli	ick to Import		
File Help			
Import My Telephon You can download the con button.	ne System C	Configu Ily from th	iration e switch using
Configuration Import	E	Drag a col	umn header here
	S	elected	Number 🔺
	S	elected	Number 🔺
DIDs			Number × 202 203

Click Yes to being the process.

Confirm	
	Are you sure you want to import the configuration to PBX: Head Office
	Yes No

Click Ok and close down the config import tool.



MyCalls is now configured and ready to be opened.

Opening MyCalls for the First Time

To open MyCalls double click the MyCalls Icon, a shortcut is created on the desktop of the PC or is available in the Start / Programs / NEC Infrontia Menu.



By default there are no usernames or password configured. At the User Login screen click ok.

User Login	<u>?</u> ×
Enter a user name and password When logged in you will be allowed to use the level that your user has been granted. This cou a user, supervisor or admin.	system to the uld be as either
User Name	Browse
Password	<u>C</u> ancel

MyCalls will open and is ready to use. Details on how to use MyCalls is available in the MyCalls End User Guide.



MyCalls and Virtual Loopback Reporting

MyCalls can report on calls that are passed through virtual loopback trunks on the SV9100. This is because SMDR and P commands are output for loopback trunks just like they are for any other trunk type. Loopbacks can often be configured on an SV9100 to give greater flexibility for call routing and reporting.

Previously if a call arrived on a real trunk and was passed around a loopback trunk, there would be two unrelated SMDR records output, these would both be displayed in the call records view and be available in the MyCalls reports.

The example below shows a call that arrived on ISDN trunk 1 and was passed round virtual loopback trunk 31. The call was then answered by extension 200. The two calls are listed next to each other but there is no easy way to know that the two calls are associated. The big downside to the call records being displayed like this is if you have call recording. This is because the recorded call is associated with the real trunk and not the virtual trunk. If you were to filter the call records view to show calls for ext 200, there would be no way to playback the associated recorded call.

										ч×
Period	Today 🔹	From: 23 / 04 /	2013 00:00 -	To: 23 / 0	4 / 2013 23 : 59	•				
Number	DID Ext	ension -Call Ty	pes	rd 🔽 lat	Max Calls	Anna Fillenn an				
					30 ¥	Nore Filters >>				
Drag a o	column header here to gro	up by that column				Column	Chooser	Options	Refre	sh
 (1) 	🛛 🔎 Date/Time 💿 👻	Extension	Trunk	DID Number	Number	Location	Abbr	Duration	Ring Time	
- 🔊	23/04/2013 15:53	252 (EXT 252)	001 (Line 001)	315890	01159695700	Nottingham	📫 Inc	80:00:00	00:00:03	
	23/04/2013 15:53	200 (Simon Fred)	031 (Line 031)	400000	01159695700	Nottingham	📄 Inc	00:00:08	00:00:03	
•										- F
🏷 Alarn	ns 📖 Calls 📠 Unretur	rned Calls 📓 Audi	t Log 📝 Actions 🖁	🗟 Address Boo	ks					

There is an combined enhancement in SV9100 system software and MyCalls version 4 and above that tags loopback calls to the trunk that the call originated on. The enhancement to the system software marks the SMDR output to indicate the call has been passed around a loopback. This feature is set by MyCalls when it does the configuration import and enables PRG 35-02-24, Virtual Loop Marking. MyCalls version 4 will use the virtual loop marking feature to group loopback call to real calls.

The screenshot below shows the same call as above – a call that arrives on real trunk 1, passes round a loopback and is answered by extension 200. The call type now shows as an Incoming Transfer call with the + icon shown on the far left of the call record.

										4	×
Period Today	y 🔹	From:	23 / 04 / 2	2013 00 : 00 🔻	To: 23 / 04	/ 2013 23 : 59 🔻					
Number		Extension	-Call Typ ✓ Inc	ves ✓ Out ✓ A	Abd 🗹 Int 5	Max Calls 0 🗘 More	Filters >>				
Drag a column I	header here to	o group by that	column				Column Cho	oser Op	tions	Refresh	
🔹 🔊 🥥 🖉 🗈	Date/Time	- Extensio	n	Trunk	DID Number	Number	Location	Abbr	Duration	Ring Time	
🛨 🚺 🛛 2	3/04/2013 16:	:13 200 (Sin	on Fred)	001 (Line 001)	315890	01159695700	Nottingham	🛋 Inc Tfr	00:00:07	00:00:03	
≽ Alarms 📠	Calls 💷 Un	nreturned Calls	🗎 Audit	Log 💋 Actions	address Books 🗞						
Licensed to User.	Company:	: Expires on	09/04/2014	Logged in User:	p						

When you expand the view by clicking the + icon, you can see both legs of the call that is on both trunks 1 and 31.

								Ψ×
Period Today 🔹	From: 23 / 04 /	2013 00:00 💌	To: 23 / 04 /	2013 23:59 💌				
Number DID Ext	ension Call Ty Inc	pes ✓ Out ✓ At	bd 🗹 Int 5	ax Calls	Filters >>			
Drag a column header here to gro	up by that column				Column Cho	ooser Oj	ptions	Refresh
🕥 🥥 🖉 Date/Time 🛛 👻	Extension	Trunk	DID Number	Number	Location	Abbr	Duration	Ring Time
23/04/2013 16:13	200 (Simon Fred)	001 (Line 001)	315890	01159695700	Nottingham	🛋 Inc Tfr	00:00:07	00:00:03
🔬 Date/Time 👻 👻	Extension	Trunk	DID Number	Number	Location	Abbr	Duration	Ring Time
23/04/2013 16:13		001 (Line 001)	315890	01159695700	Nottingham	inc 🔿	00:00:03	00:00:02
23/04/2013 16:13	200 (Simon Fred)	031 (Line 031)	400000	01159695700	Nottingham	📫 Inc	00:00:04	00:00:01
≽ Alarms 🖾 Calls 🖾 Unretur	ned Calls 📓 Audit	Log 💋 Actions	a Address Books					
Licensed to User: Company: E	xpires on: 09/04/201	4 Logged in User:p						.:

If call recording is being used you can playback the calls against either of the call records. The view can also be filtered by extension number and the recording can still be played back. If call recording isnt being used then the loopback calls will still be grouped together but the speaker icon will not be available.

The only limitation to using this feature is that if a loopback is dialled internally that doesn't have a trunk call associated with it the call isnt displayed correctly in MyCalls. If there is a requirement to dial loopbacks internally for reporting purposes then PRG 35-02-24, Virtual Loop Marking will need to be manually disabled in the SV9100 configuration. If the Config Import Tool is ever re-run and modifies the SV9100 configuration the PRG item will need disabling afterwards.

Licensing

Before any of the MyCalls products can be used, the correct MyCalls license should be installed. The MyCalls license is usually downloaded from the LMS and stored in the SV9100. Initially after MyCalls has been installed the Post Installation License check takes place, this will take you through the process of reading the license from the SV9100. If this process is cancelled at any point, then the license manager can be manually started from the Start / Programs / NEC Infrontia Menu.

As standard, each of the MyCalls products works with up to 512 extensions, to use more than this number of extensions an extension expansion license is required.

After the license has been read from the SV9100, it will hold its own copy of the license. Only when the license changes on the SV9100 would you need to reread the license from the SV9100. When the license is read from the SV9100, it is necessary to register the license, there is a 15 day grace period in which to complete the registration. The time it takes to read a license from the SV9100 can vary based on the license type.

For details on MyCalls Enterprise licensing refer to the <u>MyCalls Enterprise License</u> section of this manual.

The SV9100 needs to be licensed to use P Commands and SMDR, these are included in the MyCalls license that is installed on the SV9100*. When MyCalls reads the license from the SV9100 it verifies that the license in the SV9100 is valid. If MyCalls discovers that any licensing rules have been incorrectly purchased or the license agreement breached then it may choose not to include them in the license or invalidate the license.

Note: MyCalls will not be able to read a license while the 60 day trial is running on the SV9100. Before reading the license from the SV9100, you should check that PRG 90-55-01 is set to 0. A license will also need to be installed on the SV9100.

When the MyCalls license is registered it is bound to the CPU and MyCalls checks on start-up that it is connected to the correct CPU. If a CPU is replaced then MyCalls will not start until the MyCalls licenses exist on the new CPU. When the licenses exist on the new CPU, the license should be re-read and re-registered using the license manager.

* MyCalls Desktop requires the 3rd Party CTI license to be installed on the SV9100.

Reading the License from the SV9100

If a license is being upgraded or you need to run the License Manager manually, from the Start / Programs / NEC Infrontia / MyCalls menu, start the License Manager application. Select SV9100 / Read License from Switch.

ile <u>Li</u> cense	SV8100	Help	
Serial Numbe	Rea	d License from Switch)e
1	Ger	erate Registration Request File	
Registered U	ser	Registe	red Company

Enter the IP Address of the PBX and click read license. The TCP Port can be changed if required, you would only change the TCP Port if PRG command 10-47 had been changed.

To license the application Enter the switch IP addre license button. The license registered using the Gen	n, firstly the license must be ess and modify the port if ne- se will then be displayed. The nerate Registration Request	read from the switch. cessary. Click the read its license needs to be option off the SV8100
menu, then the validated	return license needs to be i	nstalled.
menu, then the validated Switch IP Address	return license needs to be i <u>P</u> ort	nstalled.

You will be warned that the operation may take some time, click yes to continue.

2	Reading the license from the switch can take over 5 minutes and during this time the application will not respond to any commands. This operation will not affect the switch, but cannot be cancelled. Are you sure you want to continue?
	Yes No

After the licence has been read from the PBX, you will be asked if you want to install it, click yes and the license will be installed on the PC.

lyCalls L	icense Manager			
	Are you sure you	wish to install this lice	nse? Any previou	us license will be overwritten.
			No	

The license will now work for a period of 15 days, during this 15 day period, the MyCalls software has to be registered. If the MyCalls software is not registered during this period then it will expire.

MyCalls Li	icense Manager
Ų	The License has been successfully installed and will be locked to this computer. This license needs to be registered using the Generate Registration Request option off the SV8100 menu.
	ОК

Registration

MyCalls License M	anager		
ile License SV8100	SV8100 Help		
Serial Number Re	Read License from Switch		
95177025-el Ge	Generate Registration Request File		
Registered User		Registered Compan	y
Expires		Maintenance Rene	wal
16/09/2008		01/09/2008	
PBXs	Extensions	Concurrent Users	ACD Supervisors
1	Unlimited	1	0
Agents	Agent Desktop Users	Wallboard Users	
In		In The second se	
Call Playback Users	Digital Trunks	Analog Trunks	IP Trunks
Jo		10	Jo
	Inst	all	

After the license has been read from the SV9100, you should select 'Generate Registration Request File' from the SV9100 menu.

A Window will open containing the registration information and instructions, if the PC that MyCalls is running on has internet access, then open the following web page. If the PC does not have internet access then save the text from within the windows into a text file and take it to a PC that has Internet Access.

http://www.kelmar-software.com/svlicensing/default.aspx

tequest of itegistration obac	
Follow the instructions below to generate the SV8100 registr received the registration file, use the License Manage to ope license.	ation code. After you have n the file and then install the
nstructions	
Copy all of this text, save it to a text file then take it to a computer that then follow the instructions below. Open a web browser and go to the page: http://www.kelmar-software Copy the following information into the page.	has internet access, open it a.com/svlicensing/default.aspx
Registration Request Information:	
rOnsDtqWhB8Hk0a0U0He/Zgq6bi5vtl7+A1FE6BZw+4y1drWekqmg 2uleKjF5EWx0fWMqp5/bSYDM++PEuKhsoi75yKk1Z4h1mMiMQeAs kqqyGAwo8RiaQPZkLRJ1LVc0MUvwBR1Ju0DwCDLitB3RvN05UI/ MpdHtlvggkt39NFraYU/Xy	PZ8D974VSJ/g/lY1+k4sCsbQgi yvsEpzGMlXISXdRv7uJqL48AG /gq8bUdxAa+gGu3AsyT/D82iBX

Enter the details into the website, the user name / organisation should be details of the customer. The email address is the mail address that the registered license should be sent to. You can also elect to receive MyCalls email notifications, check the box to enable notifications. Now copy and paste the registration information into the 'Registration Request Information' box. Take care when copying the information into the box to make sure that only the registration information (show in the above screenshot, highlighted in blue.) Do copy any other information or it may result in an invalid license being issued. Finally click the 'Send Registration Details' button to submit the registration request.

indows Internet Explorer		
licensing/default.aspx	•	
je l		
registration is for below. The registration file will be emailed to the email address provided.		
David Smith		
DS Computers Ltd		
david.smith@email.co.uk		
□ Notify me of updates and information regarding MyCalls		
rOnsDtqWhB8HkOaOUOHe/Zgq6bi5vtl7+A1FE6BZw+4y1dr1JekqmgPZ8D974VSJ/g/tYI+k4sCsbQ gj2u1eKjF5EWx0fWMqp5/bSYDM++PEuKhsoi75yKk124h1mMiMQeAsyvsEpzGMtX1SXdRv7uJqL48A GkqqyGAwo8RiaQPZkLRJ1LVcOMUvwBR1JuODwCDLitB3RvN051J1/gq8bUdxAa+gGu3AsyT/D82iBX MpdHtIvggkt39NFraYU/Xy		
li li	censing/default.aspx registration is for below. The registration file will be emailed to the email address provided. David Smith DS Computers Ltd david.smith@email.co.uk Notify me of updates and information regarding MyCalls rOnsDtqWhB8Hk0a0U0He/Zgq6bi5vtl7+A1FE6BZw+4y1dr1JekqmgPZ8D974V5J/g/tYI+k4sCsbQ_ gj2uleKjF5EWx0fMkqp5/bSYDM++PEuKhsoi75yKk124h1mMiMQeAsyvsEpzGMtX1SXdkv7uJqL48A GkqqyGAwo8RiaQPZkLR71LVcOMUvwBR1Ju0DwCDLitB3RvN051J1/gq8bUdxAa+gGu3AsyT/D82iBX	

Once the registration has been submitted, it is automatically processed by a web server and a registered license file is sent to the email address that was provided. The email will come from <u>SV9100MyCallsRegistration@kelmar-software.com</u> and will have a license file attached. Save the license file onto the MyCalls server and open the license manager *see note1. From the file menu, select open and open the .Irf that was in the email. Verify that the information is valid and correct then click Install to install the license. The main difference between the license pulled from the SV9100 and the registered license is the expiry date. The license pulled from the switch will have an expiry date of 15 days from when it is read from the SV9100. The expiry date of the registered license will increase by at least 1 year or to the date 01/01/2105.

*Note 1. If the file is downloaded using webmail, then there is a possibility is can become corrupted. If when you attempt to open the Irf file in the license manager is says it can't open the file, then you should re-register the license and download the attachment using another method other than webmail.

🔑 MyCalls License M	anager		_ 🗆 🗵	
File License SV8100) Help			
Serial Number		License Type		
95177025-efc0-4bf3-ae48-1dc2a777750e		Multi-User		
Registered User		Registered Company		
Ivor Bin	Ivor Bin		NECi Engineering	
Expires	Expires		Maintenance Renewal	
01/01/2105	01701/2105			
PBXs	Extensions	Concurrent Users	ACD Supervisors	
Agents	Agent Desktop Users	Wallboard Users	1.	
Call Playback Users	Digital Trunks	Analog Trunks	IP Trunks	
	Ins	tall		

Click OK to complete the installation of the license.

MyCalls L	icense Manager
<u>.</u>	Are you sure you wish to install this license? Any previous license will be overwritten.
	OK Cancel

Once the license has been successfully installed you will a receive confirmation.

MyCalls L	icense Manager
Ų	The License has been successfully installed and will be locked to this computer.

Adding Additional MyCalls Licenses

To add additional items to a MyCalls installation, then they first have to be installed on the SV9100. After the license has been installed on the SV9100, then you will need to re-read the license from the SV9100 and carry out the registration process again.

MyCalls Call Recorder Licensing

MyCalls Call recorder licensing works in the same method as other MyCalls features. Call recording does not work with the 1 year version of MyCalls, at least MyCalls Call Manager / Call Centre / Enterprise is required. As part of the call recording package, a license containing call recording for the relevant number trunks should be downloaded from the LMS and installed on the SV9100.

If you are adding a call recorder to an existing installation then you should treat the installation as an upgrade and carry out the read license / registration procedure after installing it.

Installing a Client

A MyCalls client can be installed to allow an individual to use the MyCalls application on their PC. During the installation you are prompted to enter the name of the MyCalls server PC. Once the installation has completed then the client will be able to use any of the functions available in the MyCalls application. There are three types of clients that can be installed, a network client, a standard client or a client can be deployed using an MSI file. A network client works by installing a small amount of components on the client PC and then running the MyCalls application from a network share on the MyCalls server. A standard client will install a lot more components onto the client PC and the application will be run from the local PC. The MSI installer allows an installation file to be created, this can be deployed on a client PC.

There are 4 different client applications that can be installed.

MyCalls	This is the MyCalls application typically used for configuring MyCalls, running reports and viewing real time information
MyCalls Desktop	This is the MyCalls Desktop application.
MyCalls Opera	This is the Operator Console application.
Stop Start Recording	This is the Stop / Start Recording Client.

When each client is installed, you can choose with of the applications are installed.

! Note: It is not possible to use the Network client and screen pop Outlook.

Network Client

The main advantage with a network client is that you only need to install it once on a client PC. If the MyCalls software running on the MyCalls server PC was upgraded then as the MyCalls client runs the application from the server, the client could not need upgrading. During the installation of the MyCalls Server, the MyCalls installation folder is shared. In a Windows Domain environment, users will need the read and execute permission to the MyCalls share on the MyCalls server. To see if a client can access a share, from Windows explorer, type <u>\\servername\myCalls</u> where servername is the name of the MyCalls server. In the example below the server is called MyCalls.



If an explorer window opens showing the contents of the share then the client can connect to the server and share.



If an error is displayed saying there is a Logon failure then it is possible that the user trying to connect to the share does not have the correct permissions.



To check permissions, on the MyCalls server, right click on the MyCalls folder in C:\Program Files\NEC Infrontia and then Sharing and Security.

The second se				
File Edit View Favorites Tools He	lp			
🕞 Back 👻 🕤 👻 🏂 🔎 Search	🧞 Folders 🛛 🎹 ▾			
Address 🛅 C:\Program Files\NEC Infrontia				
	L			
File and Folder Tasks 🛛 😤 🛜				
	Open			
📺 Rename this folder 🛛 🤎	Explore			
😥 Move this folder Search				
Copy this folder	Sharing and Security			
Oublish this foldow to the				

On the security tab, make sure the user or group that is accessing the share has the Read and Execute permission to the share.

Group or user names:			
Administrators (MYCALLS VA)	dministrators)		-
Domain Users (NITSUKO_H	Q\Domain Users)		μ
	A <u>d</u> d	<u>R</u> emove	
Permissions for Domain Users	Allow	Deny	
Full Control Modify Read & Execute List Folder Contents Read Write Special Permissions or for adve	I I I I I I I I I I I I I I I I I I I		
click Advanced.	inced settings, –	Ad <u>v</u> ance	<u>+</u>

Start the MyCalls installation program and from the 'Setup Type' menu, select network client and click next.

MyCalls - In	stallation Wizard	×
Setup Type		
Choose the	setup type that best suits your needs.	
Please select	t a setup type.	
C Comple	ete	
	All program features will be installed. (Requires the most disk space.)	
🔿 Cļient		
15	Install only the client applications.	
C Server		
1	Install only the server components.	
C <u>E</u> mail C	ollector	
	Install only the email collector	
C Cu <u>s</u> ton	n	
13	Choose which program features you want installed and where they will be installed. Recommended for advanced users.	
• Networ	k Client	
1 4	Install a network client	

From the Client Installation menu, choose which client applications will be installed and click Next.

🙀 MyCalls -	Installation Wizard			×
Client Inst	allation			
Please s	elect one or more clients you	would like to install.		
Г МуС	alls			
Q	MyCalls should be installed reports on this computer.	l if you want to see t	he real time statist	ics and run
Colle	ctor Configuration Client			
P	A Collector Configuration (configuration of the Collec	Client should be insta tor from this comput	alled if you want to er.	modify the
🔽 Desk	top Client			
Ò	A Desktop Client should be from this computer.	e installed if you wan	t to control your ca	all handling
InstallShield				
		< <u>B</u> ack	<u>N</u> ext >	Cancel
				11. S.

When prompted, enter the name of the MyCalls server PC name and click next.

MyCalls - Installation Wiza	ard		×
Server Name			
if a Call Processor has not be operate correctly, it needs to Processor has been or will be An IP Address must not be e	en included in this installation o know the name of the comp e installed onto. ntered here. It must be a cor	n then, for MyCalls t uter on which the D nputer name.	o vata
Please enter the Server Name	e		
mycalls			
istallShield		C 33	

At the next prompt, click install to complete the installation.

🙀 MyCalls - Installation Wizard	×
Ready to Install the Program The wizard is ready to begin inst	allation.
Click Install to begin the installat If you want to review or change exit the wizard.	ion. any of your installation settings, click Back. Click Cancel to
Install5hield	< Back Install Cancel

The MyCalls application can now be launched using the Start Menu or a short cut is available on the desktop.

Standard Client

Run the setup installation wizard and step through until you reach the Setup Type screen. Choose Client and click next.

🙀 MyCalls - Ins	tallation Wizard		×
Setup Type Choose the s	etup type that best suits you	ur needs.	1
Please select	a setup type.		
C <u>C</u> omple	te		
15	All program features will b	be installed. (Requires th	e most disk space.)
• Client	Install only the client appl	lications.	
⊂ <u>S</u> erver	Install only the server cor	mponents.	
InstallShield			
	_	< <u>B</u> ack <u>N</u> e	xt > Cancel

Choose which applications will be installed and click Next.

🛃 MyCalls -	Installation Wizard
Client Inst	callation
Please s	elect one or more clients you would like to install.
MyC	alis
<u>.</u>	MyCalls should be installed if you want to see the real time statistics and run reports on this computer.
🖵 Colle	ctor Configuration Client
P	A Collector Configuration Client should be installed if you want to modify the configuration of the Collector from this computer.
🔽 Desk	top Client
Ò	A Desktop Client should be installed if you want to control your call handling from this computer.
InstallShield	
	< <u>B</u> ack <u>N</u> ext > Cancel

When prompted, enter the name of the MyCalls server PC name and click next.

r tycalis - Installation mize	ard		2
Server Name			
if a Call Processor has not be operate correctly, it needs to Processor has been or will be An IP Address must not be e	en included in this installation o know the name of the comp installed onto. ntered here. It must be a con	then, for MyCalls to uter on which the Da nputer name.	ata
Please enter the Server Name	e		
Please enter the Server Name	e 		
Please enter the Server Name mycalls	9		

At the next prompt, click install to complete the installation.

🔂 MyCalls - Installation Wizard		×
Ready to Install the Program The wizard is ready to begin installa	tion.	
Click Install to begin the installation. If you want to review or change any exit the wizard.	y of your installation settings,	click Back, Click Cancel to
InstallShield	<u> </u>	nstall Cancel

The MyCalls application can now be launched using the Start Menu or a short cut is available on the desktop.

MSI Installer

Clients can also be installed by creating an MSI Installation file, this allows custom items such as the MyCalls server name to be specified. The MSI installer file is installed without any interaction from the person installing the software, it just uses the options they were set when the installer was made.

When the MSI Installer is used, .NET Framework 4 will need to be installed manually before installing the MSI file.

To make an MSI file, open the MyCalls Toolkit on the MyCalls Server, this is usually:

C:\Program Files(x86)\NEC Infrontia\MyCalls\Toolkit.exe

When the toolkit loads, click Client > Generate Client Installer...

HyCalls Toolkit	na faarilaan					
Services Database	Message Queue Firewall Clustering	Client	Licenses	Translations	Trace Viewer	
Services	Configuration and Test					¥
Messages	Generate Client Installer					*
Databases	Generate Outlook Client Installer					×

From the list of applications, choose which which should be part of the installer package. The Stop / Start Recording Client should only be selected if that specific feature is being used. Other configuration items such as the location of the Database Server and port numbers can also be changed. Enter the options as required and click OK.

Generate Client Instal	ller			— ×-			
This option allows you to generate an unattended Installer for the Client applications that can be manually installed or pushed out to multiple clients as required.							
Default Installation F	Default Installation Folder :						
C:\Program Files (x86	C:\Program Files (x86)\NEC Infrontia\MyCalls\						
Select Applications t	to install :						
MyCalls MyCalls Desktop MyCalls Operato MyCalls Stop/Sta	✓ MyCalls ✓ MyCalls Desktop ✓ MyCalls Operator Console MyCalls Stop/Start Recording Client						
005.0	<u> </u>		D · 1 · 0				
pc0335	Local	ctor : Collector	pc0335\KSS	rver :			
DCD Server Port 9997	CPE Server Port 9995	Status Port 9993	SMDR Port 9991	TAPI Status Port 9971			
Messaging Port	Agent Control Port	Call Control Port	RT Comms Port	Licensing Port			
9981	9983	9987	9985	9876			
IM Port 9970	PresencePort 9969	Ops Console Port 9973	Call Recording Port 9888	Tracing Config Port 8500			
	9970 9969 9973 9888 8500 OK Cancel						

The toolkit will take a short while to create the MSI file, when prompted enter a name for the file and click Save.

Select Output File	oraries	Documents		r 4 9	Search Docume	ents	×
Organize 🔻 Ne	w folde	r					0
Documents Music Pictures Videos	*	Documents library Includes: 2 locations Name	Date modified	Тур	Arrange	by: Folder	-
File <u>n</u> ame: Save as <u>t</u> ype:	MyCa *.MSI	llsClient4.5.MSI			Save	Cancel	•

Once the file has been created, click OK.

Generate O	Client Installer	3
i	The Client installer was generated successfully at C:\Users\admin\Documents\MyCallsClient4.5.MSI.	
	ОК	

To install the client, browse to the MSI file and run it, the client will be installed using the options specified in the Toolkit.

	uments 🕨 Client		→ 41	Search Client	<mark>×</mark> ت
Organize 🔻 👸 Install 🔻	Share with 🔻 E-mail	Burn New fold	er	!≡ ▼	
☆ Favorites ■ Desktop	Documents lik	orary		Arrange by: Fo	lder 🔻
Downloads	Name	*	Date modified	Туре	Size
increme Places	■ MyCallsClient4.5		28/10/2014 10:45	Windows Installer	293,332 KE
💶 Computer	▼		III		•
MyCallsClient4.5 Windows Installer Pack	Date modified: 28/10/201 age Size: 286 MB	4 10:45 Date o	reated: 19/09/2014 13:01		

Outlook Plugin

The Outlook Plugin gives users the ability to set their presence status directly from Outlook. The installation file is made in the say way as the MSI Installer file. Open the Toolkit on the MyCalls Server, this is usually:

C:\Program Files(x86)\NEC Infrontia\MyCalls\Toolkit.exe

When the toolkit loads, click Client > Generate Outlook Client Installer...

HyCalls Toolkit	in factors					x
Services Database	Message Queue Firewall Clustering [Client	Licenses	Translations	Trace Viewer	
Services	Configuration and Test					*
Messages	SQL QUERY					*
Databases	Generate Client Installer Generate Outlook Client Installer					*

Confirm the settings are correct and click OK to proceed.

Generate Outlook Addin Installer	— ×							
This option allows you to generate an Installer for the Outlook Addin that can then be manually installed or pu out to multiple clients.								
Default Presence Server :								
pc0335								
Presence Server Port :								
9969								
ОК	Cancel							

When prompted, enter a name for the file and click Save.

Select Output File	rarias	Documents		A Soard	Desuments	
	ianes	bocuments v	• • • • • • • • • • • • • • • • • • •	- Seurci	Documents	~
Organize 🔻 Ne	w folde	·				0
🖌 Favorites 📃 Desktop		Documents library Includes: 2 locations			Arrange by: Folder 🔻	
Downloads	E	Name	Date modified	Туре	Size	-
Kecent Places		Jent Client	28/10/2014 10:50	File folder		
File <u>n</u> ame:	Outloo	kPlugin				-
Save as <u>t</u> ype:	*.MSI					-
Hide Folders				<u>S</u> a	Cancel	

Once the MSI file has been created, double click to Install it. This will start a standard Windows installer.



Step through the Installation Wizard to complete the process.



To confirm that the installation has been successful, open Outlook and you will see the PRESENCE menu option in the toolbar.

0 🛛 🖉 🤊 🛛 🗢			Inbox -	rich@testmail.local - N	licrosoft Out	look			_		23
File Home	Send / Receive	Folder	View	McAfee E-mail Scan	PRESENCE						∾ 🕜
9 ¥											
Settings											
My Presence	- Falders Hara									_	
		Search Inb	ox (Ctrl+E)				P	This is the F	РВХ		<
4 rich@testmail.loc	al	Arrange By	: Date			Newest on top	-	toll fraud		-	
🖂 Inbox (18)								guard@testr	mail.l	ос	No
Drafts		4 Iwo W	reeks Ago					Sent: Wed 15/10	0/2014	17:	odr

If there is a requiement to install the application without any interaction from the install, the MSI cal be run with the /qn switches against it. An example of how you would do this using a command prompt is shown below.

C:\Windows\system32\cmd.exe Volume in drive C has no label. Volume Serial Number is 7E9F-0A20 Directory of C:\Users\admin\Documents 29/10/2014 11:12 7,667,712 OutlookPlugin4.5.0.7.MSI 19/09/2014 10:06 293,912,576 stopstart.MSI 2 File(s) 301,580,288 bytes 0 Dir(s) 90,312,978,432 bytes free C:\Users\admin\Documents>OutlookPlugin4.5.0.7.MSI /qn
Patching MyCalls

From time to time, patches may be release to enhance the performance of MyCalls. These patches are made available from the following FTP site, <u>ftp://ftp.neci.co.uk/mycalls/patches</u>. The patches are made available on a per PBX / per version of MyCalls. There is a set of instructions available online that show you how to install the patches. Patches should be applied to the MyCalls server and any clients.

Un-installing MyCalls

If you wish to perform a complete removal of MyCalls then follow these instructions. This process will remove all of the MyCalls components from the PC including and historic data and configuration. If you are moving the data to another PC then make sure you take a backup of the Configuration and Call Records databases by opening MyCalls on the MyCalls server PC and choosing Database Backup on the system menu. If you are upgrading MyCalls it is not nessacary to perform a complete removal of MyCalls instead follow the <u>Upgrade Instructions</u>.

MyCalls Server

On the MyCalls server in Control Panel > Programs and Features remove the MyCalls application.

Programs and Features - 🗆 🗙						×
🔄 🄄 👻 🕆 🛐 > Control Panel > All Control Panel Items > Programs and Features 🗸 🖒 Search Programs and Features 🔎						P,
Control Panel Home View installed updates	Uninstall or change a program To uninstall a program, select it from the list and th	Uninstall or change a program To uninstall a program, select it from the list and then click Uninstall, Change or Repair.				
Turn Windows features on or off	Organise 🔻				•=== •	0
	Name	Publisher	Installed On	Size	Version	
	Microsoft SQL Server 2008 R2 Microsoft SQL Server 2008 R2 Native Client Microsoft SQL Server 2008 R2 Setup (English) Microsoft SQL Server 2008 Setup Support Files Microsoft SQL Server Browser Microsoft SQL Server WSS Writer Microsoft SQL Server VSS Writer MyCalls	Microsoft Corporation Microsoft Corporation Microsoft Corporation Microsoft Corporation Microsoft Corporation Microsoft Corporation NEC Infrontia	22/04/2013 22/04/2013 22/04/2013 22/04/2013 22/04/2013 22/04/2013 22/04/2013	2.90 MB 32.0 MB 26.1 MB 8.99 MB 1.89 MB 503 MB	10.50.1600.1 10.50.1600.1 10.1.2731.0 10.50.1600.1 10.50.1600.1 4.0.0.3	
	<					>

When the upgrade validation window appears, click yes to contiune

	Upgrade Validation	×
lin tr A	n order to upgrade to a later version, your license will need to contain ne correct upgrade items. To view your upgrade eligibility, use the lelp->Upgrade Requirements menu option from the main application. re you sure you want to continue?	
	<u>Y</u> es <u>N</u> o	

Once the MyCalls application has un-installed, remove Microsoft SQL Server 2008 R2. At the first menu click remove.



Click OK when prompted.

1	SQL Server 2008 R2 Setup	- 🗆 🗙				
Setup Support Rules						
corrected before Setup can contin	ue.					
Setup Support Rules	Operation completed. Passed: 6. Failed 0. Warning 0. Skipped 1. Show details >> <u>View detailed report</u>	<u>R</u> e-run				
	ОК	Cancel				

When prompted, select the option to remove the KSS instance.

	Rem	ove SQL Server 2	008 R2		- 🗆 🗙
Select Instance Specify the instance of SQL Server	to modify.				
Select Instance Select Features Removal Rules Ready to Remove Removal Progress	stance Select the instance of SQL Server to remove. To remove Management Tools and share select "Remove shared features only" and then click next. Rules Instance to remove features from: Kemove Installed instances:				ed features only,
Complete	Instance Name	Instance ID	Features	Edition	Version
	KSS	MSSQL10_50.KSS	SQLEngine, SQLEn	Express	10.50.1600.1
			< <u>B</u> ack <u>N</u> ext	> Cancel	Help .:

Once the KSS instance has been selected then complete the wizard to remove MyCalls SQL components.

•	Remove SQL Server 2008 R2 – 🗆 🗙
Complete Your SQL Server 2008 R2 rem	noval completed successfully.
Select Instance Select Features Removal Rules Ready to Remove Removal Progress Complete	Summary log file has been saved to the following location: C:\Program Files\Microsoft SQL Server\100\Setup Bootstrap\Log\20130422_114255 \Summary_pc0385_20130422_114255.txt Information about the Setup operation or possible next steps: Your SQL Server 2008 R2 removal completed successfully.
	Close Help

Click close once the process has finished. To complete the removal process, delete the MyCalls installation folder which will be "C:\Program Files (x86)\NEC Infrontia\MyCalls" MyCalls will now be completely removed from the PC.

MyCalls Clients

To completely remove a MyCalls client in Control Panel > Programs and Features remove the MyCalls application.

Programs and Features – 🗆 🗙						×
🔄 🄄 👻 🕆 🕅 🕨 Control Panel 🕨 All Control Panel Items 🕨 Programs and Features 🔹 🗸 🖒 Search Programs and Features 🔎						P
Control Panel Home Uninstall or change a program						
View installed updates	To uninstall a program, select it from the list and th	en click Uninstall, Change or Repair.				
🚱 Turn Windows features on or						
off	Organise 🔻				•	0
	Name	Publisher	Installed On	Size	Version	
	 Microsoft SQL Server 2008 R2 Microsoft SQL Server 2008 R2 Native Client Microsoft SQL Server 2008 R2 Setup (English) Microsoft SQL Server 2008 Setup Support Files Microsoft SQL Server Browser Microsoft SQL Server VSS Writer Microsoft SQL Server VSS Writer 	Microsoft Corporation Microsoft Corporation Microsoft Corporation Microsoft Corporation Microsoft Corporation Microsoft Corporation NEC Infrontia	22/04/2013 22/04/2013 22/04/2013 22/04/2013 22/04/2013 22/04/2013 22/04/2013	2.90 MB 32.0 MB 26.1 MB 8.99 MB 1.89 MB 503 MB	10.50.1600.1 10.50.1600.1 10.1.2731.0 10.50.1600.1 10.50.1600.1 4.0.0.3	>

When the upgrade validation window appears, click yes to contiune.

Click close once the process has finished. To complete the removal process, delete the MyCalls installation folder which will be "C:\Program Files (x86)\NEC Infrontia\MyCalls" MyCalls will now be completely removed from the PC.

Upgrading MyCalls

There are two aspects to upgrading a site, the licensing and the upgrade of the MyCalls software.

Upgrade Licensing

Important: Before upgrading take note of which version is currently installed and which version you wish to upgrade to. As a precaution, take a backup of the configuration and call records database before upgrading!

To determine what licenses are required in order to carry out the upgrade, in the MyCalls application click Help > Upgrade Requirements. The screenshot below shows an example of what the upgrade requirements may be identified as.

MyCalls	×
(i)	Upgrade Requirements
4	To upgrade to the next version, you need to purchase the following:
	1 Single version PBX upgrade(s). You currently have 0 5 Single version Desktop upgrade(s). You currently have 0
	To upgrade to any other version, you need to purchase the following:
	1 Multiple version PBX upgrade(s). You currently have 0
	5 Multiple version Desktop upgrade(s). You currently have 0
	OK

Upgrades are available in two main types, singles version upgrade and any version upgrade. A single version upgrade will allow you to upgrade from version 4.5 to 5. A Multi version upgrade will allow you to upgrade from version 4.5 to any other released version. All version release numbers will be staged in .5 increments. A Single version upgrade will allow you to upgrade from 4.5 to 5 or from 5 to 4.5 and so on. To upgrade from 4.5 to 5.5 or above, you will need to purchase an any version upgrade license.

There are several different upgrade licenses that can be purchased and are summarised below:

License Name	Part	Description				
	Single Version Upgrades					
MyCalls Single Version Upgrade per PBX	EU400117	Required for each PBX in the MyCalls license. More than one license is required for enterprise sites only. The number of PBX's can be checked in the help / about section of MyCalls.				
MyCalls Single Version Upgrade Desktop per User	EU400120	Required for each Call Control User in the MyCalls License. The number of call control users can be displayed in the help / about section of MyCalls.				
MyCalls Single Version Upgrade Agents per Agent	EU400122	Required for each Concurrent User Logins (Agents) in the MyCalls License. The number of concurrent users can be displayed in the help / about section of MyCalls.				
MyCalls Single Version Upgrade Expansion Pack	EU400227	Required only if the MyCalls is using the expansion pack license.				
MyCalls Console Single Version Upgrade	EU400036	1 license is required for each console user.				
	Any	Version Upgrades				
MyCalls Any Version Upgrade per PBX	EU400118	Required for each PBX in the MyCalls license. More than one license is required for enterprise sites only. The number of PBX's can be checked in the help / about section of MyCalls.				
MyCalls Any Version Upgrade Desktop per User	EU400121	Required for each Call Control User in the MyCalls License. The number of call control users can be displayed in the help / about section of MyCalls.				
MyCalls Any Version Upgrade per Agent	EU400123	Required for each Concurrent User Logins (Agents) in the MyCalls License. The number of concurrent users can be displayed in the help / about section of MyCalls.				
MyCalls Any Version Upgrade Expansion Pack	EU400228	Required only if the MyCalls is using the expansion pack license.				
MyCalls Console Any Version Upgrade	EU400037	1 license is required for each console user.				

Before the upgrade can take place, the licenses should be installed on the SV9100, read in using the MyCalls license manager and registered on the Kelmar website. To verify that the upgrade can take place, click the Help / Upgrade requirements option in the MyCalls application.

If the requirement for upgrading is satisfied then in the Help / Upgrade requirements menu will return to following message. The window will tell you if you can upgrade a single version or more than one version.



Should there be any items missing from the licenses then the following screen will be displayed showing you what license items are installed so you can work out what is required in order for the upgrade to be allowed.

MyCalls	×
(i)	Upgrade Requirements
4	To upgrade to the next version, you need to purchase the following:
	1 Single version PBX upgrade(s). You currently have 0 5 Single version Desktop upgrade(s). You currently have 0
	To upgrade to any other version, you need to purchase the following:
	1 Multiple version PBX upgrade(s). You currently have 0
	5 Multiple version Desktop upgrade(s). You currently have 0
	OK

If the upgrade requirements have not been met and MyCalls is un-installed, you will not be able to install a new version, it will halt during the install. To apply the upgrade licenses, the original version of MyCalls will have to be re-installed to allow the licenses to be installed.

Upgrading the MyCalls Software

Before you start the upgrade of the MyCalls software, take a backup of the Configruation and Call Records databases on the MyCalls Server, this can be done using the System > Database backup in the MyCalls application. Always upgrade the MyCalls server first and then any clients afterwards.

Once the backup has completed, in Control Panel > Programs and Features remove the MyCalls application.

	Programs and Features – 🗖					
🛞 ∋ ▾ ↑ 🔯 ኑ Control P						
Control Panel Home View installed updates R Turn Windows features on or	Uninstall or change a program To uninstall a program, select it from the list and then	click Uninstall, Change or Repair.				
off	Organise 🔻 Uninstall				H 🗸 🔞	
Install a program from the network	Name	Publisher	Installed On	Size	Version	
	Microsoft SQL Server 2005 Compact Edition [ENU] Microsoft SQL Server 2008 (64-bit)	Microsoft Corporation Microsoft Corporation	05/04/2013 22/03/2013	1.92 MB	3.1.0000	
	MyCalls	NEC Infrontia	22/03/2013	328 MB	4.0.0.1	
	 Notepad++ Microsoft Visual Studio Tools for Applications 2.0 - E SolarWinds TFTP Server 	Microsoft Corporation SolarWinds.Net	25/02/2013 22/03/2013 19/02/2013	234 MB	6.3 9.0.30729 SolarWinds TFTP Se	
	SV8100 PC Pro	NEC Unified Solutions	08/01/2013	131 MB	8.00.00	
	TeamViewer 8	TeamViewer	03/04/2013		8.0.17396	
NEC Infrontia Product version: 4.0.0.1 Support link: http://www.KelmarSoftwareSolutions.com Help link: http://www.KelmarSo Size: 328 MB						

You will be reminded that the upgrade license need to be applied before the upgrade can take place, click yes to continue or no to cancel.

	Upgrade Validation	×
?	In order to upgrade to a later version, your license will need to contain the correct upgrade items. To view your upgrade eligibility, use the Help->Upgrade Requirements menu option from the main application. Are you sure you want to continue?	
	<u>Y</u> es <u>N</u> o	

Once the old MyCalls software has been removed, install the new version of MyCalls and the upgrade will complete. Once the MyCalls server PC has been upgraded then repeat this process for the client installations.

MyCalls Desktop and Desktop Lite

MyCalls Desktop is a CTI based application that allows users to carry out call control actions and Screen pop using MyCalls. There are two different variants of MyCalls Desktop available, MyCalls Desktop Lite and MyCalls Desktop. The features available in the two products are listed in the table below:

Feature	MyCalls Desktop Lite	MyCalls Desktop
Standard Call Control - Answer, Hangup, Transfer,	\checkmark	✓
Hold and Dial		
Highlight and Dial	\checkmark	\checkmark
Personal Call list	✓	√
Address Book	✓	✓
10 DSS or Speed Dial buttons	\checkmark	\checkmark
Outlook Screen pop	✓	√
Advanced Call Control – Park, Conference, DND,		\checkmark
Call Forward, Camp on, Broker		
Un-returned Calls		\checkmark
1000 Action Buttons per User		\checkmark
Screen pop to various CRM's		\checkmark
Standard Presence / Instant Messaging		\checkmark

MyCalls Desktop uses the 3rd Party TAPI driver to carry out call control functions. The 3rd Party TAPI driver is a licensed feature on the SV9100 and will only run when the license is installed. The part number for the 3rd Party TAPI is BE114079, more detail about this is available in the SV9100 licensing manual. The process for installing the TAPI driver is explained in the CTI Installation manual. It's recommended that the TSP is installed on the MyCalls server PC. It is possible to install the TSP on to different PC to the MyCalls server, instructions are provided later on in the manual.

MyCalls Desktop can also screen pop a number of CRM's, these are listed below.

Database Type	Versions
Outlook	XP, 2003, 2007, 2010 & 2013
Act !	2005 – 2014
Goldmine	6.7 – 9
Maximiser	9.5 – 10.5
Microsoft CRM	4.0, 2011 & 2013
Sales Force	
Sage Line 50	Any version of Sage Line 50 that supports ODBC

There is a separate manual that explains how to configure MyCalls to work with each of the different CRM's, this is put into the Start > Programs > NEC Infrontia > MyCalls menu when MyCalls is installed.

Note: Due to the way that MyCalls Desktop interacts with the SV9100, Line Keys must not be programmed on any extension.

MyCalls Desktop can be used in two different ways, either the MyCalls application can be used or the MyCalls Desktop application can be used. The main difference between the two is that if you use the MyCalls application you can have access to Real Time Screens, Reports and all of the other MyCalls features along with the call control and screen pop functionality. MyCalls Desktop only has access to the call control and screen pop functionality. The number of users that can logon to each of the application types are controlled via the license.

Any configuration changes have to be made through the MyCalls application.



Macro Scripting

Macro Scripting allows MyCalls Desktop to integrate with different CRM's (Customer relations management) by providing a mechanism to send key strokes and mouse actions to an application. This could, for example, navigate to a search field in a CRM, enter the CLI of the outside caller and perform a search. Macro scripting requires the EU4000101 license in order to work, this license effectively it a site wide license that gives any user the ability to use Macro Scripting.

Presence

MyCalls has to capability to allow users to set a presence state, this can show co-workers if they are in the office, at lunch, on holiday or out of the office. Each MyCalls Desktop User gets a standard presence and so does any standard MyCalls user. Additional licenses can be used to enable the Outlook plugin and Exchange Integration.

Further detail of how to configure and use presence is available in the MyCalls End User Guide.

SV9100 MyCalls Desktop Programming

Some of the features that are available in MyCalls Desktop have to be enabled on the SV9100 before they will work in MyCalls. The MyCalls features along with the related programming commands are listed in the table below.

MyCalls Desktop Feature	Programming Commands	Comment
Call Forward	Wizards / COS / Call Forward	There are several call forward class of service items that can be enabled / disabled for call forwards.
	Wizards / COS / Call Forward Off-premise	Turns on call forward External.
Call Forward	Wizards / Trunks / Trunk to Trunk Routing / Trunk to Trunk Transfer	Turns on trunk to trunk transfer.
(External)	Wizards / Trunks / Trunk to Trunk Routing / Outgoing Route Setup	Assign a trunk group used for trunk to trunk transfer.
Barga In	Wizards / COS / Barge in Initiating	Turn on to allow an extension to Barge in to another
Barge In	Wizards / COS / Barge in Receiving	Turn on to allow an extension to be barged into.
Broker	Wizards / COS / Automatic On-Hook Transfer	If the broker feature is being used and On-Hook transfer is enabled, the desktop user clears down the call, the two callers are transferred together. If the broker feature is being used then this should be disabled.
Paging	Wizards / Extensions / Extension Internal Paging Group	Extensions should be assigned to paging groups before MyCalls will be able to page
Transfer to voicemail	Wizards / System Numbering Plan / Service Codes / Single Digit Code / Voicemail Access	This is the code used by MyCalls to transfer call to voicemail.

The transfer to voicemail option is configured to be 6 as a single digit option by default.

When MyCalls configures the SV9100, it disables on hook transfer on the SV9100. The reason it is disabled is that MyCalls takes responsibility for deciding if a transfer is a supervised or blind transfer. With On Hook Transfer enabled, if a MyCalls Desktop user receives a call and makes a call to another extension, and then cancels the call it would be transferred to the other extension. On hook transfer can be enabled on a per class of service basis and therefore could be enabled for non MyCalls desktop users.

Configuring MyCalls Desktop

Once the MyCalls licenses are active in the MyCalls application and the 3rd Party TAPI driver is running then you ready to configure MyCalls Desktop.

Login to the MyCalls application as a PBX administrator and from the configure menu select Telephone system, then expand the PBX name / expand Call Control / select Call Control then click Configure Call Control.

🕸 Configure Telephone System	
PBXs Potential Office All Recording	Call Control Groups
Gain recording Agent Control Gain Control Call Control Call Control Service Codes Operators Groups	A Call Control Group defines the rest group. These restrictions include the Tasks Configure Call Control Use the Call Control wizard to ena method of call control that is to be
	Use the Call Control wizard to method of call control that is <u>Create or Edit a Call Control G</u>

From the control type drop down menu, select Generic Tapi and click Edit.

Call Control Configuration	? ×
Specify the control Type Before call control configuration can take place, the type of control needs to be specified.	
Control Type	
Generic Tapi 🗾 🗾 Edit	
<u>O</u> K <u>C</u> ance	

Enter the name of PC that is acting as the call control server. This is normally the same PC as the MyCalls server and is running the 3rd Party TAPI driver. The call control service is installed by default when a complete installation of MyCalls is carried out. If the TAPI driver is installed on a different PC to the MyCalls server then the call control service should be installed onto that PC running TAPI. Instructions on how install the call control service onto a different PC are provided later on in this manual. Other configurable items are as follows:

- Outside Line Access Code The outside line access code is the number used to seize a trunk on the PBX
- Number of internal call digits The number of digits of extensions on the PBX. If MyCalls dials a number of over this number of digits then the number entered in 'Outside line access code' is added to the dialled number.
- Auto Hang-up Calls If this option is enabled, when a call has finished on the PBX, the phone will return to an idle state.
- Always dial these numbers externally Any number entered here will always have the 'Outside line access code' added when they are dialled.

TAPI Connection Configu Enter the name of the computer run you need to dial a code to access a Enter the maximum number of digi exclusions to that rule.	ration nning the Call Contr an outside line, ente ts for an internal cal	ol Service. If r it here. I and also
Call Control Server name mycalls		
Outside line access code	Always dial these n 999	umbers externally
Number of internal call digits	911 112	Add
4 🗮		Remove
🔽 Auto Hangup Calls		
	<u>0</u> K	<u>C</u> ancel

Click OK the save the changes

Users now have to be created to allow them to use call control features, in Configure / Organisation, click create new user. When creating users, at least one PBX Administrator should be created, this will allow a nominated user to carry out administrative functions. Enter a name for the user, set the User Role as required and select Advanced or Basic from the Call Control drop down menu. Advanced users are normal MyCalls desktop users, Basic users are for MyCalls desktop Lite. Users can be enabled for Hot Desking, by turning this feature on, it allows a user to select which extension they will logon to when they first logon to MyCalls. If a user is not enabled for Hot Desking then the user must be assigned to an extension.

Create a New User	[?]
Assign the correct user ro Users are people who in generally the users role you can restrict config users.	le employed by the organisation. By setting guration modifications to the appropriate
<u>N</u> ame Bich	<u>A</u> bbreviation
<u>J</u> ob Title	User Role
	User
<u>G</u> roup Organisation/	Email Address
Password	Call <u>C</u> ontrol
Enable <u>R</u> eal Time Statistics	Enable for <u>H</u> ot Desking

Users that use the same extension or are not enabled for Hot Desking should be assigned to an extension. When users are assigned to an extension that are enabled for Hot Desking, they will be offered to login to their default extension. To assign a user to an extension, select Configure / Telephone System / PBX / Devices / Extensions / Create or Edit Extensions and then click the edit button against the extension. Then click the select button next to Default User and in the select user window, type part of the users name in the top left box and select the user. Click OK and the user is assigned to the extension.

Edit an Extension		<u>?</u> ×	5	elect User		? ×
Identify an Extension An extension should be named and a understand its use. By specifing the extensions can be produced. If the e Announcement extension, then settin calls to this extension connected for	assigned to a defined user to help others extension type, reports on specific types of dension is an AutoAttendant, Voice Mail or ig a voice mail timeout will cause any incomin less than the voice mail timeout to be marked	ig 📕		Select User Type in the first few letters of the user's na with all the names beginning with those le 'Clear' to choose no user.	ame. The box will be automatically filled atters. Click 'Select' to choose the user of	r
PBX Code Head Office	Number: 200			Type part of a user name here	Selected user	
Name: EXT 200	Default User: Richard (Organisation) Select]		Richard	Select	
Type: Unassigned	Extension Group	•		×	Clear	
Voice Mail Timeout (Seconds)	 ✓ Enable for <u>H</u>ot Desking ✓ Enable <u>R</u>eal Time Statistics 				<u> </u>	
Created By	Creation Date					

Repeat this procedure for each user that will need creating. Users can be created 'en-masse' if there are several users to create, this can be achieved using the config import tool. Details of how to do this are shows in the Using the Config Import Tool section of this manual.

While editing extensions, you can choose to enable an extension for Hot Desking. Extensions that are not enabled for Hot Desking are not available for Call Control Users to logon to.

Edit the E The type and and pasting	xtension I user group onto the oth	S of multiple extensior er extensions. To edi	ns can be changeo it an individual exte	l by clicking the right nsion click the edit b	mouse button ai utton for that exti
Drag a column header here to group by that column					
Drag a colu	mn header her	e to group by that colur	mn		Enable Ho
Draga colu Number 🔺	mn header her Name	e to group by that colur	mn Group	User	Enable Ho Desking
Drag a colu Number 🔺 200	mn header her Name EXT 200	e to group by that colur Type Unassigned	mn Group None	User Richard	Enable Ho Desking
Drag a colu Number 🔺 200	mn header her Name EXT 200 EXT 201	e to group by that colur Type Unassigned Unassigned	mn Group None None	User Richard None	Enable Ho Desking
Drag a colu Number • 200 201 202	mn header her Name EXT 200 EXT 201 EXT 202	e to group by that colur Type Unassigned Unassigned Unassigned	mn Group None None None	User Richard None None	Enable Ho Desking

Once users have been created, they have to be put in call control groups. A call control group is where you can allow users to use call control and define permissions for these groups. In Configure / Telephone System / Call Control / Call Control / Create or Edit a Call Control Group.

Enter a name for the Call Control Group and then from the list of users, add them to the list included users by clicking Add. In the lower section of the window, permissions can be configured for members of the call control group.

3X Code		N <u>a</u> me:	
ead Office			
Users Tupe part of a name here			
Type part of a finance field		Included users	
Richard (Organisation)	-	[-
	Add		
	Bemove		
	Tienove		-
T	F	<u>.</u>	
Allow Answer Call	Allow Set Forward	🔽 Allow Barge In	
Allow Make Call	Allow Set DND		

Once the users have been configured, they will be able to login to the MyCalls or desktop application and use the call control functions.

Accessing Call Control Features in the MyCalls Application

When a call control user first logs on to the MyCalls application, MyCalls , they enter their user name and configured password. If the user if a Hot Desking User then they will be asked to choose an extension to logon to. For the duration that the user is logged in, the calls they handle will be assigned to that extension. You must have the appropriate user licenses to use the MyCalls application.

Enter a user name and password When logged in you will be allowed to use the system to t level that your user has been granted. This could be as ei a user, supervisor or admin.	the ither Extension Selection Please select the usual extension h
User Name Richard Brov Password	vse PBX Head Office
	ancel

Extension S Please select th usual extension	election e extension y has been pr	vou are working at. Yo eselected.	iur
РВХ		Extension	
Head Office	*	200	-
	[ancel

From the view menu, select Call Control Toolbar.

MyCa	lls		
<u>L</u> ayout	Configure	<u>V</u> iew <u>U</u> ser <u>H</u> elp	
. 🖬 🗃	/ 🗔 De	e Real Time Information Call Records Window Unreturned Calls Window	
		Call Control Toolbar	
		 ✓ <u>M</u>ain Toolbar ✓ <u>G</u>rid Bar ✓ <u>S</u>tatus Bar 	

The Call Control Toolbar allows users to perform Telephony functions such as Answer, Hand up, Transfer, Hold etc. At the bottom of the call control toolbar, you see the status of the user's extension and how long it has been in that state. There is also a mini wallboard for the calls handled by that extension for the day. The toolbar can be either inside the MyCalls application or placed on a user's desktop. To move the toolbar into the MyCalls application, drag the blue title bar and drop it in the upper section of the MyCalls application. The remove the toolbar from MyCalls, drag the dotted line on the far left side of the toolbar and drop it anywhere outside of MyCalls.

MyCalls Contr	ol												
Q .	-		 ■ ■		Ŧ	6-9	A	A	Ρ	Ρ	59	2.	8.
DND	FWD		Dial	Answer	Hangup	Transfer	Hold	Recall	Park	Retrieve	Conference	Operations	Options
Extn: 200 (EX	T 200)	Idle	19:44:56			Inc: 0	Abd: I	0 Out:	0				

When the toolbar has been removed from the application, MyCalls can be minimised and the toolbar will remain in view.



To access the call records / Un-returned calls / Actions Buttons and Address Books, click the icons in the lower section to display them.

Search	Order contacts on Order Line Line Line Line Line Line Line Line	🕐 <u>C</u> ompany	Search in ✓ <u>S</u> ystem Contacts	New personal contact
	<u>L</u> ast Name		Personal Contacts	
				1
🖾 Calls 🖾 Unretu	rned Calls 💋 Actions 🧟 Addres	s Books		
icensed to User: Rich	Horsley Company: Quite Well Organ	ised [Expires on: 31	/12/2105 Logged in User:	Richard

Accessing Call Control Features Using MyCalls Desktop





When the view is expanded then the extra menus are available in the lower section of MyCalls Desktop.

2.	14.		• #			A	A	Ρ	Ρ	1507	2.	3
DND	FWD		Dial /	Answer H	langup Transfe	r Hold	Recall	Park	Retrieve	Conference	Operations	Option
Extn: 201	(EXT 201)	Idle	00:00:06			nc: 1 🛛 A	bd: 0 🗾	Dut: 0			196	12
Period	245	Number	DID	Call Type	es				3.0			
Today	•			🖌 Inc	🗸 Out 🗸	Abd	Colum	nn Choo	ser			
Date/Ti	ime 👻	From Device	To Device	N	umber		Location	1		Total Durati	ion Duratir	on
00,000	2009 11-23	005 (Line 005)	201 (EXT 20	1) 01	159695700		Nottingh	am		00:00:07	00:00:1	04

Using Call Control Features

For information of how to use the call control features in MyCalls, please refer to the MyCalls End User Guide.

Configuring Screen pop Interfaces

For information on configuring Screen pop interfaces, please refer to the MyCalls Screen pop configuration guide.

Installing the Call Control Service

In circumstances where the 3 Party TAPI driver is not installed on the MyCalls Server, it is necessary to install the MyCalls Call control service onto the PC running the 3rd Party TAPI driver. To install, the call control service, start the MyCalls install and from the Setup Type screen, select custom and click next.

🖥 MyCalls - Ins	stallation Wizard
Setup Type	
Choose the s	setup type that best suits your needs.
Please select	a setup type.
C <u>C</u> omplet	te
1	All program features will be installed. (Requires the most disk space.)
C Client	
128	Install only the client applications.
O <u>S</u> erver	
13	Install only the server components.
C <u>E</u> mail Co	ollector
13	Install only the email collector
• Custom	
1 <mark>6</mark> 8	" Choose which program features you want installed and where they will be installed. Recommended for advanced users.
C <u>N</u> etwork	k Client
r 🔚	Install a network client
nstallShield	
	< <u>B</u> ack <u>N</u> ext > Cancel

From the list of components to install, choose only to install the call control service and step through the installation wizard.

🚏 MyCalls - Installation Wizard	×
Custom Setup Select the program features you want installed.	
Click on an icon in the list below to change how a feature Call Collector Call Processor Applications X • Applications Call Collector Configuration Computer ID Generator Desktop Client Call Control Server Install to:	s installed. Feature Description This option allows you to install the database. You would normally install the database on the same machine as the Call Processor. This feature requires 21MB on your hard drive.
InstallShieldSpace	Next > Cancel

At the Call Collector Name Screen, click Next.

MyCalls - Installation Wizard	
Call Collector Name	
If you are installing a Call Collect if there are several Call Collector given a unique name and that na added to the configuration.	tor, you need to choose a name for it. Note that rs installed in your company, each one must be ame must be used when the Call Collector is
If you have already performed a Collector with the name Local Co below.	a Complete Setup, there will already be a Call Illector and you must enter a different one
Please enter the Call Collector N	ame
stallShield	

At the Database Server prompt, you will need to browse and select the location of the MyCalls Database. If the default options have been installed, then you can Database server will be the PCNAME\KSS. If a custom SQL Installation was used then you will need to select the appropriate option. Click Next to continue.

	ard	<u>×</u>
Database Server Select database server and a	authentication method	1
C Use MyCalls's own server		
• Select the SQL Server to a	connect to or click Browse to see a lis	t of all SQL Servers.
Database Server:		
PC0335\KSS		Browse
Connect using:		
Windows authentication	credentials of current user	
	sing the Login ID and password below	
C Server authentication us		Y
C Server authentication us		
C Server authentication us Login ID: sa Bassword:		
C Server authentication us Login ID: sa Password: stallShield		

Enter the name of the MyCalls server and click next and then complete the installation wizard by clicking next twice and then finish.

🙀 MyCalls - Installation Wizard	×
Client Installation	
if a Call Processor has not been inc operate correctly, it needs to know Processor has been or will be instal	uded in this installation then, for MyCalls to the name of the computer on which the Data ed onto.
An IP Address must not be entered Please enter the Server Name	here. It must be a computer name.
pc0335	
InstallShield	
	< <u>Back</u> <u>N</u> ext > Cancel

Once the installation has completed, the call control service will be active. From the MyCalls server, enter the name of the Call Control Server PC in the TAPI Connection Configuration. That is the PC that the call control service was installed onto. Click OK to save the changes.

TAPI Connection Configu Enter the name of the computer ruyou need to dial a code to access Enter the maximum number of dig exclusions to that rule.	Iration Inning the Call Control Service. If an outside line, enter it here. its for an internal call and also
Call Control Server name mycalls	
Outside line access code 9 Number of internal call digits 4 • Auto Hangup Calls	Always dial these numbers externally 999 911 112 Add Remove
	<u>O</u> K <u>C</u> ancel

MyCalls Desktop with 3rd Party SIP and Analogue Devices

The functionality of MyCalls desktop when used with 3rd Party SIP and analogue devices is limited. This is because MyCalls desktop does not have control over the hook switch on either of these devices. For example if you click the answer button in MyCalls desktop because the hook switch cannot be lifted, the call won't be answered. The following two tables state how the two device types operate.

Analogue Extension

MyCalls Feature	Comment on Functionality
Outbound Call	When a number is dialled in MyCalls Desktop, the analogue extension rings and when the handset is picked up, the outbound call is made
Transfer	Blind and supervised transfer to an extension work fine.
Hangup	After the hang up button has been clicked in MyCalls the terminal remains off hook until the handset is replaced.
Hold / Recall / Park / Retrieve	Works Fine
Answer	When the answer button is clicked, the call can't be answered. The call can only be answered by manually picking up the handset.
Transfer to voicemail	This feature is not supported
NEC IP Dect Device	

MyCalls Feature Comment on Functionality When a number is dialled in MyCalls Desktop, the dect extension **Outbound Call** rings and when its answered, the outbound call is made The transfer operation has limited functionality; transfers have to Transfer be completed by using manually pressing the hangup button on the IP Dect phone. When the hangup button is clicked in MyCalls, the call clears down and the IP Dect device remains off hook until the hangup button is Hangup pressed on the handset The Park and Hold function work ok but it's not possible to retrieve Hold / Recall / Park / Retrieve from hold Not possible as pressing the answer button cannot be simulated. Answer Transfer to voicemail This feature is currently supported

MyCalls Call Centre

MyCalls Call Centre provides real time monitoring of an SV9100 running ACD. ACD works on a concept on agents logging into ACD groups to take calls. The longest waiting call in an ACD group is delivered to the agent that has been idle to longest. MyCalls Call Centre can show in real time the status of ACD queues and agents. Detailed reports can be produced on agent and ACD group performance. Furthermore ACD can be enhanced be the use of Skill Based Routing, this allows agents to be given a skill level within an ACD group. Calls will then be presented to an available agent with the highest skill set.

MyCalls Agent Control

MyCalls Agent Control provides a major enhancement to MyCalls Call Centre. With agent control, you can use the MyCalls application to login to ACD to take calls. Unavailable codes can be setup so that when an agent will not be taking calls, they can specify a reason why. Completion codes can also be used to specify the nature of a call. An ACD supervisor will have the ability to control the status of multiple agents. In addition to the MyCalls Call Centre Reports, there are additional reporting features available in MyCalls Agent Control. When the Skill based routing feature is used on the SV9100, Agent control can be used to manage skill sets on the SV9100.

This manual is intended to give an installer with an understanding of MyCalls and SV9100 ACD the ability to install and configure MyCalls Call Centre.

SV9100 Programming

The SV9100 should be programmed for ACD in order for MyCalls Call Centre to work refer to the ACD Installation manual for further details. MyCalls will require the following item set in accordance with the existing ACD and MyCalls programming.

Wizards / Advanced Items / ACD (Automatic Call Distribution) / ACD Agent Setup / ACD Login Code. Set the number of digits an agent should enter to logon to ACD. This agent ID is used by MyCalls to identify the agent and does not have to match the extension number. The idea is where ever you logon using your agent ID, your call statistics will always be assigned to you.



Configuring MyCalls

Configuring Pilot Numbers

Calls that are delivered to ACD groups are referred to as Pilot Numbers in MyCalls. Pilot numbers are displayed in MyCalls as a two digit number ranging from 01-64. During the Config Import MyCalls will detect configured ACD groups on the system and list them as pilot numbers. The SV9100 does don't store a name for the pilot numbers so these can be given meaningful names in the MyCalls configuration.

Any pilot numbers that are not auto configured can be added manually. If MyCalls sees a call to a new pilot number that it does not know about, it will automatically add it into its configuration. Any pilot numbers that have been automatically added into MyCalls will need setting as ACD queues. In MyCalls, click Configure / Telephone System / Devices / Pilot Numbers / Create or edit. When editing the pilot numbers, you can assign ACD using the drop down menu in the Type column.

it Pilot Nu	mbe	rs					
Edit the The type then sele that pilot	e Pil and u cting num	ot Numbe user group of and pasting ber.	rs multiple pilot numbe onto the other pilot n group by that column	ers (um	can be changed bers. To edit an	by clicking the right mouse individual pilot number clicl	button and copying < the edit button for
Number		Name	Туре		Group	Enable Statistics	
01		Sales	Unassigned	-	None		Edit
			Unassigned ACD Queue Hunt Group				

To manually add a pilot number, you can click 'Add new pilot number' in 'Edit Pilot Numbers' or click create a range of pilot numbers in Configure / Telephone System / Devices / Pilot Numbers. When adding the pilot numbers, make sure to set the type to ACD Queue.

reate a New Pilot Number	<u>? ×</u>
Identify the Pilot Number By adding a name and selecting the users will be able to recognise it ea	e correct type of the pilot number sily.
PBX Code Head Office	<u>N</u> umber
N <u>a</u> me	<u>I</u> ype
	ACD Queue 👻
Pilot Number <u>G</u> roup	Unassigned ACD Queue
None	Hunt Group
N <u>o</u> tes	

Creating Users / Agents Using MyCalls

From the Configure / Organisation menu, typically here you would create groups that represent departments or common groups of agents. These groups can be used to create real time windows or for reporting purposes. Within the groups, if required, you can create sub groups to build up a tree type structure to represent departments within a company. Use the 'Create a New Group' option to create a group.

🚠 Configure Organisation Structure	
Constantion	Organisational Group
Ist Line Ist Line	Organisational Groups are organisation. They are arra groups. It is typical that ar then maybe different team: Tasks Create a New Group Use the Create a New (a Department/Team. Create a New User

Once you have created a group, you need to create users within the groups. Select which group the user will belong to and click 'Create a New User.'

Create a New User		? ×
Assign the correct user ro Users are people who in generally the users role you can restrict config users.	le employed by the organisation. By setting guration modifications to the appropriate	
<u>N</u> ame	Abbreviation	
Simon Shivers		
<u>J</u> ob Title	<u>G</u> roup	
	Organisation/Support/2nd Line/	
<u>U</u> ser Role	Email Address	
User	• [
Password	_	
Enable Call Playback		
Enable Real Time Statistics		
N <u>o</u> tes		
		×

Enter the user details as required, the only mandatory field is the name field. Any number of uniquely named users can exist per organisation group. Enter a password if the user will be required to enter a password to login to MyCalls. The user role should be selected from the drop down menu, the user role defines the access level of the user within the MyCalls application. For a detailed description on which features are available to the different user roles refer to the version differences document accessible via the help menu in MyCalls. If MyCalls Call Recorder is being used, you can give the user permission to playback recorded calls by selecting 'Enable Call Playback.' If you wish to create real time views displaying statistics for the user the select 'Enable Real Time Statistics.'

Once users have been created, they need assigning to a PIN number. The pin number is the code entered by an agent when they are prompted to 'Input Your ID' on the SV9100 Keyset. To assign a user to a pin number, go to Configure / Telephone System / Select the PBX / Devices / User Logins / PIN Codes. Click 'Create or Edit a User Login'

🔯 Configure Telephone System	
E	User Logins / PIN Code
Call Recording Agent Control Devices 	User Logins are the codes tha receiving calls in an ACD envi codes. Tasks <u>Create or Edit a User Login</u> Use the Create or Edit a U edit an existing user login. notes.
872 Unavailable Codes	Create a Range of User Logi

At the Edit User Logins screen, click 'Add new User Login.' In the Login ID, enter the digits that the agent uses to logon with.

Create a User Login		<u>? ×</u>
Associate the User L By associating this login id matter which extensions th	.ogin with a user, you will be able to run e user logged on to.	reports for the user no
Login ID 600	<u>U</u> ser None	Select
N <u>o</u> tes		
		<u>OK</u> <u>C</u> ancel

Once the login ID is entered, click select to choose a user. In the 'Type part of a user name here' start to enter the name of the user and click on the user from the list of users displayed underneath. Click select and the user will appear in the 'Selected user' box. Click OK to save the settings.

Select User		<u>?</u> ×
Select User Type in the first few letters of the user's na with all the names beginning with those le 'Clear' to choose no user.	ame. The box will be automatically filled etters. Click 'Select' to choose the user or	
Type part of a user name here	<u>S</u> elected user Steven Smith	-1
Simon King Steven Smith Susan Breaker	Select	
x x	<u><u>C</u>lear</u>	

Click OK again to confirm the changes.

Create a User Login	<u>? ×</u>
Associate the User Lo By associating this login id wi matter which extensions the u	gin th a user, you will be able to run reports for the user no iser logged on to.
Login ID	User Steven Smith (Support/1st Line)
N <u>o</u> tes	
	<u> </u>

You will now return to the Edit User Logins screen, repeat the procedure for each ACD Agent that will logon.

For each PB) etters. Each	(there must exist set set of login login identifier must be assigned	identifiers. These can co 1 to a User. A User may b
ne login ide eports on U	ntifier. This can be useful if Úser sers will include calls wherever t	's log on to different PBXs hey may have logged on.
Drag a colun	in header here to group by that colur	nn
Login ID		
500	Steven Smith	Edit

Once users have been created, they will need to logout and back into ACD in order for MyCalls to start reporting on the newly created agents.

Users can be optionally assigned to extensions, this is beneficial for when users use the same extension all of the time. To assign an extension to a user go to Configure / Telephone System / PBX / Devices / Extensions / Create or Edit Extensions. Click the select button next to the Default User box.

dit an Extension		<u>? ×</u>
Identify an Extension An extension should be n understand its use. By sp extensions can be product Announcement extension calls to this extension cor	on amed and assigned to a defined user to becifing the extension type, reports on sp ced. If the extension is an AutoAttendant a, then setting a voice mail timeout will c anected for less than the voice mail time	o help others becific types of , Voice Mail or ause any incoming eout to be marked
<u>P</u> BX Code	<u>N</u> umber:	
Head Office	206 🗆 En	able Beal Time Statistics
		abie fredi filme ordistico
N <u>a</u> me:	Default <u>U</u> ser:	

Now select the user in the same method as when assigning the user to the PIN number and click OK to save changes.

Creating Users Using The Config Import Tool

If there are numerous users to create, the Config Import Tool can be used to speed up the procedure. When using the Config Import Tool to create users on an existing installation, you should be aware that the config import tool will overwrite any existing configuration in MyCalls. After the config has been read from the SV9100, if you didn't want to alter DDI's / Trunks etc, then these should be deselected before completing the config import.

On the extensions page there is an option to 'Create Default Pins.' By clicking on this button, the extension numbers are duplicated across to the PIN field. If required, the numbers can be changed by over typing them. The same idea applies to users. Click the 'Create Default Users' button to populate the users column. The user names that are generated can be edited if required. The user role can be changed by selecting one of the options in the drop down menu in the user type column.

Configuration Import Account Codes	Drag a colu	mn header here	e to group by that	column.				
Callers (ABB Dial)	Selected	Number 🔺	Name	Туре	Group	PIN	User	User Type
	 Image: A set of the set of the	200	Steven	Unassigned	1	200	Steven	User
		201	Thomas	Unassigned	1	201	Thomas	User
Extension Groups		202	Kevin	Unassigned	1	202	Kevin	User
- ③ Pilot Numbers - 84⁄2 Service Codes	<u>C</u> reate De <u>C</u> lear	fault PINS PINS	Create [Cle) efault Users ar Users	Admi	nistrator Us	er Name	Administrator Password
								<u>C</u> lose

An Administrator user name and password have to be entered when setting up users in the Config Import Tool. Click the disk icon in the Config Import Tool to send the configuration into MyCalls. After import users using you will have to create organisation groups as required and move the newly imported users in to the appropriate groups. To check that the user logons are working, you need to login to MyCalls and create a real time user view. From the MyCalls menu select View / Real Time Information / Real Time Status / Users / Create a New User Status View.

eal Time User Status Configuration	on ?X
Select the groups to view You may select one or more gro be able to group the results by a	w ups of users to display. You will ny of the available parameters.
Organisational Groups	
 Organisation/ Organisation/Sales/ Organisation/Service Team/ Organisation/Support/ Organisation/Support/1st Line/ Organisation/Support/2nd Line/ 	
C Show <u>D</u> etailed	• Show <u>O</u> verview
C Show Summary	🔲 Use Short Names
Edit Summary Font	Edit Detailed Font
	<u>O</u> K <u>C</u> ancel

Select the organisation group the agent / agents belong to, choose to 'Show Overview' and click OK.

Once the user status screen is displayed, click the double arrows pointing downwards next to the user's name, this will show more detail about the agent. If the agent is logged off, their status will show as logged off.

Stever	n Smith	*
User Extn DID Pilot Caller Code Time	Steven Smith	
Status	Logged Off	

Once the agent logs on, their status will change to show that they are available. If the Agent was already logged on when they were created in MyCalls, they will need to logoff / logon before their status will be displayed correctly.

User S Display <1 st Lin	tatus Window Users for the foll e>	owing (
Steve	n Smith	*
User	Steven Smith	
Extn	EXT 200	
DID		
Pilot		
Caller		
Code		
Time	00:00:04	
Status	Available	

Creating Real Time Windows

There are several different Real Time windows that can be created in MyCalls. Real Time Statistics, Single Value Windows and Combination Value Windows act in the same way they do in a non ACD configuration. The main differences with working in an ACD environment is the Real Time Status windows, which can be used to display Agent Status and Pilot Number status in various different ways. A real time user view will show an agents status regardless of if they are logged into ACD or not. A pilot number view will show the number of calls in queue and display agents that are logged into specified ACD queue.

Real Time Status – Pilot Numbers

A real time pilot number status view will show which agents are who is logged into a pilot number and some calls in queue information. From the View menu select Real Time Status / Pilot Numbers / Queue Status / Create a New Queue Status View.

Real Time Queue Status Configuration	n	? ×
Select the device/group to The status is filtered to show only va selected. The DID and Pilot Numbe your telephone system. Check with	view alues for the type you have r status may not be available on your maintainer for details.	
<u>P</u> BX	Pilot Number	
Head Office	ACD 01	-

Select the Pilot number you wish to create the view for and choose either a detailed, overview or summary view and click OK. A summary of the different views are as follows:

Show Detailed is a moving status window where users move around based upon which state they are in and how long they have been in that state. The number of calls in queue, Longest Wait Time (duration of the call queuing the longest in HH:MM:SS) and the CLI of the longest waiting caller. In the sample below, there are 3 users available to take calls. Agent 200 is at the top of the list because they have been in the available state the longest. If agent 200's extension was to ring with an ACD call, Agent 200 would move to the ringing column. If 5 extensions were ringing, then there would be 5 extensions in the ringing column, the call that had been ringing the longest would be at the top of the list.

Pilot Status W	/indow						
Pilot Numb CIQ: 0	er: Sales Longest	Wait 00:0)0:00 Caller	:		Со	lumn Chooser
Available (3)	Off Hook (0)	Ringing (0)	Incoming (0)	Hold (0)	Non ACD (0)	Unavailable (0)	Wrapup (0)
agent 200 Extn: EXT 200 00:03:45							
Agent 201 Extn: EXT 201 00:00:18							
Agent 202 Extn: EXT 202 00:00:11							

Show Overview will show all agents against the selected pilot number, the agents will remain in the same place and the colour of the agent will change based upon what state they are in. If you click the double arrows next to the agent's name, more information is displayed about their status. The number of calls in queue, the longest wait time and CLI of the longest waiting caller are also displayed.

Pilot Sta	itus Windo	w				×
Pilot I CIQ:	Number: 1	ACD 01 Longest	Wait	00:00:18	Caller:	0150964310
Agent 2	00	\$	Agent 201		*	
User Extn DID Pilot Number Code Time	Agent 200 EXT 200 00:00:08	1	Agent 202		×	

The Show Summary will display the number of calls in queue and longest wait time, no real time agent statuses are shown.



Real Time Status – Users

A user view will show the status of a user regardless of if they are logged on or not.

From the MyCalls menu, click View / Real Time Information / Real Time Status / Users / Create a New User Status View.

📷 Configure Real Time Parameter Winde	Dws
Real Time Status	Real Time User Status
Extensions Extensions DIDs Pilot Numbers Trunk Groups	The Real Time User Status is a real each User and the time in that state.
E G Real Time Statistics	Create a New User Status View

Choose which organisational group to create the user view for and choose which type of view to wish to create

teal Time User Status Confi	guration
Select the groups t You may select one or mo be able to group the resul	o view pre groups of users to display. You will ts by any of the available parameters.
Organisational Groups ☐ Organisation/ ☑ Organisation/agents/	
• Show <u>D</u> etailed	C Show <u>O</u> verview
C Show Summary	Use Short Names

The detailed and Overview views are the same as you can create against pilot numbers.

The Summary View for users is fixed grid view and displays the user's status. As the user changes status, the colour of line changes and the Status field is updated.

Drag a column h	eader here to group by that (column				Column Chooser
Group	User		ension	Status	Time	Number/Name
	Agent 200	EXT	200	Available	00:00:25	
	Agent 201	EXT	201	Outgoing	00:00:13	643133

MyCalls Agent Control

MyCalls Agent Control uses a separate TCP connection to the SV9100 that allows agents and supervisors to control their ACD status using the MyCalls application. It works by sending AIC logon commands via the Agent Control TCP Port. An AIC code is created for each ACD group and when an agent requests to login to ACD groups 1, 2 and 3, MyCalls will send 3 separate commands telling the SV9100 to login the designated agent to groups 1, 2 and 3.

MyCalls uses ACD group 64 as a holding area for agents, if for example you login to groups 1, 2 and 3, MyCalls will first log you in to ACD group 64, then 1, 2 and 3. For this reason, the SV9100 should not be programmed to deliver any calls to ACD group 64. There is a limit on the number of times an agent can logon using AIC commands, after the agent has logged on using 16 different AIC code, they will need to logout before they will be allowed to logon to any more groups. For these reasons, an ACD agent can only logon to 15 ACD groups. It is not possible to control the status of an agent while they are on an internal call.

MyCalls Agent Control requires a valid Agent Control License.

SV9100 Programming

Note: Agent Control requires SV9100 system software 7 of greater.

The TCP Port for Agent Control should be set in Wizards / Advanced Items / ACD / ACD MIS Setup, set ACD Agent Control TCP Port Number to 4002. This item is set by the MyCalls Config Import Tool.



The remaining ACD programming must be done manually and is not done by the MyCalls config Import Tool. Each Agent must be set to AIC login, Wizards / Advanced Items / ACD Agent Setup / ACD Agent Log in Mode.

Untitled [NEC Philips S¥8100] - PCPro				
Eile View Programming Communications To	ols <u>H</u> elp			
🗄 🗋 😂 🔙 🌣 📣 🍞 🔍 💷 🏹 👄 🦊	• 🕇 🛛 😁 🗉	🔞 🍡 🕘		
Wizards 👻 🗣 🗙	Apply Cancel	Default Group	box Col choos	er Expand all Contract all
Programming Level 🛛 🗖	Station Port	△ Extension	Name	Login Type
	001	200	EXT 200	AIC Login Mode
Advanced Items	002	201	EXT 201	AIC Login Mode
ACD (Automatic Call Distribution)	003	202	EXT 202	AIC Login Mode
ACD MIS Setup	004	203	EXT 203	AIC Login Mode
ACD A new Cature	005	204	EXT 204	AIC Login Mode
ACD Agent Login Mode	006	205	EXT 205	AIC Login Mode
ACD Agent Cogin Mode	007	206	EXT 206	AIC Login Mode

64 sequential AIC codes need to be created. A Default ACD group can be specified, this is used to assign the settings from ACD Group Agent Options to agents, when using AIC login an agent is given one set of options and it's defined by the first AIC code they login with. The ACD Group Agent Options will define the step on timer and wrap-up timer for agents. Using Agent Control the first group all agents will login to is 64 so if agents that login to different groups require different settings then the default ACD group for ACD group 64 should be set to 0.

For example looking at the below AIC codes if an agent logged into ACD 1, 2, 3, 4 and 5 they would have used the default settings from ACD group 1 in ACD Agent Setup / ACD Group Agent Options. An agent logging in to ACD 5, 6, 7, 8 and 9 would use the settings from ACD 2.

Untitled [NEC Philips SV8100] - PCPro				
Eile View Programming Communications To	ols <u>H</u> elp			
🗄 🗋 😂 🔙 🌣 📣 🌍 🔍 💷 🏹 👄 🦊	1 3	🗉 🧭 🌄 🥹		
Wizards 👻 🛡 🗙	Apply Can	cel Default Group box	Col chooser Expan	d all Contract all AIC Table
Programming Level 🛛 🖬	AIC Table	ACD Agent Identity Code	Default ACD Group	ACD Group in Operation Mode 1
	001	001	1	1
ACD (Automatic Call Distribution)	002	002	1	2
ACD MIS Setup	003	003	1	3
- 🛨 ACD Time Patterns	004	004	1	4
- 🛨 ACD Agent Setup	005	005	1	5
AIC Table	006	006	2	6
ACD Group Pilot number	007	007	2	7
ACD Service codes	008	008	2	8
ACD Group Assignment for Extensions	009	009	2	9
ACD Group Target for IRG	010	010	2	10
	011	011	2	11

AIC codes 9 – 64 should also be created.

Untitled [NEC Philips S¥8100] - PCPro					
Eile View Programming Communications	To	ols <u>H</u> elp			
🗄 🗋 😂 🛃 🏶 🐟 🍞 🔍 📰 🛛 🖛	4	1 😚	🗉 🧭 🎭 🥹		
Wizards 🔻 🗖	×	Apply Can	cel Default Group box	Col chooser Expan	d all Contract all AIC Table
Programming Level 🛛 🗖	a	AIC Table	ACD Agent Identity Code	Default ACD Group	ACD Group in Operation Mode 1
		056	056	1	56
- ACD (Automatic Call Distribution)		057	057	1	57
ACD MIS Setup		058	058	1	58
ACD Time Patterns		059	059	1	59
ACD Agent Setup		060	060	1	60
		061	061	1	61
ACD Group Pilot number		062	062	1	62
ACD Crown Assimum to Extensions		063	063	1	63
ACD Group Assignment for Extensions		064	064	0	64

Its good practice to create all groups between 1 and 64 regardless are if they using all ACD groups. ACD group 64 must be created in order for agent control to function correctly.

Configuring MyCalls for Agent Control

Before you can configure Agent control, you must install a valid license containing the Agent Control feature. To check if you have an agent control license, click help about in MyCalls and review the License Details. Typically on an SV9100, the license would have been gathered from the LMS (License Management Server) and installed on to the SV9100's CPU. MyCalls will then read the license from the SV9100. Refer to the MyCalls Installation manual for further details on MyCalls licensing on the SV9100.

Set the Agent Control IP Address / TCP Port

From the Configure / Telephone System menu, expand your PBX and go to Agent Control / Configure Agent control

🔯 Configure Telephone System	
PBXs	Agent Control Groups
Call Recording Gent Control Agent Control ⊡ % Agent Control ⊡ % Unavailable Code Groups ⊡ % Devices ⊡ % Groups	An Agent Control Group defin the group. These restrictions a list of primary logon queues

From the Agent Control Configuration screen, select the PBX Type as NEC SV9100 and click Edit

enc concroi coningi	uration	?
Specify the PE	3X Type	
Before agent contro	ol configuration can tak	e place.
the type of PBX nee	eds to be specified.	
<u>P</u> BX Type		
<u>P</u> BX Type NEC Aspire	▼ Ed	it
<u>P</u> BX Type NEC Aspire	▼ Ed	it
<u>P</u> BX Type NEC Aspire	T Ed	it
In the PBX Connection Configuration screen, enter the IP Address of the PBX and the TCP Port used for Agent Control. The transaction Timeout should be left at 5 seconds. The start AIC code is the first AIC code that was created during the SV9100 Programming, by default leave the Start AIC code at 1. If for some reason, the AIC codes have been created starting from some other code, you can change the start AIC code. If for example the AIC codes started so that AIC code 100 logged into ACD group 1, then AIC 101 logged into ACD Group 2, you would set the AIC start code to be 100. Click OK twice to save the changes, MyCalls will attempt to connect to the once you have configured this setting.

PBX Connection Configuration	<u>?×</u>
PBX Connection Con Enter the IP address and Po control system requires a co codes. If your AIC codes are please enter the first number like to use.	nfiguration ort of the PBX. The agent ontiguous range of 64 AIC not in the range 1 to 64, er in the range you would
PBX IP Address	PBX Port
Transaction Timeout (s)	Start AIC Code

Agent Control Groups

Users have to be created in MyCalls and assigned to a PIN number as normal. They then have to be assigned to an Agent Control Group. An Agent control group is where you can give a number of agents the ability to logon to different ACD groups. If unavailable code groups have been created, they can also be assigned to the Agent Control Group. In Configure / Telephone System / Agent Control select 'Create or Edit an Agent Control Group.'

PBXs Head Office	Agent Control Groups
Call Recording Agent Control Agent Control	An Agent Control Group defines the restri the group. These restrictions include the a list of primary logon queues and a list of Tasks <u>Configure Agent Control</u> Use the Agent Control wizard to enable specify the type of PBX that is being c <u>Create or Edit an Agent Control Group</u> Use the Create or Edit an Agent Control agent control group or edit an existing

In the Edit Agent Control Groups, click 'Add New Agent Control Group.'

<mark>dit Agent</mark> Control Groເ	ıps		?
Edit the Agent C To edit an individual that group.	Control Grou agent control gr	u ps oup click the e	edit button for
Name		*	
Add new agent co	ntrol group		
	ļ	<u>o</u> ĸ	<u>C</u> ancel

When creating an Agent Control Group, enter a name for the group and add the users to the group. To add a user, start to type the users name in the 'Type part of a name here' box, select the user from the box below and click the add button. All members of the group are shown in the 'Included users' dialog box.

Note: An agent can only belong to one Agent Control Group.

Create Agent Control Group	? ×
Configure an Agent Control Group An agent control group should be named help others understand its use. The Users list should contain all the users who are to be controlled by this group. The ACD Queues list should contain all the queues the users are allowed to log on to. The queue should be marked as a primary login queue if it is one of the main queues that the user logs onto during their course of work. The Unavailable Code Group selected defines the unavailable codes available to the user.	9
PBX Code Name:	
Head Office Sales	
Users Lype part of a name here a Included users	
Agent 201 (Sales) Agent 202 (Support) Agent 203 (Support) Add	
<u>Bemove</u>	

Once all the users are added to the group, in the lower section of the window, you can select which ACD groups the agent can logon to. Add the ACD queues to the included ACD queues and select if the ACD queues are a primary login or not. If an ACD queue is set as a Primary login, then when an agent clicks the login button, they are logged into all Primary login queues. The agent can then optionally login to any of the other included ACD queues.

06		*		Name	Primary Login	Wrapup
17				01	V	00:05
9			Add	02	V	00:10
				03	V	00:15
		-	<u>R</u> emove	04	V	00:30
<	Þ			05	V	01:00 🚖
vailable Code Group			🔽 Allow User Login		🔽 Allow User	r Wrapup
ie 🖉	-		Allow User Unavaila	able		

Wrap-up Timer

Wrap-up is controlled by the SV9100 and is defined in the ACD Group agent options based on the setting for the first AIC used to log the agent in. Using Agent Control it's possible to set a wrap-up timer on a per ACD group basis rather than following the settings on the PBX. To do this the maximum time that an agent should be in wrap up should be specified in the SV9100.

	Apply	Group box Col chooser Expand all Contract a	II ACD Group	agent 💌 Hel	lp	
	ACD	Wrap-up Mode	Automatic A	SLT Automa	ACD Off-dut	Automatic Wrap-up End Time
Ш	Group					
	01	After Call is finished automatically			Don't receive	60

Once this is configured agents monitored by MyCalls will exit wrap-up in this timer unless a lower time is specified against the Agent Control Group. The example below shows ACD 1, 2, 3 and 5 have custom wrap up timers set, as there is nothing entered for ACD 4 this will follow the wrap up timer on the SV9100.

		_	=		
06		*	Name	Primary Login	Wrapup
08			01	V	00:05
09			Add 02	V	00:30
			03	V	00:15
		-	Remove 04	V	
<	+		05	V	01:00 🚖

Unavailable Codes

Unavailable codes can be put into groups and assigned to Agent Control Groups. Unavailable codes allow agents to specify a reason for going unavailable. This unavailable code is displayed in real time status windows in the MyCalls application, unavailable codes can also be reported against.

To create an unavailable code group, you must first create the unavailable codes you require, go to Configure / Telephone System / PBX / Agent Control / Unavailable Codes. Click on create or Edit Unavailable Codes.



On a default installation, there 10 unavailable codes, you can add new codes as required

dit the Una To edit an individ	vailable Codes ual code click the e	s edit button for that code		
Code 🔺	Name	Short Name	1	
01	Refreshment	RT	Edit	Ī
02	Natural Break	NB	Edit	
03	Smoking	SG	Edit	
Add new Una	vailable Code			
		1		
		· · · · · · · ·		

When adding a new unavailable code, enter the Code number, which is the number assigned to the code. The name is used to identify the code in MyCalls. The short name is displayed in real time user status windows when users make them selves unavailable.

Create Unavailable Code		? ×
Identify the Unavailat By adding a name to the cod easily.	ble Code le, users will be able to recognise it	
Code:		
N <u>a</u> me:	Short Name:	_
' <u>C</u> reated By	Creation <u>D</u> ate	
PC0223\admin	21/02/2008 10:32:41	

Once all the required codes have been created, they have to be put into groups and assigned to an Agent Control Group. Go to Configure / Telephone System / PBX / Agent Control / Unavailable Code Groups / Create an Unavailable Code Groups and click Create an Unavailable Code Group.

E - ♥ PBXs E - ♥ Head Office	Unavailable Code Groups
Call Recording Agent Control Groups Groups Groups Agent Control Agent Co	Unavailable codes define reasons tha calls. These codes may be grouped Control Group to restrict the unavaila Tasks <u>Create an Unavailable Code Group</u> Use the Create Unavailable Code unavailable code group that will co also be able to add a recognizable

Enter a name for the group and click OK.

C	reate a New Unavailable Code Group
	Identify the Unavailable Code Group By giving the unavailable code group a recognisable r help others understand its meaning. Unavailable Coc used to restrict the unavailable codes that users can their course of work.
	PBX Code
	Head Office
	<u>N</u> ame
	Sales Unav Codes

Now navigate to the group and click Edit Unavailable Code Group Configuration.



Choose which codes will be assigned to the group by ticking the included box, click OK once you have selected all the code needed.

Edit the C Check the	Group Membershi unavailable codes that s	p hould be members of t	this group.	
Drag a col Code	umn header here to group b	y that column	Included	×
Drag a col Code 01	umn header here to group b	y that column Short Name RT	Included	
Drag a col Code 01 02	umn header here to group b	y that column Short Name RT NB	Included	

Now the unavailable code group has been created, it should be assigned to the appropriate Agent Control Group. Go to Agent Control / Create of Edit and Agent Control Group, select the Agent Control Group and click edit. From the drop down menu, select the Unavailable Code Group.

<u>U</u> navailable Code Gi	roup	🔽 Allow User Login	🔽 Allow User Wra
None	•	🔽 Allow User Unavailable	

Create agent control groups and unavailable codes as required.

Completion Codes

Completion Codes are available in MyCalls, for details on configuring completion codes, refer to the MyCalls end user guide.

Skill Based Routing Management

Skill Based Routing is a feature that is available on the SV9100. It allows an ACD agent to be given a priority in an ACD group, each agent is assigned a skill set that defines their skill level in each ACD group they login to. If you have Agent Control and use the SV9100 Skill Based Routing feature, you can use MyCalls to manage skill sets that agents have. This includes creating skill sets and the ability to assign them to agents.

MyCalls will also show the skill level that an agent has in the real-time view of a pilot number. When MyCalls is licensed, it will detect if Skill Based Routing is licensed in the SV9100 and if it is enable the feature in MyCalls. When the license has been detected, you will see the Skill Based Routing icon in Configure > Telephone System > PBX > Agent Control.



Before the skill sets can be managed in MyCalls, Skill Based Routing must be configured on the SV9100, refer to the ACD Installation manual for further details. All agents including those that are not using Skill Based Routing should still be listed in the SV9100 - PRG Command 41-23 or Easy Edit / Advanced Items / ACD / ACD Skill Based Routing / ACD Skill Based Routing Login code. This is because MyCalls will use this as the SV9100 as the master list of user login / PIN codes when it's read from the SV9100.

Skill Sets

A Skill Set can be defined and assigned to Agents. When you first click 'Edit Skill Sets,' MyCalls will connect to the SV9100 and download any existing configured Skill Based Routing Tables. This is effectively the data configured in the SV9100 PRG Command 41-23 or Easy Edit / Advanced Items / ACD / ACD Skill Based Routing / ACD Skill Based Routing Table.

Skill Set 🔺	Skill Set Name	Sales	Support	Customer Service	Overflow	Reception	
001	General	5	5	5	1	1	
002	All High	1	1	1	1	1	
003	All Low	7	7	7	7	7	
104	004	1	1	1	1	1	

By default, only skill sets that are assigned to agents are displayed, the check box in the lower left hand section of the window can be toggled to show all 512 entries in the table. Only ACD groups that are configured for Skill Based Routing in PRG command 41-22 / Easy Edit / Advanced Items / ACD / ACD Skill Based Routing / ACD Skill Based Routing Setup are displayed. The Skill Set can be given a meaningful name, this makes it easier for an end user which agent is assigned to a particular skill set. The skill level can be changed in here and the values are written back to the SV9100. When setting the skill level, 1 is the highest and 7 is the lowest.

Assigning a Skill Set to an User

Skill sets can be assigned to users, the first time you click 'Create or Edit a User Login' MyCalls will download the User Login /PIN numbers from the SV9100 and any Skill Sets they are assigned to. When this happens, it will replace the existing list of user logins and pin number that are configured in MyCalls. This means effectively means all login ID's / user login / PIN Codes should be created in the SV9100 before using this feature.

Next to the Login ID (the Login ID is the User Login / PIN Code), you can click the 'User' drop down menu and assign the Login ID to the User. The Skill Set can also be assigned in the Skill Set drop down menu.

Drag a colur	nn header here to group by tha	at column	-
.ogin ID 🔺	User	Skill Set	
300	Agent 300 (Organisation)	General	Edit
301	Agent 301 (Organisation)	All High	Edit
302	None	All Low	Edit
		None General All High	
		007	*

Once the required changes have been made, click OK and the skill based routing values will be written back to the SV9100. If changes are made to the SV9100 programming to add other Login ID's then the next time you click 'Create or Edit a User Login' these values will be read into MyCalls. This can then be assigned to a MyCalls user.

You can use the 'Add new User Login' button to create a new Login ID, this can be assigned to a user and to a Skill Set. This will also be added into the SV9100 when you click OK.

Freate a User Login		<u>?×</u>
Associate the User Login By associating this login id with a u matter which extensions the user l	user, you will be able to run repoi ogged on to.	ts for the user no
Login ID 303	User None	Select
<u>S</u> kill Set		
None		
N <u>o</u> tes		
		*
	<u><u> </u></u>	<u>C</u> ancel

Create a Range of User Logins

The option to create a range of user logins will allow multiple Login ID's to be created in MyCalls and the SV9100. Once they have been created, they can be assigned to Users and Skill Sets.

Create a Range of User Logins	? ×
Create Multiple User Logins The associated user can be specified through the edit a user login option.	1
PBX Code <u>N</u> umber of Logins	
Head Office	
Start Login Number	
500	
Notes	
	A N
, <u>D</u> K <u>C</u> anc	el

Delete a Range of User Logins

Use the feature with caution as deleting a Range of User Logins will remove User Logins / Pin Codes from MyCalls and from the SV9100.

Viewing Skill Sets in Real Time

To see users that have skill sets assigned to them you can create a real-time view of the pilot number. The skill set is displayed next to the users name in brackets.

Pilot Status Win	dow	×	Pilot Status Win	ldow	×
Pilot Number CIQ: 0	r: 01 Longest Wait	00:(Pilot Numbe CIQ: 0	r: 02 Longest Wait	00:0
Agent 300 (5)	*		Agent 300 (5)	*	
Agent 301 (1)	*		Agent 301 (1)	×	
Agent 302 (7)	*		Agent 302 (7)	×	

Using MyCalls Agent Control Features.

As an Agent

When an Agent logs in into MyCalls, they can use the Agent Control Toolbar to carry out various actions. From the view menu, check the Agent Control Toolbar option. Once visible, the Agent Control Toolbar can be moved around the application.



The toolbar can also be moved out of the MyCalls application and used as a free floating application. When the toolbar has been removed from the application, MyCalls can be minimised and the toolbar will still be visible. To move the toolbar out from the MyCalls application drag the dotted line situated at the left hand side of the toolbar and the move it.

MyCalls Co	ntrol				
1		(\mathbf{b})	9	I .	
Log In	Log Out	Wrap Up Start	Unavailable	Options	
Extension 2	200 (Steven)	Idle	18:49:18		Inc: 0 Abd: 0 Out: 0

The functions of each of the Agent Control Bar buttons are described as follows:



Login – Click the login button to login to all of the primary login groups associated with your Agent Control Group. Click the Arrow to be presented with a list of ACD groups available to login to. When an agent clicks the login button, they will be prompted with extension they should login to. If the user is assigned to a default extension, they can simply click ok to login to their default extension or choose an extension from the drop down menu.

Logout – Click the logout button to logout of all ACD groups. Click the Arrow to logout of individual ACD groups.

Wrap up - Click to Enter / Exit Wrap up



×

Options.

Lock

Always On Top

Compact Display

Tool Buttons

Unavailable – Click the arrow to choose an unavailable reason. If unavailable codes are not setup, click the icon to go unavailable.

Once logged in, an agent can close the MyCalls application down and they will stay logged into their ACD groups.

Options – Click the options button to view the list of available options: Lock – Will stop the toolbar stop a user from being able to move the toolbar.

Always on Top - If always on top is selected, the toolbar will always sit visible in the screen. If other applications are running, the toolbar will sit on top of those applications.

Compact Display – Select to reduce the size of the icons that are shown in the agent control toolbar.

Tool Buttons – Click to add and remove buttons from the agent control toolbar and change the order in which they appear. Hot Keys can be assigned to the buttons, for example, the default hot key for Login is Ctrl + F5. To change the hotkey, click in the 'Press new hot key' box and press the new key sequence that should be used as the hot key. If you enable the 'Global Hot Key' option then if the Hot Keys will work even if the MyCalls application is not running in the foreground.

Tool Buttons		
Tool Button Con To assign a hot key to key' box, then press the to assign the new hot I factory default.	figuration a button, select th e hot key you requi key. Click the 'Rese	e button, click on the 'new hot re. Click the 'Assign' button et All' button to reset to the
Category Agent Control		
Buttons ✓ Log In ✓ Log Out ✓ Wrapup ✓ Exit Wrapup ✓ Unavailable ✓ Available	Move Up Move Down	Current hot key

As An ACD Supervisor

An ACD Supervisor has the ability to view real time user status and pilot number status and change the status of agents. They can also run reports.

In the view / real time information / real time status / users menu, choose to 'Create a New User Status View.' Choose an Organisation group, select overview and click OK. Right click on any Agent and you will be able change their status. For an Agent that is not logged in, you have the option to login the Agent to either their Primary Login Queues or any individual queues assigned to the Agent.

Agent 200	×	
Agent 201	Agent 200	
Agent 201	Log Onto Queue 🔹 🕨	All Primary Login Queues
	Log Off Queue 🕨	ACD 01
	Enter Wrapup	ACD 02
	Exit Wrapup	ACD 03
	Enter Unavailable	ACD 04
	Exit Unavailable	ACD 05
1.1		ACD 06

Once an Agent is logged in, you can control their Agent status further. You can put the agent in a wrap up state or an unavailable state. If unavailable codes are being used, you can specify an unavailable reason from the list.

Agent 200		
Agent 201	Agent 200	
Agent 201	Log Onto Queue 🔹 🕨	
	Log Off Queue 🔹 🕨	
	Enter Wrapup	
	Exit Wrapup	
	Enter Unavailable 🔸	Refreshment
	Exit Unavailable	Natural Break

The logon / logoff options can be used to login / logout of individual groups.

Call Centre Reporting

With MyCalls Call Centre you can produce reports based around users (agents) or pilot numbers (ACD groups.) When running reports you should filter be either pilot number of organisation group. When reporting against Agents, if essential that agent login and logout each day. MyCalls will calculate how long an agent has been logged in by looking at when an agent first logged in and when they last logged out. If an agent was still logged in when the report is run then the statistics may not be correct.

Sample Agent Activity Report.

To create an Agent Activity Report that will show Agent based stats, carry out the following instructions.

From MyCalls, click Reports / Reports / Report Templates / Usage / Custom Group Summary for each Member / Create Saved Report Item.



Enter a name for the report, select a Report Group and click OK.

ame a Report Item				? ×
Enter a name for this r Report Items should be name purpose and can therefore be either select an existing group to help organise the Report Ite	eport ite ed so as to i easily iden o or enter a ems.	m reflect th tified, Yo new gro	eir ou may up name	
<u>R</u> eport Name Agent Detail Report				
Report <u>G</u> roup				
Custom Reports		•		
	<u>0</u> K		<u>C</u> ancel	

The report wizard will start, the first step of the wizard is to configure the reporting period. Choose the period the report will run for and click next.

ithin each of these time p	periods.). This will only include calls i	inal were nanoleo
eporting Period		Period <u>1</u> Start	Period <u>1</u> End
<u>H</u> egular	and it	00 : 00 : 00 🌲	23 : 59 : 59 🌲
Today		Include Second Perio	bd
<u>C</u> ustom			
Start Date	Start <u>T</u> ime		
29 / 02 / 2008 💌	00 : 00 : 00		
End Date	End Time	Include calls for the follo	wing days
29/02/2008	23 + 59 - 59	Mon Ved I	/ Fn 🖌 Sat

From the upper section of the Custom Group Summary for each Member Configuration, select the Device Type as Organisation Group and choose which group the report will be for. If you wish to report against Unavailable Code, then select which code will be included in the reports. Only 10 unavailable codes can be reported against in a single report.

🖺 Custom Group Summary for each Member Configurati	ion 📃 🗌 🗙
Specify the information to include in the r By specifying multiple groups you can compare the result At least one group must be selected and the device type specification. Show the available information using the A deselect the information to include in the report. Modify the next to another header. Moving a header off the grid will a	report. Its of different groups over the same time period. to group by CANNOT be one used in the filter Available Information button and select or the order by clicking on a header and moving it also remove the information from the report.
Device Type Organisation Group Groups Organisation Select All Select None Include sub groups of selected groups	Select up to 10 unavailable codes 123 Natural Break Refreshment

In the lower section of the configuration screen, click Available Information / Users. From the Users menu, select items as required, examples are First Login at, Last Logout at, Total Time Logged In.

Include sub groups or selected groups	Last Call Start Time	
cluded Information	Last Log In At	
		Last Log Out At
		Logged In Maximum
		Logged In Minimum
		Number of Logins
	<u>Available Information</u>	Total Time Busy
	Call Durations	Total Time DND
	Costs +	Total Time Free
Prev	r Call Counts 🕨	Total Time Logged In
	Call Count Percentages 🔸	Total Time Unavailable
		Total Time Wrapup
	Users	teres tone treapap
	Performance	

To include Unavailable codes in the report, click Unavailable Codes and you will be presented with a sub menu displaying the Unavailable codes selected in the upper section of the report configuration screen. Under each unavailable code, you can select Unavailable % Time, Count of Total Time. % Time will show the percentage of time your have been unavailable in that particular unavailable code. Count will display the number of time you have been unavailable for that reason. Total Time will display the total time you have been unavailable in that code.

vailable Information	<u> </u>	review Report	
Call Durations	+		
Costs	- + [
Call Counts	- F	Cancel	
Call Count Percentage:	€)		
Users			
Performance	•		
Unavailable Codes	•	Natural Break 🔹 🕨	Unavailable %Time
		123	Unavailable Count
		Refreshment	Unavailable Total Time

Other items can be included in the reports from the available menus. Each of the categories are described as follows:

Call Durations / General – Call durations can be used to display items such as based around the duration of calls. For example you could display the total amount of time an agent been on an incoming or outgoing call. Average Calls Durations can also be displayed as well as Ring no Answer Times.

Costs / General – If call costing, fixed costs or handling costs are being used, these can be included by selecting items from the Costs menu.

Call Counts / General - Call counts will display statistic such as the number of incoming calls or outgoing calls

Call Count Percentages – Will display the number of calls as a percentage, available for different call types.

Users – Agent based statistics.

Performance – Used to Display Grade of Service values.

Unavailable Codes - Used to display statistics on unavailable codes.

Once you have selected the fields that should be included in the report, click next. Choose is to consolidate transferred calls or not and click next.

🗎 Custom Group Summary for ea	ch Member Configu	iration		
Specify whether to report One incoming call can consist of reported as a single call, or report and extension side reporting wo	ort a transferre f several individual (orted on individually, uld report on individ	d call as sing call legs. These ca Typically trunk side ual calls.	le call or seve n either be consolid e reporting would co	ral calls. ated and insolidate calls
Consolidate Transferred Calls	Prev	Next	Finish	Cancel

At the filter page, you can be more specific about the calls that are included in the report. By default without and filtering all calls from all DDI's / Pilot numbers are included. To only include calls from a specific Pilot Number, tick the Pilot Numbers / Groups check box. When you click next you will have the option to specify which Pilot Numbers you want to report against. Optionally you can filter by any of the other options.

Specify the devices to The report can filter the result were handled by Extension O filtering will be configured lat results to a certain type of de	Fraction Member Configuration 5 filter the report to ts to only include calls that match s roup, "Sales". Select the types that er in the wizard depending on what vice then do not not select that opti-	selected criteria, such as only list calls that y you wish to filter the results to. The t you select. If you do not wish filter the on.		
Account Codes/Groups	✓ Pilot Numbers/Groups	Costing Types		
<u>Callers/Groups</u>	<u>Extensions/Groups</u>	Call Durations		
🔽 Call <u>Types</u>				
Trunks/Groups	Users/Organisation Groups			
DIDs/Groups	Dialed/Received Numbers			
Include the filter description in	the report.			
	Prev Next Finish Cancel			

If you selected to filter by a pilot number, then either select the a pilot number group from the list of Pilot Number Groups to Include, or select individual pilot number from the lower configuration section of the screen and click next.

All Hunt Groups		Select <u>A</u> ll		
Unassigned Pilot Num	bers Se	elect None		
	<u> </u>			
Include Deleted Pilot N	lumbers			
Include Deleted Pilot N pe part of a number her	Numbers e			
Include Deleted Pilot N pe part of a number her	lumbers e		Included Pilot Numbers	
Include Deleted Pilot P pe part of a number her	lumbers e	1	Included Pilot Numbers	A
Include Deleted Pilot N pe part of a number her	Numbers e	Add	Included Pilot Numbers	A
Include Deleted Pilot f pe part of a number her	Numbers e	Add	Included Pilot Numbers	×

The final step in creating the report is to choose what call types are included in the report. Select the call type as required and click finish.

Custom Group Summary for each Member Configuration	_ 🗆 🗙
Select the Call Types to include in the report. By selecting specific call types it is possible to produce very detailed reports. For Incoming Abandoned will only list calls that the caller hung up on before the call v the (Ans) and (Abd) columns in the reports will include both internal and incoming page.	example, selecting only vas answered. Note that g calls, if selected on this
Call Types to Include	
✓ Incoming ✓ Incoming Conference ✓ Incoming Abandoned ✓ Incoming Abandoned ✓ Incoming Abandoned Voice Mail ✓ Incoming Transferred ✓ Incoming Pickup	
-Call Type Groups	
All Outgoing call types	
C All Internal call types	
Prev Next Fir	nish Cancel

To run the report, go to Report Item / Report Group / choose the report and click run.

MyCalls Enterprise

MyCalls Enterprise can be used to provide a centralised call management solution for an organisation. This manual is intended to give an installer who has knowledge of MyCalls the ability to install MyCalls enterprise. MyCalls Enterprise works with the SV9100, SV8100 and SL1100 PBX. In an Enterprise installation a mixture of these different PBX's can be used. Different installation scenarios can be used for larger installation or for specific enterprise functionality. The installation scenarios are described further in this manual.



MyCalls PC Specification

MyCalls Enterprise can typically be dealing with larger call volumes and therefore needs a high specification PC to run on. The supported operating systems is the same as for any MyCalls install but the minimum hardware specification is as follows:

Minimum Hardware Specification

Intel i5 Processor 4GB RAM Min 50GB of available Hard Disk Space

Data Storage

As MyCalls Enterprise can be dealing with large amounts of data, to cope with that, there are two methods in which data can be stored in MyCalls. You can either use SQL Express 2008 R2 or SQL Server 2008 R2. SQL Express 2008 R2 is used by default with MyCalls and will allow up to 10GB of data to be stored in it. 10GB of data is approximately 50,000,000 call records. Once the storage limit has been reached it will be necessary to purge historic data from MyCalls.

SQL Server 2008 R2 does not have any storage limits and can be used where you are required to store more than 50,000,000 call records. It can also be used if a customer has a SQL Server and asks for the MyCalls database to be installed on to it.

MyCalls Enterprise Licensing

The license for an Enterprise installation will be firstly installed on an SV9100 that has been nominated as the SV9100 that will hold the license for the entire Enterprise. Any licenses relating to the MyCalls Enterprise software will have to be installed on the SV9100 that is holding the license. That will include any additional application users or call recording licenses. The PC that will act as the MyCalls enterprise server will read the license from the SV9100 holding the license for the enterprise. Once the license has been registered and installed on the enterprise server all of the other MyCalls clients and server will take their license from the enterprise server. Any SV9100 that exists in the enterprise will also require a license to allow SMDR and P Command output. Where Netlink is used, it is not considered as an Enterprise installation and does not require a MyCalls Enterprise license.

T I		· · · · · · · · · · · · · · · · · · ·	!! !	
I ha scanarios that ara	$\alpha_{1} \alpha_{2} \alpha_{3} \alpha_{3$	avar aittarant i	nneeinia antari	nried continuiratione
	3			

10 x SV9100's running MyCalls Call Manager connected using MyCalls Enterprise			
Qty	Part Number	Comment	
10	EU400003 – MyCalls Call Manager	10 Call Managers required to allow reporting against the 10 SV9100's	
9	EU400001 – MyCalls Basic	The 9 MyCalls basic licenses will allow SMDR and P Command output from each of the remote SV9100's.	
1	EU400010 – MyCalls Enterprise	Allows the Call Manager licenses to be 'Enterprised' together	

In the above scenario, the 10 Call Managers and 1 Enterprise license will be installed on the SV9100 that will hold the license for the entire enterprise license. Once these licenses have been installed on the SV9100, the MyCalls Enterprise Server PC will read the license from the SV9100, then register and install the license. The remaining 9 MyCalls Basic licenses should be installed on each of the other SV9100's that will be monitored. This will allow SMDR and P Command out of the other PBX's, these licenses should **not** read from the SV9100 and registered. If any call recorders are used, again the licenses should be installed on the SV9100 holding the license for the enterprise.

7 x SV9100's running MyCalls Call Manager 3 x SV9100 using MyCalls Call Centre all SV9100's are connected using MyCalls Enterprise			
Qty	Part Number	Comment	
7	EU400003 – MyCalls Call Manager	7 Call Managers required to allow reporting against the 7 SV9100's	
1	EU400012 – EU400017 – Various Call Centre Packages.	1 Call Centre package is required for this configuration. This should have enough agents for the entire enterprise. With MyCalls enterprise, multiple call centre packages should not be installed else MyCalls will stop working.	
1	EU400010 – MyCalls Enterprise	Allows the MyCalls packages to be 'Enterprised' together	
9	EU400001 – MyCalls Basic	The 9 MyCalls basic licenses will allow SMDR and P Command output from each of the remote SV9100's.	

In this scenario, the call manager licenses and Call Centre licenses are all installed on the Main SV9100 that will hold the license for the enterprise. Note, only one call centre packages should be purchased that will have the correct number of agents that exist in the enterprise. Each of the remote PBX's should have the MyCalls basic license installed on them and they should not be registered. Details of how to install the licenses are available in the SV9100 MyCalls Installation Manual.

SL Licensing

If SL1000 / SL1100 only are being used (and not SV9100's) in the Enterprise then the licenses will be required as follows. As with SV9100 all licenses will have to be installed on one PBX and not on each separate ones.

	10 x SL1000 / 1100's running MyCalls Call Manager connected using MyCalls Enterprise				
Qty	Part Number	Comment			
10	EU300011 – MyCalls Call Manager	10 Call Managers required to allow reporting against the 10 SV9100's			
1	EU300013 – MyCalls Enterprise	Allows the Call Manager licenses to be 'Enterprised' together			

Note that SMDR is not licensed on the SL series so no licenses have to be installed at the remote sites.

Mixture of SV9100 / SV8100 / SL Licensing

If a mixture of SV9100's and SV8100's and SL's are being used in the same Enterprise network then one SV9100 will have to hold the Enterprise licenses.

5 x SV9100's, 5 x SV8100's and 5 SL1100's running MyCalls Call Manager connected using MyCalls Enterprise			
Qty	Part Number	Comment	
10	EU400003 – MyCalls Call Manager	10 Call Managers required to allow reporting against the 5 SV9100's and 5 SV8100's	
9	EU400001 – MyCalls Basic	The 9 MyCalls basic licenses will allow SMDR and P Command output from each of the remote SV9100's.	
1	EU400010 – MyCalls Enterprise	Allows the Call Manager licenses to be 'Enterprised' together	
5	EU000230 – MyCalls PBX License for SL1100	Allows extra SL1100's to be added to the Enterprise. This should be installed on the same PC as the EU000003 Call Manager and EU000010 MyCalls Enterprise license.	

When You use a mixture of different PBX's and SV9100 MyCalls is installed, the Config Import may not work successfully for other PBX's. It is therefore recommended that the connections to the PBX are configured manually using the <u>Collector Configuration Application</u>. The scheduled config import should be disabled for this PBX also.

Installation Scenarios

There are many different configurations that can be used in an enterprise environment. These different configurations are shown in the following section of this manual. The same level of MyCalls software should be used where different types of NEC PBX's are used. Check with your technical support if you are unsure about the current released versions of MyCalls.

An SV9100 has two types of information that MyCalls needs in order to function, Port Commands (Referred to as P Commands or P Events) and SMDR. A P Command is output each time a call is presented to the PBX or each time an extensions status changes. A standard call will generate around 10 P commands. It is therefore not recommended to directly connect more than 10 SV9100's or to a single PC. If there is a requirement to connect more than 10 SV9100's into a MyCalls Enterprise network then clustering should be used. Clustering can send a unified version of the P commands and SMDR output to a MyCalls Server.

Call recording can be used with any of the following scenarios and will always need a local PC to record calls on to. Calls can be played back from a central location or client over a network. Call recording licenses should be installed on the SV9100 holding the license for the Enterprise.

A combination of SL series PBX's and SV9100's can be used in the same enterprise installation but the MyCalls software level must be the same.

Scenario 1 – A Central MyCalls PC Colleting from Multiple PBX's

There is a Central PC running MyCalls at a head office and all the P commands and SMDR are sent directly over the network to the MyCalls server PC. This is only suitable for connecting up to 10 SV9100's to a single PC. If a link between the remote sites goes down then there is a possibility that data will be lost until the link is restored.

MyCalls clients can be installed on the network to give users access to real time screens and reports. Any user in MyCalls will be able to report against any PBX.



<u>Scenario 2 – Clustered Installation with a Cluster server and Node</u> <u>Cluster Clients</u>

In this scenario, a PC is elected as a Cluster Server. This is the PC that holds the configuration and call records database for all the sites. The Cluster server also holds the license for the entire enterprise. Node cluster clients are PC's that are responsible for gathering data from a PBX and then feeding that information back to a cluster server. Working in a clustered environment will allow a Cluster Server to report against all PBX's in the enterprise and will allow Node cluster clients to report only against the PBX connected to it. Each node cluster client will have the ability to run reports and view real time information for its local PBX only. The cluster server will not be able to view real time information for each PBX in the enterprise.



Scenario 3 – Clustered Install with Group Cluster Clients

In this scenario there is a cluster server which stores the configuration and call records for the entire enterprise. There are also PC's that act as Group Cluster Client's. A Group Cluster Client can collect from up to 10 SV9100'sw and feed back call information to a cluster server. The group cluster client can display real time statistics for all PBX's it is connected to. MyCalls clients can be installed within the group cluster for reporting. There is no real limit on the number of group cluster servers that can exist within an Enterprise.



Scenario 4. A Cluster Server with Node Cluster Clients and Group Cluster Clients.

This scenario is a combination of both clustering methods used in scenario 2 & 3. There is a Cluster server which is responsible for holding the central MyCalls database. There are then a combination of node cluster client and group cluster clients.



Installation Procedures

The following section describes the installation procedures for the different enterprise solutions. Each of the following scenarios can be installed using SQL Express 2008 R2 or SQL 2008 R2. Further information on installing MyCalls with SQL 2008 R2 is documented in the Installing MyCalls with SQL 2008 R2 section of this manual. These instructions work on the assumption that only SV9100's are used in the installation. Instructions for adding in different PBX's into the installation are available in the 'Collector Configuration Application' section of this manual.

Scenario 1 – Single MyCalls PC, Multiple PBX's with SQL Express 2008 R2.

The steps to installing this scenario are summarised as follows:

- Make sure that all of the SV9100's in the Enterprise are programmed for MyCalls. Refer to the MyCalls Installation guide for further details.
- Carry out a complete installation on the MyCalls Server PC.
- Install the MyCalls Enterprise license on the SV9100 that will hold the license.
- On the MyCalls Server PC, read the license from the SV9100 holding the Enterprise license and register it.
- Install the license that will enable SMDR and P Commands on all of the other SV9100's that are part of the enterprise.
- Do the config import for the 1st site.
- Add the additional PBX's into MyCalls.
- Do the config import for each PBX.

When the license is read from the SV9100, the number of PBX's will reflect the number of SV9100's that will be monitored. The license will then need to be installed and registered.

NyCalls License M	anager		
File License Help			
Serial Number 9D2D1711-6604-4763	3-9630-F6364134895	License Type Enterprise	
Registered User		Registered Company	
Richard Horsley		NEC Internal	
Expires		Maintenance Renewa	ıl
31/12/2105		20/09/2008	
PBXs 3	Extensions Unlimited	Concurrent Users	ACD Supervisors
Agents 10	LAN Wallboard Users		
Call Playback Users	Digital Trunks 6	Analog Trunks	IP Trunks
	Inst	all	

Once the license has been installed and the Config import has been completed for the first PBX, login to MyCalls as an Enterprise Administrator. From the Configure menu, select Telephone System. Click Create a New PBX.

🔅 Configure Telephone System		
■ ■ ■ ■ ■ ■ ■ ■ ■	PBXs	
	PBXs are used to organise a configurati single PBX can support one telephone s and reporting is required for more than c PBXs must be configured.	
	Tasks Create a New PBX Use the Create a New PBX wizard to set the site code, assign an administ configurable notes.	

Enter a name of the PBX in the PBX code box, set the Country, the Area code and the International Access code as required. Enter a node number, each PBX must have a unique node number with the Enterprise. Once you have entered all the details, click OK.

Create a PBX		? ×
Identify the PBX The PBX Code is the unique name fo form one logical switch must be uniq Note that both a PBX Code and an Are	r each switch. Networked PBX's that uely identified by their Node identifier. ea Code must be entered.	
PBX Code	Node	
	<u> </u>	
Admin User		
None	Select	
Country		
United Kingdom 🗨	Edit Country Numbering Plan	
<u>A</u> rea Code	International Access Code	
	00	
<u>C</u> all Recorder		
None Edit		
Notes		
		v

Repeat this procedure for each PBX that will be added into MyCalls.

Once each PBX has been added, start the config import tool. In the config import, select the general page and from the 'Assign Configuration to PBX Code' drop down menu, select the PBX you are going to do the import for. After selecting the correct PBX, complete the import procedure, adding the extensions, DDI's and trunks as required.



Repeat this procedure for each SV9100 that will exist within the Enterprise.

<u>Scenario 2 – Clustered Installation with a Cluster Server and Node</u> <u>Cluster Clients</u>

The steps to installing this scenario are summarised as follows:

- Make sure that all the PBX's are programmed for MyCalls. Refer to the MyCalls Installation guide for further details.
- Install MyCalls and Elect the Cluster Server.
- Install the MyCalls Enterprise license on the SV9100 that will hold the license.
- On the MyCalls Cluster Server, read the license from the SV9100 holding the Enterprise license and register it.
- Install the license that will enable SMDR and P Commands on all of the other SV9100's that are part of the enterprise.
- Configure and add node cluster clients as required
- Do the config import for each node cluster client

Installing MyCalls

Once the PBX has been programmed for SMDR output, you should start the MyCalls installation as normal and carry out a complete installation of MyCalls. Once the installation has completed, carry out the configuration import for the first PBX as normal. Use the license manager to read the license from the SV9100 and check the number of PBX's are correct. The license will then need to be installed and registered.

🔑 MyCalls License Ma	anager		
File License Help			
Serial Number		License Type	
9D2D1711-6604-4763	3-9630-F6364134895	Enterprise	
Registered User		Registered Company	
Richard Horsley		NEC Internal	
Expires		Maintenance Renewa	l
31/12/2105		20/09/2008	
PBXs 3	Extensions Unlimited	Concurrent Users	ACD Supervisors
Agents 10	LAN Wallboard Users		
Call Playback Users	Digital Trunks 6	Analog Trunks	IP Trunks 0
	Inst	all	

Load MyCalls, from the Configure menu, select Telephone System. Click Create a New PBX.

🕸 Configure Telephone System	
E PBXs ⊕ -	PBXs
	PBXs are used to organise a configurati single PBX can support one telephone s and reporting is required for more than c PBXs must be configured.
	Tasks Create a New PBX Use the Create a New PBX wizard to set the site code, assign an administ configurable notes.

Enter a name of the PBX in the PBX code box, set the Country, the Area code and the International Access code as required. Enter a node number, each PBX must have a unique node number with the Enterprise. Once you have entered all the details, click OK.

Create a PBX		? ×
Identify the PBX The PBX Code is the unique name fo form one logical switch must be uniq Note that both a PBX Code and an Am	r each switch. Networked PBX's that uely identified by their Node identifier. ea Code must be entered.	
PBX Code	N <u>o</u> de	
	<u> </u>	
Admin User		
None	Select	
<u>C</u> ountry		
United Kingdom	Edit Country Numbering Plan	
Area Code	International Access Code	
	00	
<u>C</u> all Recorder		
None Edit		
Notes		

Repeat this procedure for each PBX that will be added into MyCalls.

Elect the Cluster Server

Start the toolkit.exe application from the c:\program files\NEC Infrontia\MyCalls folder



The toolkit application will load.



From the toolkit, click the clustering menu.

Now select the 'This computer is being used as a cluster server' option. Once you have selected to be a cluster server, select all the PBX's in the configuration and reporter boxes. In the Statistics box, ONLY select the PBX's that are directly connected to the cluster server. DO NOT select statistics for any of the node cluster clients PBX's.

Clustering Configuration	미꼬
C Clustering is not being used.	
C This computer is being used as a node cluster client. Typically you will set up the Configuration, Statistics and Reporter PBX monitor lists to contain only the PBXs that are directly connected to this computer.	
This computer is being used as a group cluster client. Typically you will set up the Configuration and Statistics PBX monitor lists to contain or the PBXs that are directly connected to this computer. The Reporter PBX monitor list should contain all the PBXs that the group cluster client needs to report on.	ly.
This computer is being used as a cluster server. Typically you will set up the Configuration and Reporter PBX monitor lists to contain all the PBXs. The Statistics PBX monitor list should only contain those PBXs that are directly connected to this computer.	
PBX Monitor Lists	
Configuration Reporter ✓ Head Office ✓ ✓ Leicester ✓ ✓ Nottingham Select <u>All</u> ✓ Select <u>None</u>	
Statistics	
Cluster Server Cluster SQL Server	
Test Connections Cancel OK	

Click the 'Test Connections' button and the cluster configuration will verify it can connect to its own services. It is usual for the SMDR connection to fail, click OK to close the test connections window.



At the Clustering Configuration screen click ok to apply the changes. MyCalls will need to restart its services, click OK to continue.

	×	
1	The services Call Processor, Scheduler and DCD will now be restarted - OK?	
	OK Cancel	

Each of the MyCalls services will all stop and then start. Click OK at each prompt.

×	X
Service KSSCallProcessor stopped OK.	Service KSSCallProcessor started OK.
ОК	ОК

Once the services have all started up, you have elected the cluster server.

Install and Configure Node Cluster Clients

Repeat the installation procedure of MyCalls, carrying out a complete installation. Once the installation has completed, cancel the license check and DO NOT do a config import, instead start the toolkit application from the c:\program files\NEC Infrontia\MyCalls folder.


In the toolkit click Clustering. In the upper section of the Clustering Configuration select 'This computer is being used as a node cluster client.' At the lower section on the configuration screen, enter the name of the PC acting as the cluster server in the 'Cluster Server' box. In the Cluster SQL Server box, enter the name of the PC that is hosting the MyCalls database followed by \kss. Once these three options have been configured, you can click 'Test Connections' to verify the configuration. All items should pass the test apart from the two SMDR tests.

🔜 Clustering Configuration	Ľ
C Clustering is not being used.	
This computer is being used as a node cluster client. Typically you will set up the Configuration, Statistics and Reporter PBX monitor lists to contain only the PBXs that are directly connected to this computer.	
This computer is being used as a group cluster client. Typically you will set up the Configuration and Statistics PBX monitor lists to contain only the PBXs that are directly connected to this computer. The Reporter PBX monitor list should contain all the PBXs that the group cluster client needs to report on.	
This computer is being used as a cluster server. Typically you will set up the Configuration and Reporter PBX monitor lists to contain all the PBXs. The Statistics PBX monitor list should only contain those PBXs that are directly connected to this computer.	
PBX Monitor Lists	
Configuration Reporter Head Office Head Office Leicester Select <u>A</u> ll Nottingham Select <u>N</u> one	
Statistics	
□ Head Office ☑ Leicester □ Nottingham Select <u>All</u> Reload PBX Lists	
Select None	
Cluster Server Cluster SQL Server	
pc0223 pc0223\kss	
Test Connections Cancel OK	

Once you have selected to be a node cluster client, entered the cluster server name and the cluster SQL server, click the 'Reload PBX Lists.' Select the PBX that will be associated with this node cluster client and click OK.

At the Clustering Configuration screen click ok to apply the changes. MyCalls will need to restart its services, click OK to continue.



Each of the MyCalls services will all stop and then start. Click OK at each prompt.

×	×
Service KSSCallProcessor stopped OK.	Service KSSCallProcessor started OK.
OK	ОК

The PC is now configured as a node cluster client. Do the config import for the PBX you selected in the node cluster configuration. Be sure to select the correct PBX in the General page before importing the config.

🍄 Configuration Import Tool	The second s
File Help	
♦ 🖬	
Import My Telephone Sy You can download the configura button.	/stem Configuration tion directly from the switch using the dowr
Configuration Import 472 Account Codes Callers (ABB Dial) 583 Carriers Carriers 584 DIDs 584 DIDs 585 Extensions 585 Extension Groups 586 Pilot Numbers 587 Service Codes	Assign Configuration to PBX Code Select a PBX Select a PBX Head Office Leicester Nottingham Switch IP Address SMDR Port
General M Trunks	SMDR Serial Configuration Port Baud Bate

Once the config has been imported, you can login to MyCalls and the node cluster client installation is completed. This procedure can be repeated for each node cluster client that will exist in the enterprise.

Scenario 3 – Clustered Install with Group Cluster Clients

The steps for this installation scenario are summarised as follows

- Make sure that all the PBX's are programmed for MyCalls. Refer to the MyCalls Installation guide for further details.
- Install MyCalls and Elect the Cluster Server.
- Install the MyCalls Enterprise license on the SV9100 that will hold the license.
- On the MyCalls Cluster Server, read the license from the SV9100 holding the Enterprise license and register it.
- Install the license that will enable SMDR and P Commands on all of the other SV9100's that are part of the enterprise.
- Carry out a complete installation on the Group Cluster Client PC and configure it as a Group Cluster Client PC.
- Do the config import for each of the PBX's in the group cluster client.

Install MyCalls and Elect the Cluster Server

Follow the instructions from scenario 2 for installing MyCalls and electing the cluster server. Once you have elected the Cluster Server, you can do the config import for the PBX connected to the Cluster Server. Before installing and configuring the Group Cluster Clients, make sure you install the Enterprise license.

Install and Configure Group Cluster Clients

Again this procedure is similar to that from scenario 2. On the Group Cluster Client PC, firstly carry out a complete installation of MyCalls. Once the installation has completed, start the toolkit application from the C:\Program Files\NEC Infrontia\MyCalls folder.

The toolkit application will load.



From the toolkit, click the clustering menu. From the Clustering configuration screen select 'This Computer is being used as a group cluster client.' At the lower section of the configuration screen, enter the name of the Cluster Server PC in the Cluster Server box. In the Cluster SQL Server box, enter the Cluster Server PC followed by \KSS. Once you have entered the Cluster Server and the Cluster SQL Server you can click Test Connections to verify the connection to the Cluster Server. It is usual for the SDMR connection to fail.

In the PBX Monitor Lists, select configuration for each PBX in the group cluster client. In the Statistics box select statistics for each PBX you will want to create real-time windows for. In Reporter, select each PBX in the Group Cluster that you will want to run reports for.

Clustering Configuration			
Clustering is not being used.			
 This computer is being used as a contain only the PBXs that are dire 	node cluster client. Typically y ctly connected to this compute	ou will set up the Configuration, Stati r.	stics and Reporter PBX monitor lists to
This computer is being used as a the PBXs that are directly connect needs to report on.	group cluster client. Typically g ed to this computer. The Repr	you will set up the Configuration and orter PBX monitor list should contain a	Statistics PBX monitor lists to contain only all the PBXs that the group cluster client
This computer is being used as a PBXs. The Statistics PBX monitor	cluster server. Typically you w list should only contain those f	ill set up the Configuration and Repor PBXs that are directly connected to th	ter PBX monitor lists to contain all the nis computer.
PBX Monitor Lists			
Configuration		Reporter	
Head Ultrice	0-1	Head Office	
✓ Nottingham	Select <u>A</u> ll	✓ Leicester	Select <u>A</u> ll
		Nottingham	
Y	Select None		Select None
Statistics		1	
🗌 Head Office 🛛 🔤	· · · · · · · · · · · · · · · · · · ·		
✓ Leicester	Select <u>A</u> ll	Reload PBX Li:	sts
-	Select <u>N</u> one		
, <u> </u>			
luster Server	Cluster SQL Server		
c0223	pc0223\kss		
Test Connections			Cancel OK

At the Clustering Configuration screen click ok to apply the changes. MyCalls will need to restart its services, click OK to continue.



Each of the MyCalls services will all stop and then start. Click OK at each prompt.

×	×
Service KSSCallProcessor stopped OK.	Service KSSCallProcessor started OK.
OK	ОК

The group cluster client in now configured. Ensuring that each PBX is configured, carry out the configuration import for each PBX. Before you start the configuration import, make sure the correct PBX is selected in the general page.

🍄 Configuration Import Tool	
File Help	
♦ 🖬	
Import My Telephone Sy You can download the configura button.	ystem Configuration ation directly from the switch using the down
Configuration Import	Assign Configuration to PBX Code
Callers (ABB Dial)	Select a PBX Head Office Leicester Nottingham Switch IP Address O
— 🧊 General — 🍽 Trunks	SMDR Serial Configuration

Scenario 4 - A Cluster Server with Node Cluster Clients and Group Cluster Clients.

This scenario is a combination of Scenario 2 and 3, the installation steps are summarised as follows.

- Install and Elect the Cluster Server
- Install the MyCalls Enterprise license on the SV9100 that will hold the license.
- On the MyCalls Cluster Server, read the license from the SV9100 holding the Enterprise license and register it.
- Install the license that will enable SMDR and P Commands on all of the other SV9100's that are part of the enterprise.
- Do the config import for the PBX connected to the Cluster Server
- Install and configure node cluster clients
- Do the config import for node cluster clients
- Install and configure group cluster clients
- Do the config import for the group cluster clients

To install MyCalls Enterprise in this way follow instructions from scenario 2, this will have MyCalls installed and node cluster clients working. Then follow the instructions 'Install and Configure Group Cluster Clients' from the installation instruction from scenario 3.

Scenario 5 – Netlink installation

A Netlink installation will look like one PBX to MyCalls. The license is slightly different to a normal enterprise licensing rules. A MyCalls Call Manager or MyCalls Call Centre license should be installed and then a Netlink node license for each secondary Netlink PBX. If the secondary Netlink system exists on the same IP subnet as the primary system that a Netlink Node license is not required. As the P Commands and SMDR are output from the Primary Netlink system, that is the only system that needs to have a license installed on it. Where MyCalls Call Centre is used the agents can be distributed amongst the Enterprise, regardless of if they are connecting to a Primary of Secondary system.

Step by step instructions are as follows:

- Install the MyCalls Server
- Install the MyCalls license on the Primary Netlink SV9100
- On the MyCalls Server, read the license from the SV9100 holding the license and register it.
- Do the config import for the Primary Netlink system

Scenario 6 – MyCalls Call Centre and Enterprise (Non-Netlink)

When MyCalls Call Centre is used in a Non Netlink configuration then the procedure for installing MyCalls is no different and can be used in any of the installations scenarios 1-4. The main difference to the whole setup is how the Call Centre licensing works. For each call centre on each PBX that exists, there should be a MyCalls Call Centre license for the appropriate number of agents.

- Install MyCalls and configure MyCalls Enterprise as required
- Install the MyCalls Enterprise and MyCalls Call Centre licenses on the SV9100 that will hold the license.
- On the MyCalls Server, read the license from the SV9100 holding the license and register it.
- Install the license that will enable SMDR and P Commands on all of the other SV9100's that are part of the enterprise.

Scenario 7 – MyCalls Call Recorder and Enterprise

Call recorders can be used in any of the scenarios 1-6 and the same licensing rules apply. When ever a call recorder is used within an enterprise, then the call recorder license will need to need to be installed onto the SV9100 that is holding the Enterprise license. As the physical call recorder need to be connected in line with the trunks then a PC will need locally to record the calls. These can be played back from the MyCalls application.

Collector Configuration Application

The Collector Configuration Application can be used to edit connections to PBX's, for example if the IP address of a PBX has changed, you can update the MyCalls configuration to reflect this change. Usually this would be done using the Configuration Import tool however the Collector Configuration Application can be used also.

The following procedures can be used to manually add a PBX into a MyCalls installation. You should only really need to do this when it is not possible to use the config import tool. Before adding a PBX, make sure the relevant outputs are programmed correctly on the PBX.

Adding an SV9100

When adding an SV9100, you will need to create two connections, one for P Events and one for SMDR. From the Start/Programs/NEC Infrontia/MyCalls/ menu launch the Collector Configuration application. At the login prompt, enter the User name 'installer' and password 'Installer' note: the password has a capital 'I.'

User Login	? ×
Enter a user name and password When logged in you will be allowed to use the level that your user has been granted. This con a user, supervisor or admin.	system to the uld be as either
User Name Installer	Browse
<u> </u>	<u>C</u> ancel

Expand Collectors / Local Collector / Network Connections and click 'Create a New Network Connection.'



The first connection will be used for SMDR, so enter a meaningful name describing the PBX and the connection type. From the Associated PBX drop down menu, select the PBX you are configuring. Enter the IP Address for the PBX and the port number for the connection. Once you have configured each of the options, click OK.

Create a New Network Connection		? X
Identify the new Network The new network connection shou understand its use	Connection Id be named to help others	
<u>N</u> ame:	Associated <u>P</u> BX:	
Leicester_SMDR	Leicester	-
DNS Name or IP Address of the PBX this connection is for: 192.168.1.2	<u>P</u> ort: 4000 €	
N <u>o</u> tes:		
	<u> </u>	cel

Locate the connection that you have just created and click on 'Edit Telephone System Template.' From the drop down menu select 'NEC Infrontia European Aspire/SV9100/SL1100/SL1000, Line/DID presented, Use Computer Date 6 Digit DDI' from the drop down menu.

ou can either select a preconfigured t in be done either by entering the info id then using a right mouse click to a	emplate (if one exists for your switch) or configure one manually. Manual config rmation directly, or by using existing event data, selecting a value from the Samp section the value	uration ple SMDR
imple SMDR		
otocol R/LF 🔹	Predefined Templates - if there are no templates in this list you will need to browse for the file MasterSwitchTemplateFile.mpbx	
sented, Use computer Date (6 Digit DID) Template Configuration ☐ General ☐ Headers ☐ Ignore ☐ SMDR Format ☐ Event Format ☐ SMDR @ Events	Select a template User Defined Fix Benetic TAPI NEC Infrontia Aspire/SV8100 Events De NEC Infrontia Aspire/SV8100 Events (TAPI) NEC Infrontia European Aspire/SV8100/SL1100/SL1000, Line/DID presented, Use NEC Infrontia European Aspire/SV8100/SL1100/SL1000, Line/DID presented, Use NEC Infrontia European Aspire/SV8100/SL1100/SL1000, Line/DID presented, Use NEC Infrontia European XN120, Line/DID presented, Use Computer Date Max lines per SMDR Record 1 First line identified by: at position	Browse

You will be ask if you wish to overwrite the current template, click yes and then OK.



The connection for the SMDR has now been created. There is a similar procedure for creating a connection to the P Events. Start by creating a connection for the P Events and giving it a meaningful name relating to the PBX and the connection type. Proceed to select the associated PBX, enter the IP address of the PBX and the port number configured for the P Events. Click OK once you have entered the required information.

Create a New Network Connection		? ×
Identify the new Network The new network connection shoul understand its use	Connection d be named to help others	
<u>N</u> ame:	Associated <u>P</u> BX:	
Leicester_Events	Leicester	-
DNS Name or IP Address of the PBX this connection is for: 192.168.1.76	<u>P</u> ort: 4001 — —	
N <u>o</u> tes:		
	<u>O</u> K <u>C</u> anc	el

Locate the connection that you have just created and click on 'Edit Telephone System Template.' From the drop down menu select 'NEC Infrontia Aspire/SV9100 Events' from the drop down menu.

🔡 Edit the Telephone System Template	e	
File SMDR Advanced		
Edit the Telephone System You can either select a preconfigured can be done either by entering the info and then using a right mouse click to	Template template (if one exists for your switch) or configure one manually. Manual config ormation directly, or by using existing event data, selecting a value from the Sam assign the value.	uration ple SMDR
Protocol CR/LF Template Name	Predefined Templates - if there are no templates in this list you will need to browse for the file MasterSwitchTemplateFile.mobx	
User Defined	NEC Infrontia Aspire Events Select a template User Defined Fix NEC Infrontia Aspire Events NEC Infrontia European Aspire, Line presented, Use computer Date NEC Infrontia European Aspire, Line presented, using Call Date in Line Field Image: NEC Infrontia European Aspire, LinePresented, using Call Date in header NEC Infrontia European Aspire/XN120, Line/DID presented, Use computer Date NEC Infrontia European XN120, DDI presented, Call Date in header Max lines per SMDR Record 1	Browse

You will be ask if you wish to overwrite the current template, click yes and then OK.

Edit the T	elephone System Template
♪	Are you sure you want to overwrite the current template?
	Yes No

Click 'Close' to shutdown the Collector Configuration Application and start MyCalls. From the view menu select Audit Log Window.

						中 :
Drag a column hea	der here to gro	oup by that column			Column Chooser Options	Refresh
Date/Time	👻 System	Category	Action	Result	Description	Who
14/11/2007 13:41	pc0223	Decoder Transp	Start	Success	Leicester: Network data source Leicester_Events	SYSTEM
14/11/2007 13:41	pc0223	Decoder Transp	Start	Success	Leicester: Network data source Leicester_SMDR	SYSTEM
14/11/2007 13:39	pc0223	Application	Start	Success	Data Change Distributor	SYSTEM
14/11/2007 13:39	pc0223	Application	Start	Success	Scheduler	SYSTEM
14/11/2007 13:39	pc0223	Application	Start	Success	Collector - Local Collector	SYSTEM
14/11/2007 13:39	pc0223	Decoder Transp	Start	Success	Head Office: Network data source Head Office_SMDR	SYSTEM
14/11/2007 13:39	pc0223	Decoder Transp	Start	Success	Head Office: Network data source Head Office_EVENTS	SYSTEM
14/11/2007 13:39	pc0223	Application	Start	Success	Call Processor Licensed for 3 PBXs, Unlimited Extensions. E	SYSTEM

Review the audit log and make sure the connections that were created have started successfully. If they do not start check the PBX programming and review the IP address and port numbers entered in the collector configuration application.

Once the connections are successfully created, you should see calls from the newly added PBX in the call records view.

From: Extension	14 / 11 / 2007 Call Types ✔ Inc ✔	00 : 00 ▼ To: Out ☑ Abd	14 / 11 Ma: 50
Extension	Call Types	Out 🔽 Abd	Ma: 50
<u></u>	🗸 Inc 🗸	Out 🔽 Abd	50
re to group by tha	t column		
X I	From Device	To Device	Number
cester	200 (200)	009 (009)	01166431
cester	010 (010)		07779123
cester	200 (200)	041 (041)	01166431
ad Office	200 (EXT 200)	001 (Line 001)	01509643
ad Office	033 (Line 033)		01509200
ad Office	001 (Line 001)		15096431
	e to group by tha X Sester Cester Cester ad Office ad Office ad Office	e to group by that column X From Device cester 200 (200) cester 200 (200) ad Office 200 (200) ad Office 200 (EXT 200) ad Office 033 (Line 033) ad Office 001 (Line 001)	E to group by that column X From Device To Device cester 200 (200) 009 (009) cester 010 (010) 041 (041) cester 200 (200) 041 (041) ad Office 200 (EXT 200) 001 (Line 001) ad Office 033 (Line 033) 001 (Line 001)

Adding an SL1100 / SL1000

Adding an SL1100 using the collector configuration application is very similar to adding an SV9100. The only difference being the SL1100 does not have a connection for P Events. Load the collector configuration application. Under Collectors / Local Collector / Network Connection click on 'Create a New Network Connection.' Give the connection a meaningful name, select the associated PBX, enter the IP Address of the PBX and enter the port number for the SMDR. Once all the information has been entered click OK.

Create a New Network Connection				
Identify the new Network (The new network connection shoul understand its use	Connection d be named to help others			
<u>N</u> ame:	Associated <u>P</u> BX:			
Nottingham_SMDR	Nottingham	-		
DNS Name or IP Address of the PBX this connection is for: 192.168.1.4	<u>P</u> ort: 4000 _≑			
N <u>o</u> tes:				
	<u>O</u> K <u>C</u> ano	el		

Select the connection that you have just created and click 'Edit Telephone System Template.' From the drop down menu under Predefined Templates, select 'NEC Infrontia European Aspire/SV9100/SL1100/SL1000, Line/DID presented, Use Computer Date 6 Digit DDI'

🔜 Edit the Telephone System Template		
File SMDR Advanced		
Edit the Telephone System Ter You can either select a preconfigured tem can be done either by entering the informa and then using a right mouse click to assi	nplate plate (if one exists for your switch) or configure one manually. Manual config ation directly, or by using existing event data, selecting a value from the Sam ign the value.	guration ple SMDR
Sample SMDR		•
Protocol CR/LF Template Name	Predefined Templates - if there are no templates in this list you will need to browse for the file MasterSwitchTemplateFile.mpbx	
D, Line/DID presented, Use computer Date	Select a template	Browse
Template Configuration General Generad General General General General General	Select a template User Defined NEC Infrontia Aspire Events NEC Infrontia European Aspire, Line presented, Use computer Date NEC Infrontia European Aspire, Line presented, using Call Date in Line Field NEC Infrontia European Aspire, XN120, Line/DID presented, Use computer Date NEC Infrontia European XN120, DDI presented, Call Date in header NEC Infrontia European XN120, DDI presented, Call Date in header	

When prompted, choose to overwrite the current template then click OK to save the changes. Close the Collector configuration application when you have finished.

Look in the MyCalls Audit log and you will see if the connection to the new PBX was successful or not.

here to group b	y that column			Column Chooser Option:	s Refrest
System	Category	Action	Result	Description	Who
pc0223	Decoder Transp	Start	Success	Nottingham: Network data source Nottingham_SMDR	SYSTEM
pc0223	Decoder Transp	Start	Success	Leicester: Network data source Leicester_Events	SYSTEM
pc0223	Decoder Transp	Start	Success	Leicester: Network data source Leicester_SMDR	SYSTEM
pc0223	Application	Start	Success	Data Change Distributor	SYSTEM
pc0223	Application	Start	Success	Scheduler	SYSTEM
pc0223	Application	Start	Success	Collector - Local Collector	SYSTEM
pc0223	Decoder Transp	Start	Success	Head Office: Network data source Head Office_SMDR	SYSTEM
pc0223	Decoder Transp	Start	Success	Head Office: Network data source Head Office_EVENTS	SYSTEM
pc0223	Application	Start	Success	Call Processor Licensed for 3 PBXs, Unlimited Extensions	SYSTEM
pc0223	Application	Stop	Success	Data Change Distributor	SYSTEM
pc0223	Application	Stop	Success	Scheduler	SYSTEM
pc0223	Application	Stop	Success	Collector - Local Collector	SYSTEM
pc0223	Decoder Transp	Stop	Success	Head Office: Network data source Head Office_SMDR	SYSTEM
	Danadas Tissus			Hand Officer, Manual, Jaka server, Hand Officer, EVENTC	CVCTEN

Any new calls will appear in the call records view.

Date/Time → PBX	From Device	To Device	Number	User	Location
14/11/2007 14:58 Nottingham	200 (200)	010 (010)		None	
14/11/2007 14:58 Nottingham	200 (200)	009 (009)		None	
14/11/2007 14:19 Leicester	200 (200)	009 (009)	0116643133	None	Leicester
14/11/2007 14:19 Leicester	010 (010)		07779123456	None	Mobile Phones (Orange
14/11/2007 14:19 Leicester	200 (200)	041 (041)	0116643133	None	Leicester
14/11/2007 13:55 Head Office	200 (EXT 200)	001 (Line 001)	01509643133	None	Loughborough
14/11/2007 13:54 Head Office	033 (Line 033)		01509200	None	Loughborough
14/11/2007 13:32 Head Office	001 (Line 001)		1509643100	None	Loughborough
•					•

Using MyCalls Enterprise

Real Time Windows

When creating real time windows, you can select which PBX's they will be for. If you are in a clustered mode, you will only be able to create real time windows for PBX's you have checked statistics for in the toolkit.

Select the group to view The statistics are filtered to show The DID and Pilot Number statist system. Check with your maintair	only values for the type you have selected. ics may not be available on your telephone ier for details.	
<u>P</u> BX	Display Values	_
Head Office 💌		
Head Office		
Leicester	<u>G</u> roup	

Reporting - Non Clustering Mode

When a report is run, by default information will appear for all devices regardless of which PBX they were made from. If there was an extension 200 at each site and you run a report against extension 200, it would show stats for every extension 200. To report specifically against one PBX, you have to filter the report against a PBX. When editing the report configuration, check the PBX's box.

The report can filter the result were handled by Extension G filtering will be configured lat results to a certain type of de	ts to only include calls that match s Froup, "Sales". Select the types thay er in the wizard depending on what vice then do not not select that optic	elected criteria, such you wish to filter the you select. If you do r in.	
Account Codes/Groups	Pilot Numbers/Groups	<u>C</u> osting Types	
Callers/Groups	Extensions/Groups Call Dur		
Call Types	PBXs		
Trunks/Groups	Users/Organisation Groups		
DIDs/Groups	Dialed/Received Numbers		
Trunks/Groups	Users/Organisation Groups Dialed/Received Numbers	Fi	

Once you have selected to filter by a PBX you can choose which PBX's to include in the report.

Lall Details Configuration	
Select the PBXs to include By selecting the include deleted for configuration.	de in the report. PBXs it is possible to report on
PBXs to Include ☐ Head Office ✓ Leicester ☐ Notingham	Select <u>A</u> ll Select <u>N</u> one
Include Deleted PBXs	Prev Next

Reporting - Clustering Mode

A cluster server should be able to report against all PBX's that have been selected for reporting in the toolkit clustering configuration. Node cluster clients will only report against their directly connected PBX's.

<u>Users</u>

When users are created, they are not tied to a PBX. Each PBX or user of MyCalls should have their own user name and password to login to MyCalls with. There are two reasons for this, each user in MyCalls has their own set of layouts. If a user logs onto MyCalls at a head office PBX and then a PBX that cannot see the head office, the layout will fail to load. The other reason for creating users is for security to stop unauthorised users logging on.

Using MyCalls with SQL 2008 R2

By default, MyCalls comes with SQL Express 2008 R2. SQL Express 2008 R2 will store up to approximately 50,000,000 call records. Once with limit has been reached it will be necessary to purge historic data from MyCalls. With SQL 2008 R2, there are no limits on the amount of data that can be stored. SQL 2008 R2 is therefore ideal for organisations that have the requirement to store over 50,000,000 calls within MyCalls. Any of the MyCalls products can be installed to use SQL 2008 R2 including MyCalls Call Manager, Call Centre and Enterprise.

It is also possible to install the MyCalls databases into an existing SQL Server environment. For example, if a customer asks you to install MyCalls onto a PC that already has SQL 2008 R2 on, you can install MyCalls, asking it to create its own database within the SQL2008 R2 server. You will require a username and password from the administrator of the SQL Server, the account should have administrator privileges.

MyCalls and the MyCalls database can actually reside on different PC's or on the same PC. Both installation scenarios are described in this section of the manual.

Installing the MyCalls and the MyCalls Database on a SQL 2008 R2 Server

This documentation explains the installation procedure for setting up MyCalls onto a PC that will use SQL 2008 R2 for its data storage.

Start the MyCalls installation wizard, from the installation type screen, choose a custom installation type.

👘 MyCalls - Insta	allation Wizard
Setup Type Choose the set	up type that best suits your needs.
Please select a :	setup type.
C <u>C</u> omplete	
1	All program features will be installed. (Requires the most disk space.)
Client	Install only the client applications.
○ <u>5</u> erver	Install only the server components.
C <u>E</u> mail Coll	ector
1	Install only the email collector
• Custom	Choose which program features you want installed and where they will be installed. Recommended for advanced users.
InstallShield ———	< <u>B</u> ack <u>N</u> ext > Cancel

From the list of components, make sure everything is selected and click next.

🖶 MyCalls - Installation Wizard	×
Custom Setup Select the program features you want installed.	
Click on an icon in the list below to change how a feature is in	nstalled.
Call Collector Call Processor Applications MyCalls Call Collector Configuration Computer ID Generator Database	Call Collector Configuration should be installed if you want to modify the configuration of the call collector from this computer. This feature requires 57MB on your hard drive.
Install to: C:\Program Files\NEC Infrontia\MyCalls\	
InstallShieldSpace <back< td=""><td>Next > Cancel</td></back<>	Next > Cancel

At the collector screen, leave the name as Local Collector and click next.

🙀 MyCalls - Installation Wizard			×
Call Collector Name			
If you are installing a Call Collector, you if there are several Call Collectors insta given a unique name and that name mu added to the configuration.	u need to choos Iled in your com Ist be used whe	e a name for it. Note th pany, each one must b n the Call Collector is	nat e
If you have already performed a Comp Collector with the name Local Collector below.	lete Setup, ther and you must e	e will already be a Call nter a different one	
Please enter the Call Collector Name			
Local Collector			
,			
InstallShield			
	< <u>B</u> ack	Next >	Cancel

At the database server screen, select the option to 'Select the SQL Server to connect to or click Browse to see a list of all SQL Servers.' Click the Browse button and select the database server from the list provided. If the database if going to be installed on to a default instance on the SQL server then you should select (local) from the list of database servers. If the database if going to be installed on to a 'named instance' then you should select (local)*instancename*, where *instancename* is the name of the database instance.

Then choose the option to connect using Server authentication using the Login ID and password below. Enter an appropriate login ID and password which will allow you to connect to the SQL Server.

MyCalls - Installa	ition Wizard			
Database Server				
Select database se	erver and authenti	ication method		
C Use MyCalls's o	wn server			
 Select the SQL 	Server to connect	to or click Browse to s	see a list of all SQL	Servers.
Database Server:				
(local)			-	Browse
Connect using:				
C Windows aut	nentication creden	tials of current user		
 Server auther 	ntication using the	Login ID and passwoi	rd below	
	-			<u></u>
Login ID:	sa			
Password:	****			
<u>P</u> assword:	*****			

Click next to continue and complete the installation as normal. Once the installation has finished, you should install the MyCalls Enterprise license. This installation can now be treated as a normal MyCalls setup. The only difference will come when configuring Node Cluster Clients and Group Cluster Clients, you must specify the correct Cluster SQL Server in the toolkit. If a default instance of the MyCalls database was installed then you should just enter the PC name of the Cluster SQL Server PC. If the MyCalls Database was installed into a default instance, you should enter Cluster SQL Server PC name. If the MyCalls database was installed into a named instance, you should enter the PC name)*instancename*, where *instancename* is the name of the database instance.

Cluster Server	Cluster SQL Server
pc01642003	pc01642003
Test Connections	

The Cluster Server will always be the PC elected as the cluster server.

Installing MyCalls and The MyCalls Database on Separate PC's

It may be a requirement to install MyCalls and the MyCalls database on separate PC's. If there is a PC that is used as a corporate SQL Server running several instances of SQL database, then it might be worth keeping the MyCalls application on a separate server. To carry out an installation of this type, the first part of this process would be to install the MyCalls Database on the SQL server.

Installing the MyCalls Database

Start the MyCalls installation wizard as normal and choose a custom installation type. When asked which components to install select to only install the database component and click next

Select the program features you want installed.	
lick on an icon in the list below to change how a feature	e is installed.
Call Collector Call Processor Applications X MyCalls Call Collector Configuration	Feature Description This option allows you to selectively install the client applications.
Computer ID Generator	This feature requires OKB on your hard drive. It has 0 of 3 subfeatures selected. The subfeatures require 19MB on

At the database server screen, select the option to 'Select the SQL Server to connect to or click Browse to see a list of all SQL Servers.' Click the Browse button and select the database server from the list provided. If the database if going to be installed on to a default instance on the SQL server then you should select (local) from the list of database servers. If the database if going to be installed on to a named instance then you should select (local)*instancename*, where *instancename* is the name of the database instance.

Then choose the option to connect using Server authentication using the Login ID and password below. Enter an appropriate login ID and password which will allow you to connect to the SQL Server.

MyCalls - Installa	ation Wizard	2
Database Server		
Select database s	erver and authentication method	
C Use MyCalls's o	wn server	
 Select the SQL 	Server to connect to or click Browse to see a list of all 9	5QL Servers.
Database Server:		
(local)		Browse
Connect using:		
Connect using:	hentication credentials of current user	
Connect using: <u>W</u> indows authors Server authors	hentication credentials of current user ntication using the Login ID and password below	
Connect using: <u>Windows aut</u> Server authe Login ID:	hentication credentials of current user ntication using the Login ID and password below sa	

Click next until you are prompted to enter a server name. The server name will be the PC name of the computer that will have MyCalls installed on. Enter the name and click next.

🛃 MyCalls - Installation Wizard			×
Server Name			
if a Call Processor has not been incl operate correctly, it needs to know Processor has been or will be install	uded in this installatio the name of the comp ed onto.	n then, for MyCalls t puter on which the D	o vata
Please enter the Server Name			
pc0223			
InstallShield			
	< <u>B</u> ack	<u>N</u> ext >	Cancel

The MyCalls database will be installed and ready for use. On the PC that will be the MyCalls server, start the MyCalls installation and choose a custom installation type. Choose to install all components except for the Database.

🐺 MyCalls - Installation Wizard	×
Custom Setup Select the program features you want installed.	
Click on an icon in the list below to change how a feature Call Collector Call Processor Applications MyCalls Call Collector Configuration Computer ID Generator Call Collector	is installed. Feature Description This option allows you to install the database. You would normally install the database on the same machine as the Call Processor. This feature requires 19MB on your hard drive.
Install to:	
Help Space < Back	Next > Cancel

At the Call Collector Name prompt DO NOT change the name from local collector and click next.



At the database configuration screen, choose to Select the SQL Server and click browse. When you click browse, select the PC name that the MyCalls Database is installed on. If the MyCalls database was installed into a named instance, then select the PC name followed by *\instancename*. Once the database server is selected, then select Server authentication and enter an appropriate login ID and password. Click next and complete the installation wizard

🙀 MyCalls - Installation Wiz	zard	×
Database Server Select database server and	l authentication method	4
 Use MyCalls's own serve Select the SQL Server to 	r) connect to or click Browse to see a list of all	SQL Servers.
PC01642003 Connect using: C Windows authentication Server authentication Login ID: sa Password: ******	n credentials of current user using the Login ID and password below ****	Browse
InstallShield	< <u>B</u> ack <u>N</u> ext >	Cancel

Once the installation has completed you can do the config import and you will up and running.

Testing The Connection to the MyCalls Database

To test the connection to the MyCalls Database, start the toolkit application from c:\program files\necinfrontia\MyCalls folder.



When the toolkit loads, click on Configuration and test from the client menu.

MyCa	lls Toolkit					
Services	Database	Message Queue	Firewall	Clustering	Client	
					Con	figuration and Test
					SQL	Query
					SQL	Query

The client and configuration and test screen will load. Click the Test Connections button and MyCalls will verify if it can connect its services. If the Database server name has been incorrectly entered, you can change it in here.

Client Configuration and Test	
CPE Server	
Database Server PC01642003	
Collector Name Local Collector Select the PBXs that can be reported on Head Office Select <u>A</u> II Select <u>N</u> one	Connected OK - tcp://pc0223:9995/KSSCPE Connected OK - tcp://pc0223:9993/Status Connected OK - tcp://pc0223:9997/KSSDCDServe Connected OK - PC01642003
Test Connections	
Save Cancel	

Client Installations with Custom Installations

If a custom installation has been carried out then there is an extra configuration step after installing a client. When the client is installed the MyCalls server name is entered, if the database is on a different PC then this has to be entered in the toolkit after the client has installed. To do this start the toolkit.exe application from the MyCalls installation folder, usually:

C:\Program Files (x86)\NEC Infrontia\MyCalls\tookit.exe

When the toolkit loads, click on Configuration and test from the client menu.

ervices	Database	Message Queue	Firewall	Clustering	Client	
					Configuration a	nd Test
					SQL Query	

The client and configuration and test screen will load, enter the name of the database server in the appropriate text box, specifying an instance if required.

Client Configuration and Test	
CPE Server	
1	
Database Server	
PC01642003	x
Collector Name	Connected OK - tcp://pc0223:9995/KS5CPE
Local Collector	Connected OK - tcp://pc0223:9993/Status
Select the PBXs that can be reported on	Connected OK - tcp://pc0223:9997/KSSDCDServer
Select <u>All</u>	Connected OK - PC01642003
Select None	OK
Test Connections	
Save Cancel	

Backup and Restore

MyCalls stores all of its configuration and calls in the MyCalls databases, these are two separate databases. With a backup of these databases, MyCalls can be restored on to another PC. You can only restore a database from the same version of MyCalls, so if you have a version 3.0 MyCalls, you cant restore that into a MyCalls 4.0 installation. You can perform a backup of the database by opening the MyCalls application and from the System Menu choosing Database backup. In the menu is an option to backup the configuration and call records databases separately.

Jatabase Backup	? 🔀
Specify filename to use for backup Select the database you want to backup and then enter the filename to us backup and optionally a name and description for the backup. The filenam file local to this PC, backups CANNOT be made to network shares or UNC	e for the 1e MUST be a) paths.
Database Configuration Configuration Call Records Overwrite file if it already exists Filename	Browse
Backup Name KSSAccounting Backup Backup Description	
<u> </u>	<u>C</u> ancel

The databases can also be backed up using the toolkit application that is usually:

C:\Program Files (x86)\NEC Infrontia\MyCalls\tookit.exe

From the database menu, you can select the database to backup.

🖳 MyCall	ls Tool	lkit						
Services	Data	oase	Message Queue	Firewall	Clustering	Client	Licenses	
Service		Attac	h		+			×
		Detac	:h		+			
Messa		Online			+ I			*
Databa		Offlin	ne		+			¥
_		Shrin	k		•			
Compu		Backu	up		•	Configuration		*
		Resto	ire		•	Call F	Records	
		Resto	ire Default Demo		1			_
		Run S	SQL Script		+			
		Test [Database Connectio	on				
		Admi	inistrator Email Cor	nfiguration	1			
		SQL (Query					
The program should only be used under the supervision of a support engineer.								

Once you have a backup then it can be restored to another PC running MyCalls. Only 1 MyCalls server can be connected to an SV9100, this is because there is only 1 connection to the SMDR output allowed at once. With this in mind, before restoring a database on to a different PC, either disconnect the existing MyCalls server from the network, stop the MyCalls services or uninstall MyCalls from the PC that the backup was taken from. The restore process will overwrite the existing databases that are on a PC so if there is data in the database it will be overwritten.

To restore the databases, install MyCalls and when it has installed, click cancel at the post installation setup / license check window. Open the toolkit and from the databases menu, select Restore and then choose either the Configuration or Call Records database based on the one you wish to restore.

🖳 MyCal	ls Toolki	it							- • ×
Services	Databa	ase) N	1essage Queue	Firewall	Clusterin	g C	lient	Licenses	
Service	А	Attach			+				¥
	D	Detach							
Messa	0	Online							¥
Databa	0	Offline			+				¥
	S	Shrink			•				
Compu	В	Backup			+ .				¥
	R	Restore			•		Conf	iguration	
	R	Restore Default Demo					Call F	Records	
	R	Run SQL Script							_
	Т	Test Database Connection							
	А	Adminis	strator Email Co	nfiguratior	n				
	S	SQL Qu	ery						
T 1									

Browse to the file that will be restored and click OK. Before the process actually begins, the toolkit will stop each of the MyCalls in turn. After both databases have been restores you need to start the services again, this can be done in Services > Start > All.

Once the restore has finished then the license will need to be re-read from the SV9100 and re-registered.

If the name of the MyCalls server has changed then there are two extra steps to carry out. The first one is to run a script against the configuration database to make the report items available. The script file is located on the MyCalls server in the c:\program files (x86)\necinfrontia\mycalls\scripts folder and is called 'changecpeserver.sql'. Edit the script file in a text editor such as notepad or wordpad. Replace the text 'PCName' in the file with the name of the MyCalls server. If the MyCalls server was called TANGO then the files would look like this:

update reportdistriblists set cpeserver = 'TANGO' update reportitems set cpeserver = 'TANGO' update reportschedules set cpeserver = 'TANGO' Once the file is correct and saved, open the toolkit and from the Database menu choose Run SQL Script > Configuration.

🖳 MyCalls Toolkit 📃 💷 🕰								
Services	Database) Message Queue	Firewall	Clustering	Client	Licenses		
Service	Atta	ch		+			¥	
	Deta	ch						
Messa	Onli	ne		F			×	
Databa	Offli	ne		•			¥	
	Shrir	nk		•				
Compu	Back	up		•			¥	
	Rest	ore		F				
	Rest	ore Default Demo						
	Run	SQL Script		•	Conf	iguration		
	Test	Test Database Connection				Records		
	Adm	ninistrator Email Cor	nfiguratior	ı T				
	SQL	Query						
The program should only be used under the supervision of a support engineer.								

Browse to the file and and run the 'changecpeserver.sql' file. To test and see if they script has been run successfully open the MyCalls application and look in Reports. All of the previously available report items should be listed.

The second thing to do if the MyCalls server name has changed is to point any client installations to the new MyCalls server. To do this, open the toolkit on any client PC's that run MyCalls and from the Client Menu select Configuration and Test.

🖳 Client Configuration and Te 🗖 🗖	K
CPE Server	
TANGO	
Database Server	
TANGO\KSS	
Collector Name	
Local Collector	٦
✓ Head Office Select <u>A</u> II	
Select None	
Test Connections	

Enter the name of the MyCalls server where it says CPE Server and before the \KSS text in the Database Server text box.

Document History

Version 1.0 Initial release for MyCalls 4.5.0.8 on SV9100.

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