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 Enterprise 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

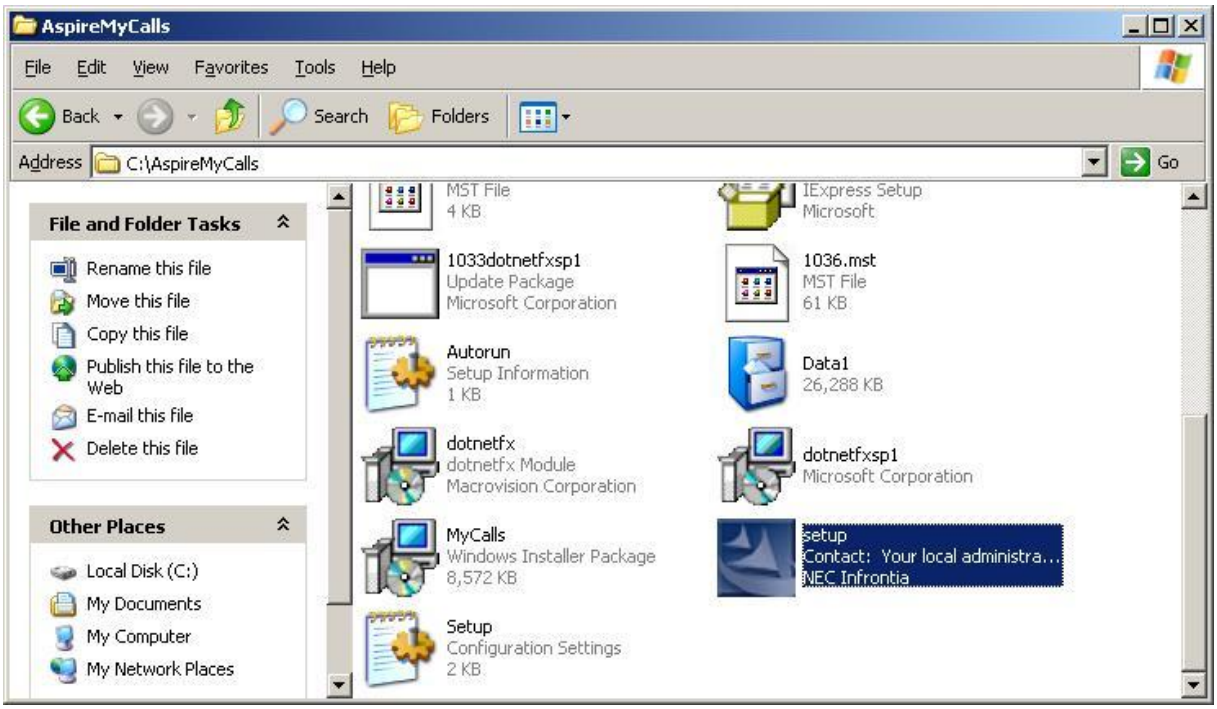
MyCalls requires two TCP connections to the SV9100 in order to work, SMDR and P Commands. SMDR is used to provide call information after calls have completed. P Commands are used to display real time information such as extension status and calls in queue information. The output can be collected from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

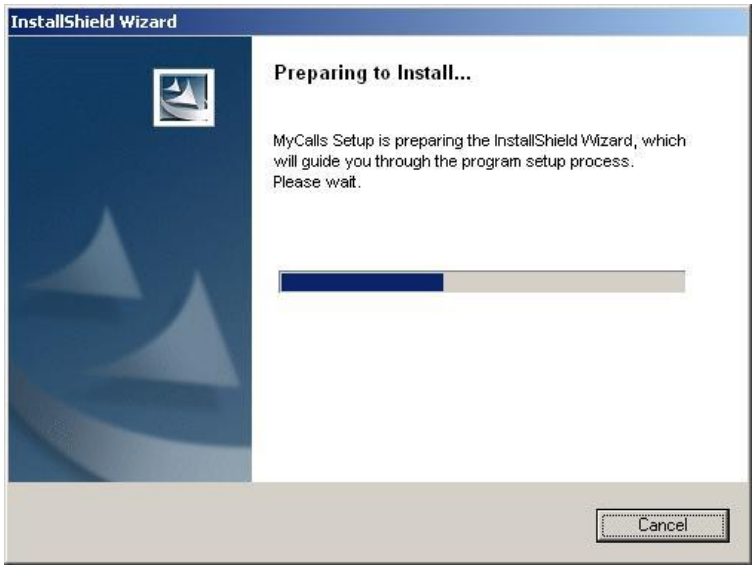
Installing the MyCalls Server

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.



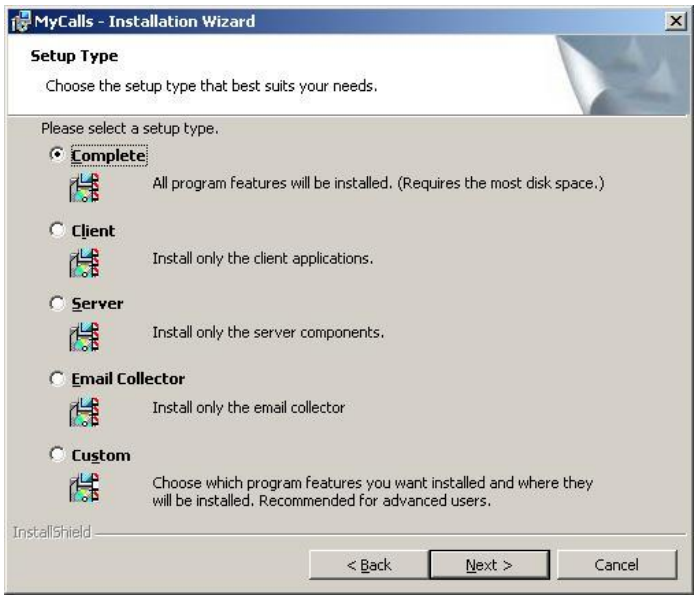
The installation wizard will begin



At the Welcome screen click next

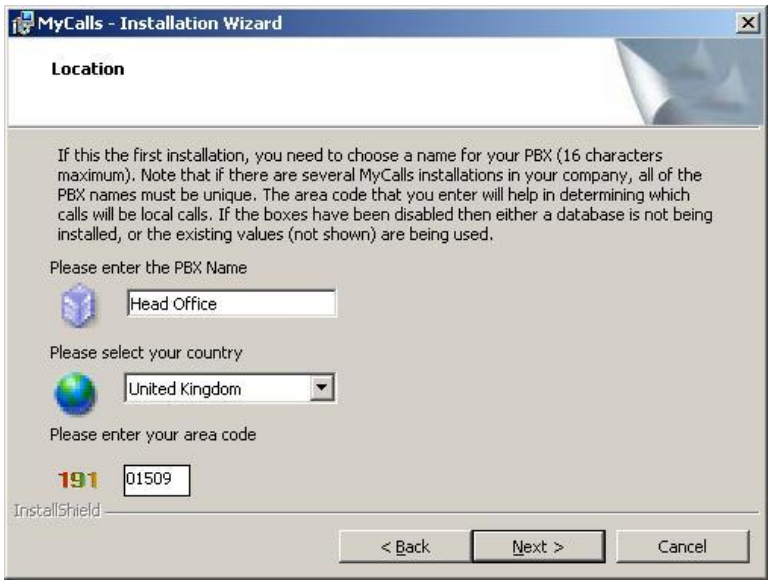
Carefully read the license agreement and click I accept, then next.

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 Using MyCalls with SQL 2008 R2 section of this manual.

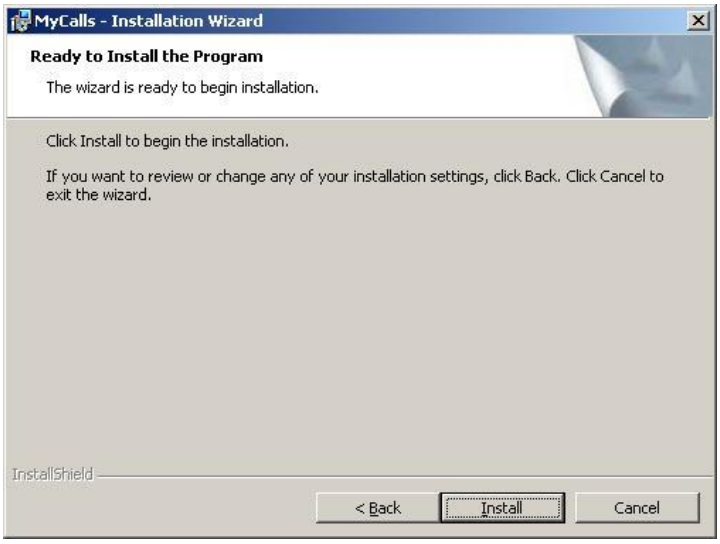


Next, enter a name for PBX, select your country and enter your area code.

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



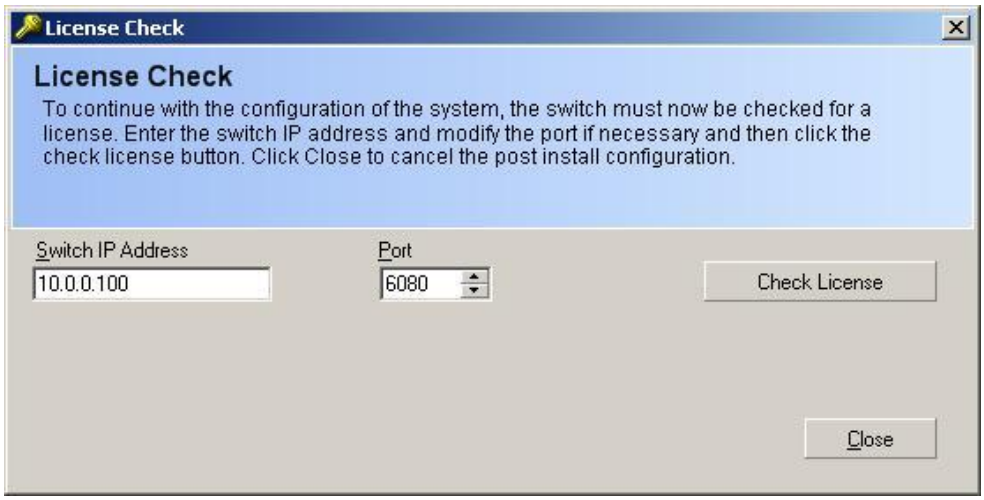
Finally, click Install to start the installation process.



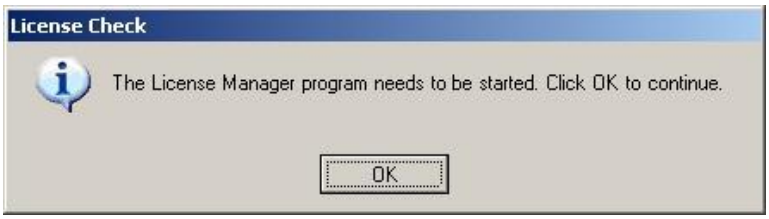
Post Installation License Check

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.

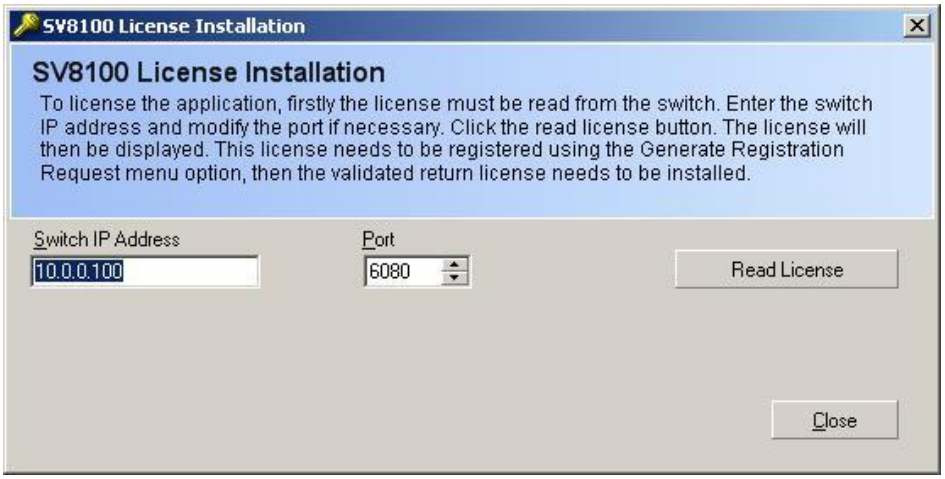
When prompted, enter the IP Address of the SV9100 and click check license. The License check will then make sure that the free license is disabled on the SV9100 and that there is a MyCalls license installed on the SV9100.



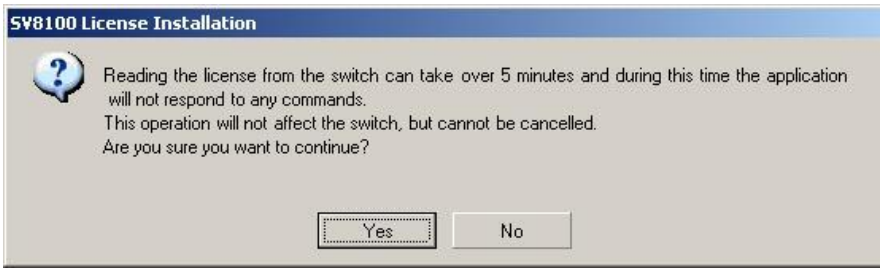
Once the license has been detected in the PBX, click 'OK' and the license manager will start.



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



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



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

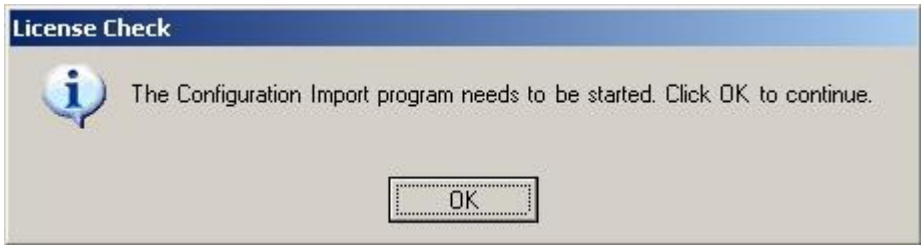
You will be notified that the license will need to be registered. The license that is read from the switch will work

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 Registration 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 Reading the License from the SV9100.

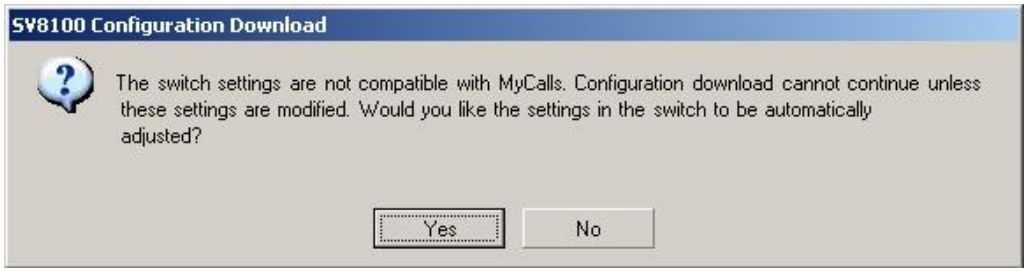
Configuration Import

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

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.

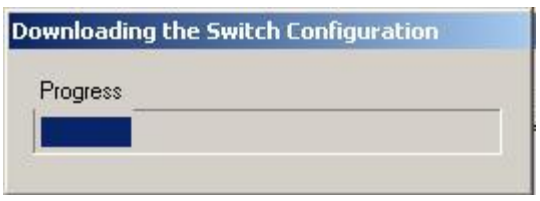


If there is a value set by MyCalls that needs to be changed, this can be done using PC Pro / Web Pro after MyCalls has set it. For example, all extensions are enabled for SMDR output, if there was a requirement for a particular extension not to output SMDR this would manually need to be changed back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

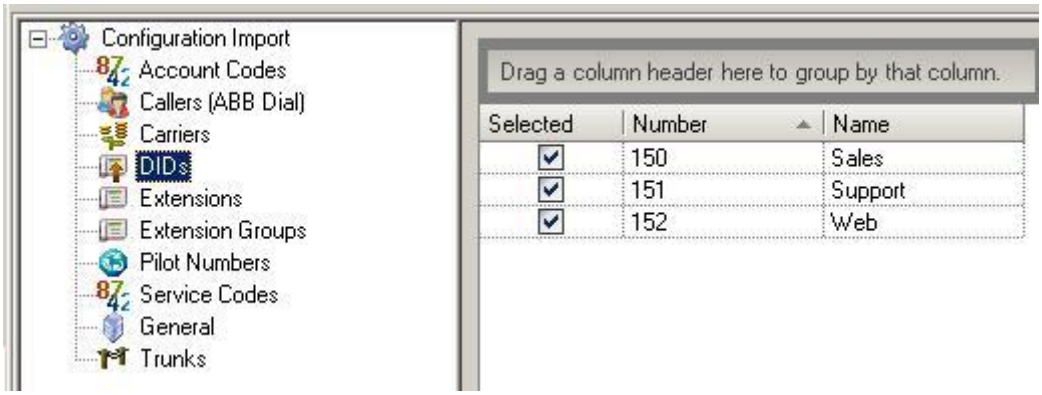


Click OK when prompted.

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 appropiate 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.



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

Click Yes to being the process.

Click Ok and close down the config import tool.

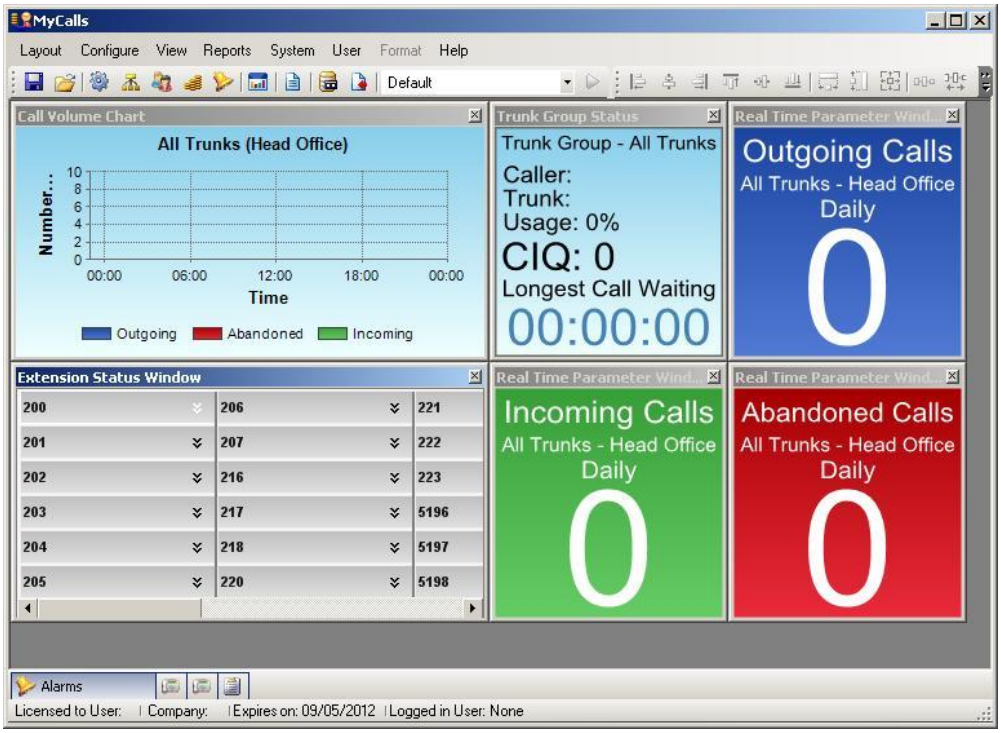
MyCalls is now configured and ready to be opened.

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.

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

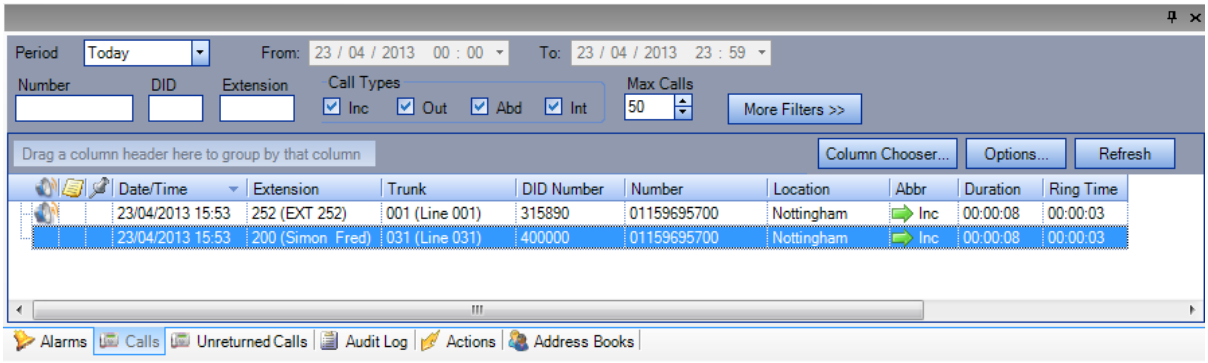


MyCalls and Virtual Loopback Reporting

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.

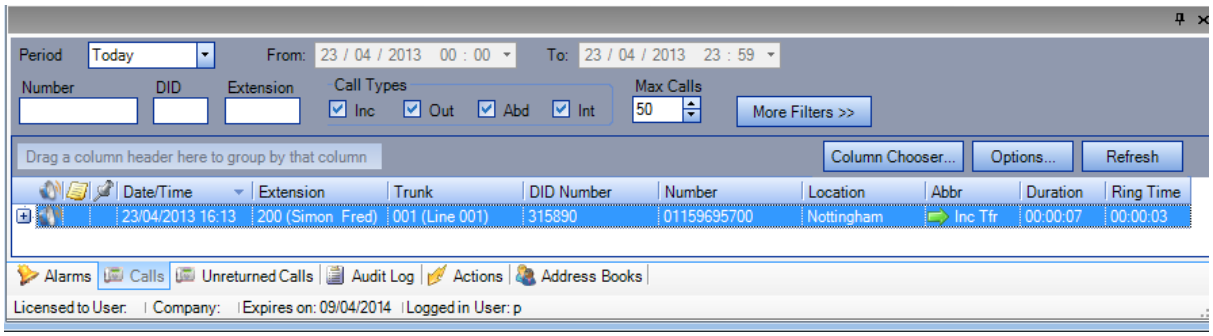
Previously if a call arrived on a real trunk and was passed around a loopback trunk, there would be two unrelated SMDR records output, these would both be displayed in the call records view and be available in the MyCalls reports.

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.

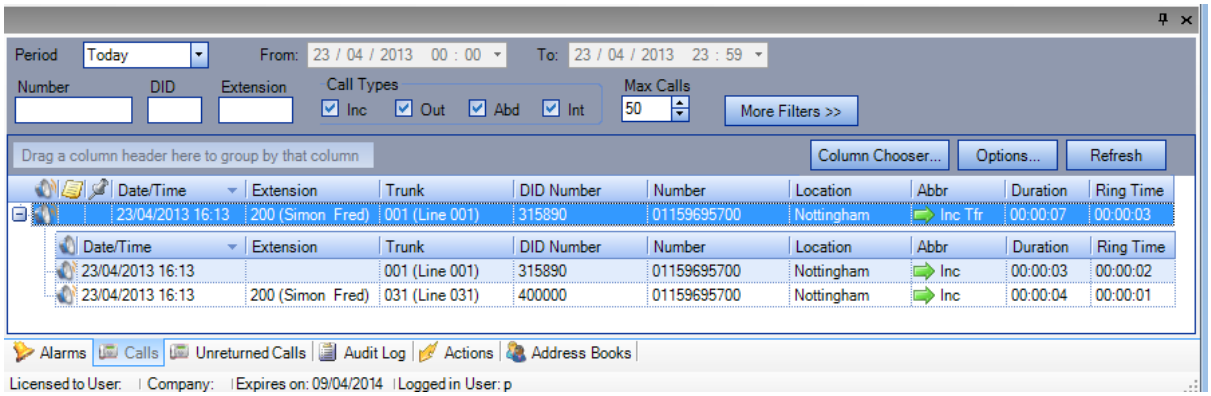


There is an combined enhancement in SV9100 system software and MyCalls version 4 and above that tags loopback calls to the trunk that the call originated on. The enhancement to the system software marks the SMDR output to indicate the call has been passed around a loopback. This feature is set by MyCalls 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.



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.



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 MyCalls Enterprise License 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.

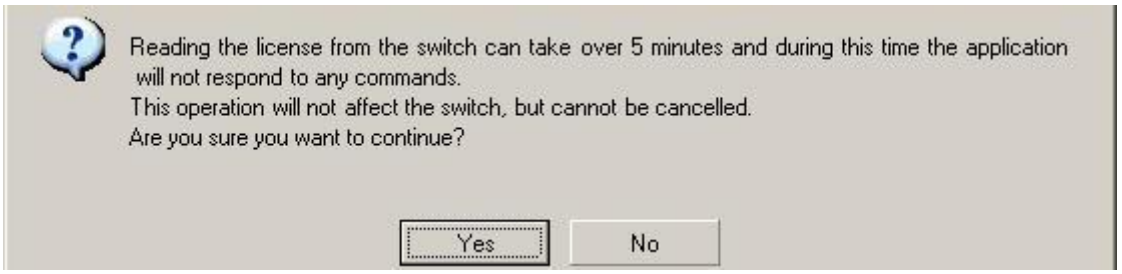
* MyCalls Desktop requires the 3rd Party CTI license to be installed on the SV9100.

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.

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.

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

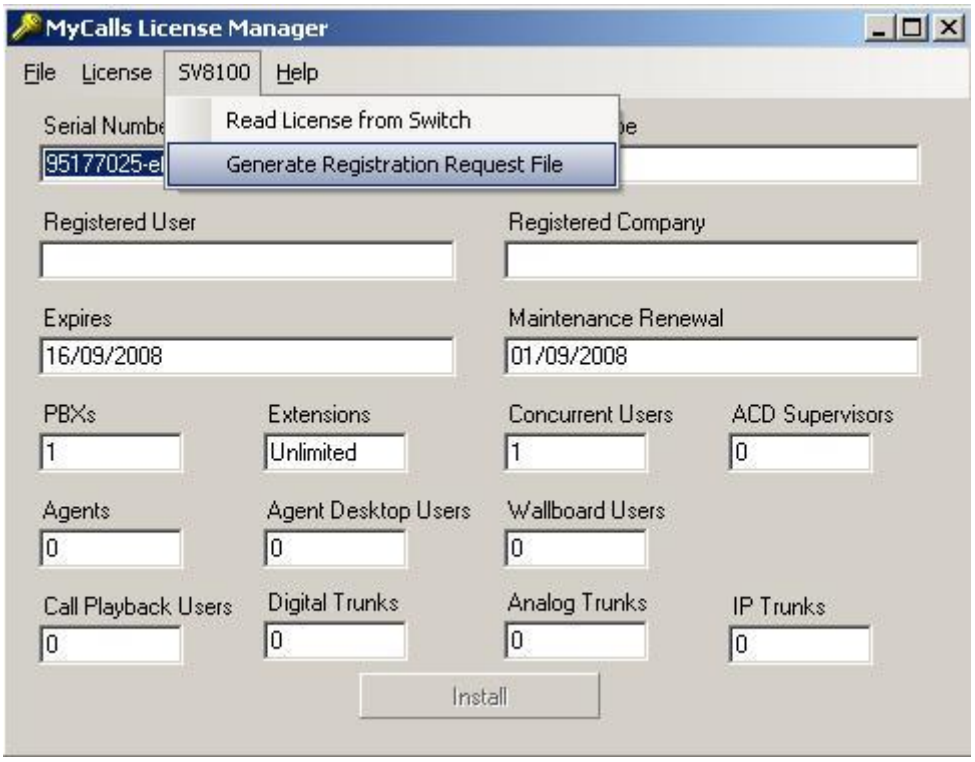


After the licence has been read from the PBX, you will be asked if you want to install it, click yes and the license will be installed on the PC.

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.

Registration

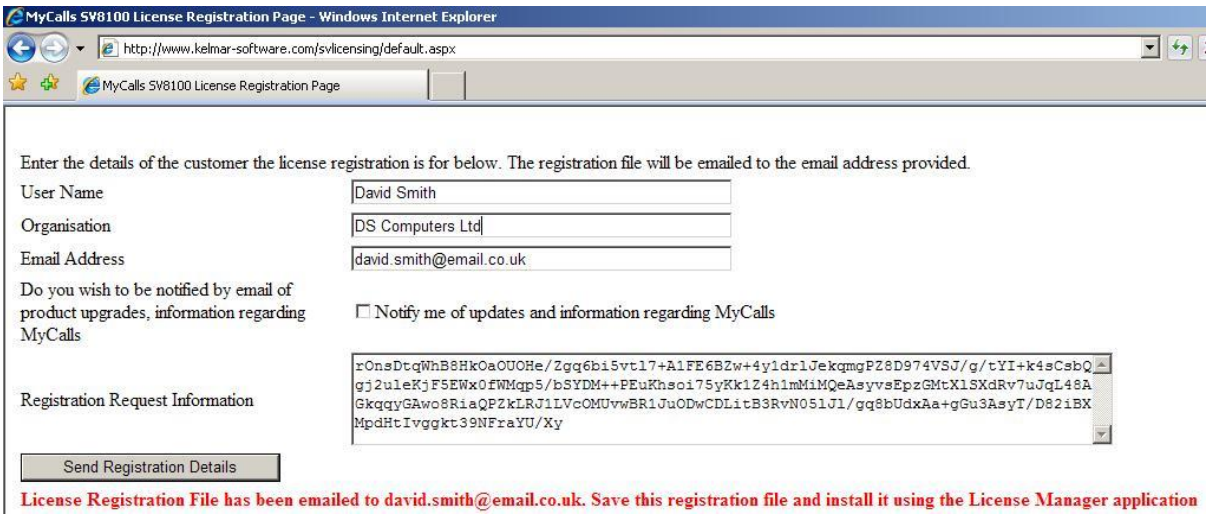
After the license has been read from the SV9100, you should select 'Generate Registration Request File' from the SV9100 menu.



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.

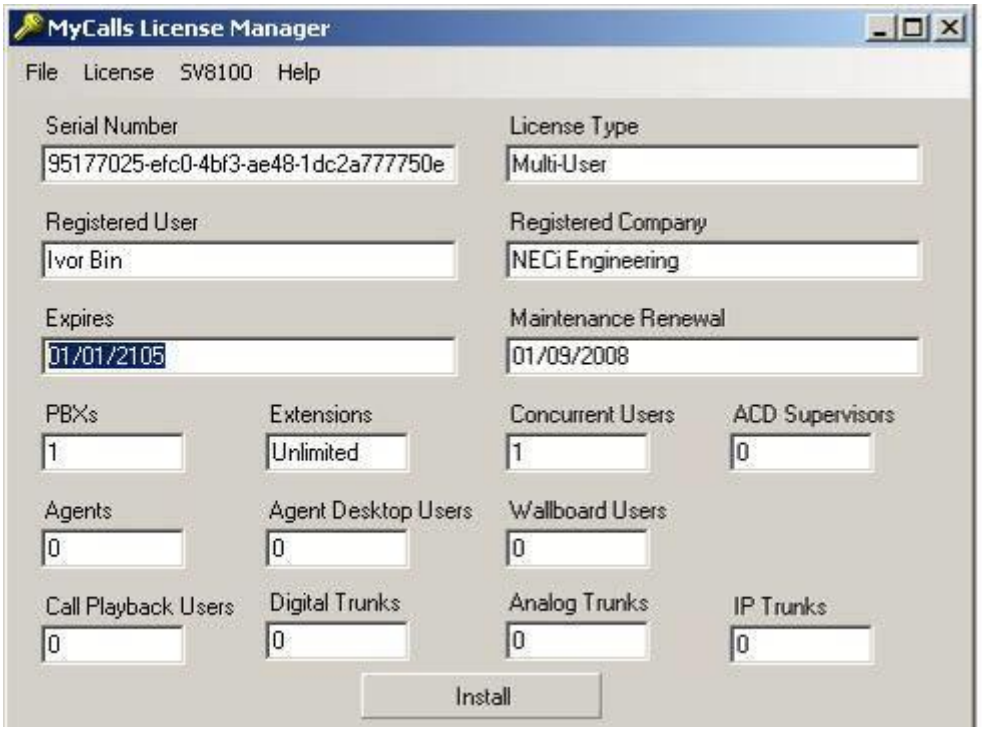
http://www.kelmar-software.com/svlicensing/default.aspx

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.

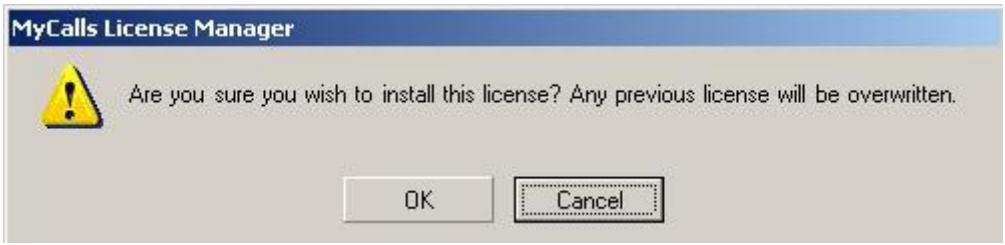


Once the registration has been submitted, it is automatically processed by a web server and a registered license file is sent to the email address that was provided. The email will come from SV9100MyCallsRegistration@kelmar-software.com and will have a license file attached. Save the license file onto the MyCalls server and open the license manager *see note1. From the file menu, select open and open the .lrf 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 lrf 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.



Click OK to complete the installation of the license.



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

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.

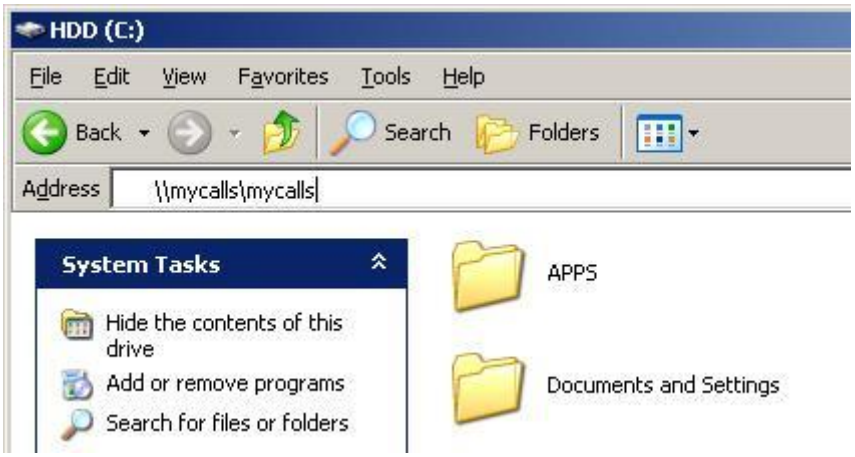
	This is the MyCalls application typically used for configuring MyCalls, running reports and viewing real time information
	This is the MyCalls Desktop application.
	This is the Operator Console application.
	This is the Stop / Start Recording Client.

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

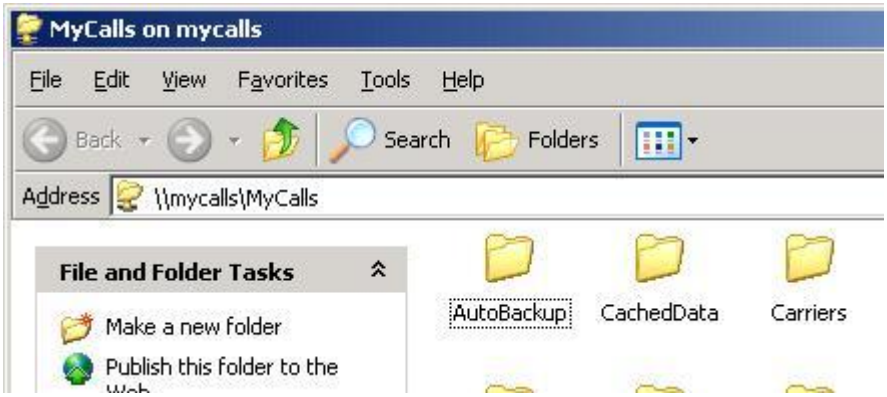
! Note: It is not possible to use the Network client and screen pop Outlook.

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 *servername*\mycalls where servername is the name of the MyCalls server. In the example below the server is called MyCalls.

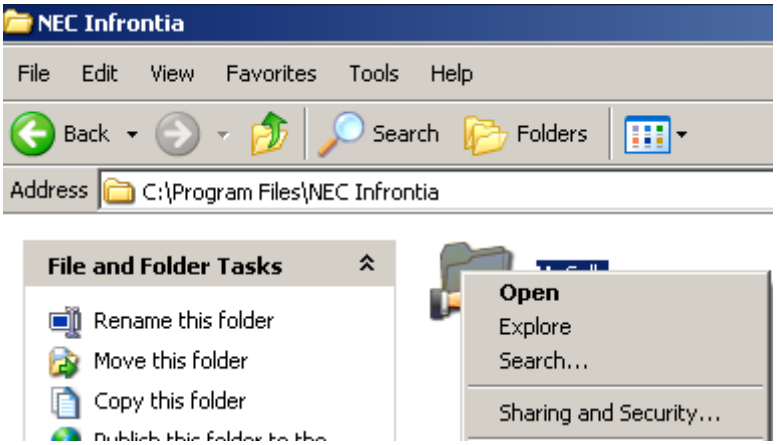


If an explorer window opens showing the contents of the share then the client can connect to the server and share.

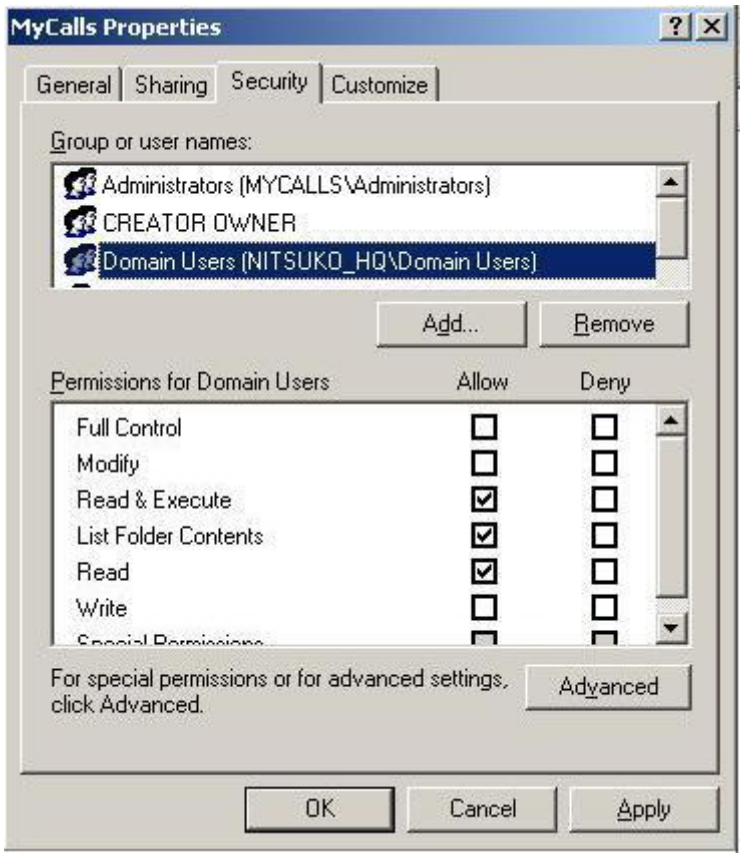


If an error is displayed saying there is a Logon failure then it is possible that the user trying to connect to the share does not have the correct permissions.

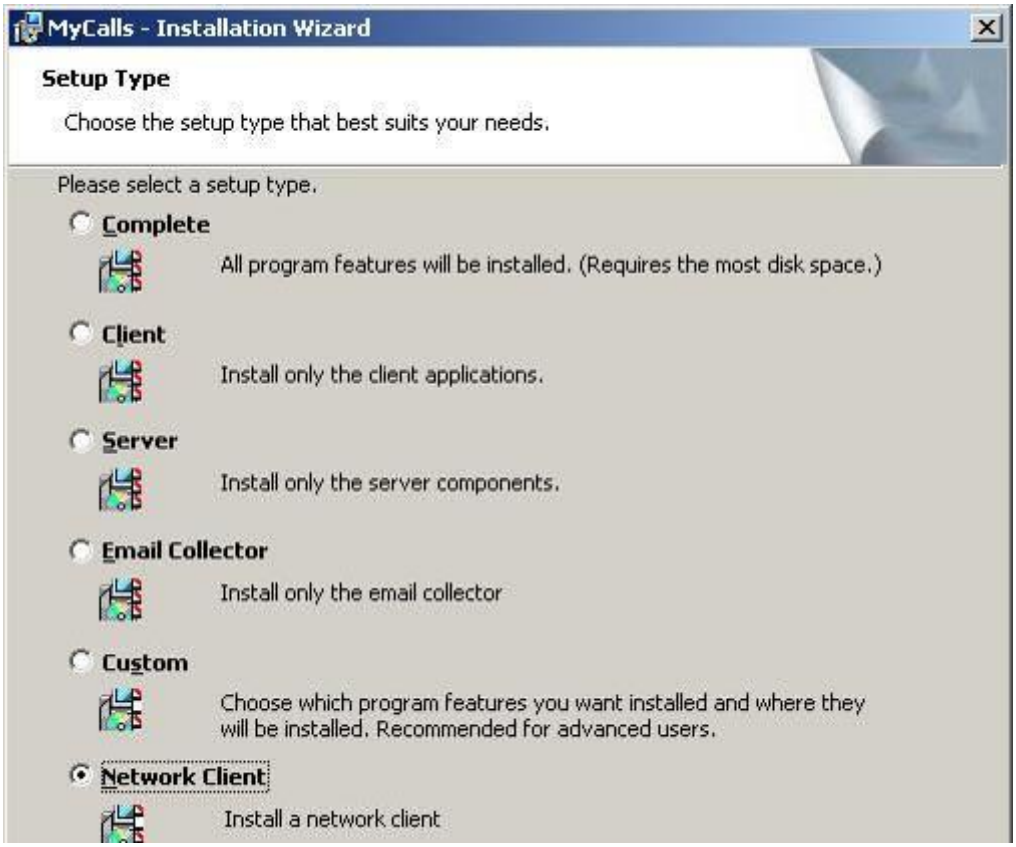
To check permissions, on the MyCalls server, right click on the MyCalls folder in C:\Program Files\NEC Infrontia and then Sharing and Security.



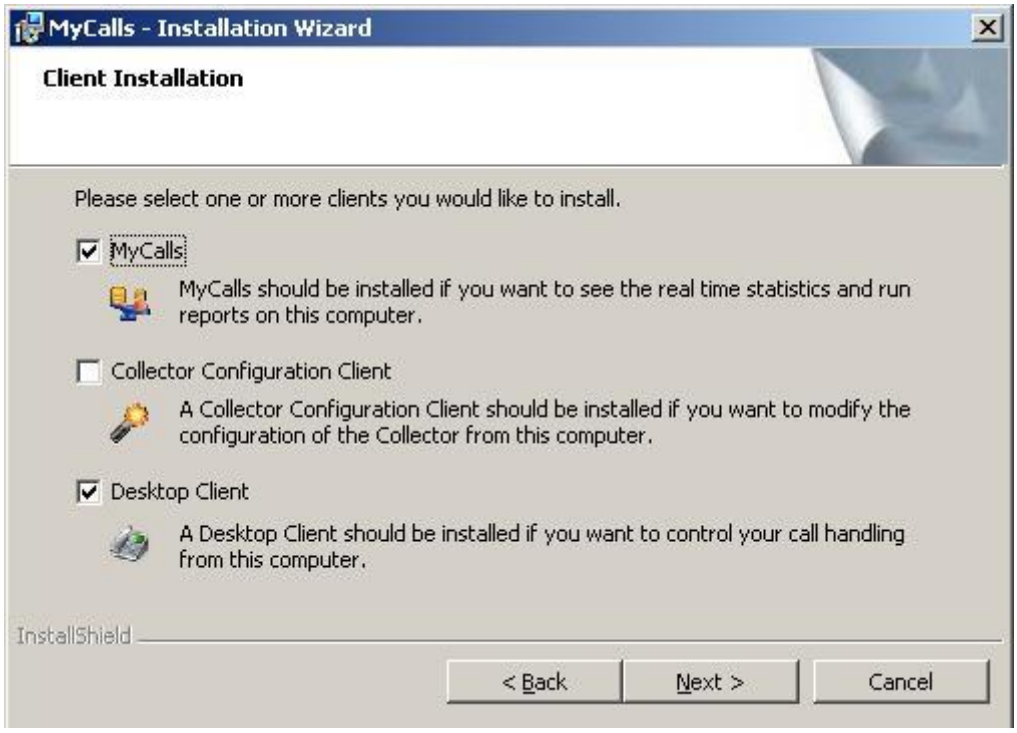
On the security tab, make sure the user or group that is accessing the share has the Read and Execute permission to the share.



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



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



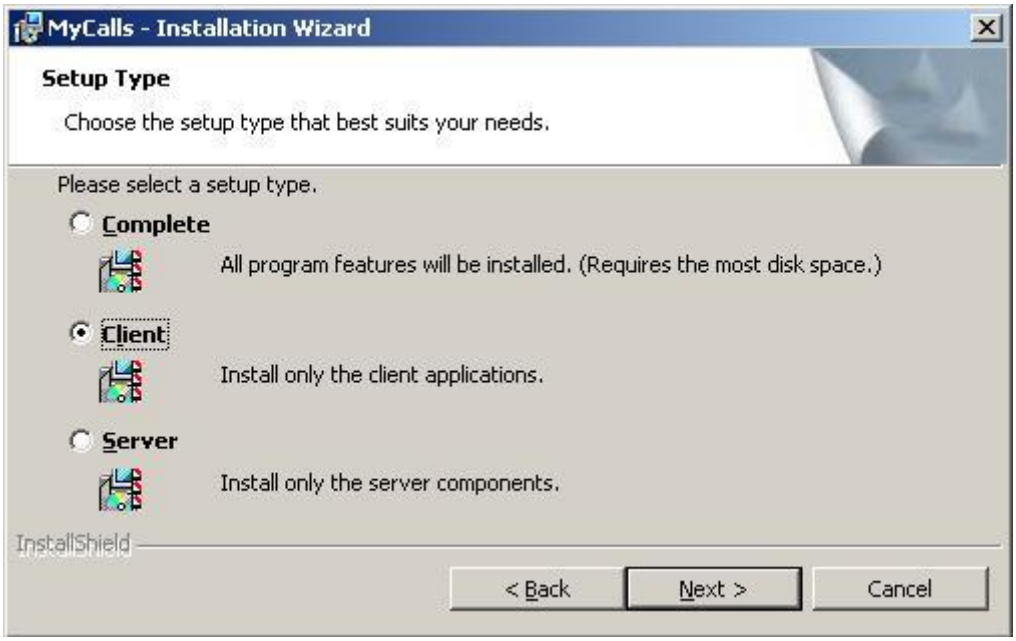
When prompted, enter the name of the MyCalls server PC name and click next.

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

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.



Choose which applications will be installed and click Next.

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

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

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

MSI Installer

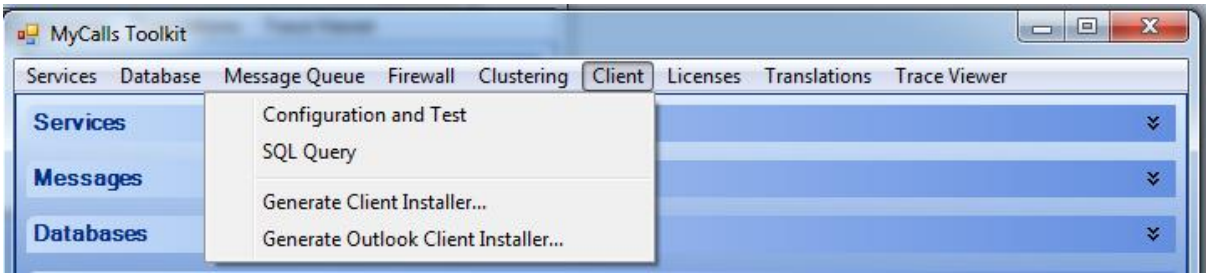
Clients can also be installed by creating an MSI Installation file, this allows custom items such as the MyCalls server name to be specified. The MSI installer file is installed without any interaction from the person installing the software, it just uses the options they were set when the installer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

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

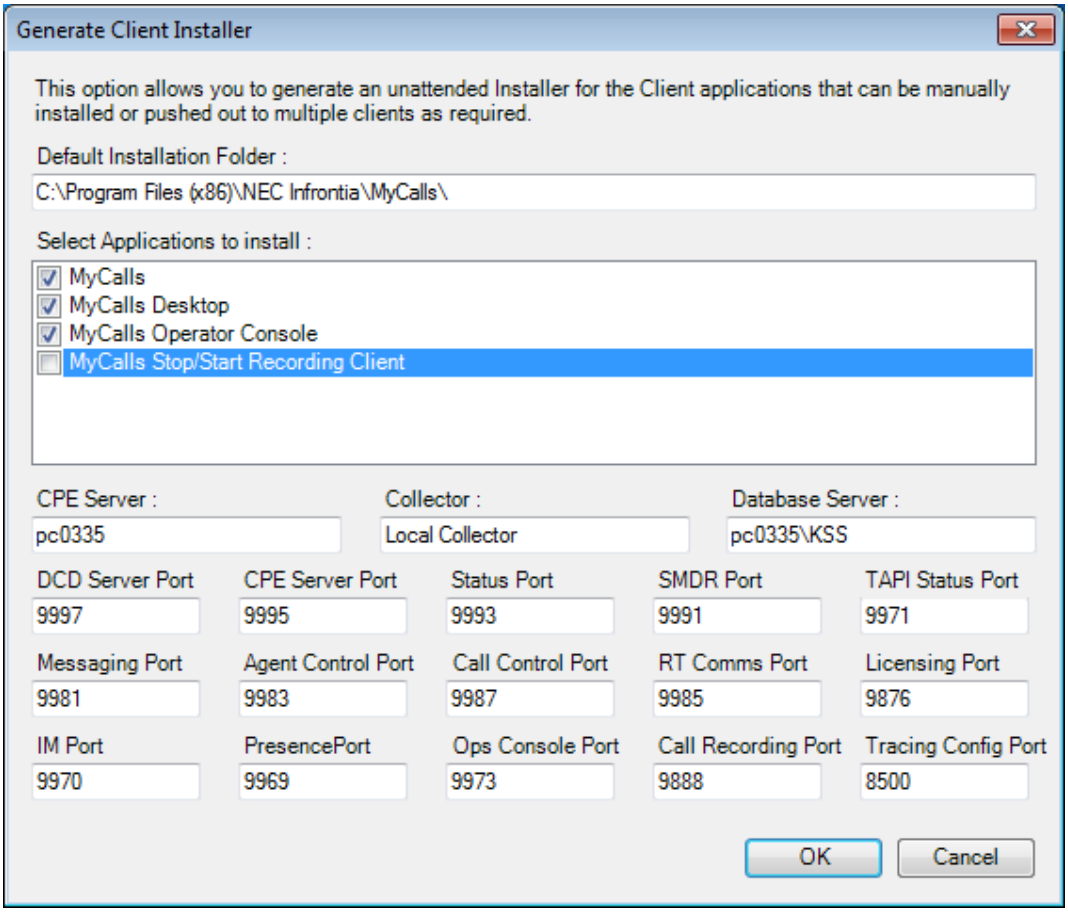
To make an MSI file, open the MyCalls Toolkit on the MyCalls Server, this is usually:

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

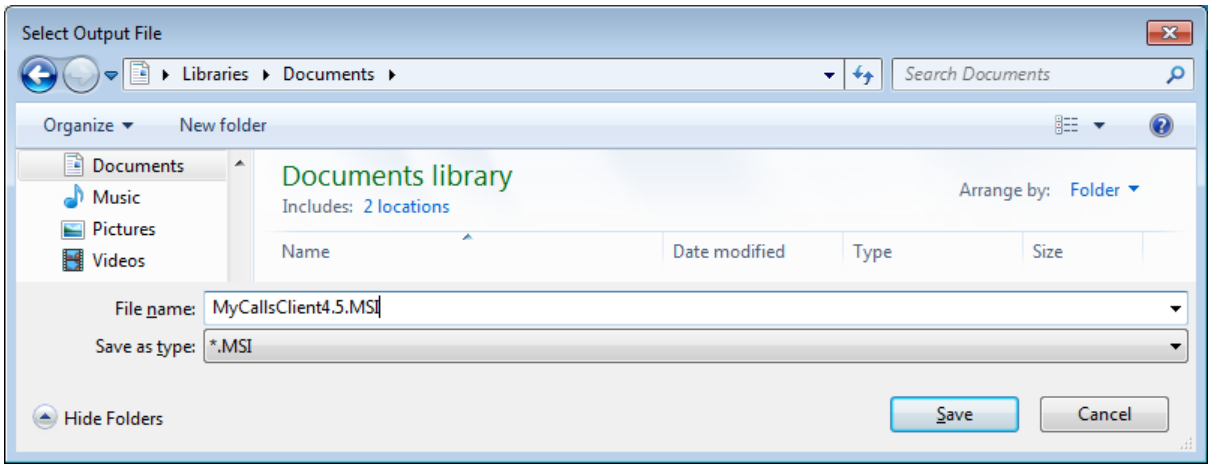
When the toolkit loads, click Client > Generate Client Installer…



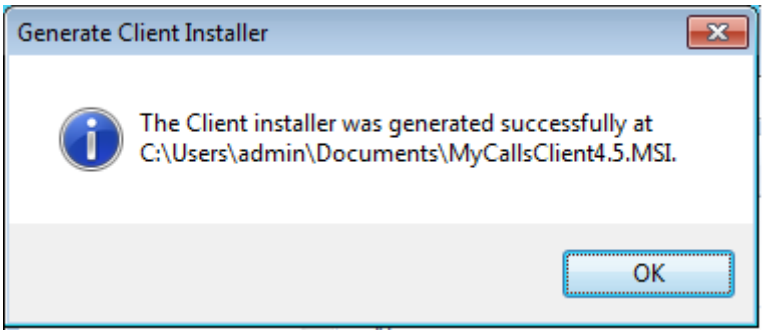
From the list of applications, choose which which should be part of the installer package. The Stop / Start Recording Client should only be selected if that specific feature is being used. Other configuration items such as the location of the Database Server and port numbers can also be changed. Enter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



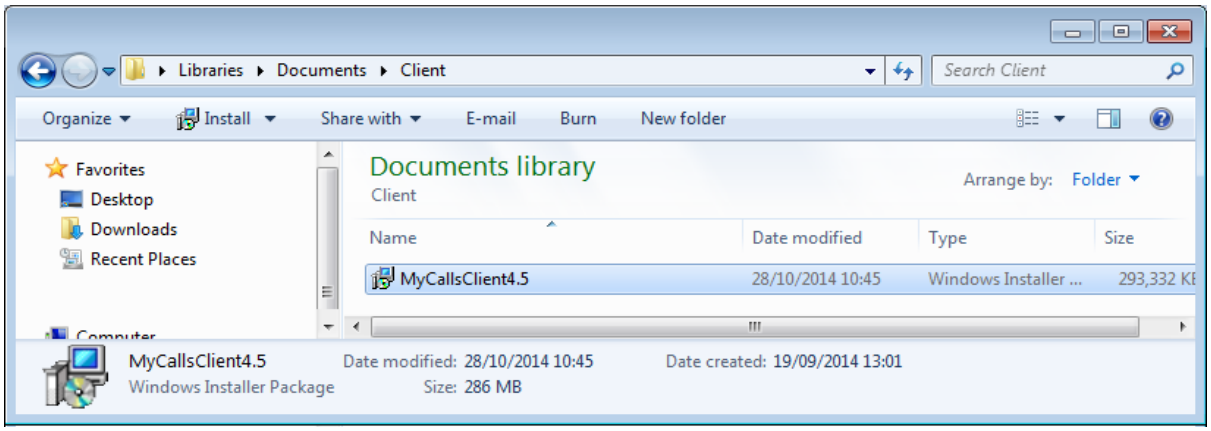
The toolkit will take a short while to create the MSI file, when prompted enter a name for the file and click Save.



Once the file has been created, click OK.



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

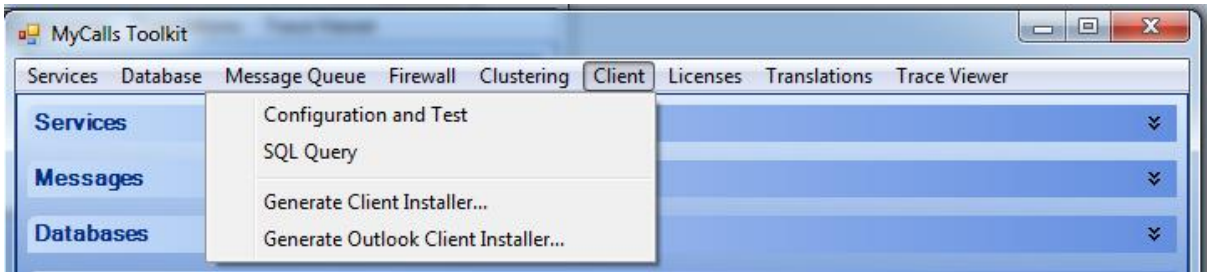


Outlook Plugin

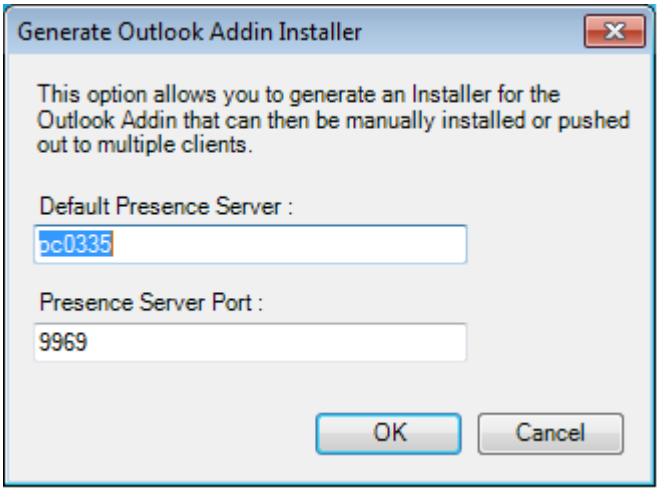
The Outlook Plugin gives users the ability to set their presence status directly from Outlook. The installation file is made in the say way as the MSI Installer file. Open the Toolkit on the MyCalls Server, this is usually:

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

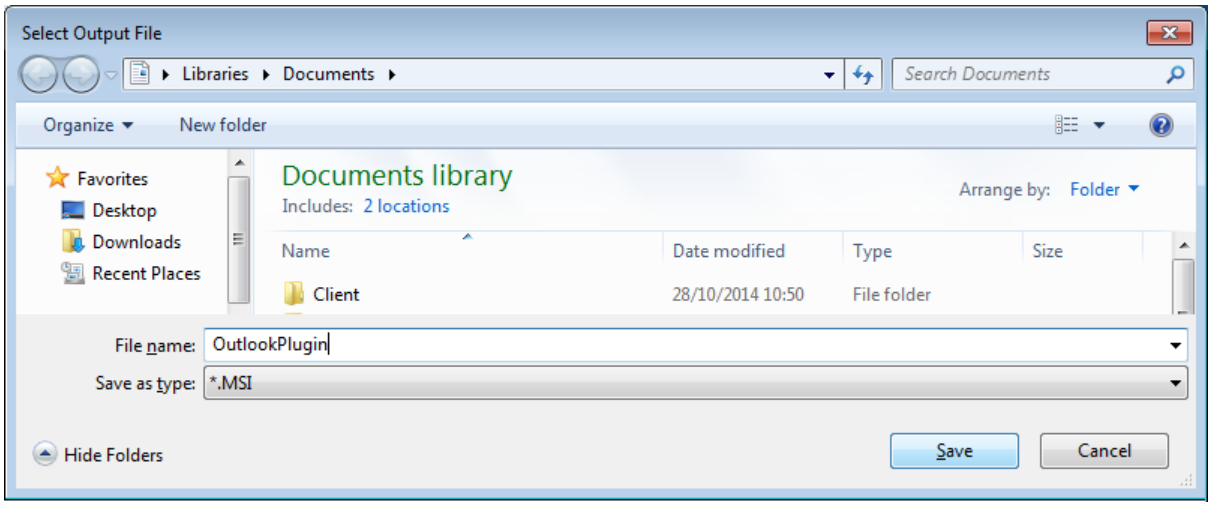
When the toolkit loads, click Client > Generate Outlook Client Installer…



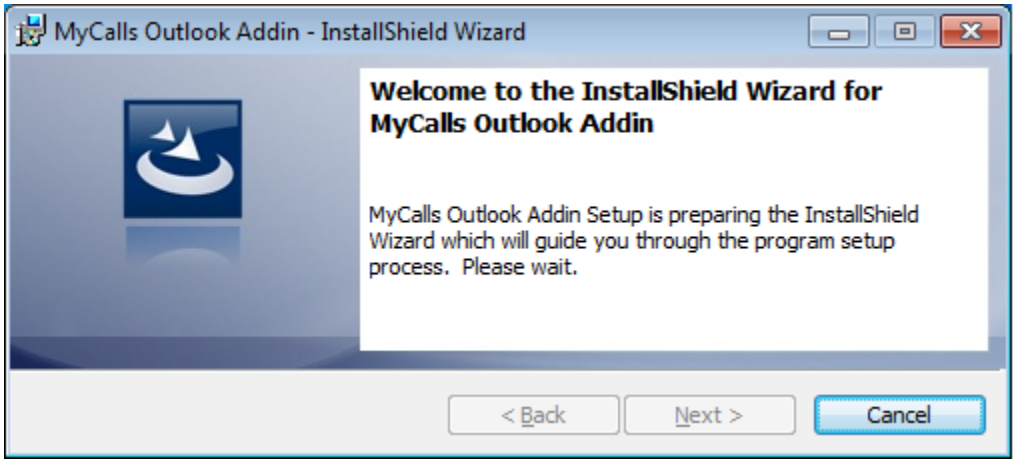
Confirm the settings are correct and click OK to proceed.



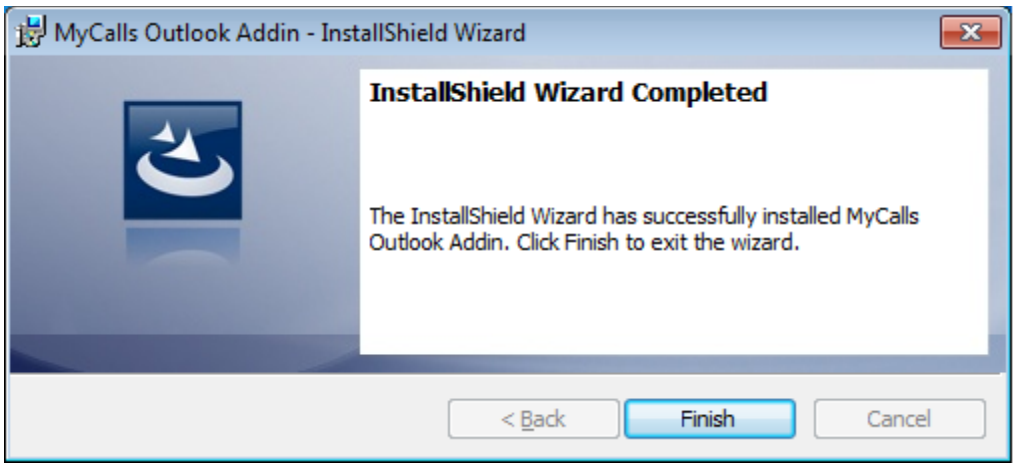
When prompted, enter a name for the file and click Save.



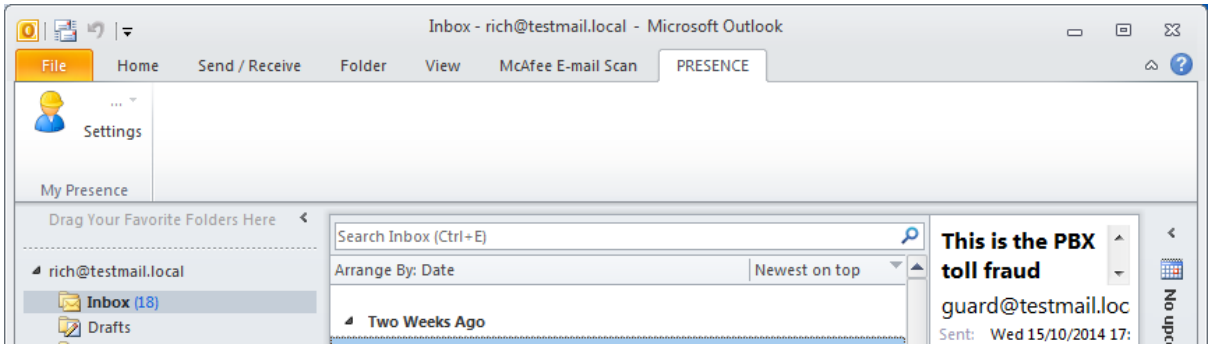
Once the MSI file has been created, double click to Install it. This will start a standard Windows installer.



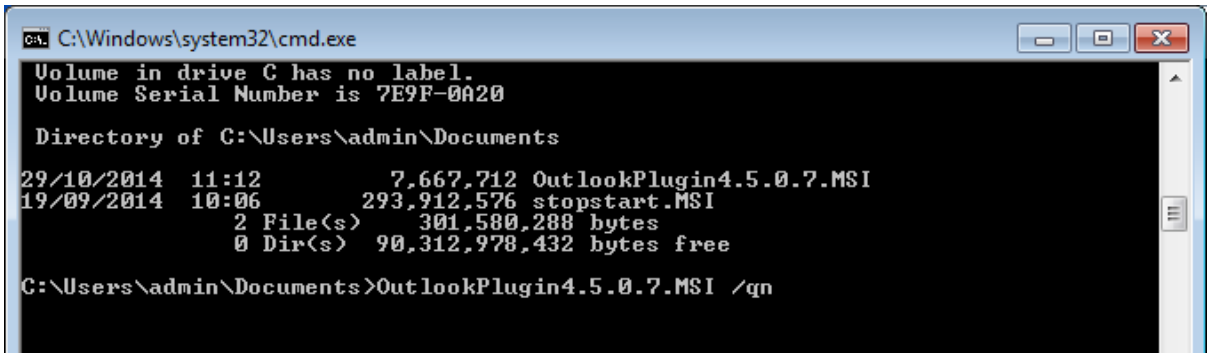
Step through the Installation Wizard to complete the process.



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



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.



Patching MyCalls

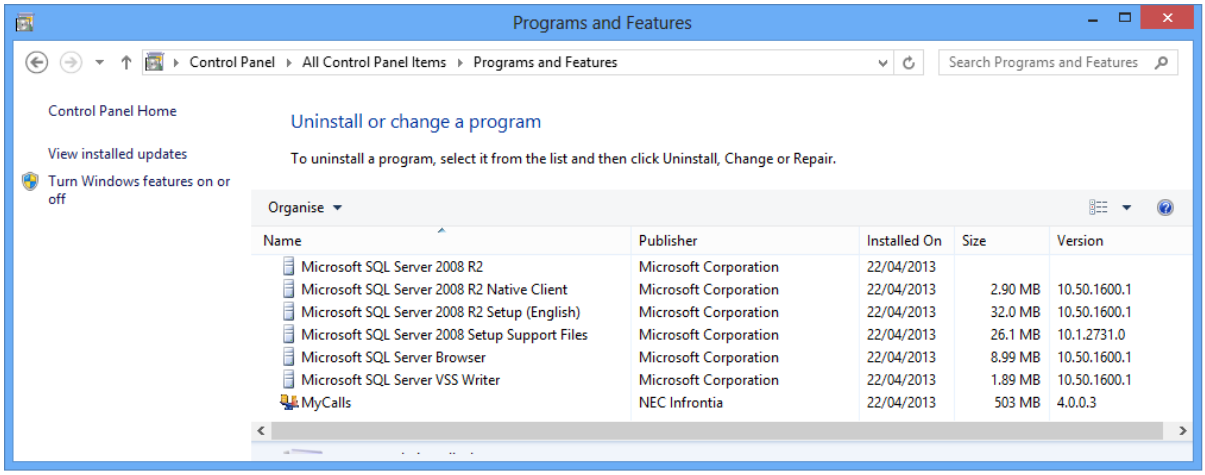
From time to time, patches may be release to enhance the performance of MyCalls. These patches are made available from the following FTP site, ftp://ftp.neci.co.uk/mycalls/patches. The patches are made available on a per PBX / per version of MyCalls. There is a set of instructions available online that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

Un-installing MyCalls

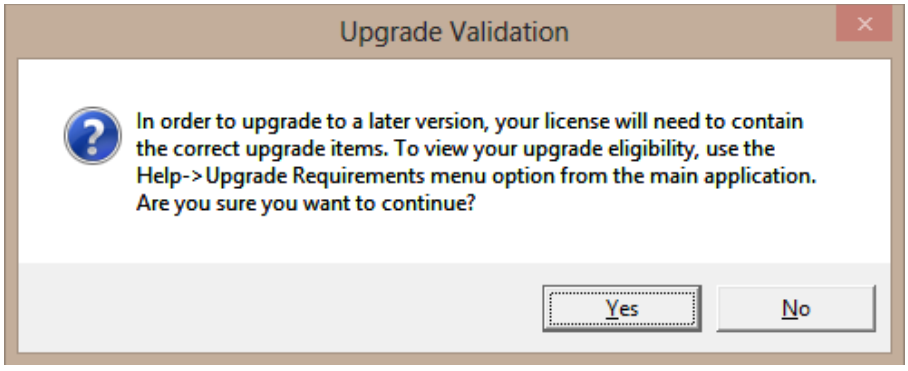
If you wish to perform a complete removal of MyCalls then follow these instructions. This process will remove all of the MyCalls components from the PC including and historic data and configuration. If you are moving the data to another PC then make sure you take a backup of the Configuration and Call 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 Upgrade Instructions.

MyCalls Server

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

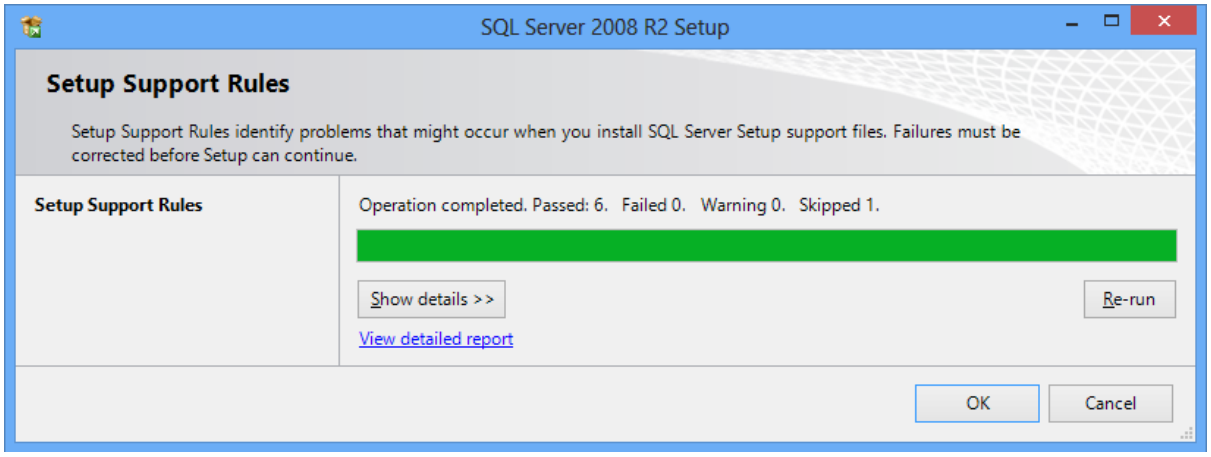


When the upgrade validation window appears, click yes to contiune

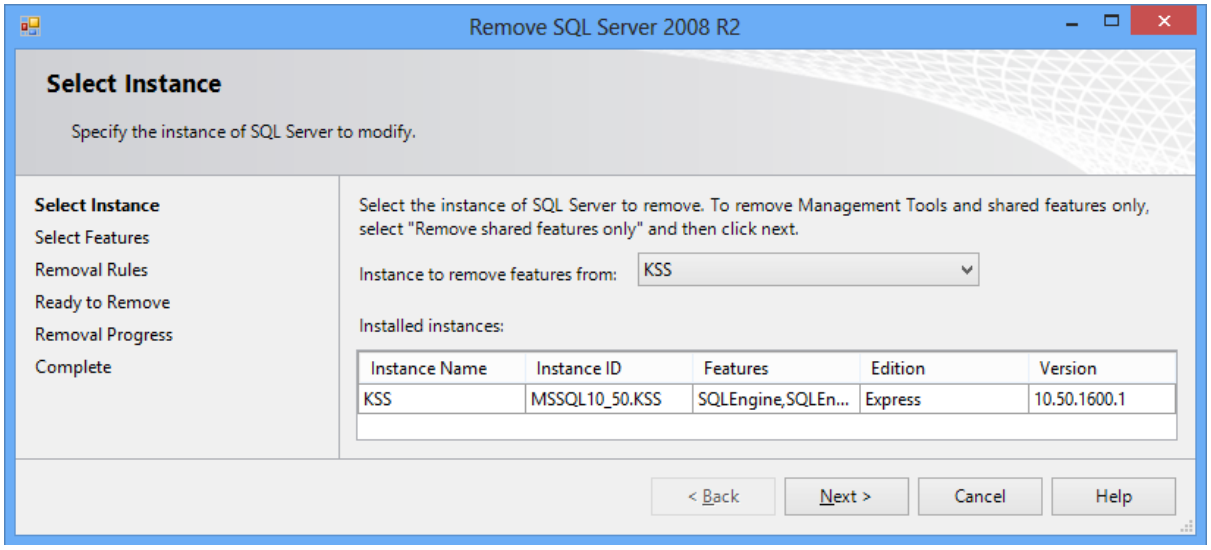


Once the MyCalls application has un-installed, remove Microsoft SQL Server 2008 R2. At the first menu click remove.

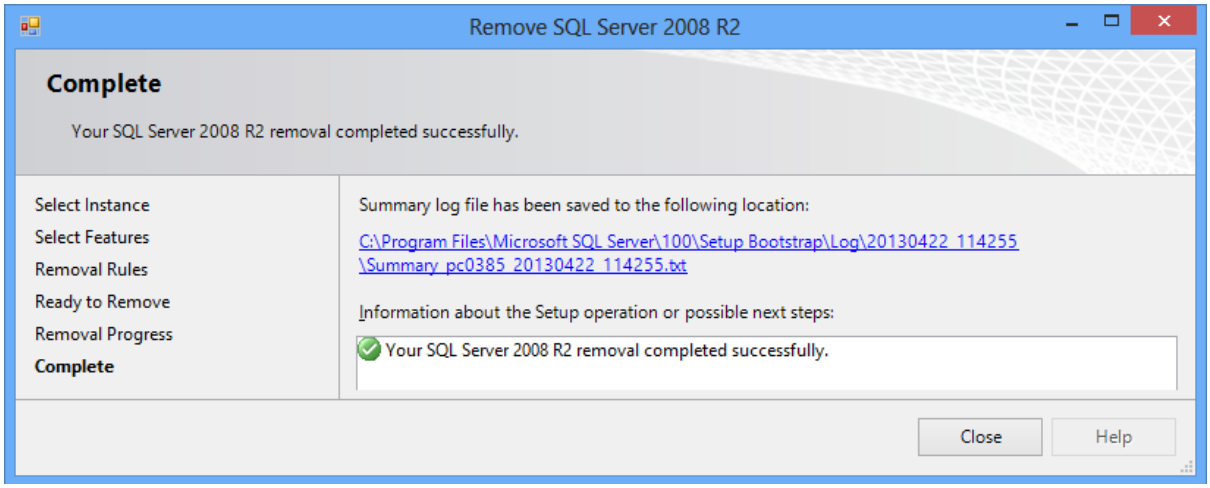
Click OK when prompted.



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



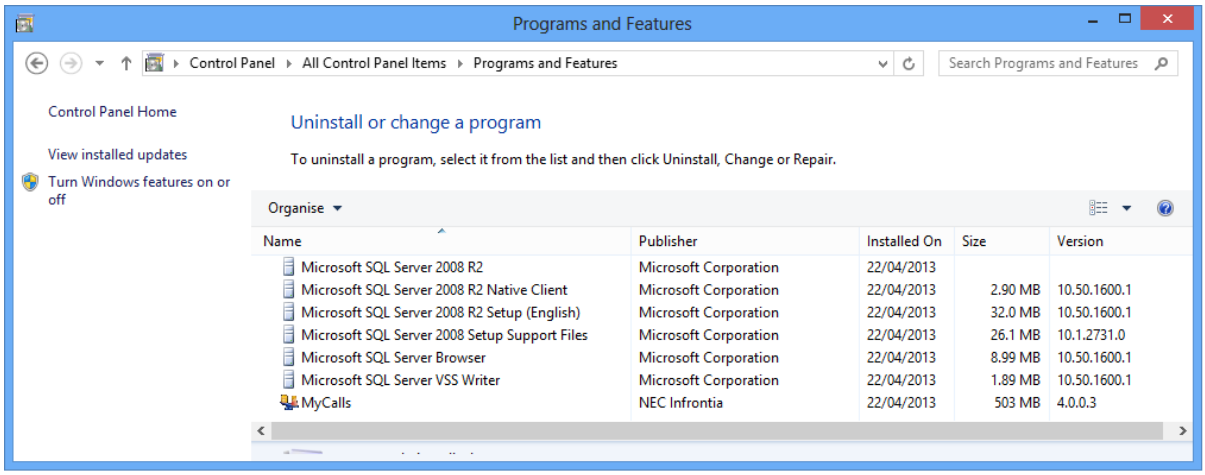
Once the KSS instance has been selected then complete the wizard to remove MyCalls SQL components.



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.



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.

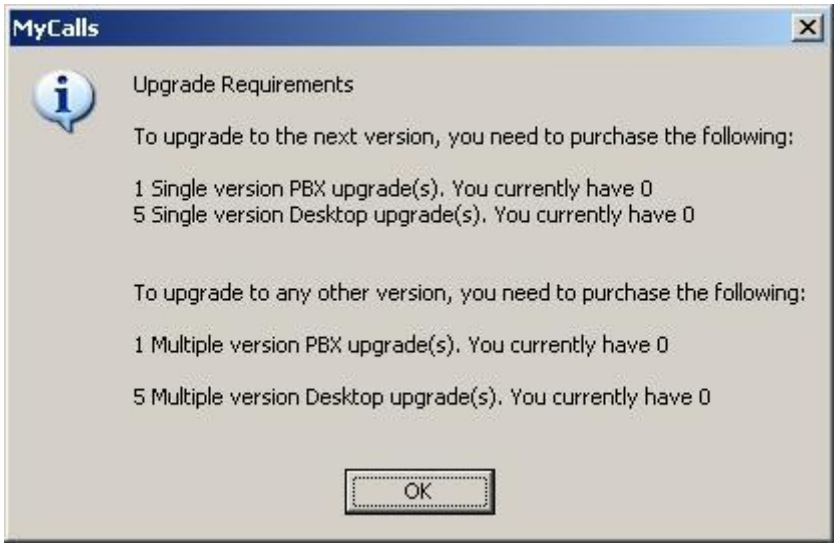
Upgrading MyCalls

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.



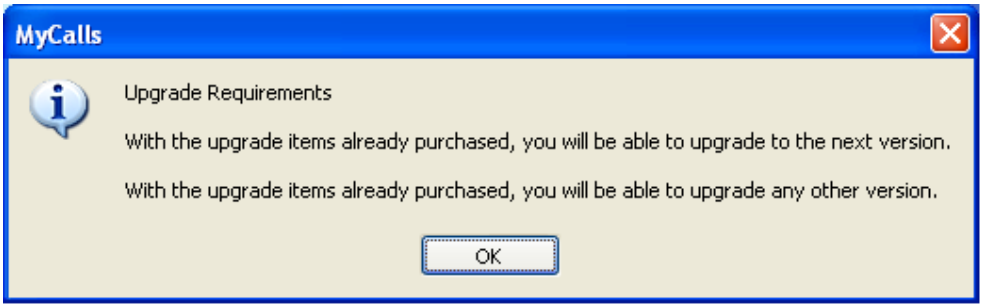
Upgrades are available in two main types, singles version upgrade and any version upgrade. A single version upgrade will allow you to upgrade from version 4.5 to 5. A Multi version upgrade will allow you to upgrade from version 4.5 to any other released version. All version release numbers will be staged 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:

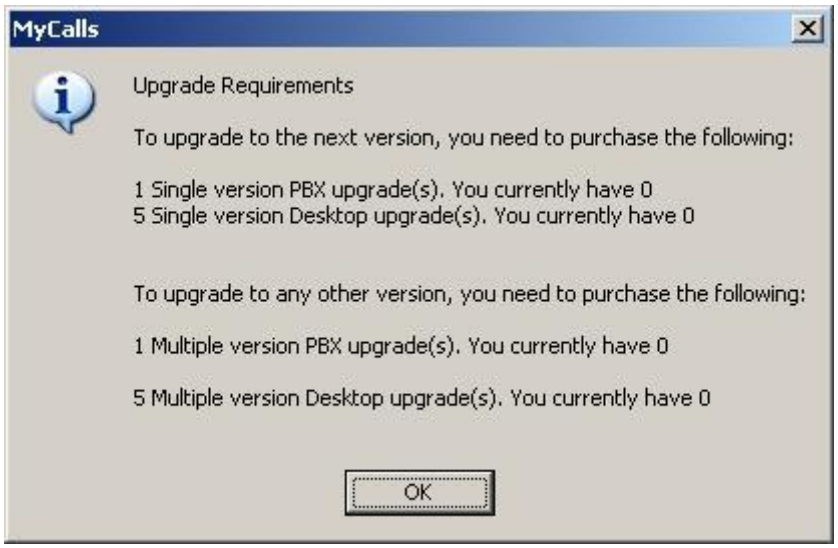
License Name	Part	Description
Single Version Upgrades		
MyCalls Single Version Upgrade per PBX	EU400117	Required for each PBX in the MyCalls license. More than one license is required for enterprise sites only. The number of PBX's can be checked in the help / about section of MyCalls.
MyCalls Single 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.

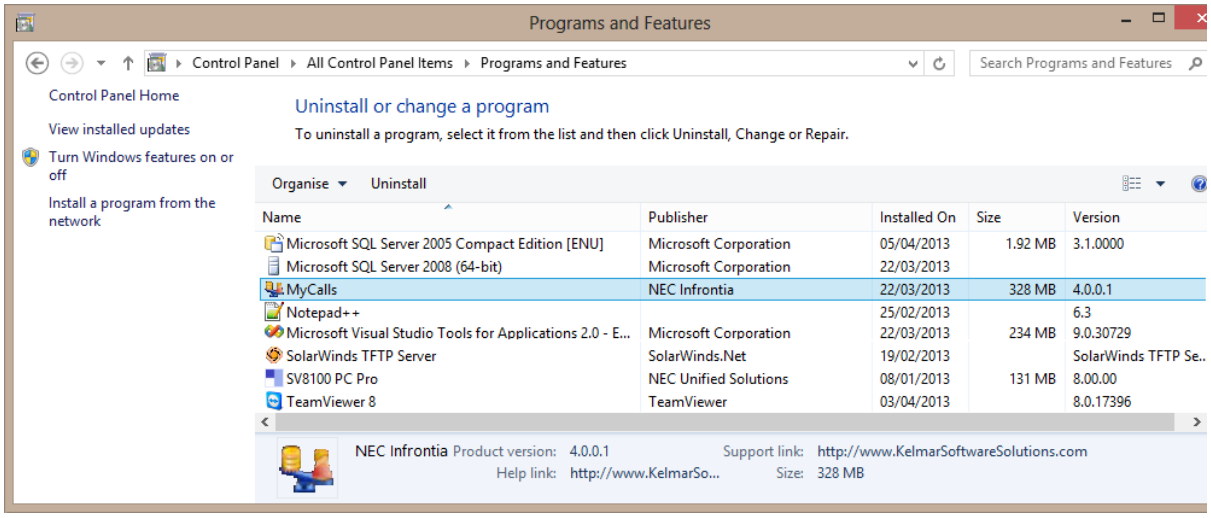


If the upgrade requirements have not been met and MyCalls is un-installed, you will not be able to install a new version, it will halt during the install. To apply the upgrade licenses, the original version of MyCalls will have to be re-installed to allow the licenses to be installed.

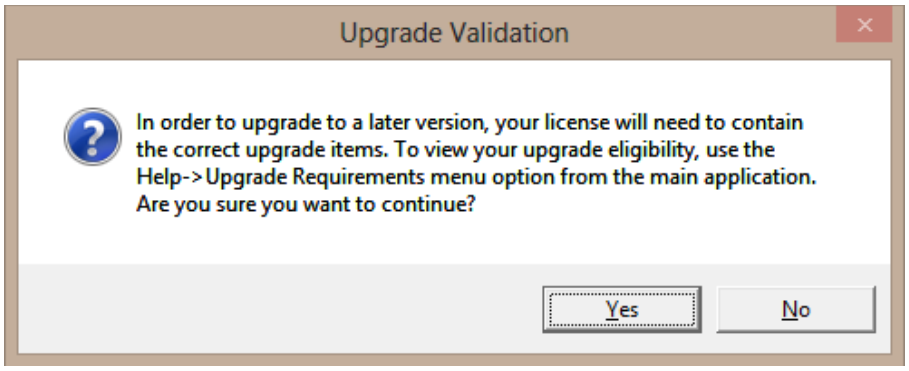
Upgrading the MyCalls Software

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.



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.



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

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.

MyCalls Application

MyCalls Desktop 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.
Call Forward (External)	Wizards / COS / Call Forward Off-premise	Turns on call forward External.
	Wizards / Trunks / Trunk to Trunk Routing / Trunk to Trunk Transfer	Turns on trunk to trunk transfer.
	Wizards / Trunks / Trunk to Trunk Routing / Outgoing Route Setup	Assign a trunk group used for trunk to trunk transfer.
Barge In	Wizards / COS / Barge in Initiating	Turn on to allow an extension to Barge in to another
	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.

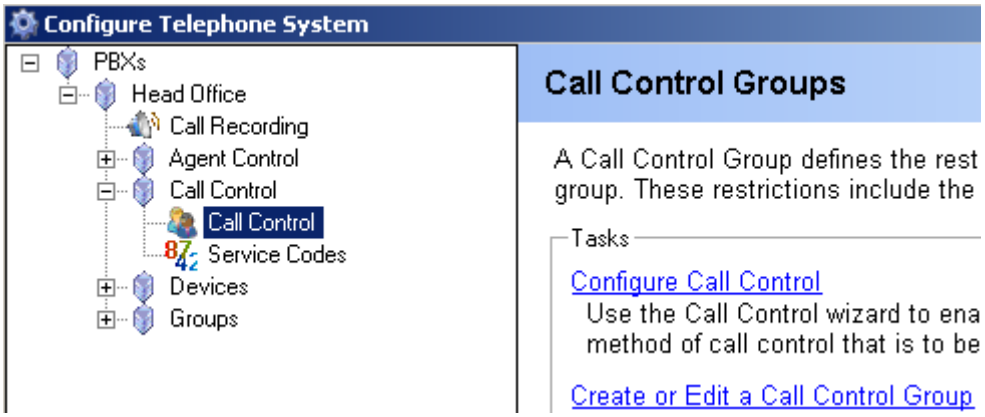
The transfer to voicemail option is configured to be 6 as a single digit option by default.

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.

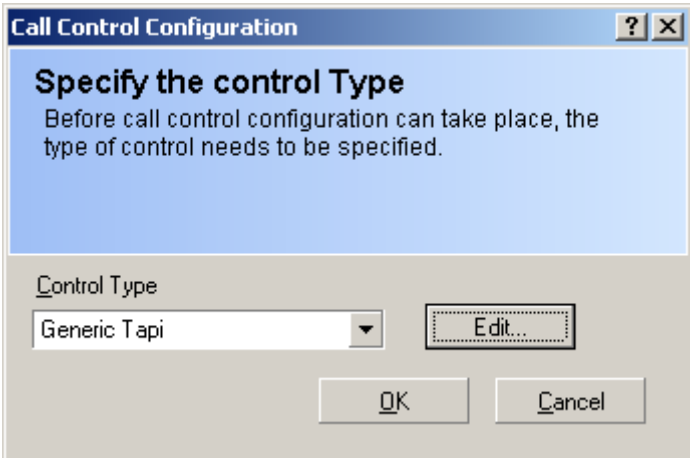
Configuring MyCalls Desktop

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.

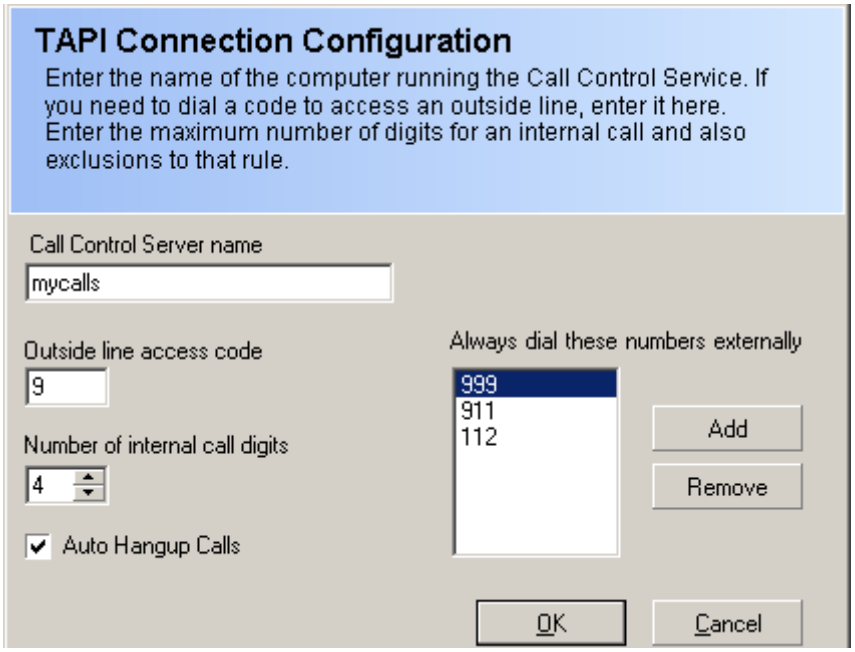


From the control type drop down menu, select Generic Tapi and click Edit.



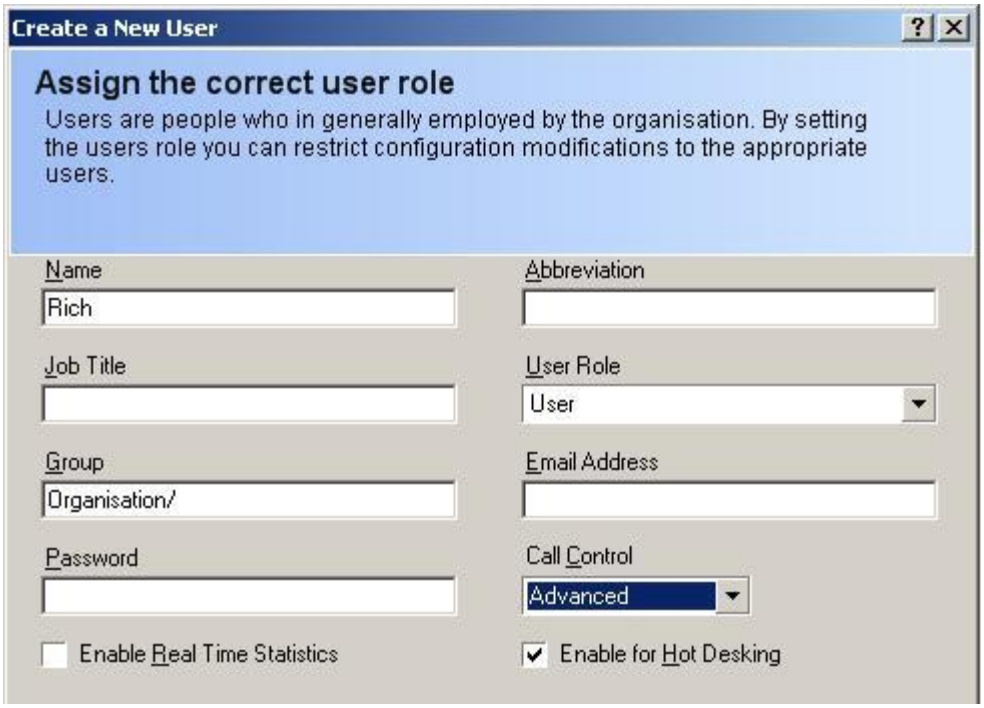
Enter the name of PC that is acting as the call control server. This is normally the same PC as the MyCalls server and is running the 3rd Party TAPI driver. The call control service is installed by default when a complete installation of MyCalls is carried out. If the TAPI driver is installed on a different 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.

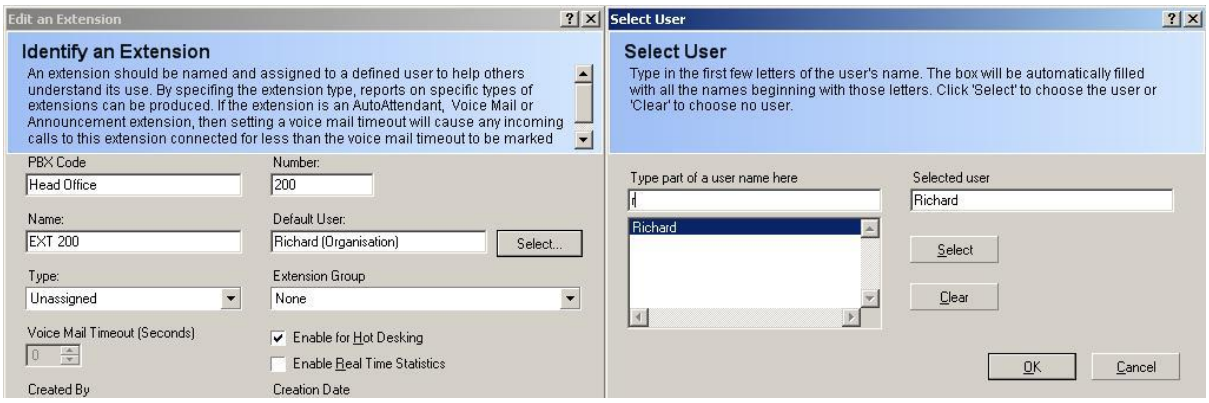


Click OK the save the changes

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.

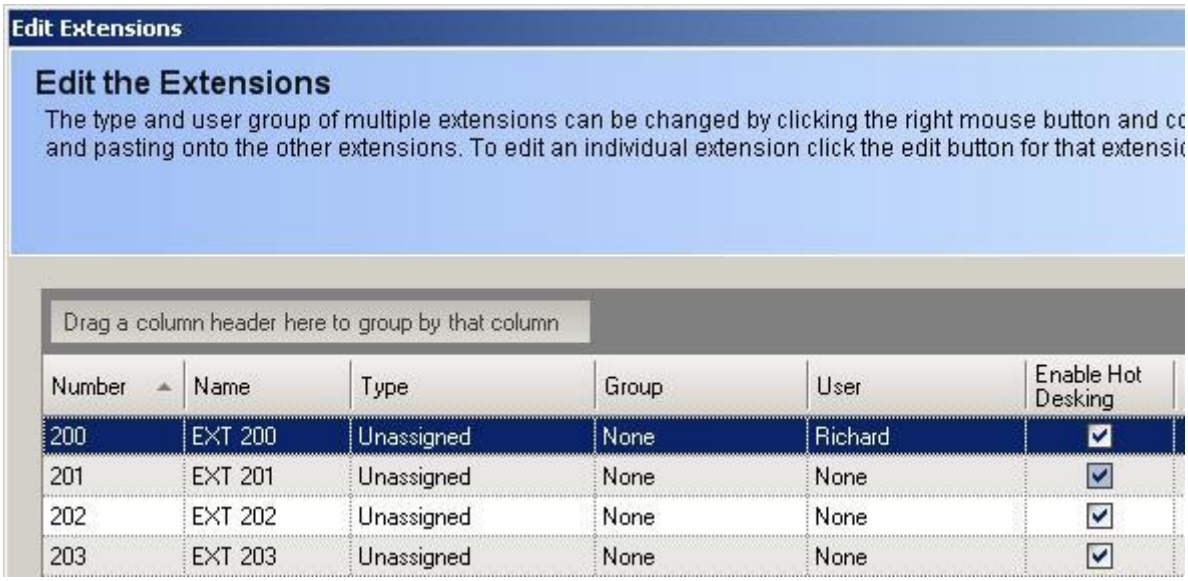


Users that use the same extension or are not enabled for Hot Desking should be assigned to an extension. When users are assigned to an extension that are enabled for Hot Desking, they will be offered to login to their default extension. To assign a user to an extension, select Configure / Telephone System / 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.



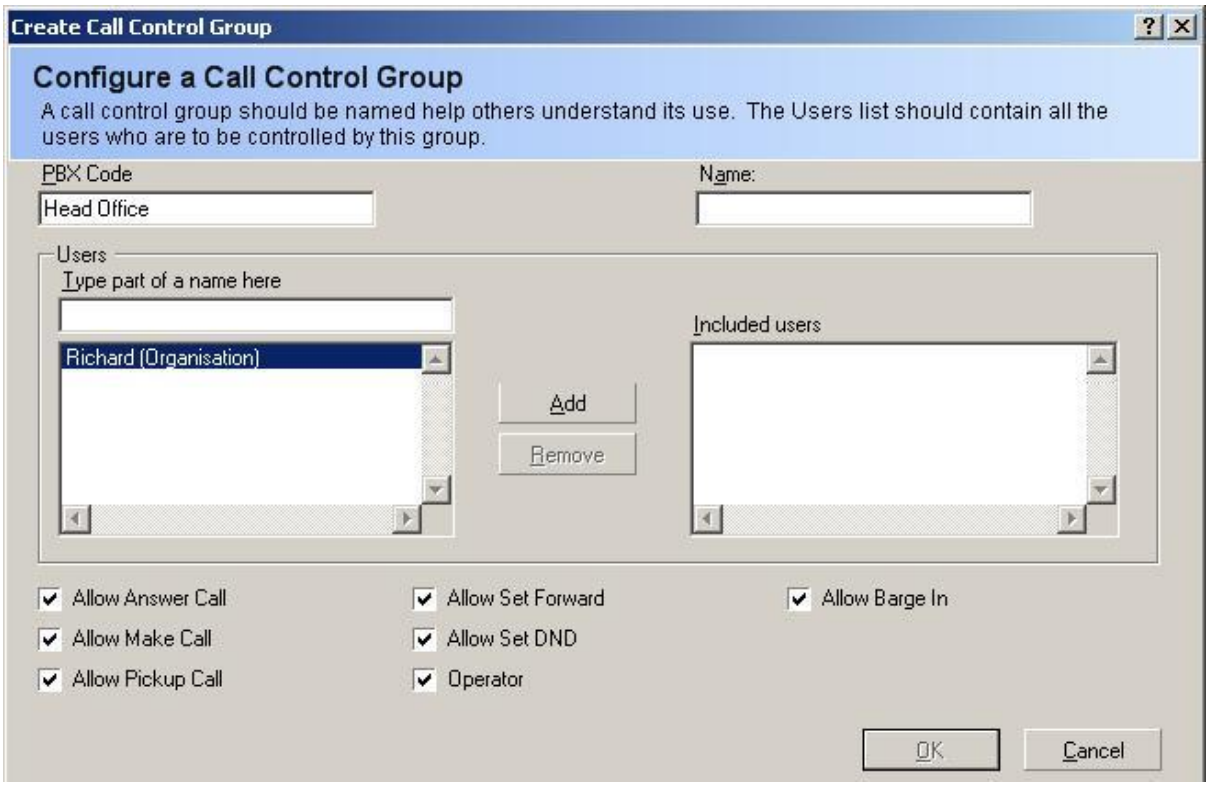
Repeat this procedure for each user that will need creating. Users can be created ‘en-masse’ if there are several users to create, this can be achieved using the config import tool. Details of how to do this are shows in the Using the Config Import Tool section of this manual.

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.



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.

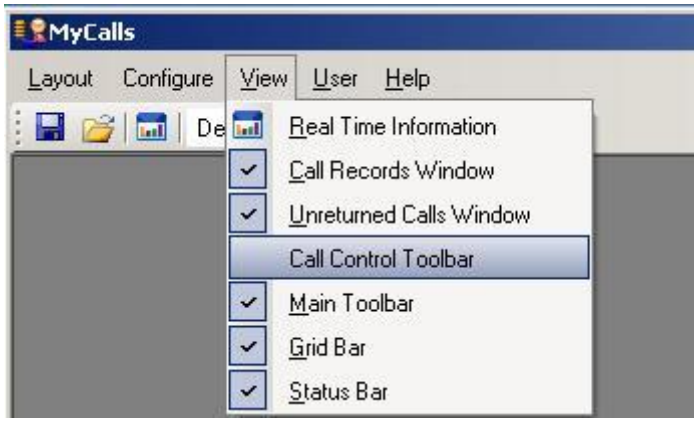


Once the users have been configured, they will be able to login to the MyCalls or desktop application and use the call control functions.

Accessing Call Control Features in the MyCalls Application

When a call control user first logs on to the MyCalls application, , 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.

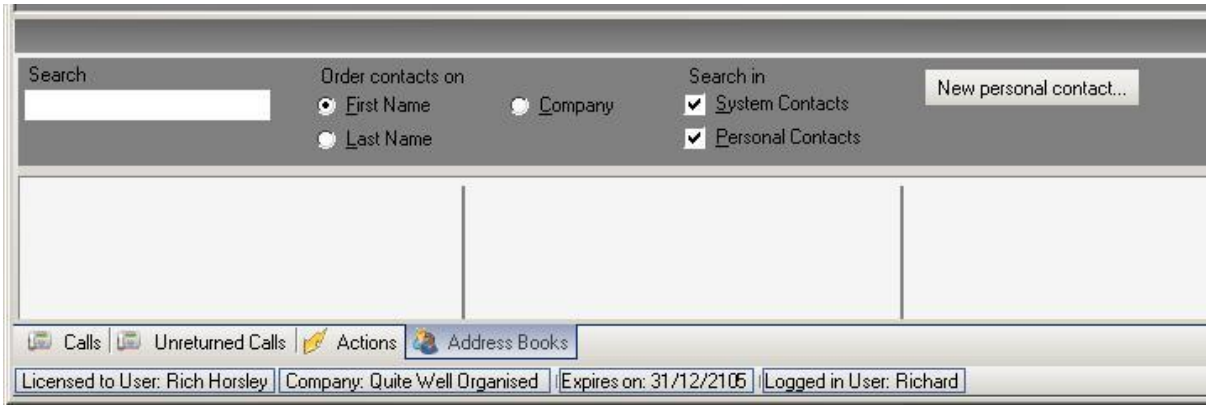
From the view menu, select Call Control Toolbar.



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.

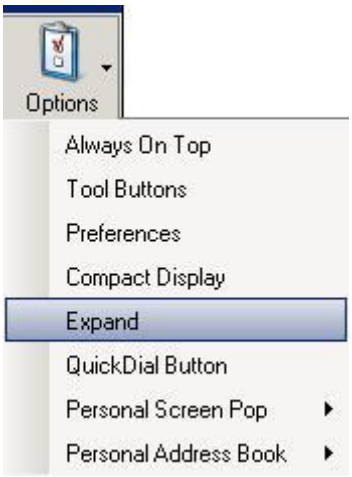
When the toolbar has been removed from the application, MyCalls can be minimised and the toolbar will remain in view.

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

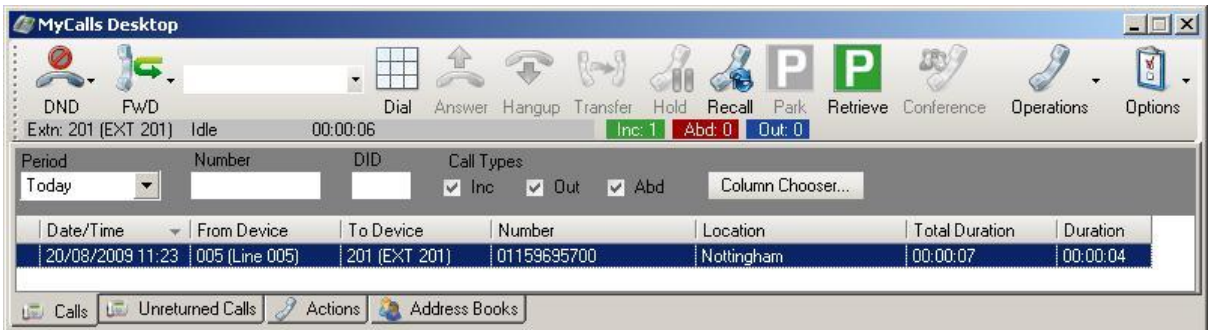


Accessing Call Control Features Using MyCalls Desktop

When a user first logs into MyCalls Desktop, , they are presented with the call control toolbar. To access the call records / Un-returned calls / Actions Buttons and Address Books, click the drop down arrow on the options button and click Expand.



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



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

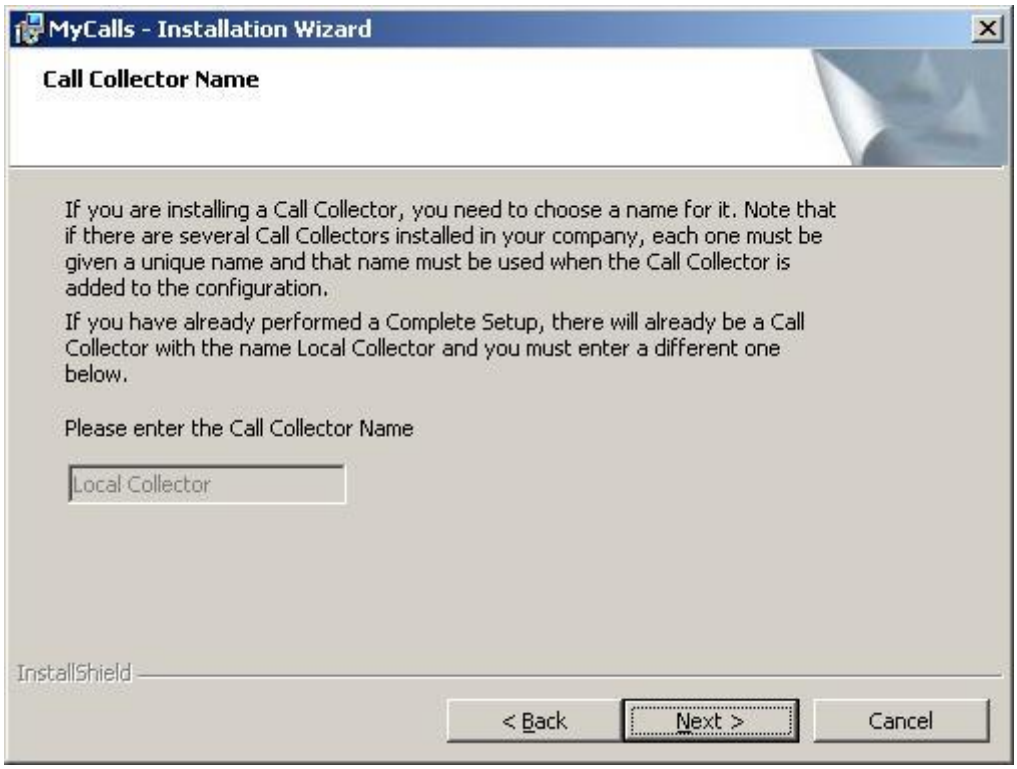
For information on configuring Screen pop interfaces, please refer to the MyCalls Screen pop configuration guide.

Installing the Call Control Service

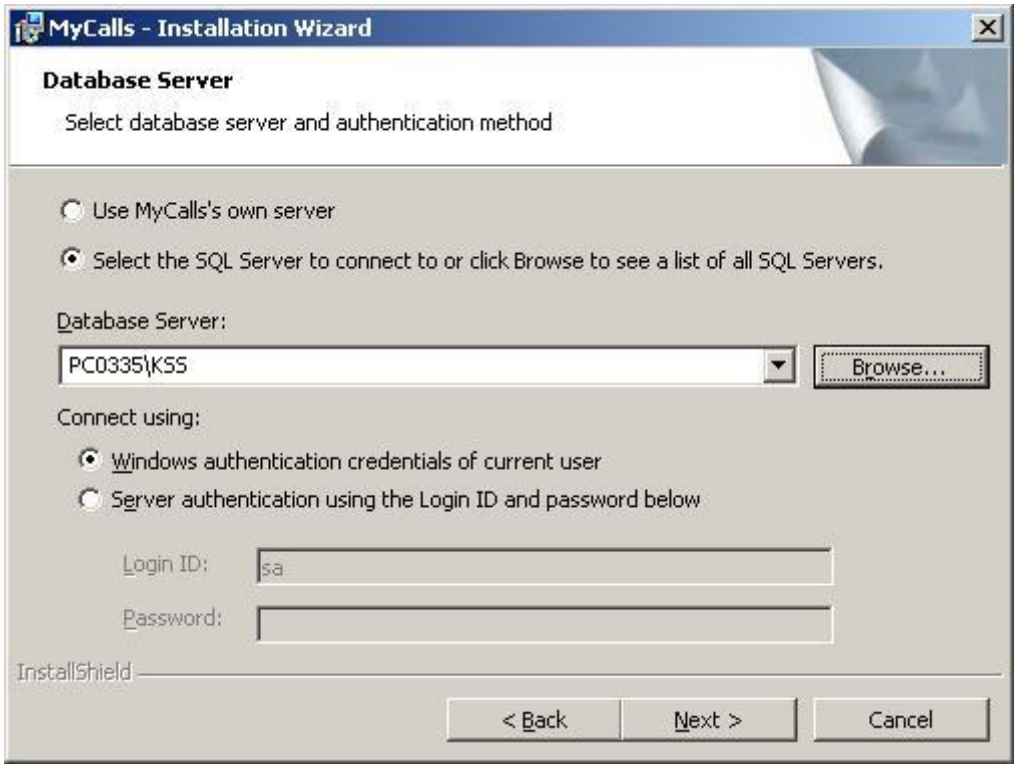
In circumstances where the 3 Party TAPI driver is not installed on the MyCalls Server, it is necessary to install the MyCalls Call control service onto the PC running the 3rd Party TAPI driver. To install, the call control service, start the MyCalls install and from the Setup Type screen, select custom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

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

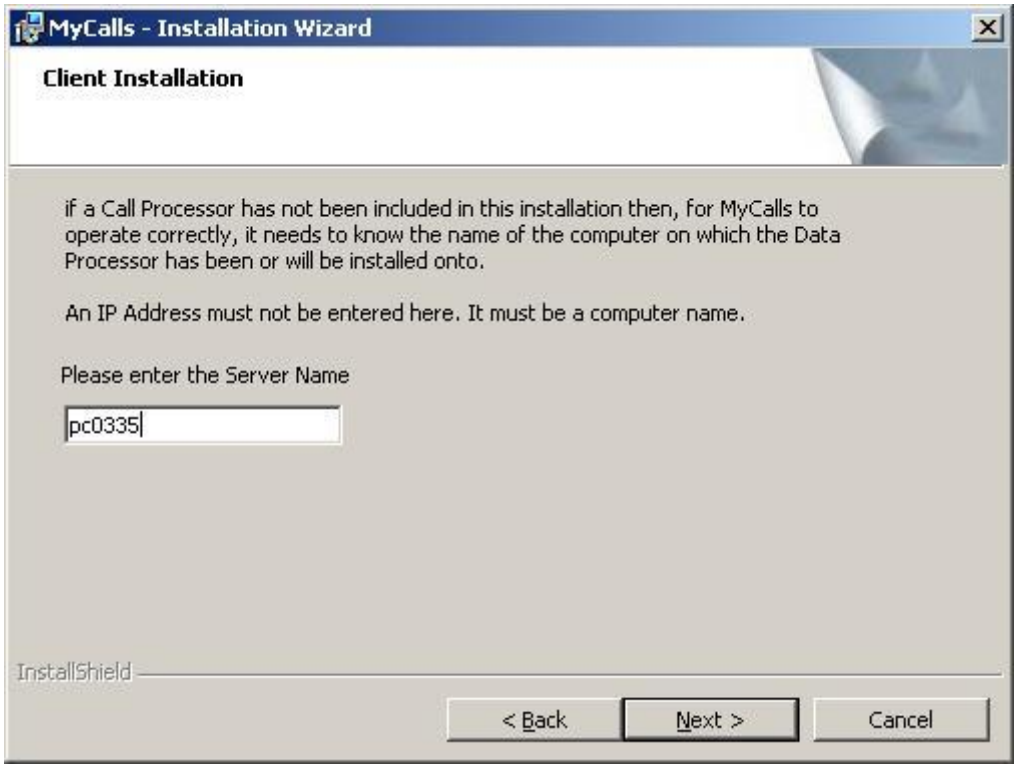
At the Call Collector Name Screen, click Next.



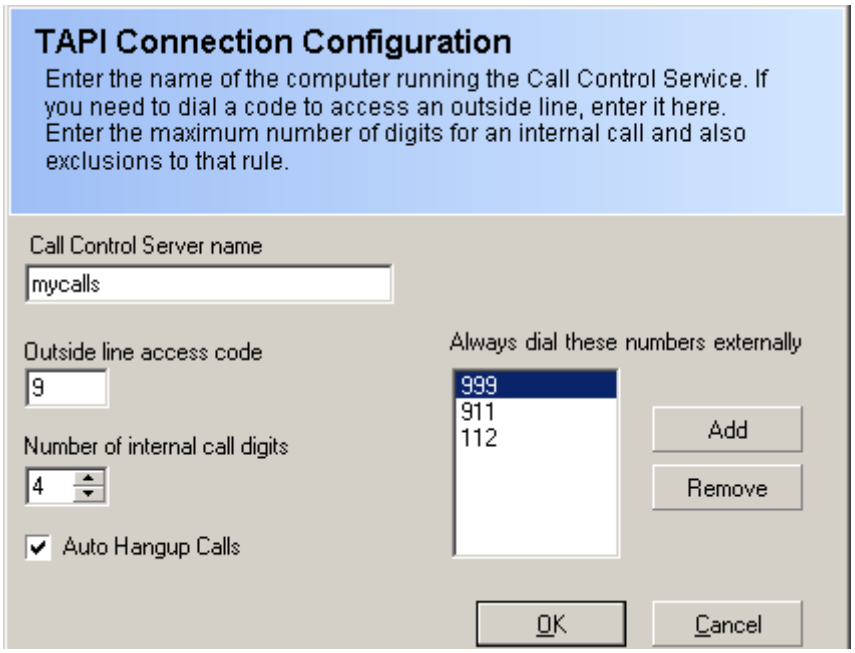
At the Database Server prompt, you will need to browse and select the location of the MyCalls Database. If the default options have been installed, then you can Database server will be the PCNAME\KSS . If a custom SQL Installation was used then you will need to select the appropriate option. Click Next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



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



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.



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

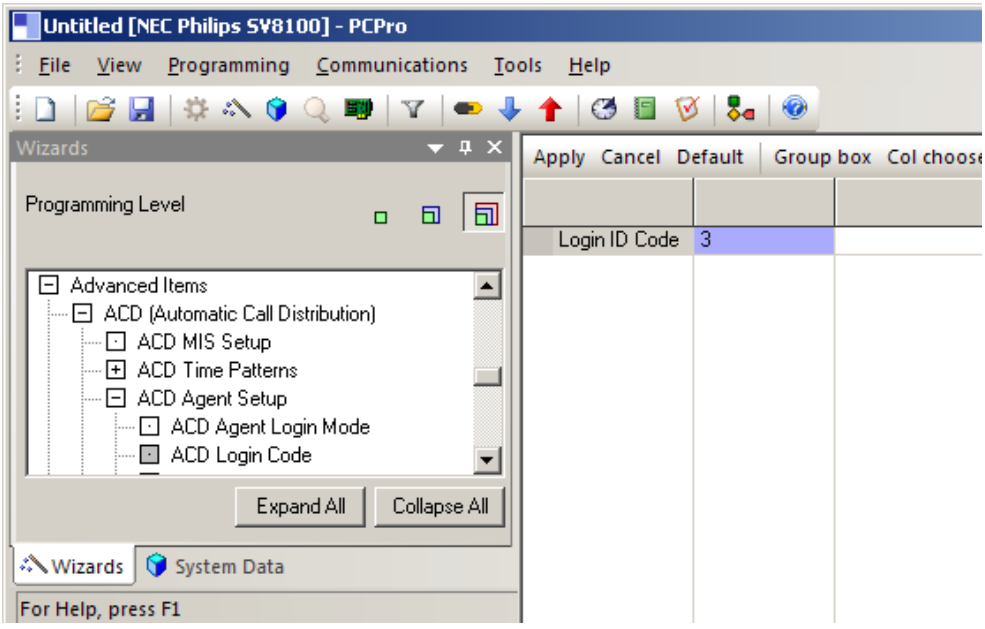
MyCalls Agent Control provides a major enhancement to MyCalls Call Centre. With agent control, you can use the MyCalls application to login to ACD to take calls. Unavailable codes can be setup so that when an agent will not be taking calls, they can specify a reason why. Completion codes can also be 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.

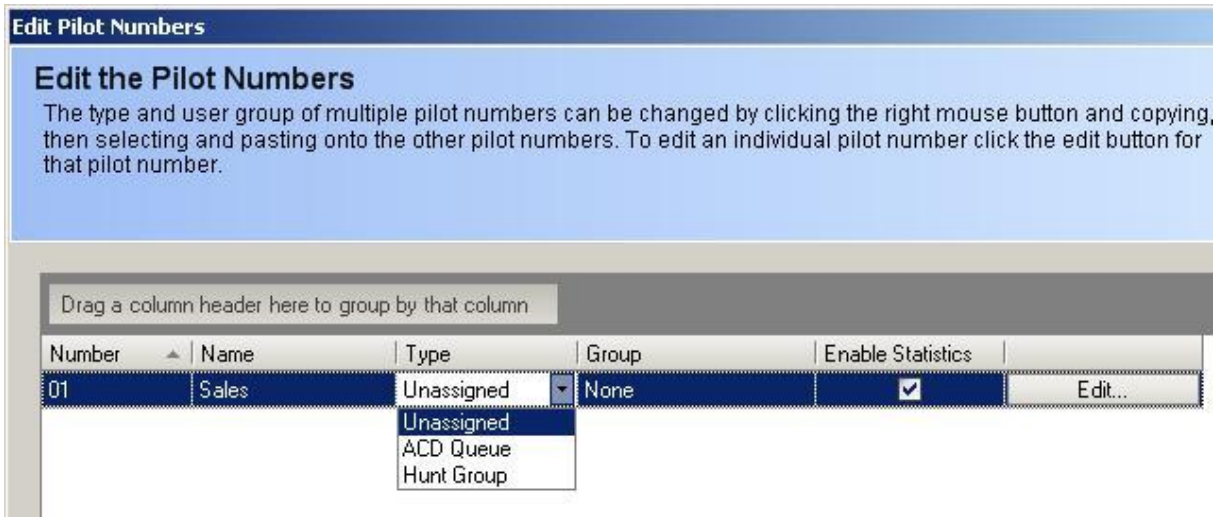


Configuring MyCalls

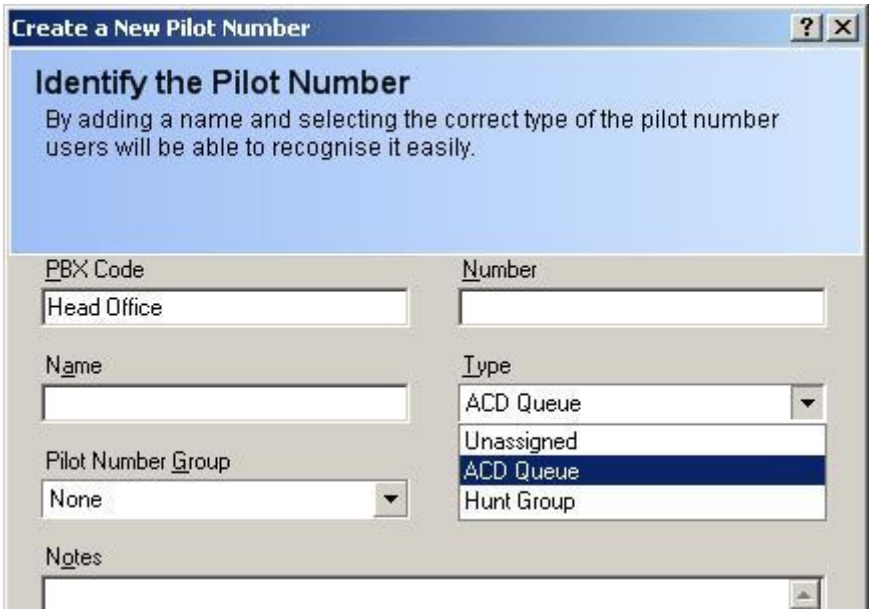
Configuring Pilot Numbers

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.



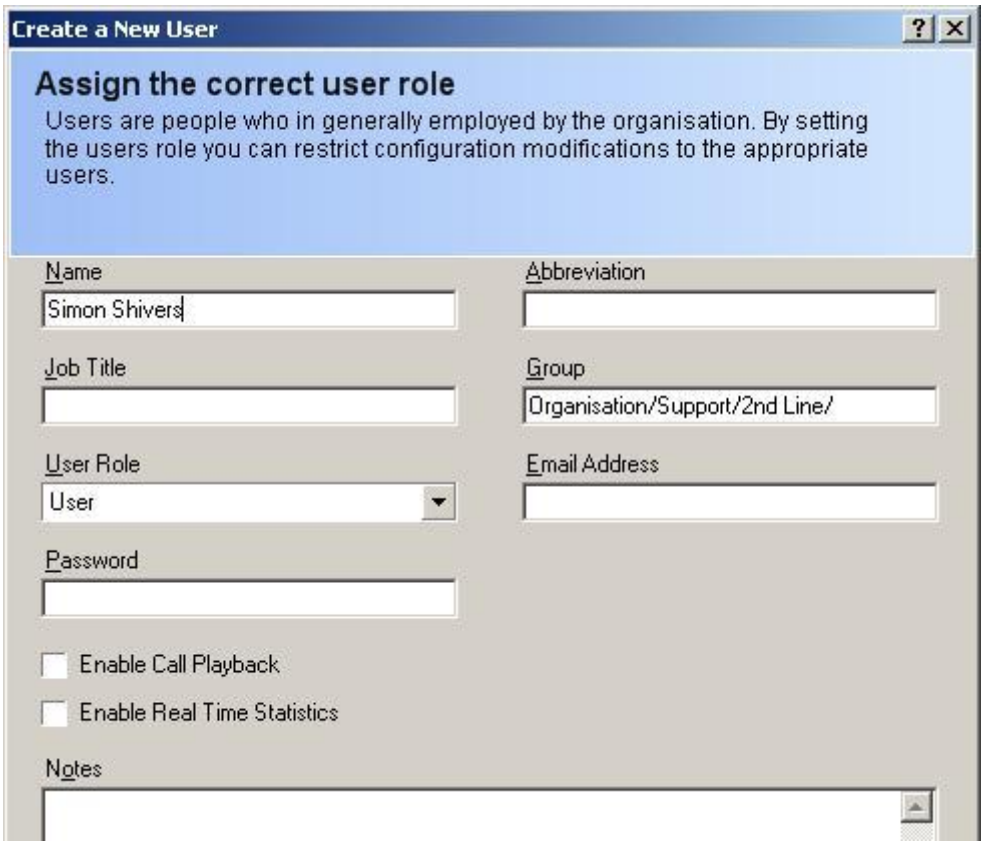
To manually add a pilot number, you can click 'Add new pilot number' in 'Edit Pilot Numbers' or click create a range of pilot numbers in Configure / Telephone System / Devices / Pilot Numbers. When adding the pilot numbers, make sure to set the type to ACD Queue.



Creating Users / Agents Using MyCalls

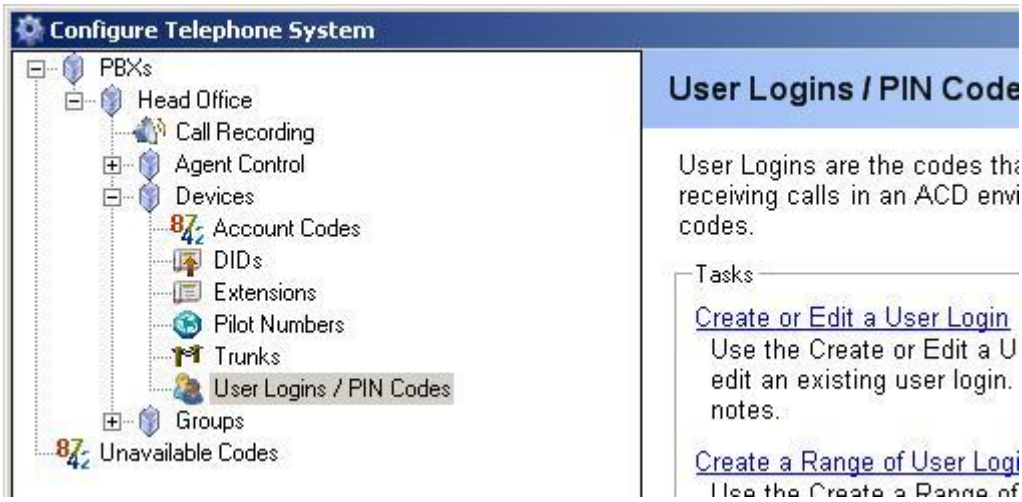
From the Configure / Organisation menu, typically here you would create groups that represent departments or common groups of agents. These groups can be used to create real time windows or for reporting purposes. Within the groups, if required, you can create sub groups to build up a tree type structure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

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.'

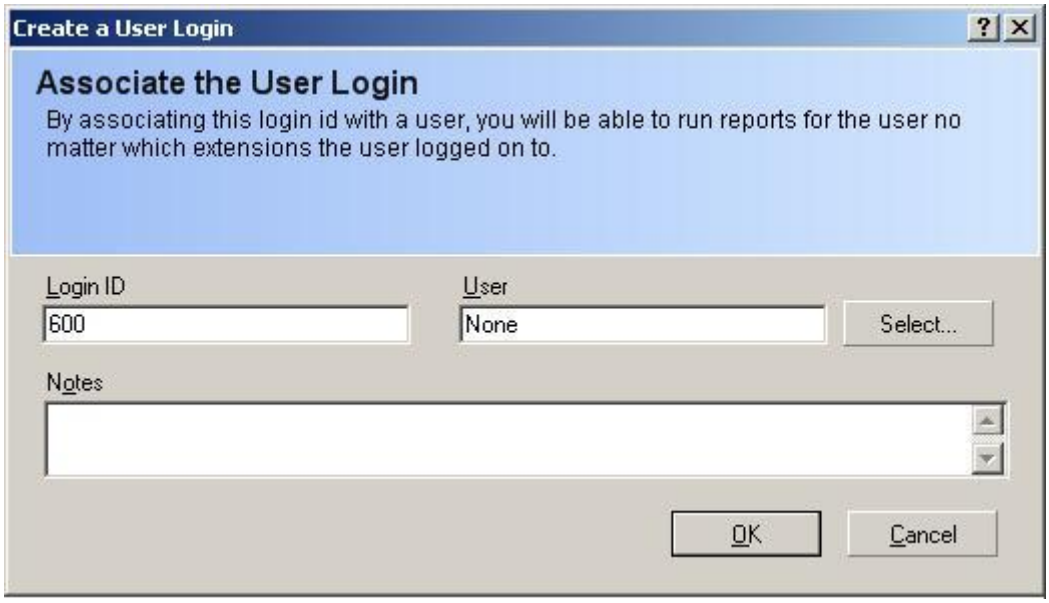


Enter the user details as required, the only mandatory field is the name field. Any number of uniquely named users can exist per organisation group. Enter a password if the user will be required to enter a password to login to MyCalls. The user role should be selected from the drop down menu, the user 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.'

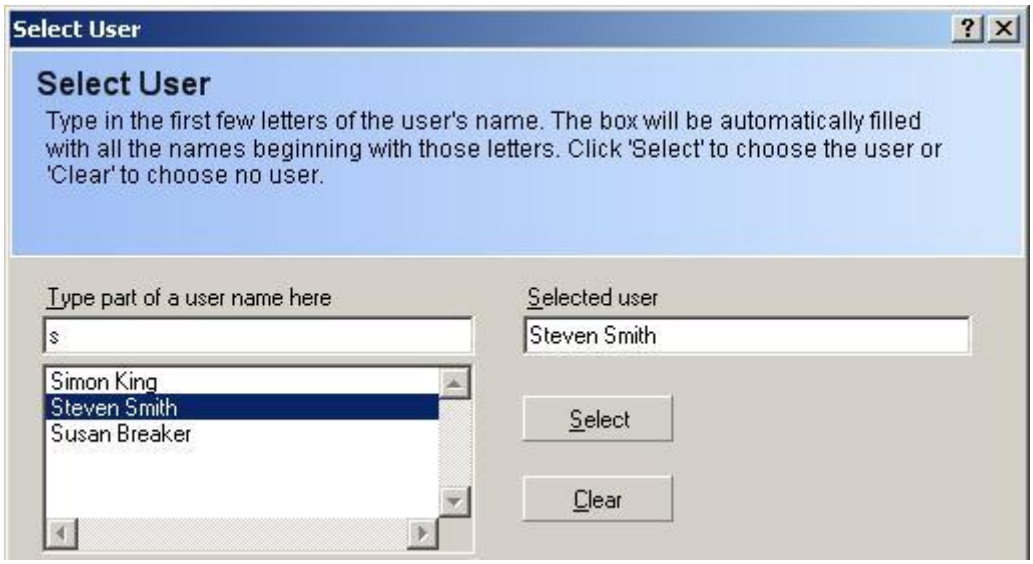
Once users have been created, they need assigning to a PIN number. The pin number is the code entered by an agent when they are prompted to 'Input Your ID' on the SV9100 Keyset. To assign a user to a pin number, go to Configure / Telephone System / Select the PBX / Devices / User Logins / PIN Codes.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



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.



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.

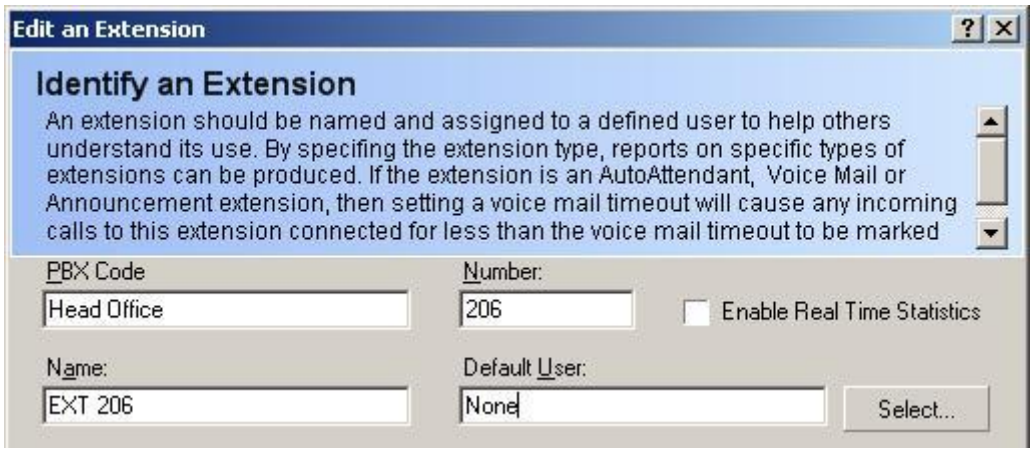


Click OK again to confirm the changes.

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

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.

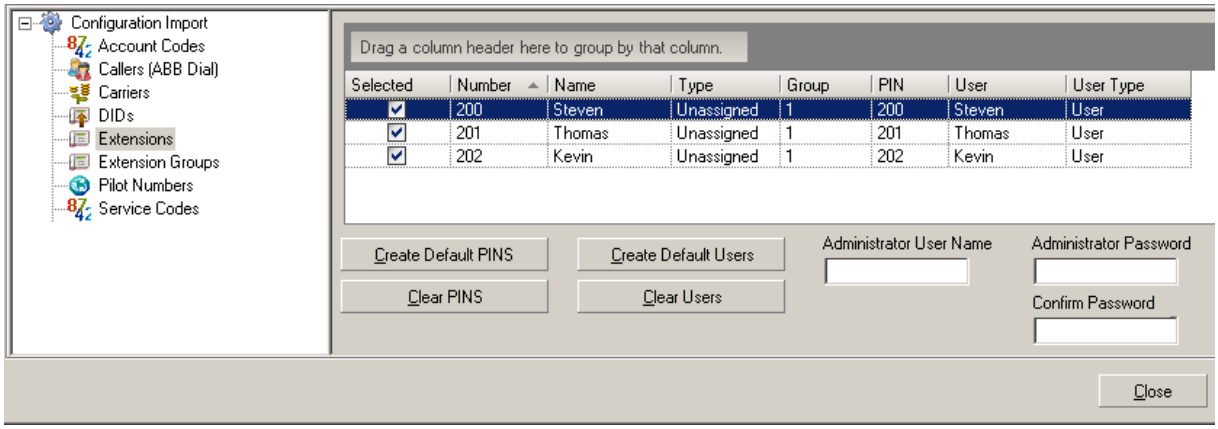


Now select the user in the same method as when assigning the user to the PIN number and click OK to save changes.

Creating Users Using The Config Import Tool

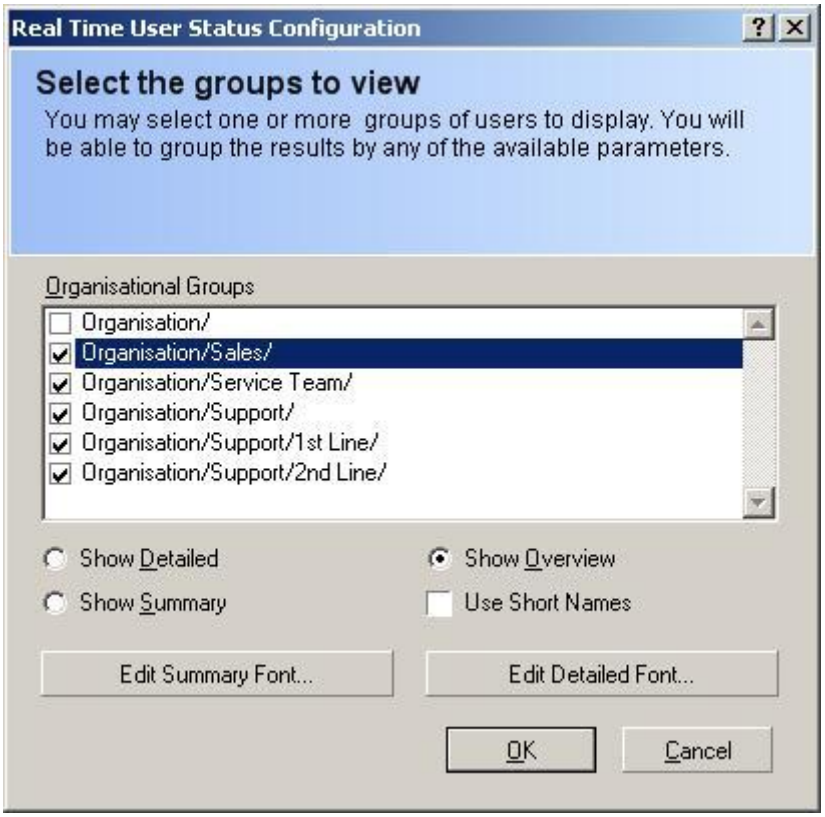
If there are numerous users to create, the Config Import Tool can be used to speed up the procedure. When using the Config Import Tool to create users on an existing installation, you should be aware that the config import tool will overwrite any existing configuration in MyCalls. After the config has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



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.



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.

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.

Creating Real Time Windows

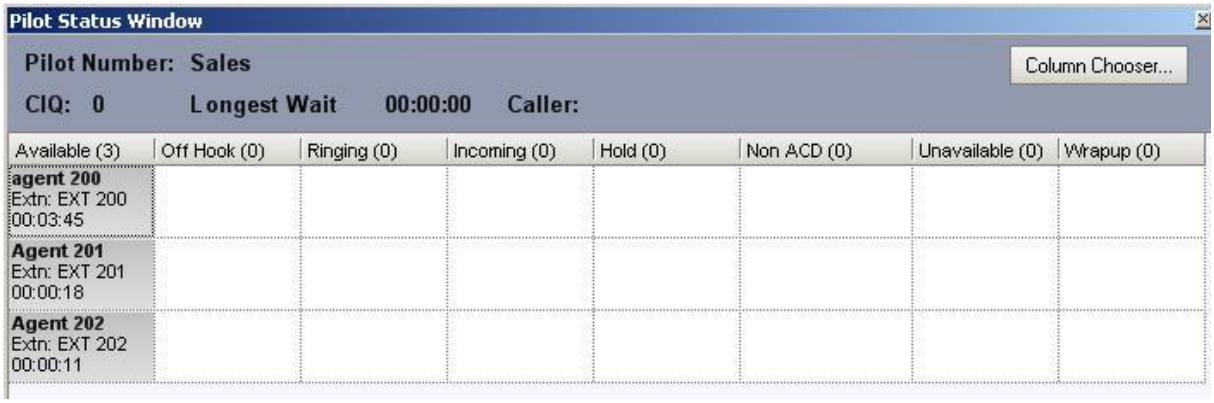
There are several different Real Time windows that can be created in MyCalls. Real Time Statistics, Single Value Windows and Combination Value Windows act in the same way they do in a non ACD configuration. The main differences with working in an ACD environment is the Real Time Status windows, which 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.

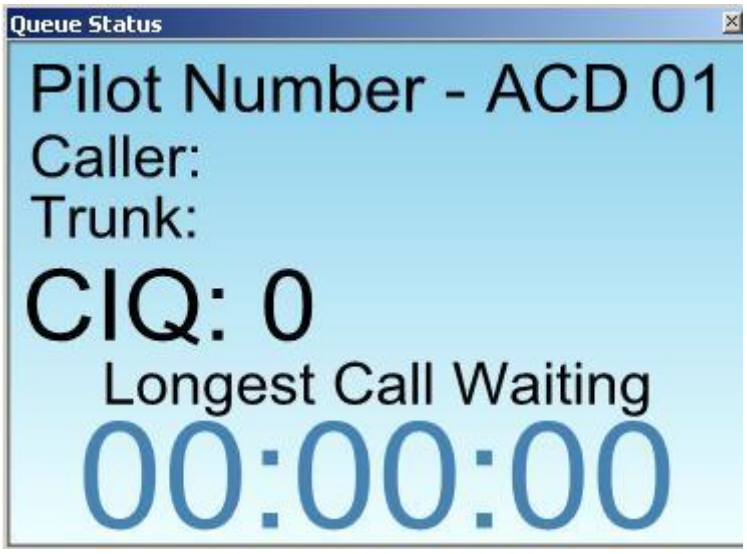
Select the Pilot number you wish to create the view for and choose either a detailed, overview or summary view and click OK. A summary of the different views are as follows:

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.



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.

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

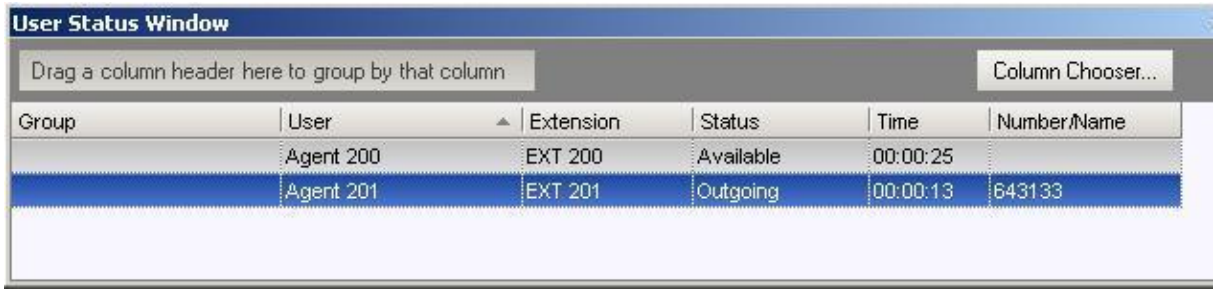
A user view will show the status of a user regardless of if they are logged on or not.

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

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

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.



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.

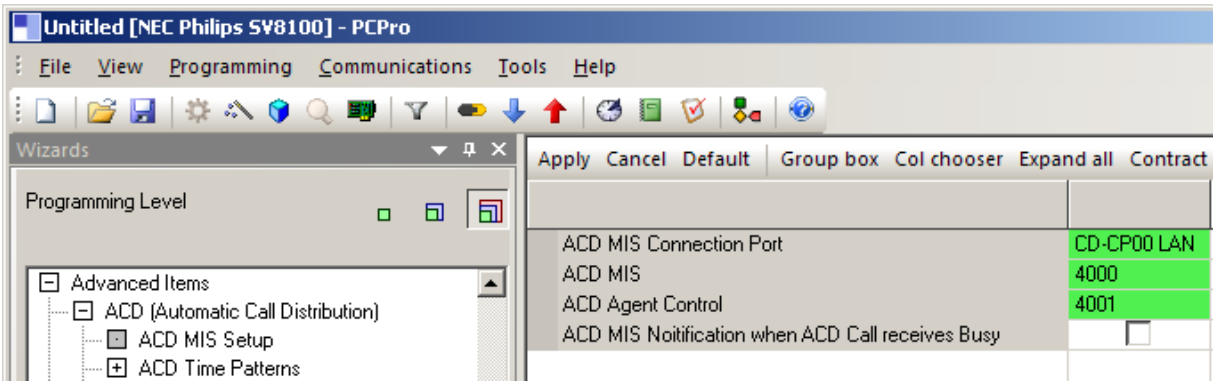
MyCalls uses ACD group 64 as a holding area for agents, if for example you login to groups 1, 2 and 3, MyCalls will first log you in to ACD group 64, then 1, 2 and 3. For this reason, the SV9100 should not be programmed to deliver any calls to ACD group 64. There is a limit on the number of times an 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.

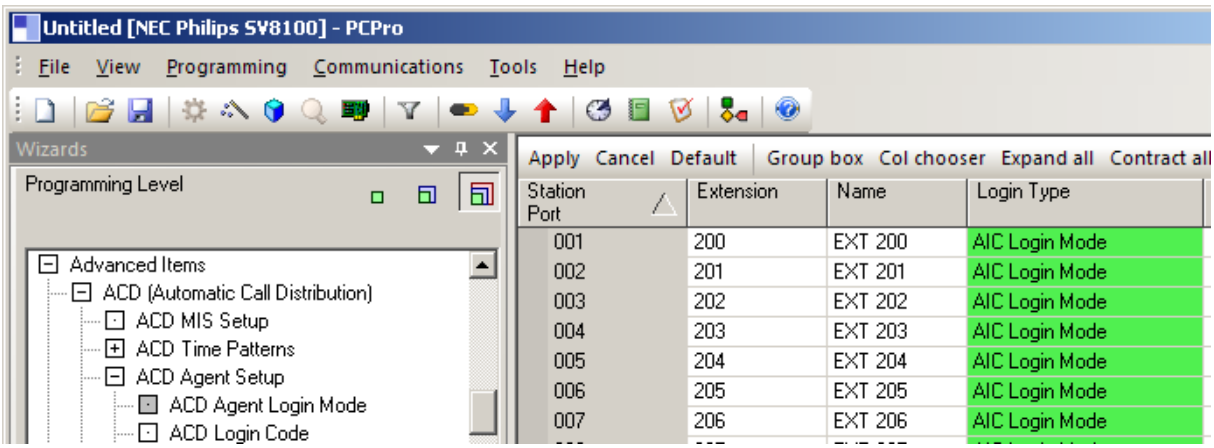
SV9100 Programming

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.

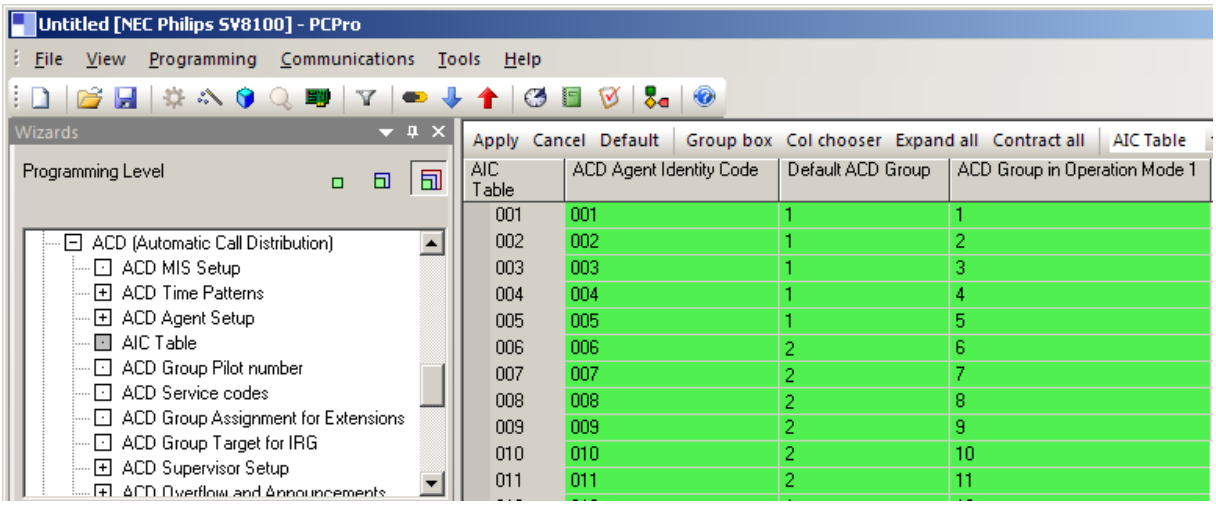


The remaining ACD programming must be done manually and is not done by the MyCalls config Import Tool. Each Agent must be set to AIC login, Wizards / Advanced Items / ACD Agent Setup / ACD Agent Log in Mode.

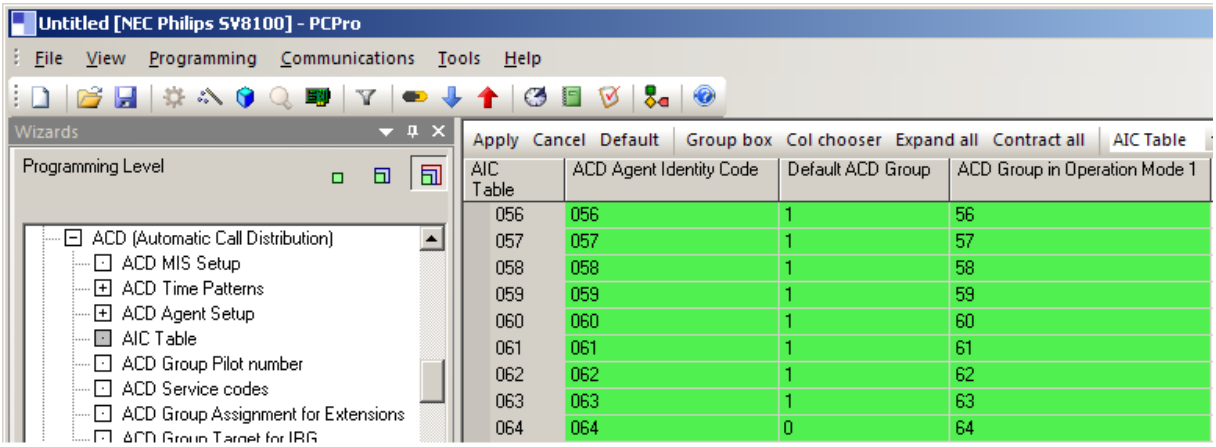


64 sequential AIC codes need to be created. A Default ACD group can be specified, this is used to assign the settings from ACD Group Agent Options to agents, when using AIC login an agent is given one set of options and it's defined by the first AIC code they login with. The ACD Group Agent Options will 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.



AIC codes 9 – 64 should also be created.



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.

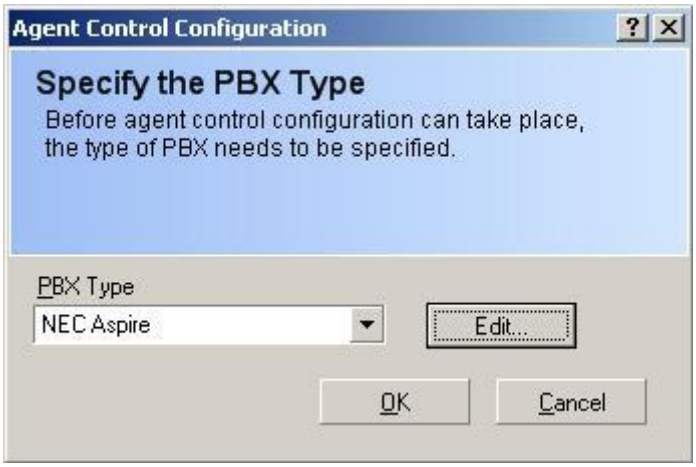
Configuring MyCalls for Agent Control

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.

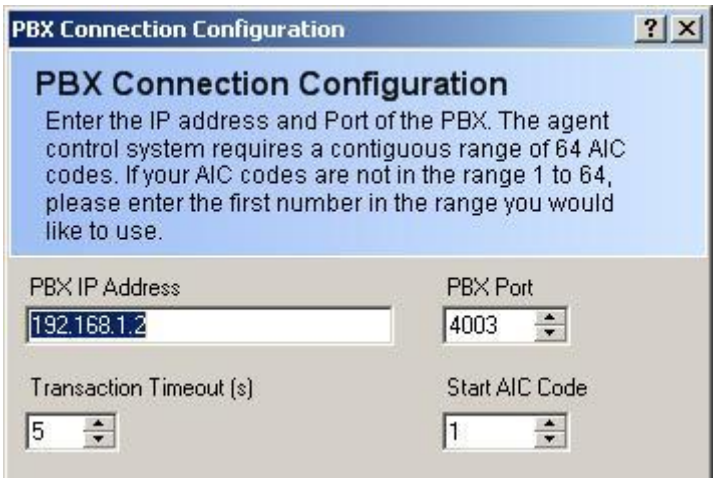
Set the Agent Control IP Address / TCP Port

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

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

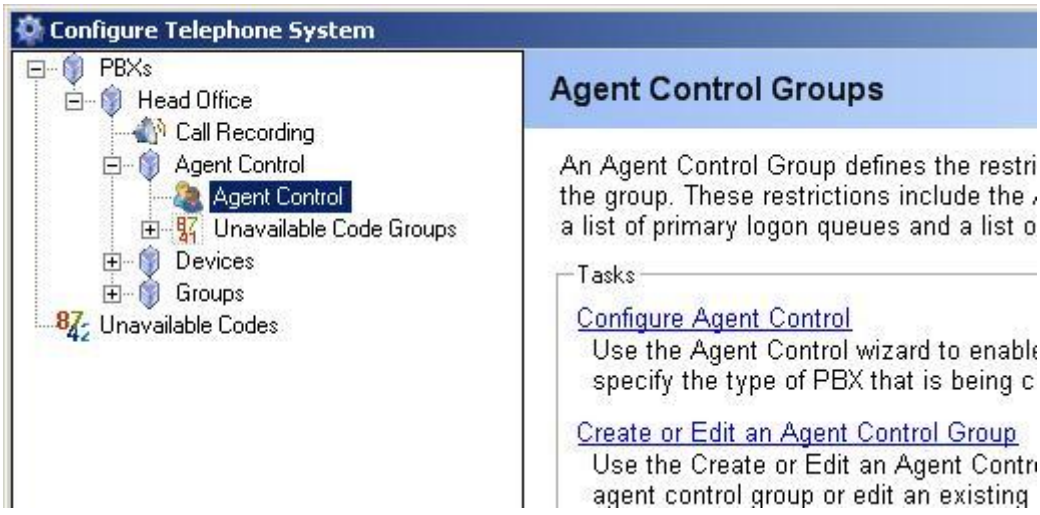


In the PBX Connection Configuration screen, enter the IP Address of the PBX and the TCP Port used for Agent Control. The transaction Timeout should be left at 5 seconds. The start AIC code is the first AIC code that was created during the SV9100 Programming, by default leave the Start AIC code at 1. 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.



Agent Control Groups

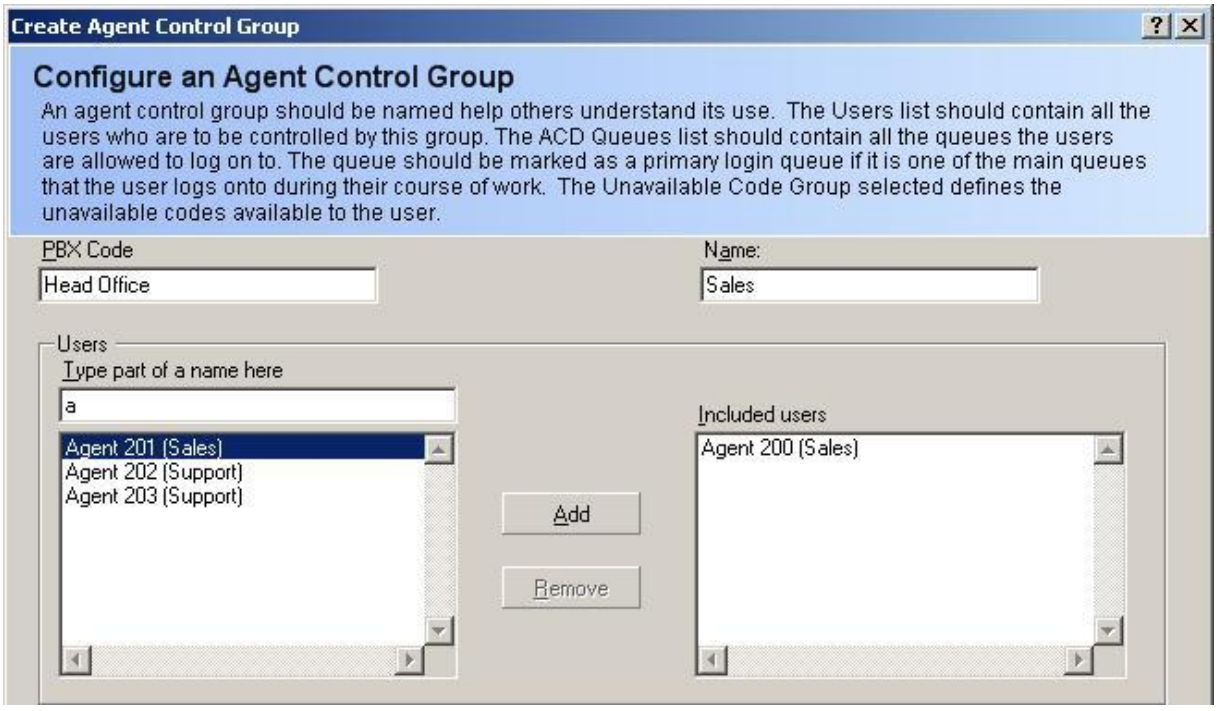
Users have to be created in MyCalls and assigned to a PIN number as normal. They then have to be assigned to an Agent Control Group. An Agent control group is where you can give a number of agents the ability to logon to different ACD groups. If unavailable code groups have been created, they can also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



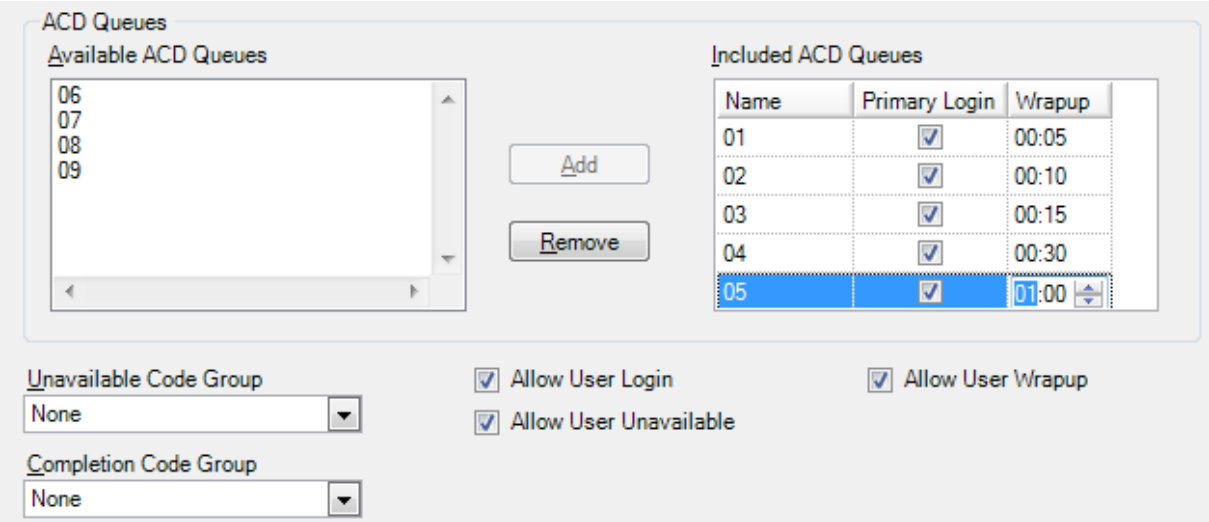
In the Edit Agent Control Groups, click ‘Add New Agent Control Group.’

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.

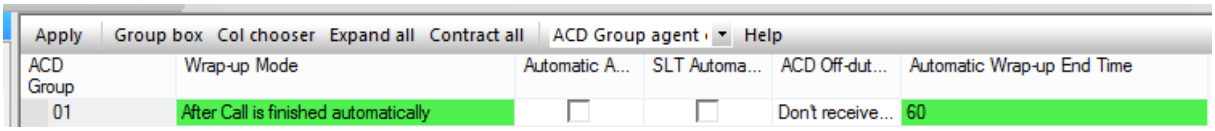


Once all the users are added to the group, in the lower section of the window, you can select which ACD groups the agent can logon to. Add the ACD queues to the included ACD queues and select if the ACD queues are a primary login or not. If an ACD queue is set as a Primary login, then when an agent clicks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

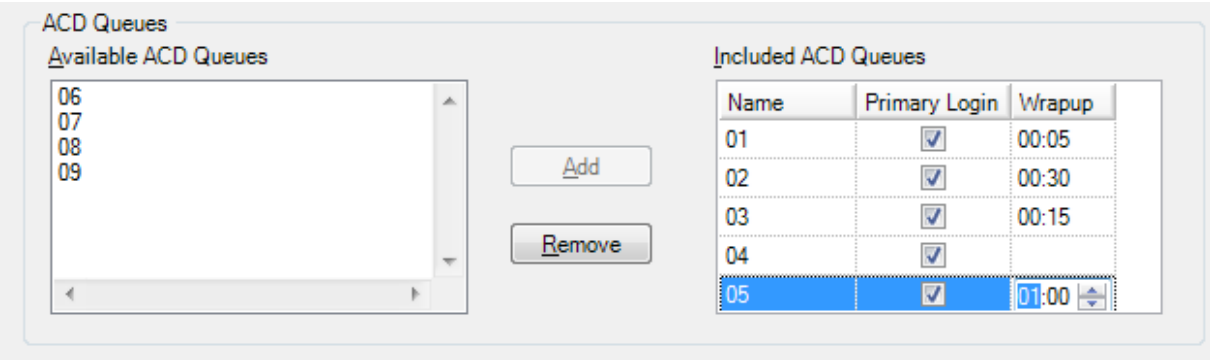


Wrap-up Timer

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.



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.

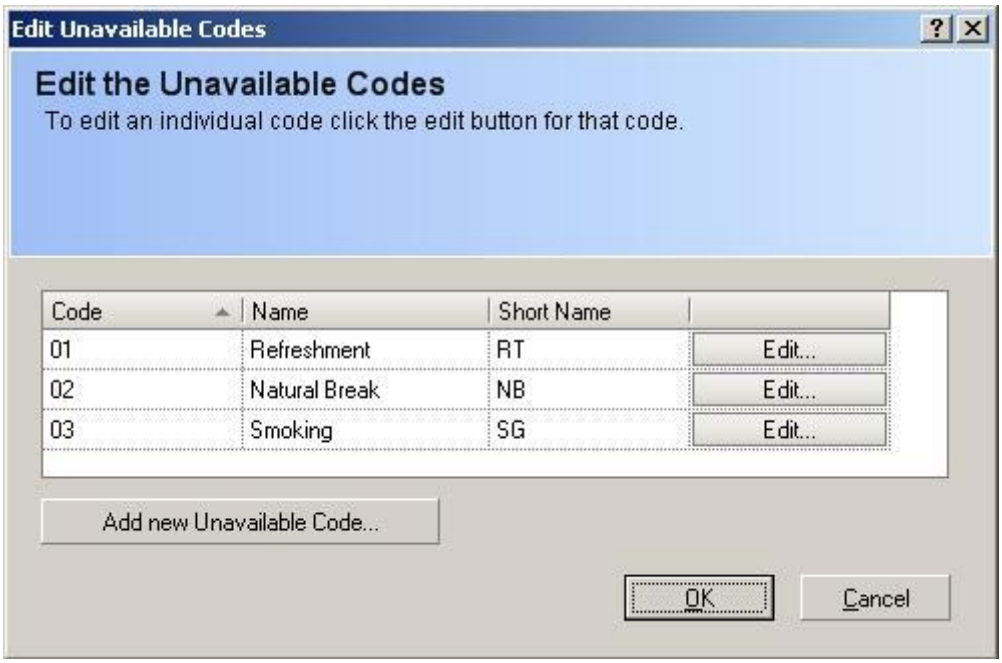


Unavailable Codes

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.

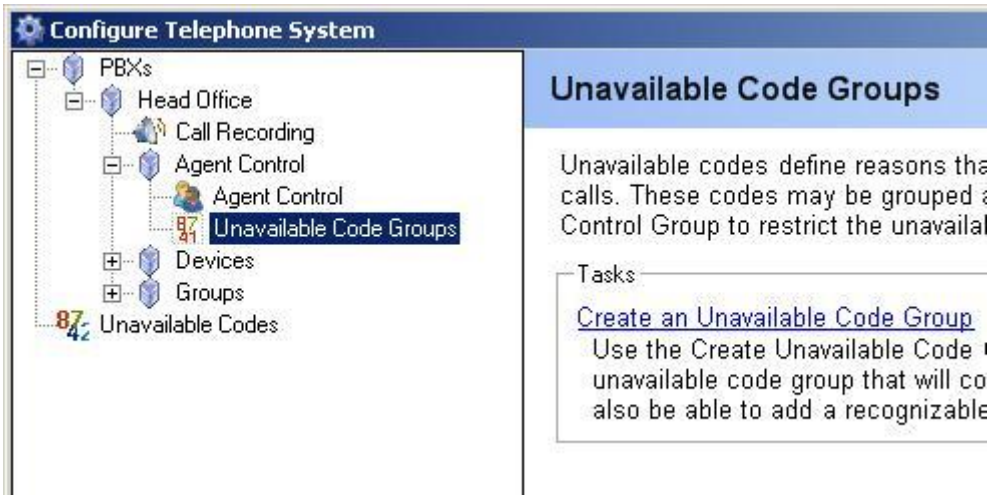
To create an unavailable code group, you must first create the unavailable codes you require, go to Configure / Telephone System / PBX / Agent Control / Unavailable Codes. Click on create or Edit Unavailable Codes.

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

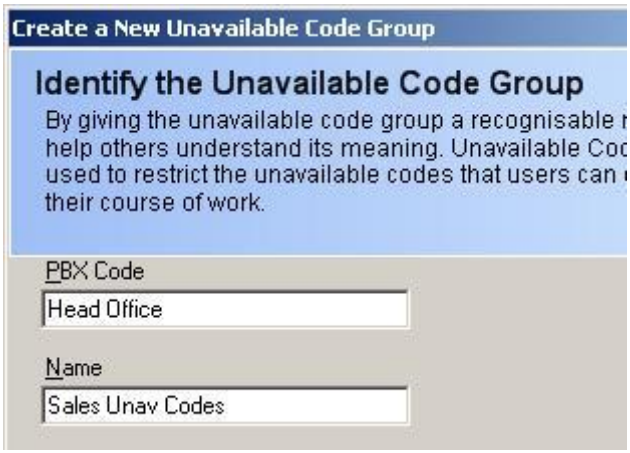


When adding a new unavailable code, enter the Code number, which is the number assigned to the code. The name is used to identify the code in MyCalls. The short name is displayed in real time user status windows when users make them selves unavailable.

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.



Enter a name for the group and click OK.



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.

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.

Create agent control groups and unavailable codes as required.

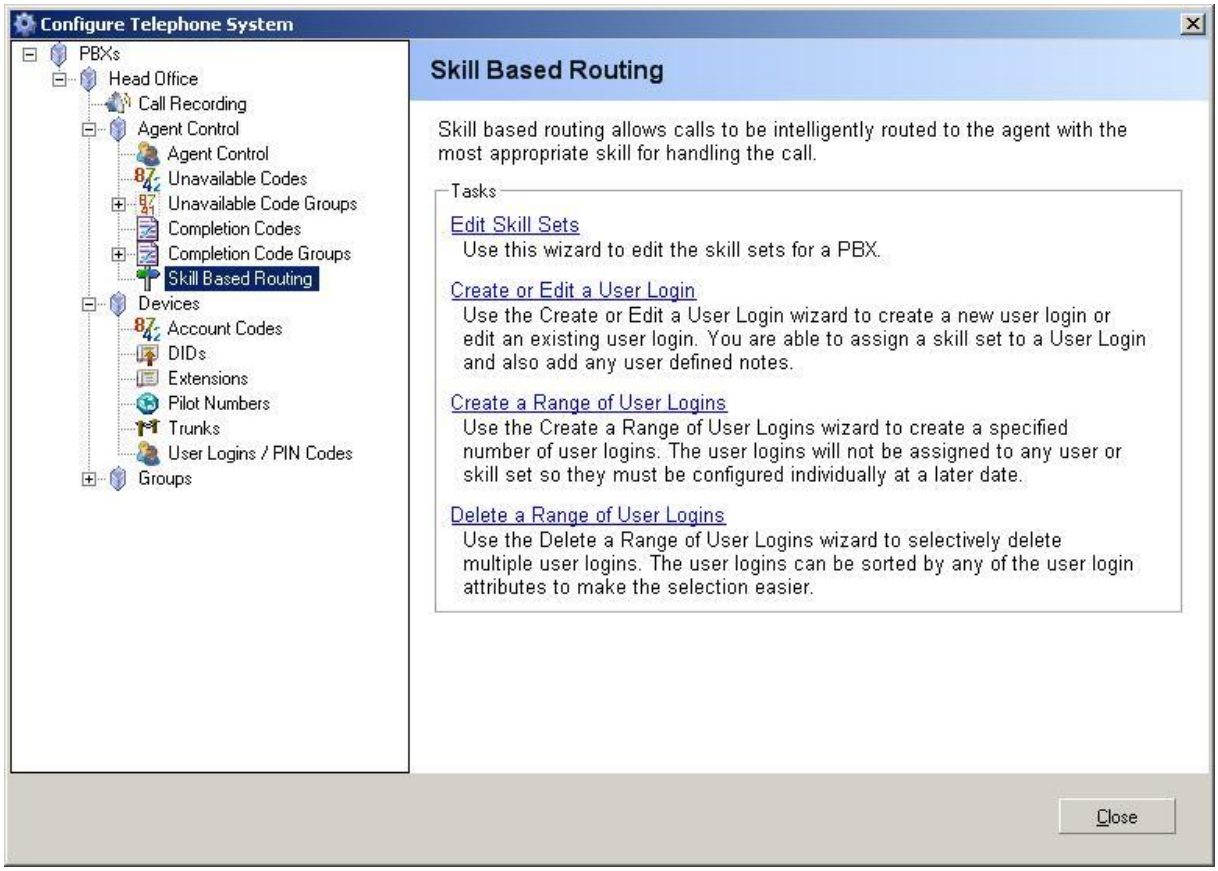
Completion Codes

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.

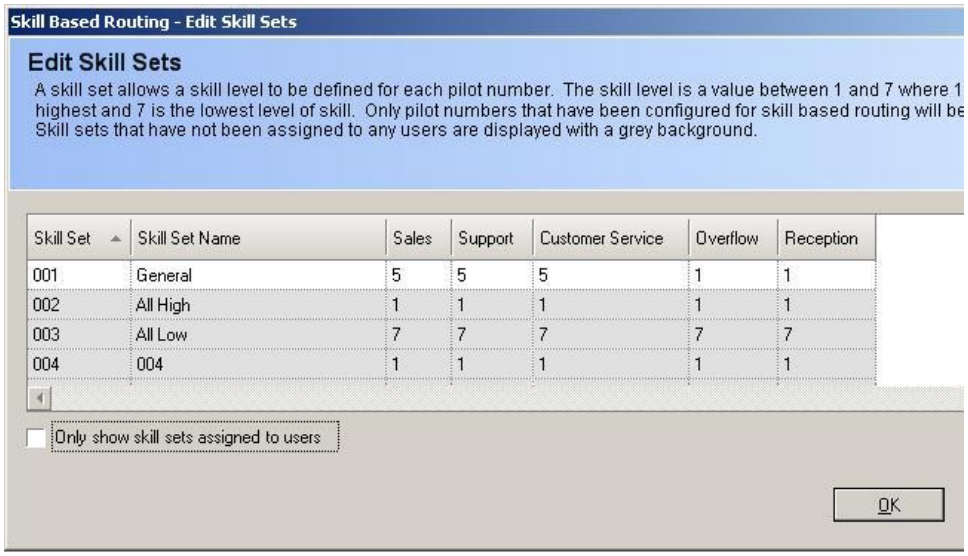
MyCalls will also show the skill level that an agent has in the real-time view of a pilot number. When MyCalls is licensed, it will detect if Skill Based Routing is licensed in the SV9100 and if it is enable the feature in MyCalls. When the license has been detected, you will see the Skill Based Routing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

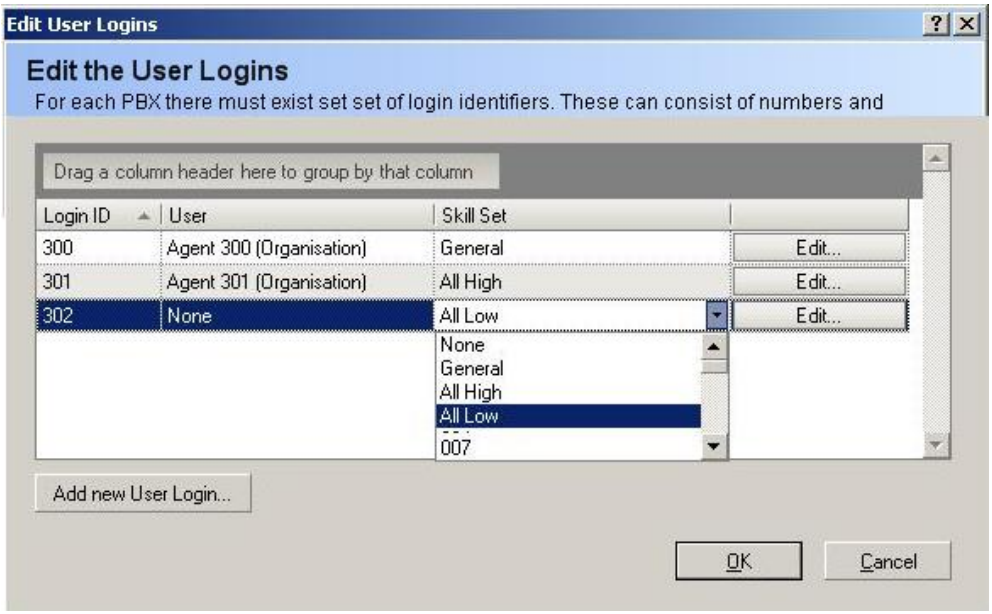


By default, only skill sets that are assigned to agents are displayed, the check box in the lower left hand section of the window can be toggled to show all 512 entries in the table. Only ACD groups that are configured for Skill Based Routing in PRG command 41-22 / Easy Edit / Advanced Items / ACD / 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

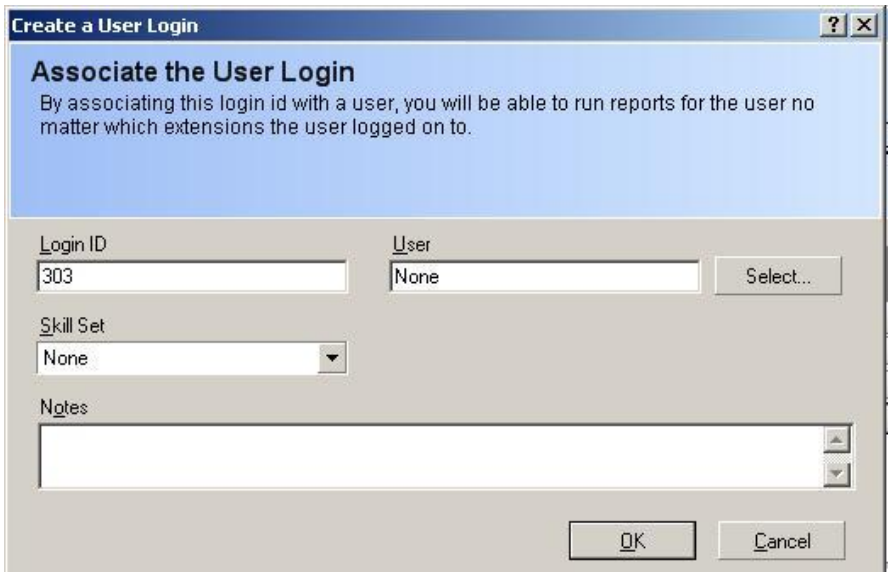
Skill sets can be assigned to users, the first time you click 'Create or Edit a User Login' MyCalls will download the User Login /PIN numbers from the SV9100 and any Skill Sets they are assigned to. When this happens, it will replace the existing list of user logins and pin number that are configured 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.



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.



Create a Range of User Logins

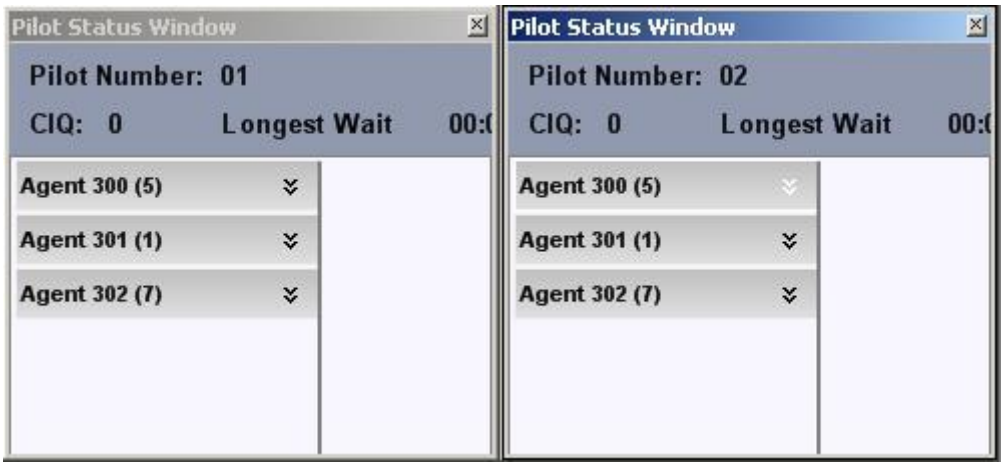
The option to create a range of user logins will allow multiple Login ID's to be created in MyCalls and the SV9100. Once they have been created, they can be assigned to Users and Skill Sets.

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

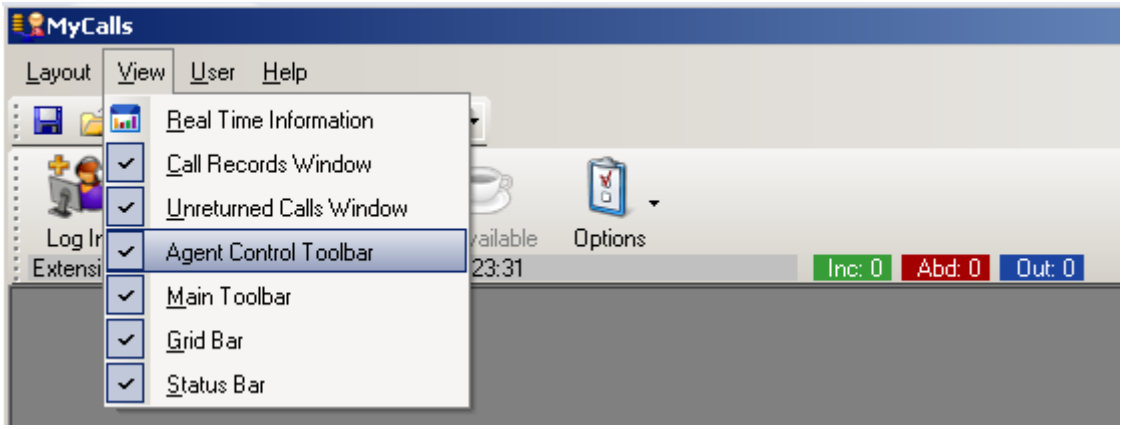
To see users that have skill sets assigned to them you can create a real-time view of the pilot number. The skill set is displayed next to the users name in brackets.



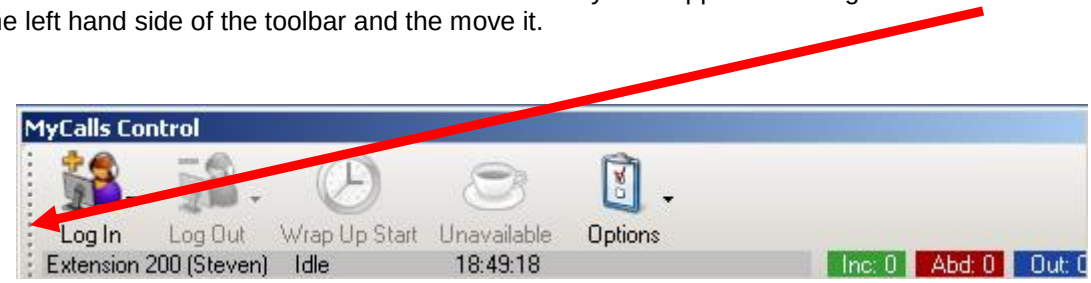
Using MyCalls Agent Control Features.

As an Agent

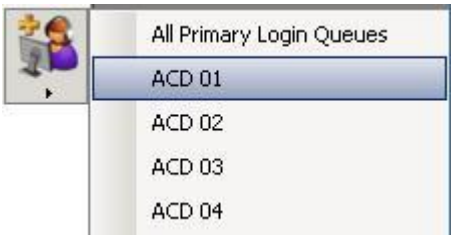
When an Agent logs in into MyCalls, they can use the Agent Control Toolbar to carry out various actions. From the view menu, check the Agent Control Toolbar option. Once visible, the Agent Control Toolbar can be moved around the application.



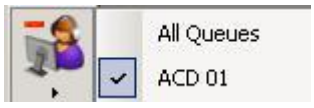
The toolbar can also be moved out of the MyCalls application and used as a free floating application. When the toolbar has been removed from the application, MyCalls can be minimised and the toolbar will still be visible. To move the toolbar out from the MyCalls application drag the dotted line situated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



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.

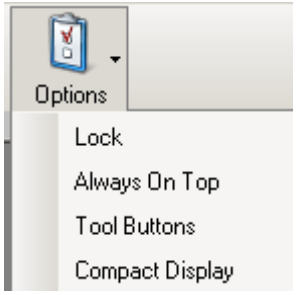


Logout – Click the logout button to logout of all ACD groups. Click the Arrow to logout of individual ACD groups.

Wrap up – Click to Enter / Exit Wrap up

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.



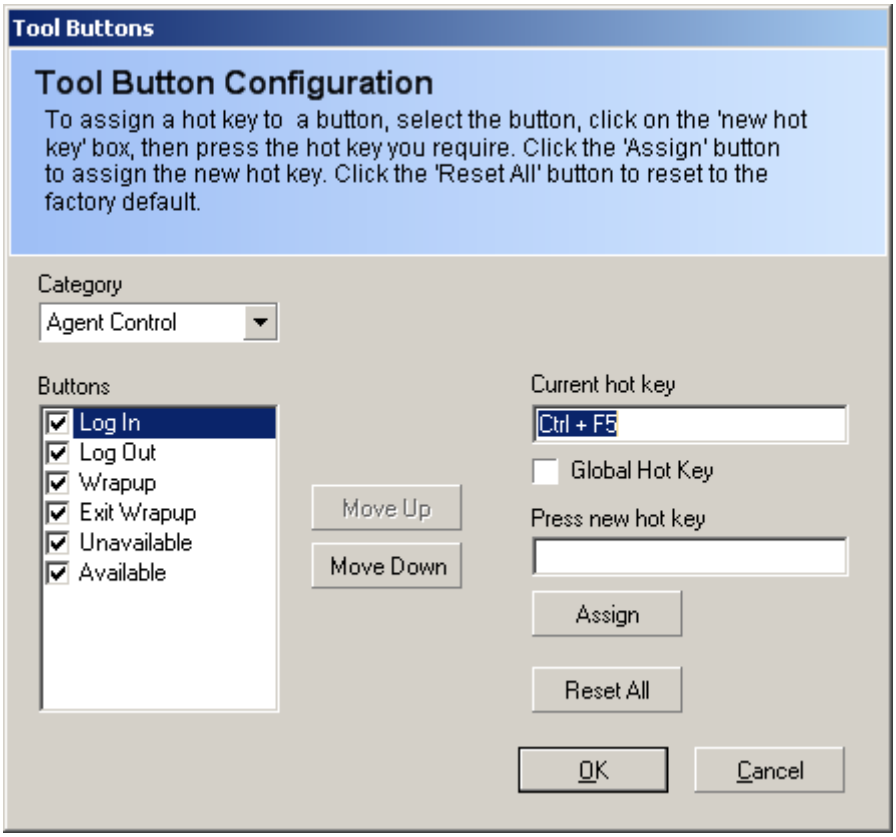
Options – Click the options button to view the list of available options:

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.

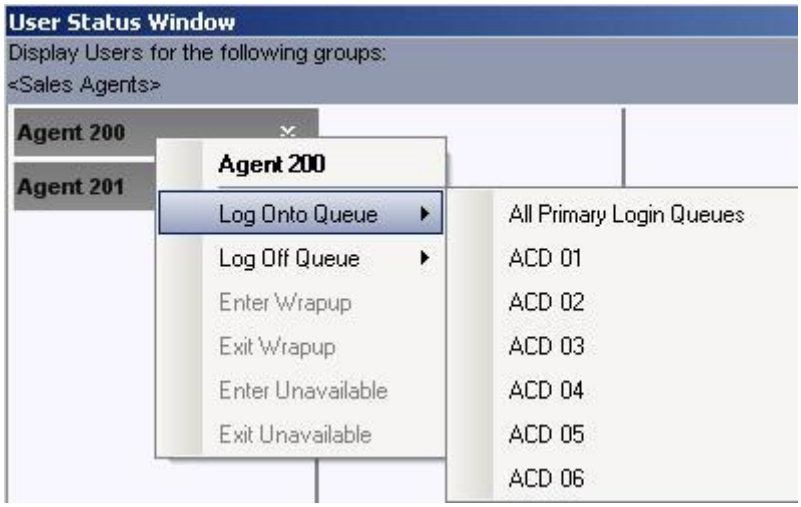
Tool Buttons – Click to add and remove buttons from the agent control toolbar and change the order in which they appear. Hot Keys can be assigned to the buttons, for example, the default hot key for Login is Ctrl + F5. To change the hotkey, click in the 'Press new hot key' box and press the new key sequence 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.



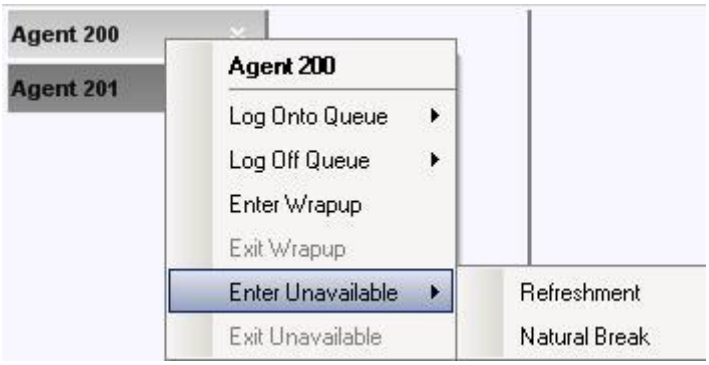
As An ACD Supervisor

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.



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.



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

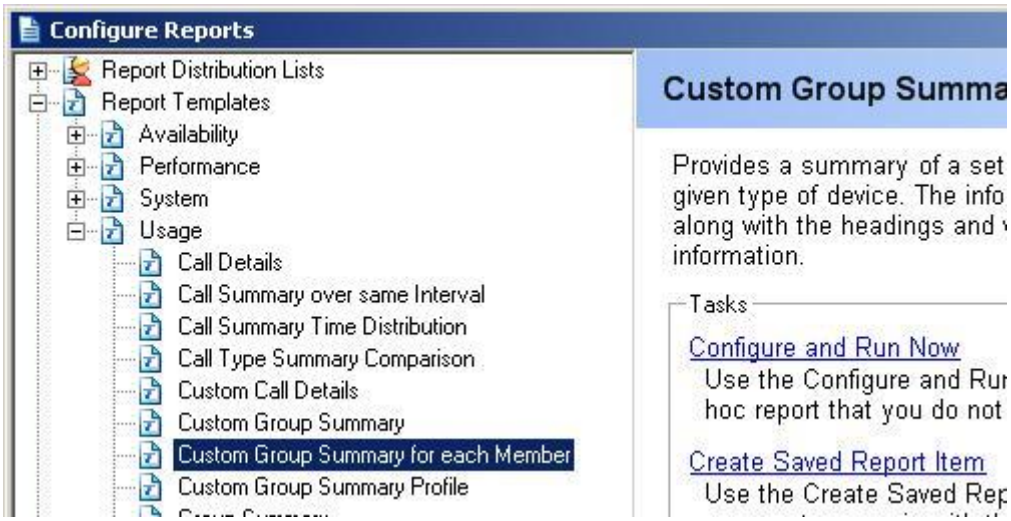
Call Centre Reporting

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.

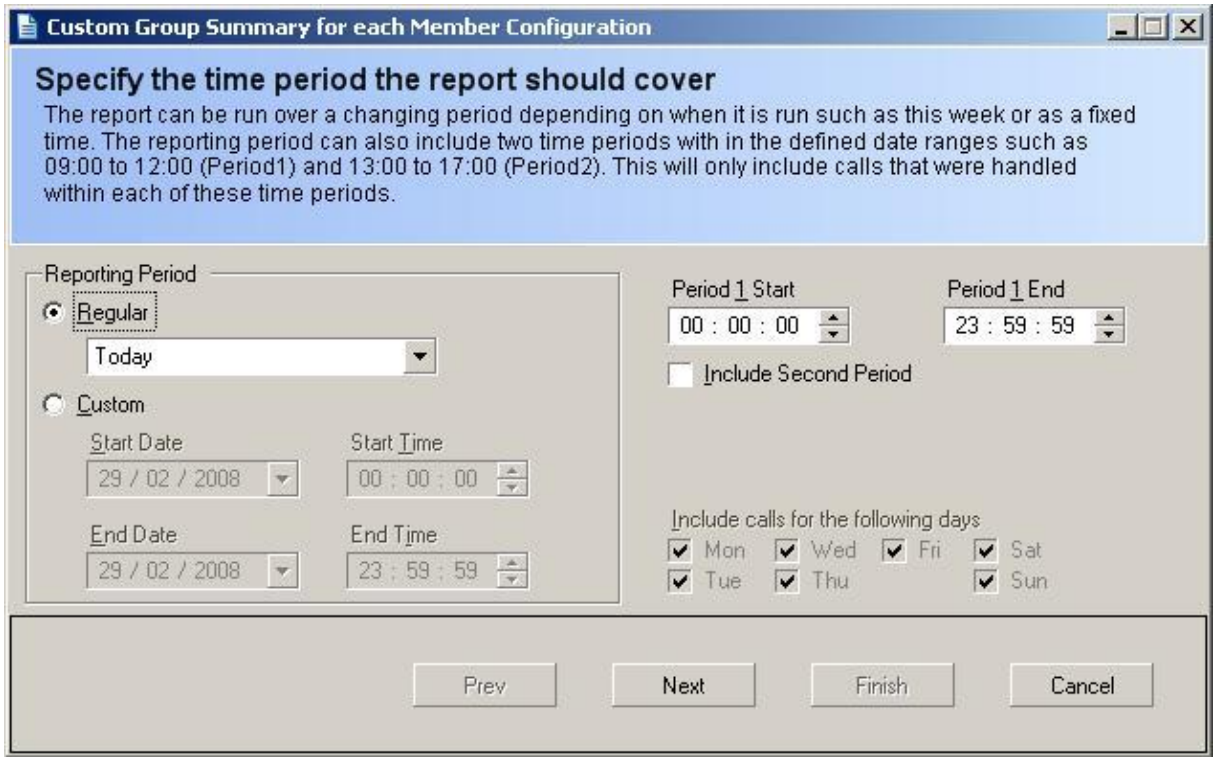
To create an Agent Activity Report that will show Agent based stats, carry out the following instructions.

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

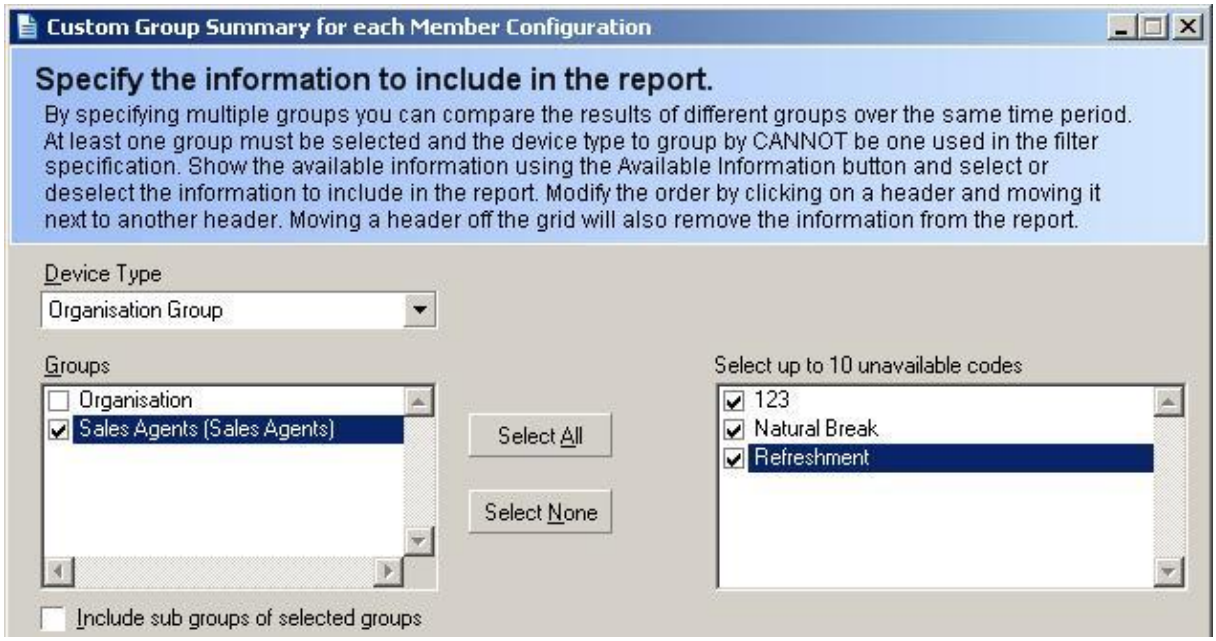


Enter a name for the report, select a Report Group and click OK.

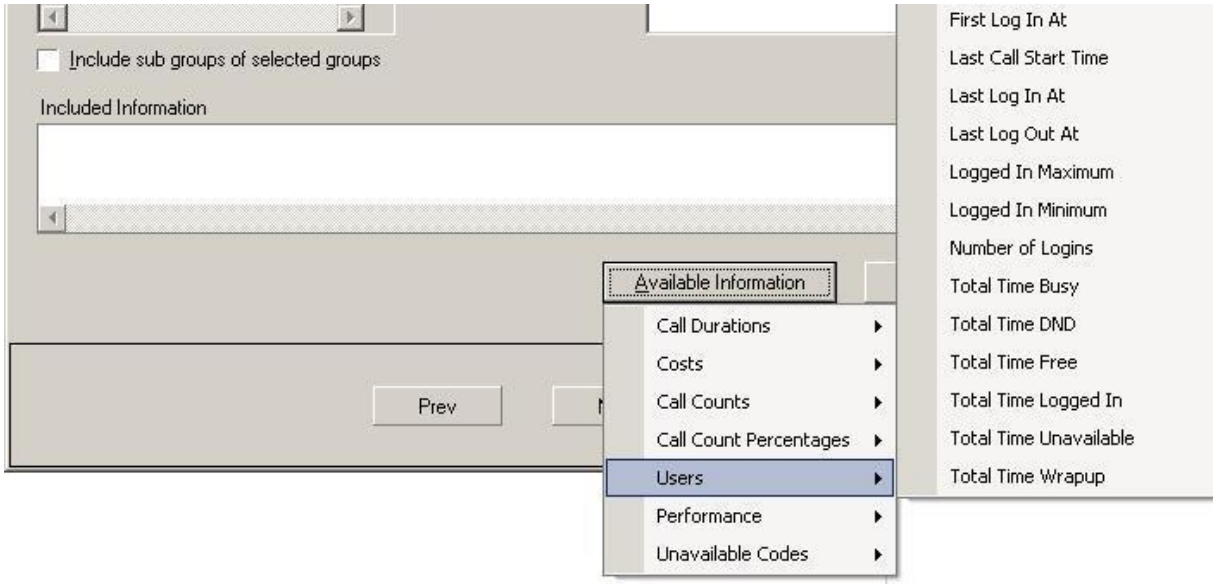
The report wizard will start, the first step of the wizard is to configure the reporting period. Choose the period the report will run for and click next.



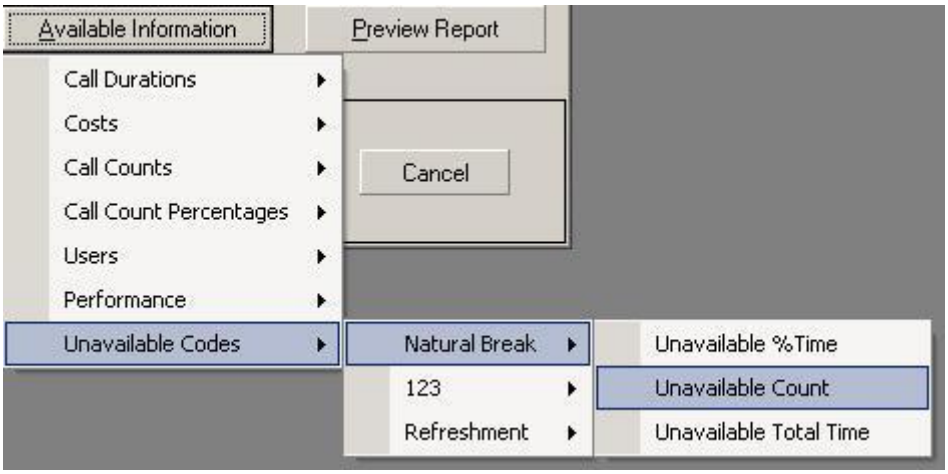
From the upper section of the Custom Group Summary for each Member Configuration, select the Device Type as Organisation Group and choose which group the report will be for. If you wish to report against Unavailable Code, then select which code will be included in the reports. Only 10 unavailable codes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



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.



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.



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.

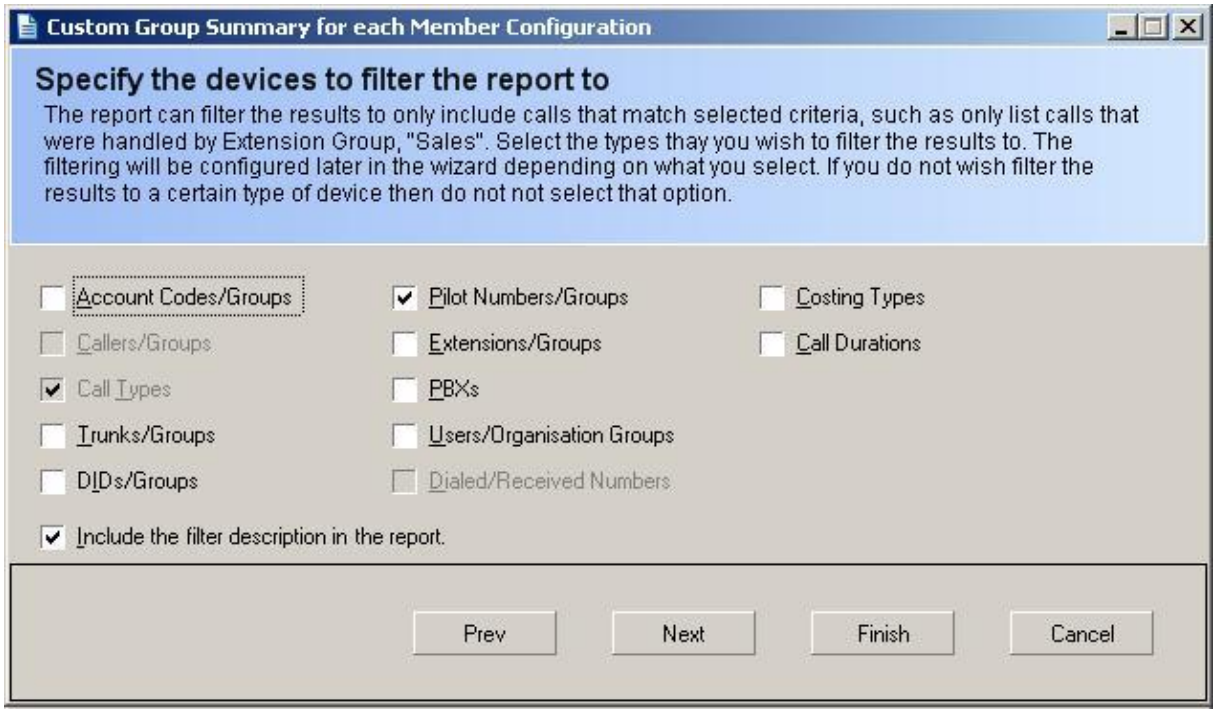
Users – Agent based statistics.

Performance – Used to Display Grade of Service values.

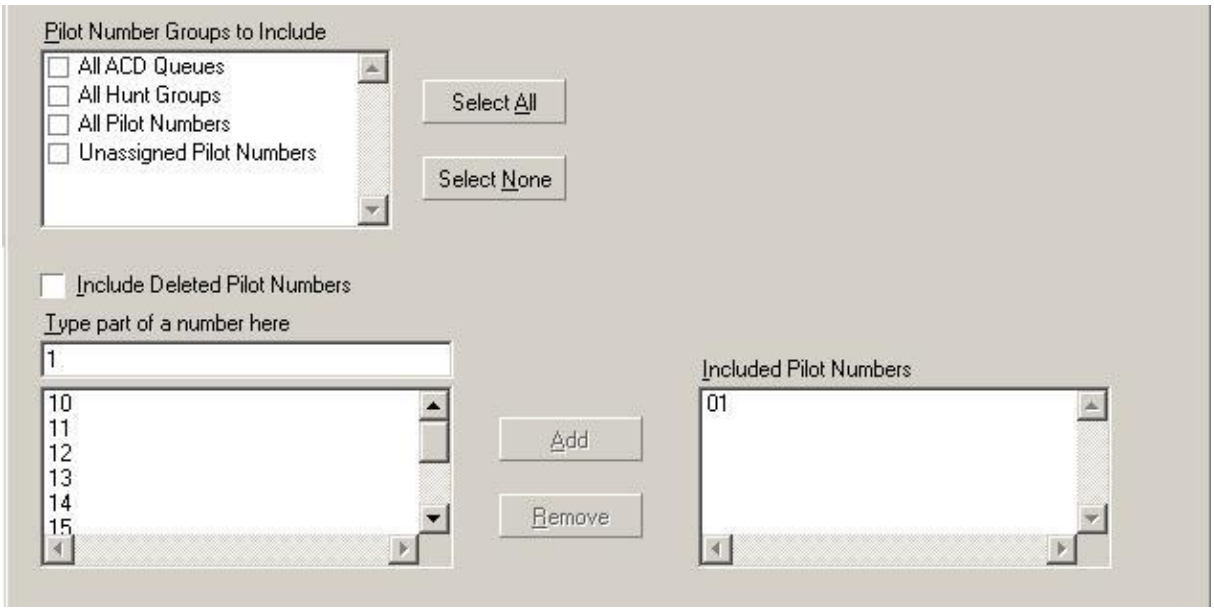
Unavailable Codes – Used to display statistics on unavailable codes.

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.

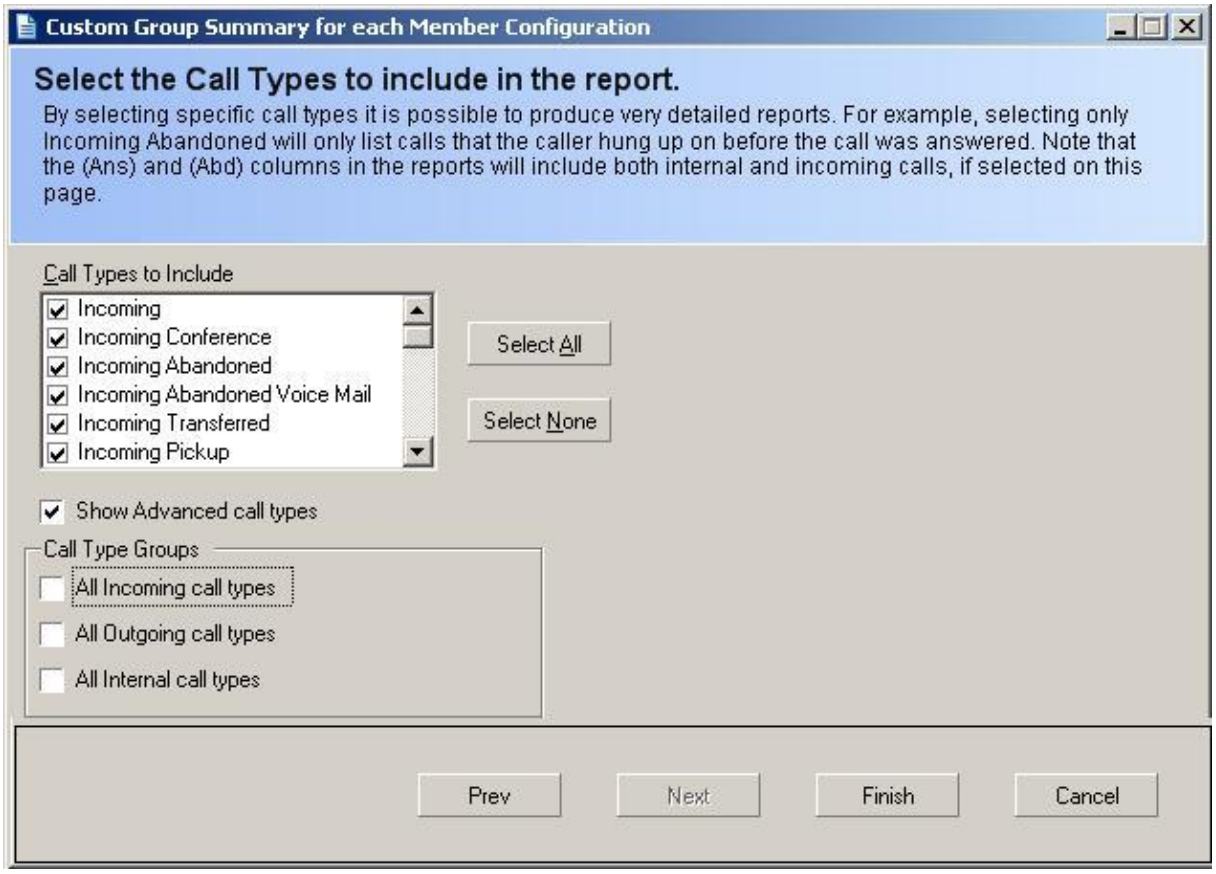
At the filter page, you can be more specific about the calls that are included in the report. By default without and filtering all calls from all DDI's / Pilot numbers are included. To only include calls from a specific Pilot Number, tick the Pilot Numbers / Groups check box. When you click next you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



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.



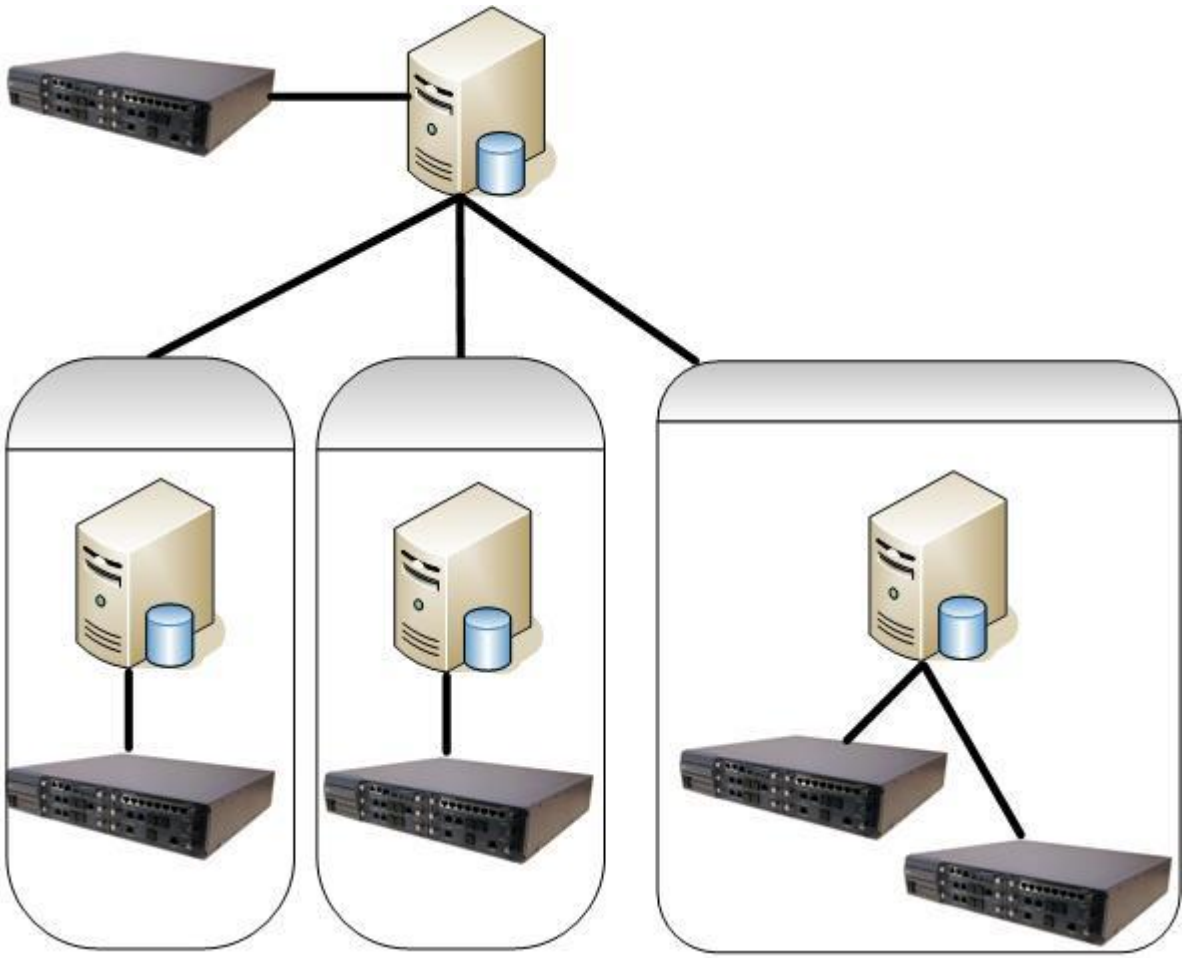
The final step in creating the report is to choose what call types are included in the report. Select the call type as required and click finish.



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.

The scenarios that are given below cover different possible enterprise configurations.

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 Collector Configuration Application. 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.

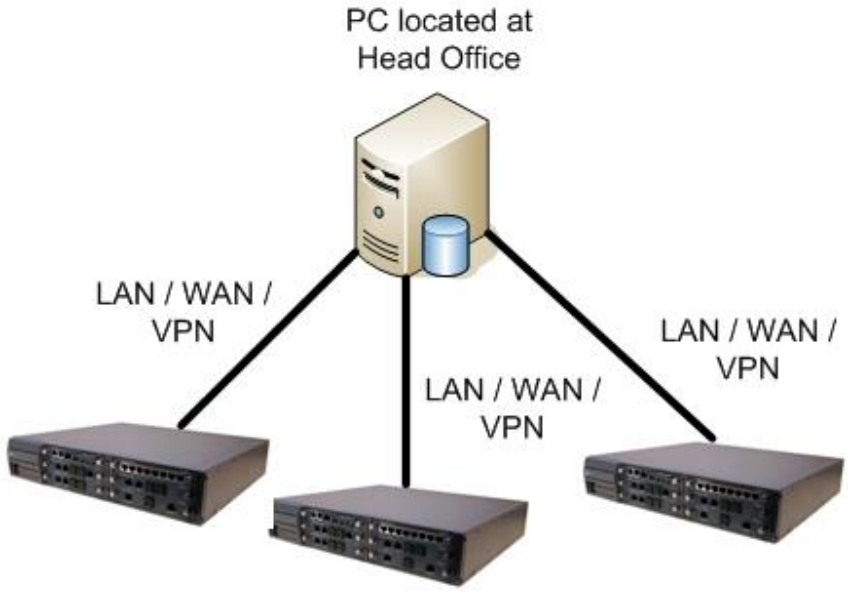
Call recording can be used with any of the following scenarios and will always need a local PC to record calls on to. Calls can be played back from a central location or client over a network. Call recording licenses should be installed on the SV9100 holding the license for the Enterprise.

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

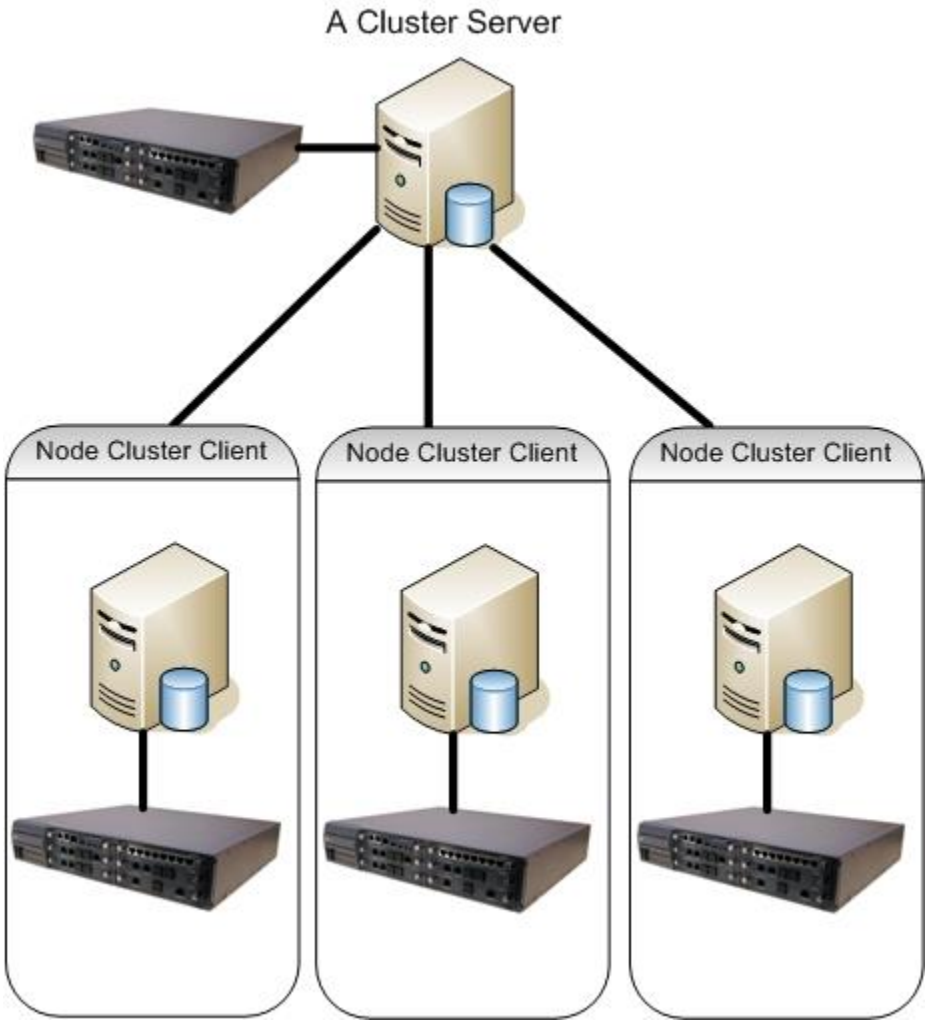
There is a Central PC running MyCalls at a head office and all the P commands and SMDR are sent directly over the network to the MyCalls server PC. This is only suitable for connecting up to 10 SV9100's to a single PC. If a link between the remote sites goes down then there is a possibility that data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



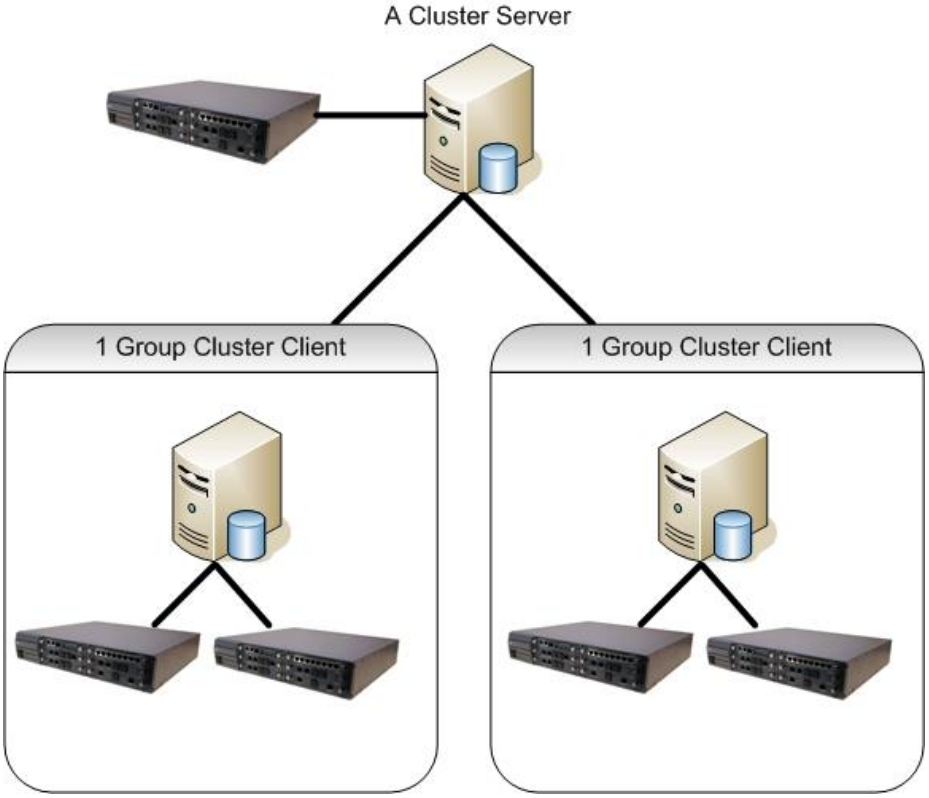
Scenario 2 – Clustered Installation with a Cluster server and Node Cluster Clients

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.



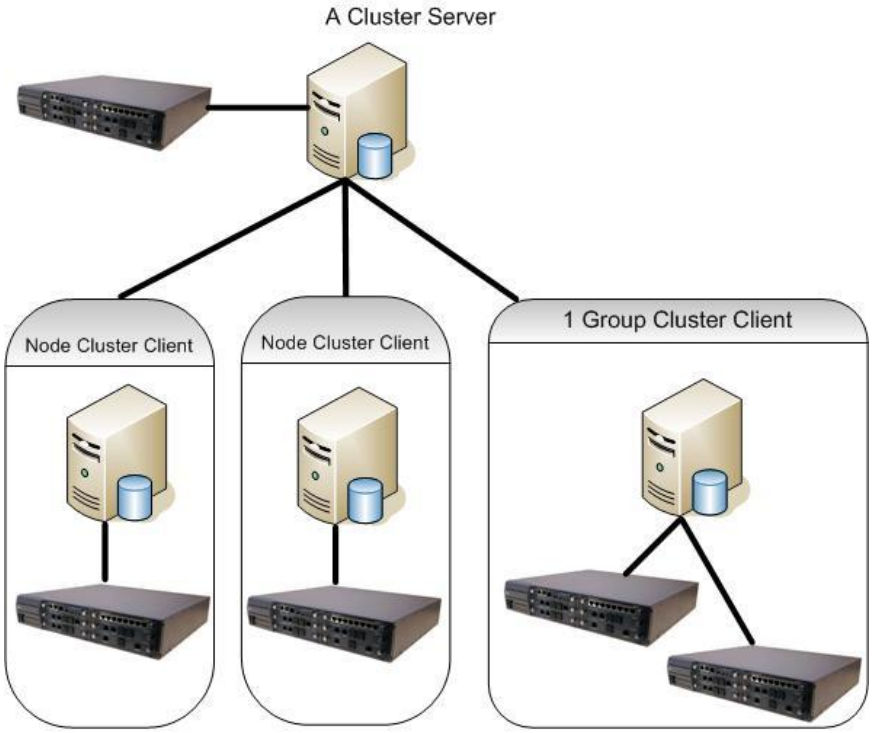
Scenario 3 – Clustered Install with Group Cluster Clients

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

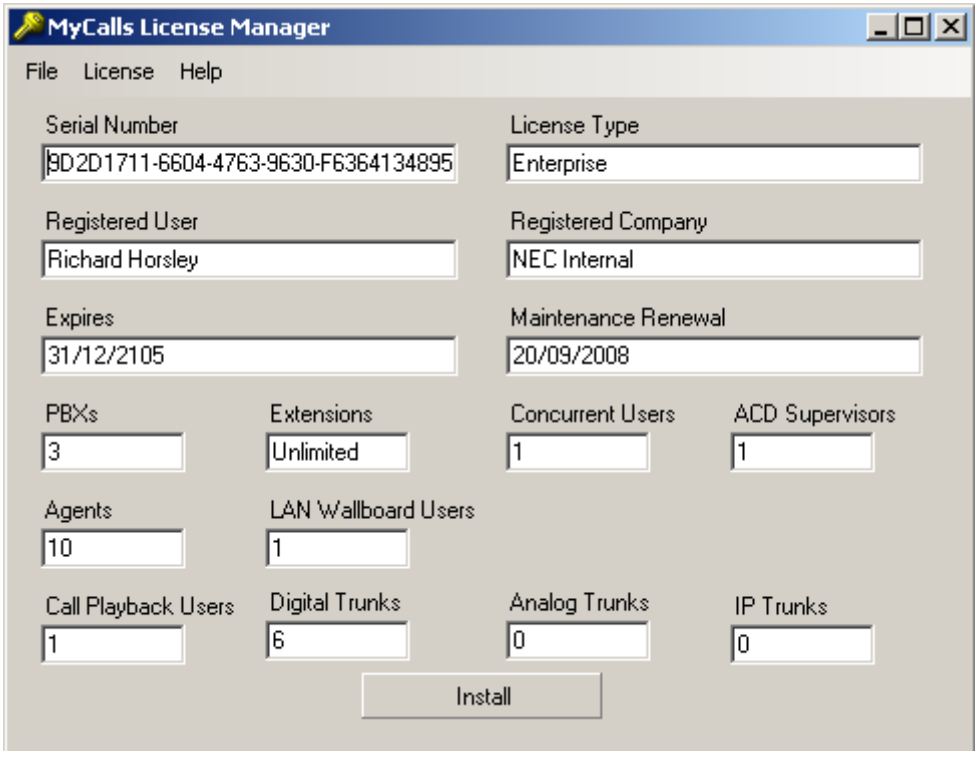
The following section describes the installation procedures for the different enterprise solutions. Each of the following scenarios can be installed using SQL Express 2008 R2 or SQL 2008 R2. Further information on installing MyCalls with SQL 2008 R2 is documented in the Installing MyCalls with SQL 2008 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.

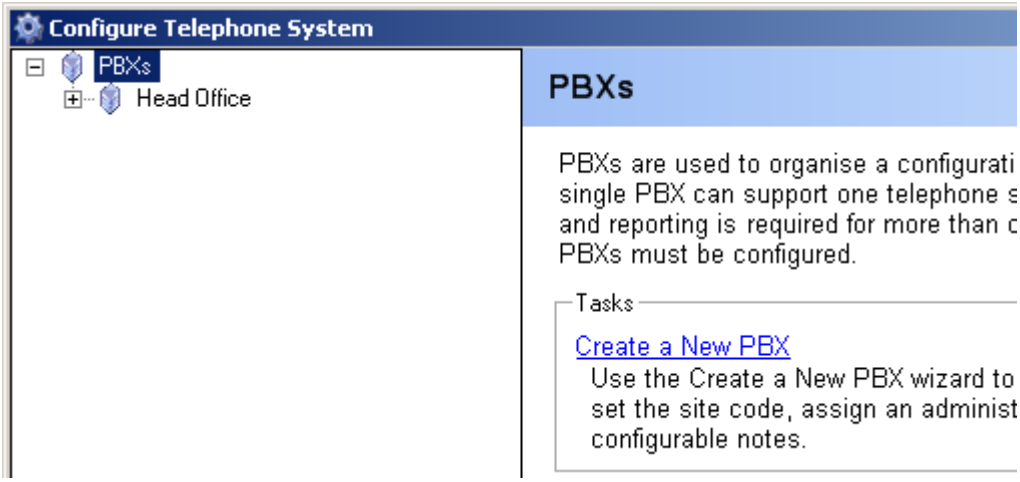
The steps to installing this scenario are summarised as follows:

- 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.

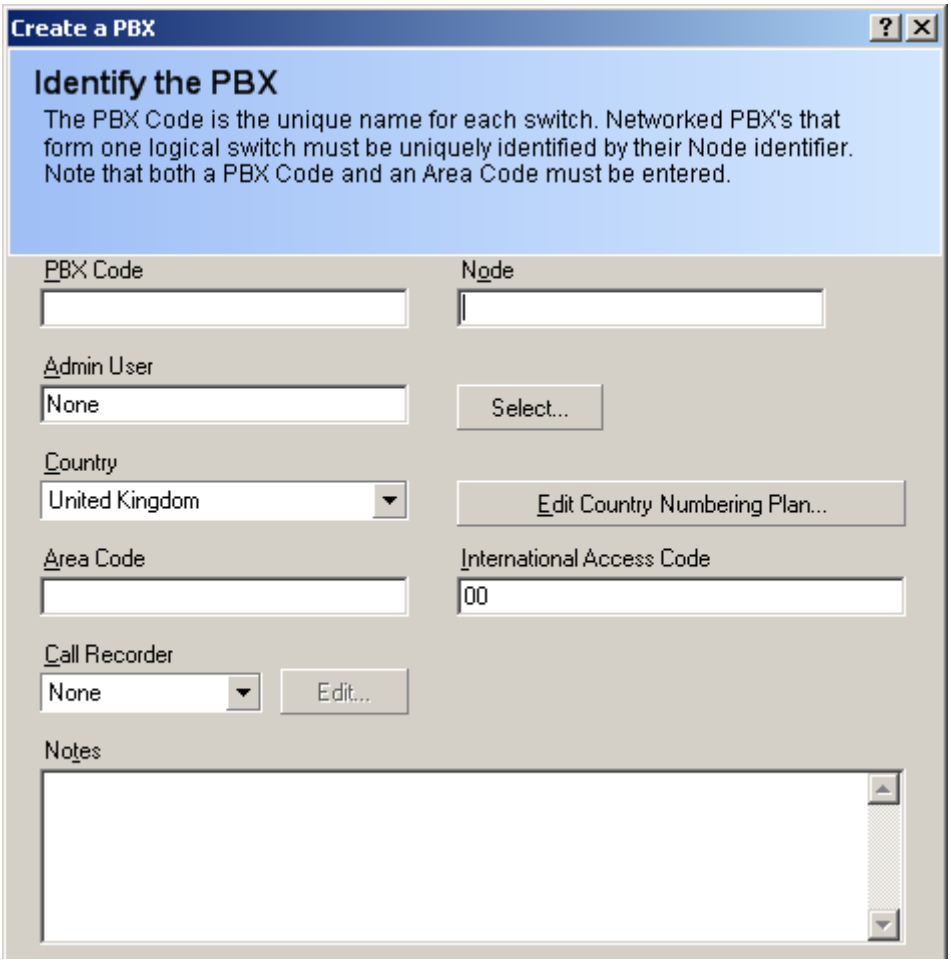
When the license is read from the SV9100, the number of PBX's will reflect the number of SV9100's that will be monitored. The license will then need to be installed and registered.



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.

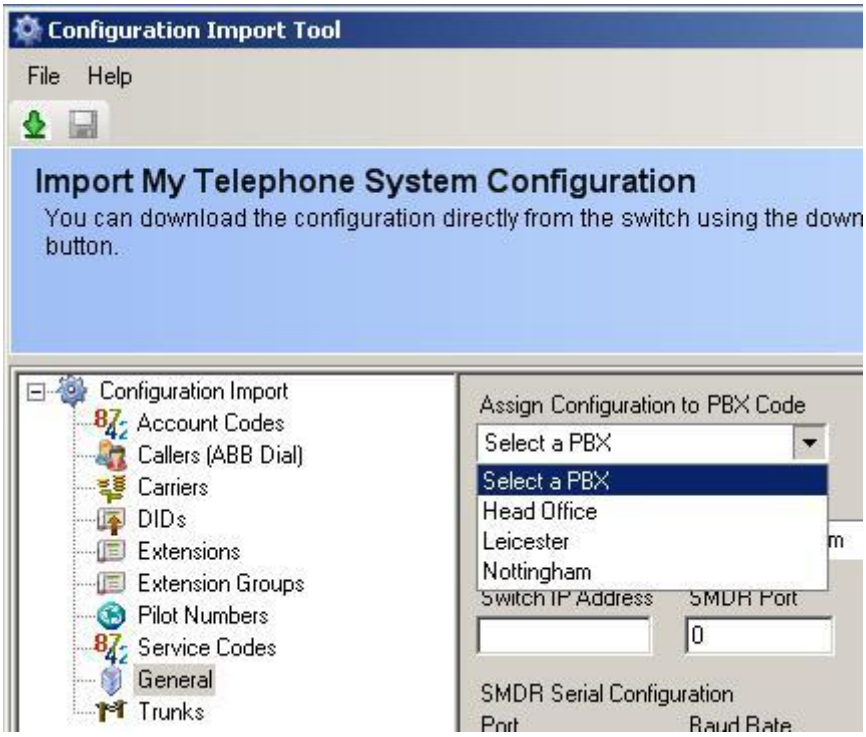


Enter a name of the PBX in the PBX code box, set the Country, the Area code and the International Access code as required. Enter a node number, each PBX must have a unique node number with the Enterprise. Once you have entered all the details, click OK.



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.

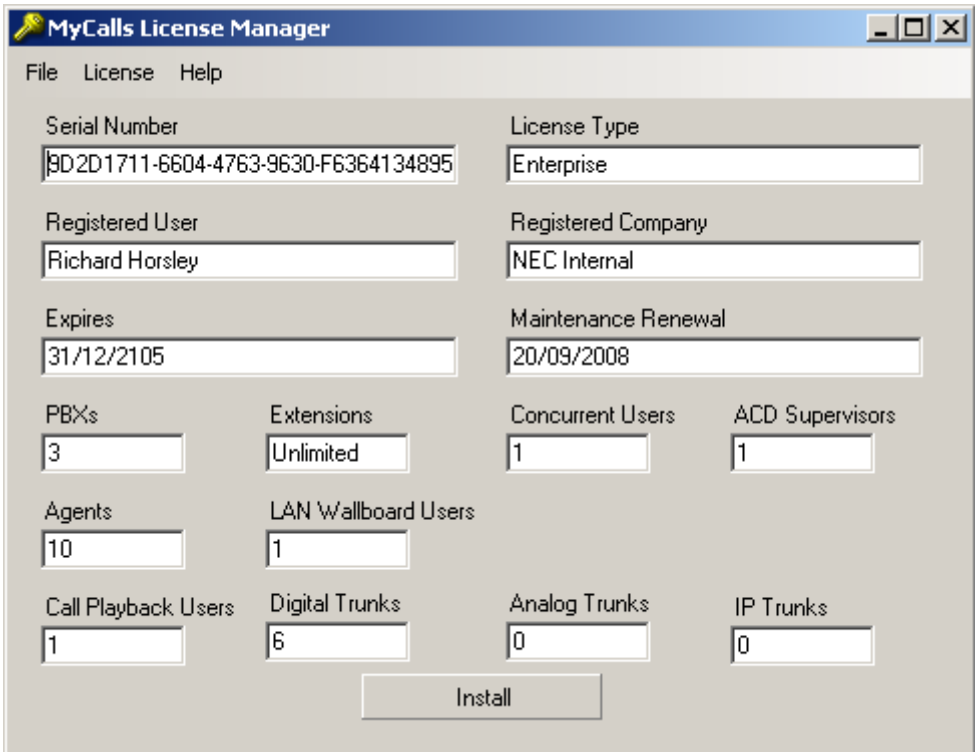
Scenario 2 – Clustered Installation with a Cluster Server and Node Cluster Clients

The steps to installing this scenario are summarised as follows:

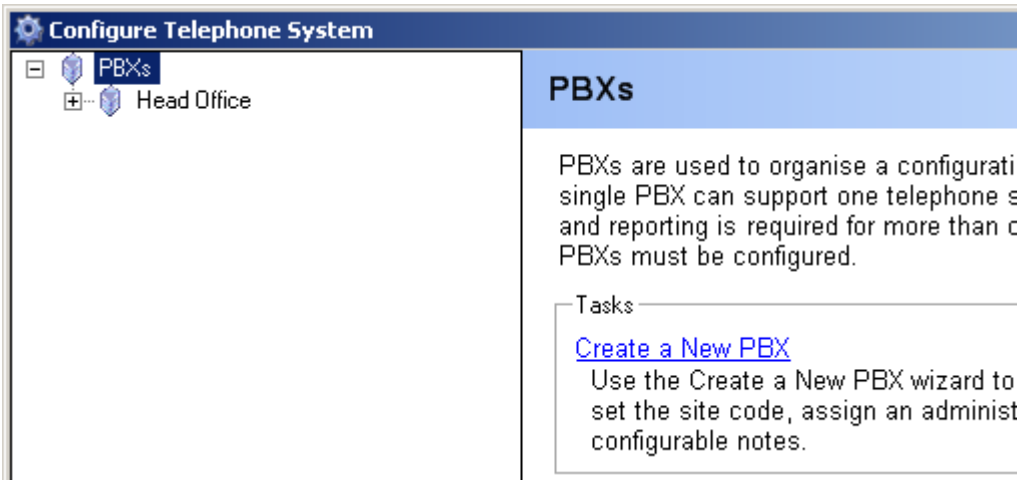
- Make sure that all the PBX's are programmed for MyCalls. Refer to the MyCalls Installation guide for further details.
- Install MyCalls and Elect the Cluster Server.
- Install the MyCalls Enterprise license on the SV9100 that will hold the license.
- On the MyCalls Cluster Server, read the license 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

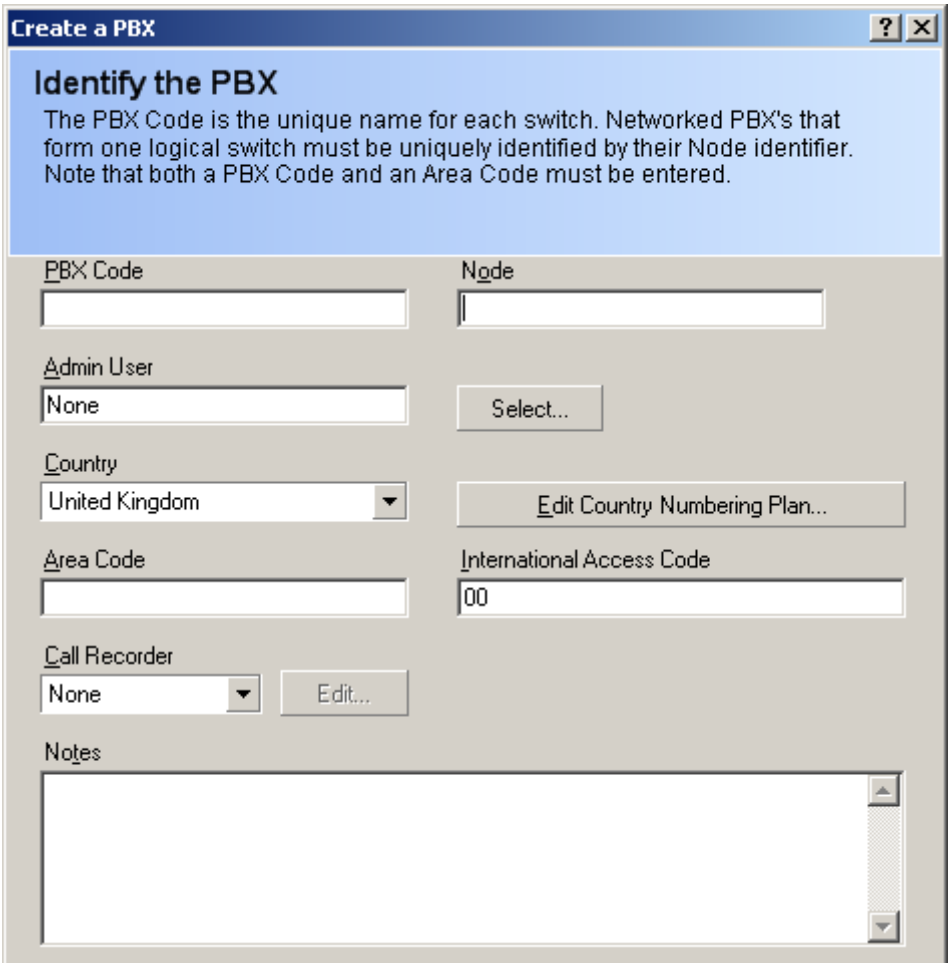
Once the PBX has been programmed for SMDR output, you should start the MyCalls installation as normal and carry out a complete installation of MyCalls. Once the installation has completed, carry out the configuration import for the first PBX as normal. Use the license manager to read the license from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



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



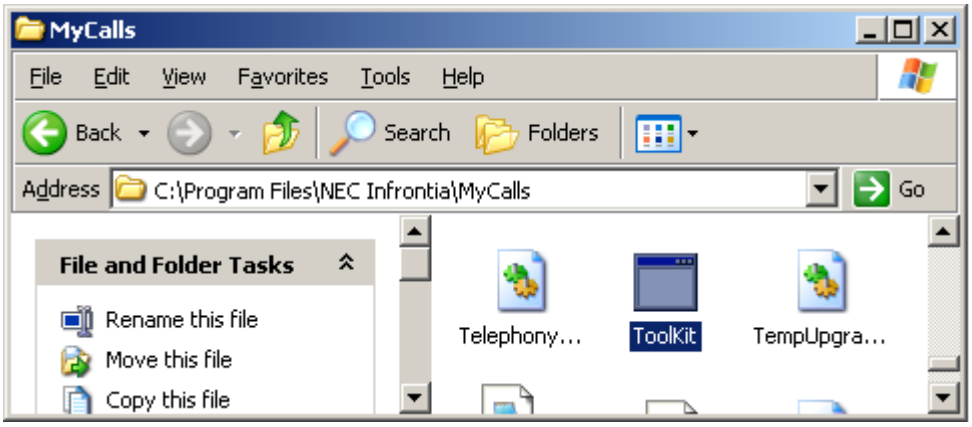
Enter a name of the PBX in the PBX code box, set the Country, the Area code and the International Access code as required. Enter a node number, each PBX must have a unique node number with the Enterprise. Once you have entered all the details, click OK.



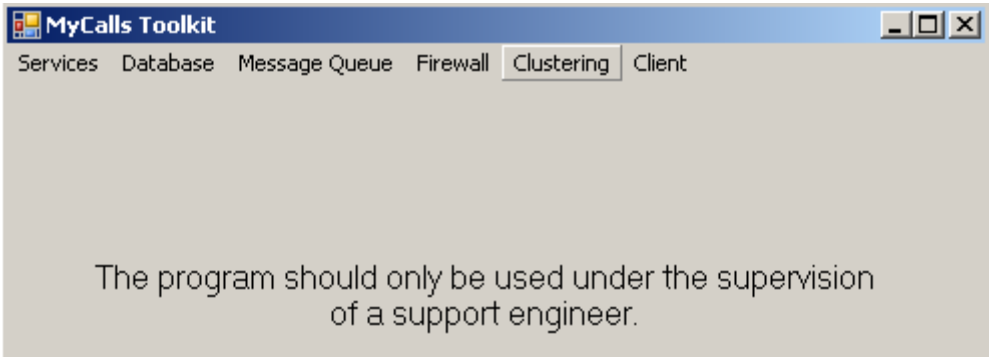
Repeat this procedure for each PBX that will be added into MyCalls.

Elect the Cluster Server

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

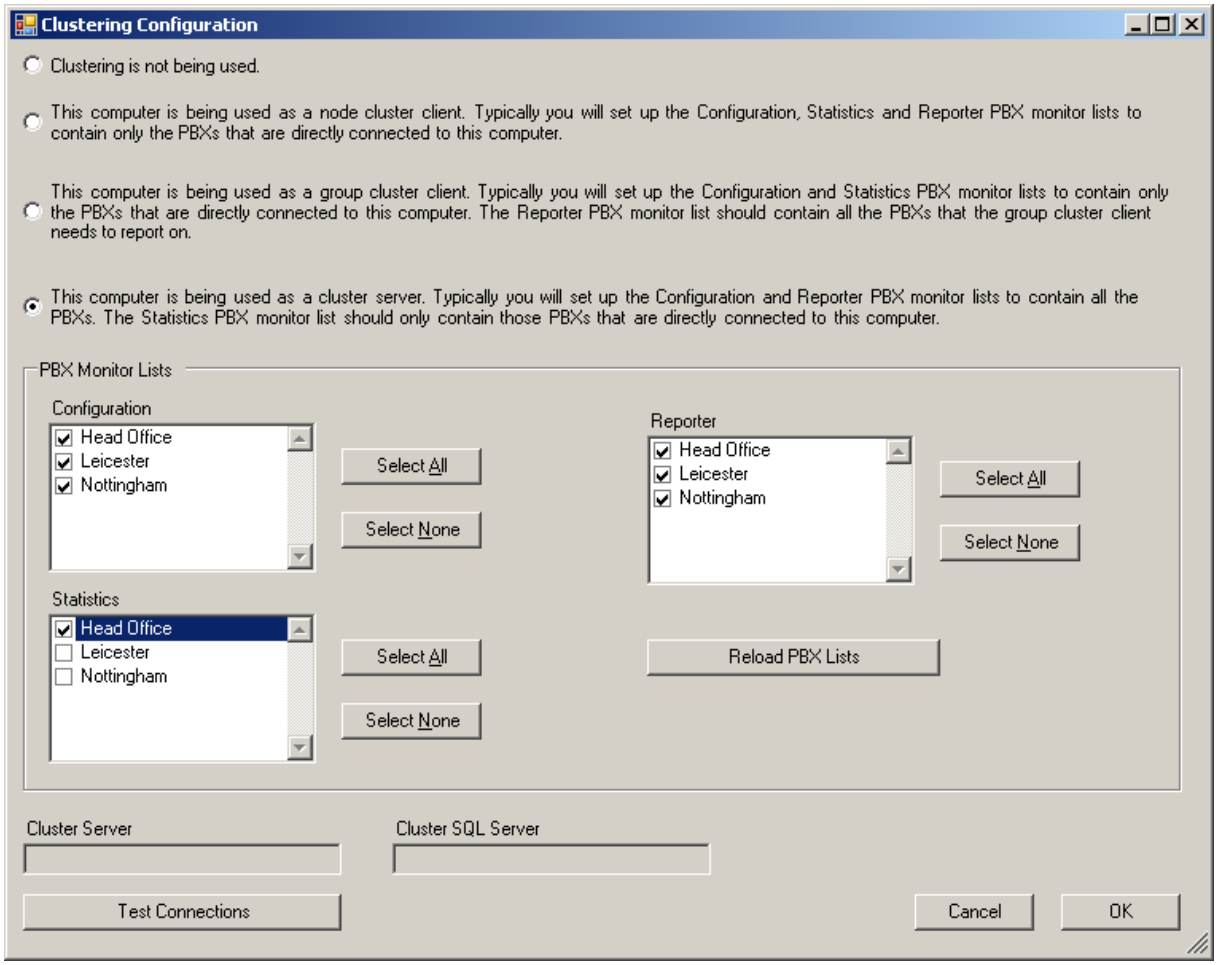


The toolkit application will load.

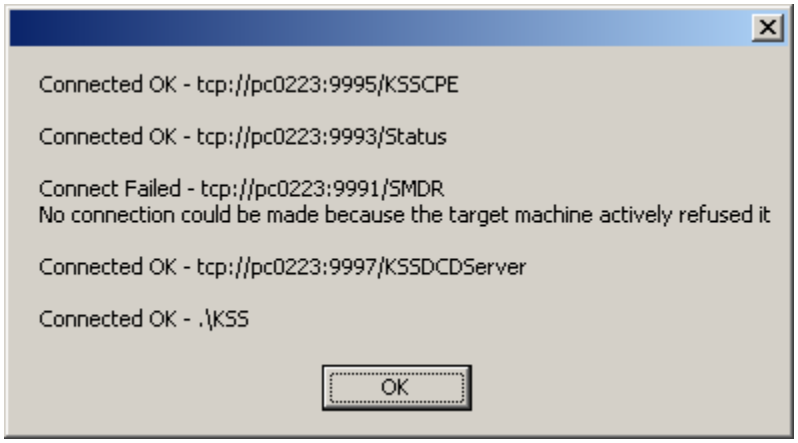


From the toolkit, click the clustering menu.

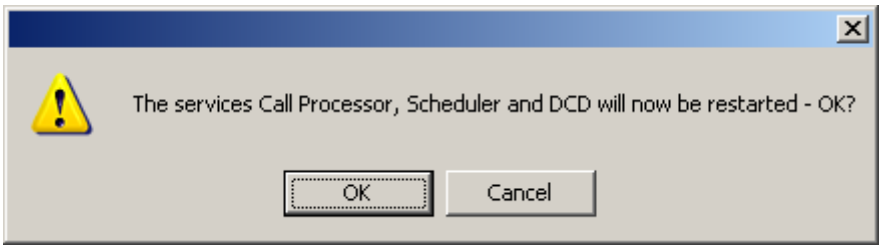
Now select the 'This computer is being used as a cluster server' option. Once you have selected to be a cluster server, select all the PBX's in the configuration and reporter boxes. In the Statistics box, ONLY select the PBX's that are directly connected to the cluster server. DO NOT select statistics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



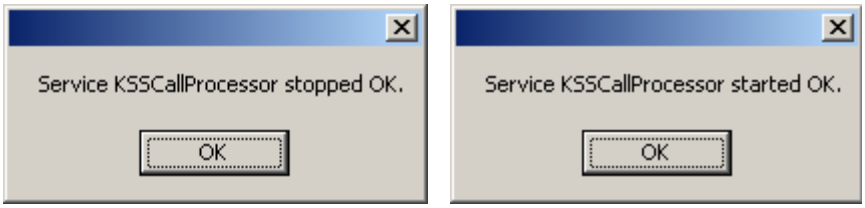
Click the 'Test Connections' button and the cluster configuration will verify it can connect to its own services. It is usual for the SMDR connection to fail, click OK to close the test connections window.



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



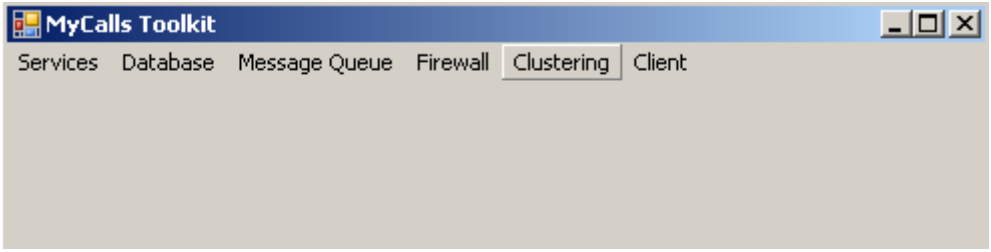
Each of the MyCalls services will all stop and then start. Click OK at each prompt.



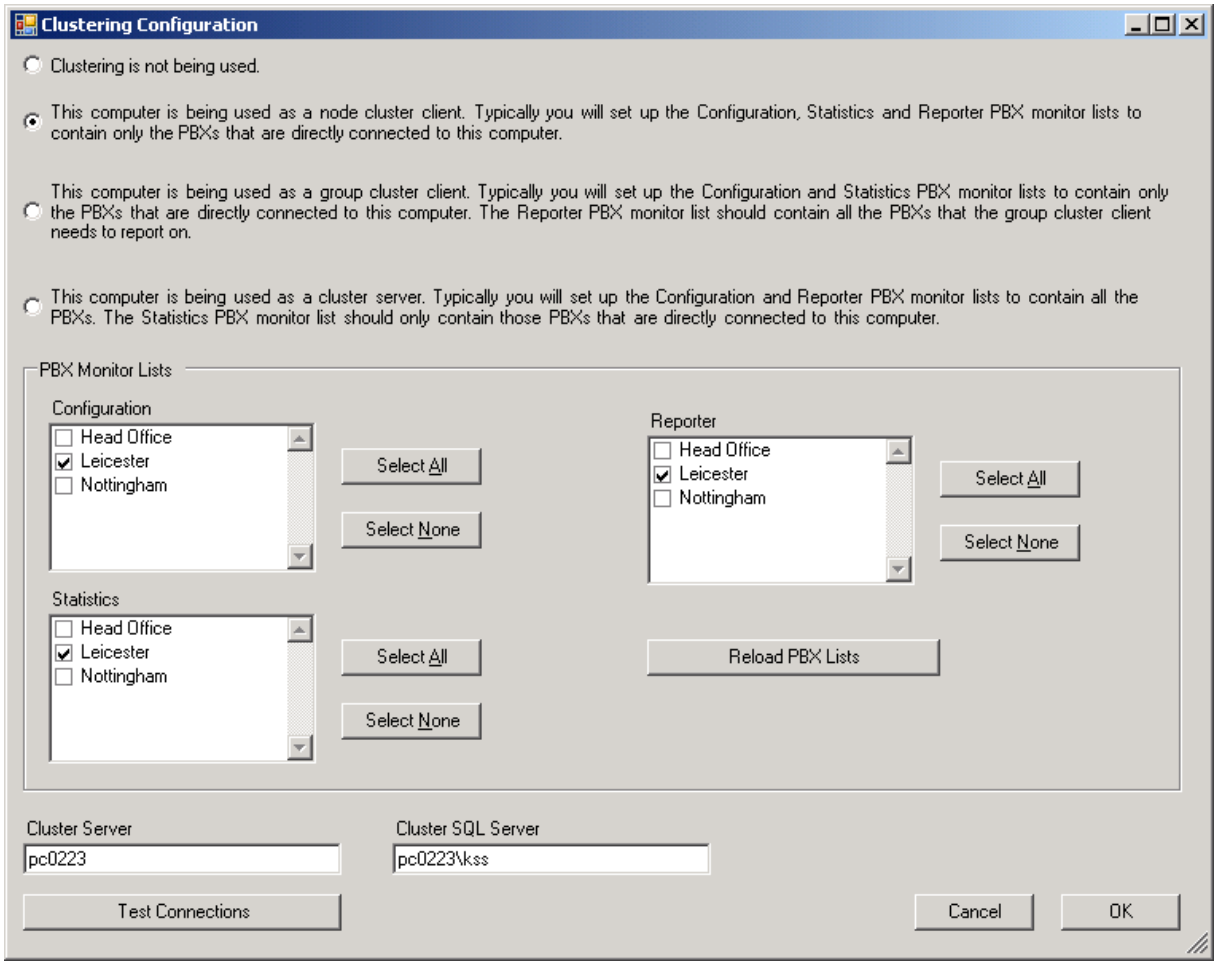
Once the services have all started up, you have elected the cluster server.

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.

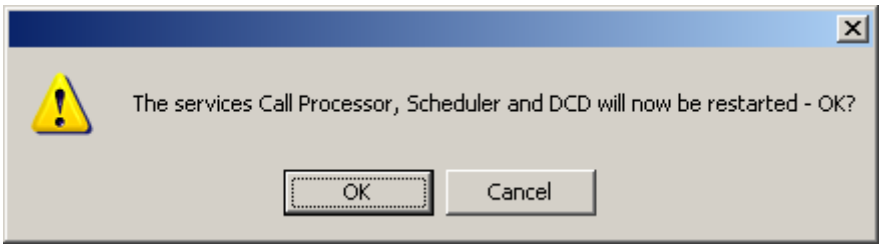


In the toolkit click Clustering. In the upper section of the Clustering Configuration select 'This computer is being used as a node cluster client.' At the lower section on the configuration screen, enter the name of the PC acting as the cluster server in the 'Cluster Server' box. In the Cluster SQL 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.



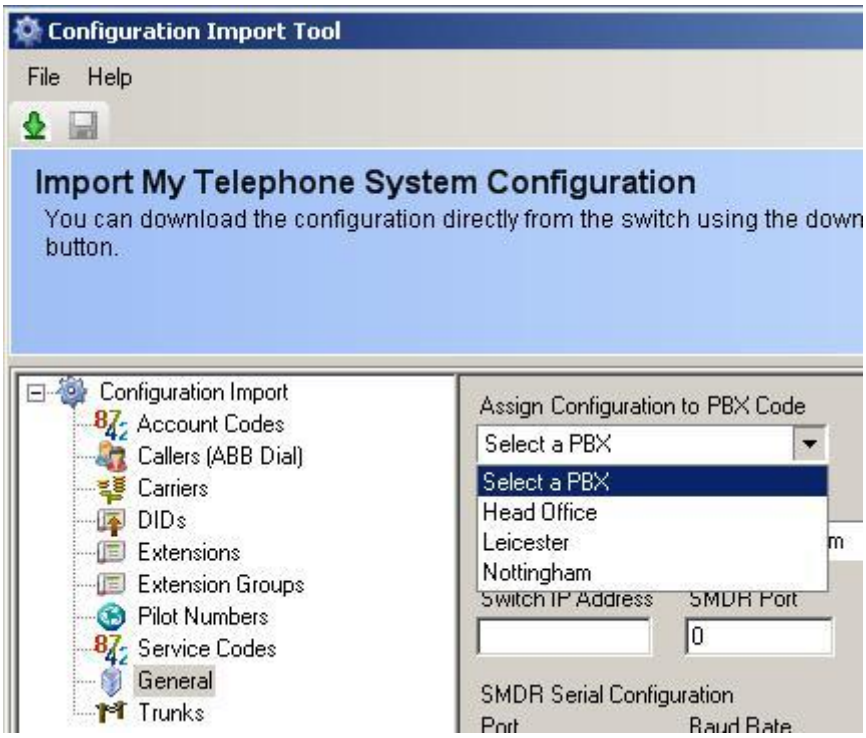
Once you have selected to be a node cluster client, entered the cluster server name and the cluster SQL server, click the 'Reload PBX Lists.' Select the PBX that will be associated with this node cluster client and click OK.

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.

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.



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.

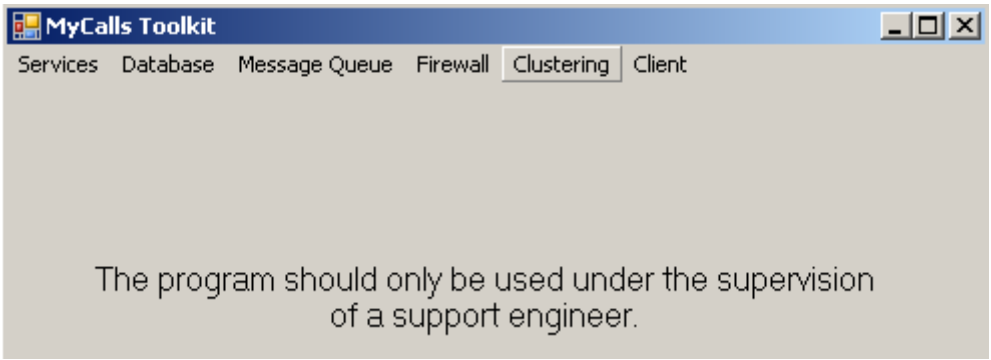
Install MyCalls and Elect the Cluster Server

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

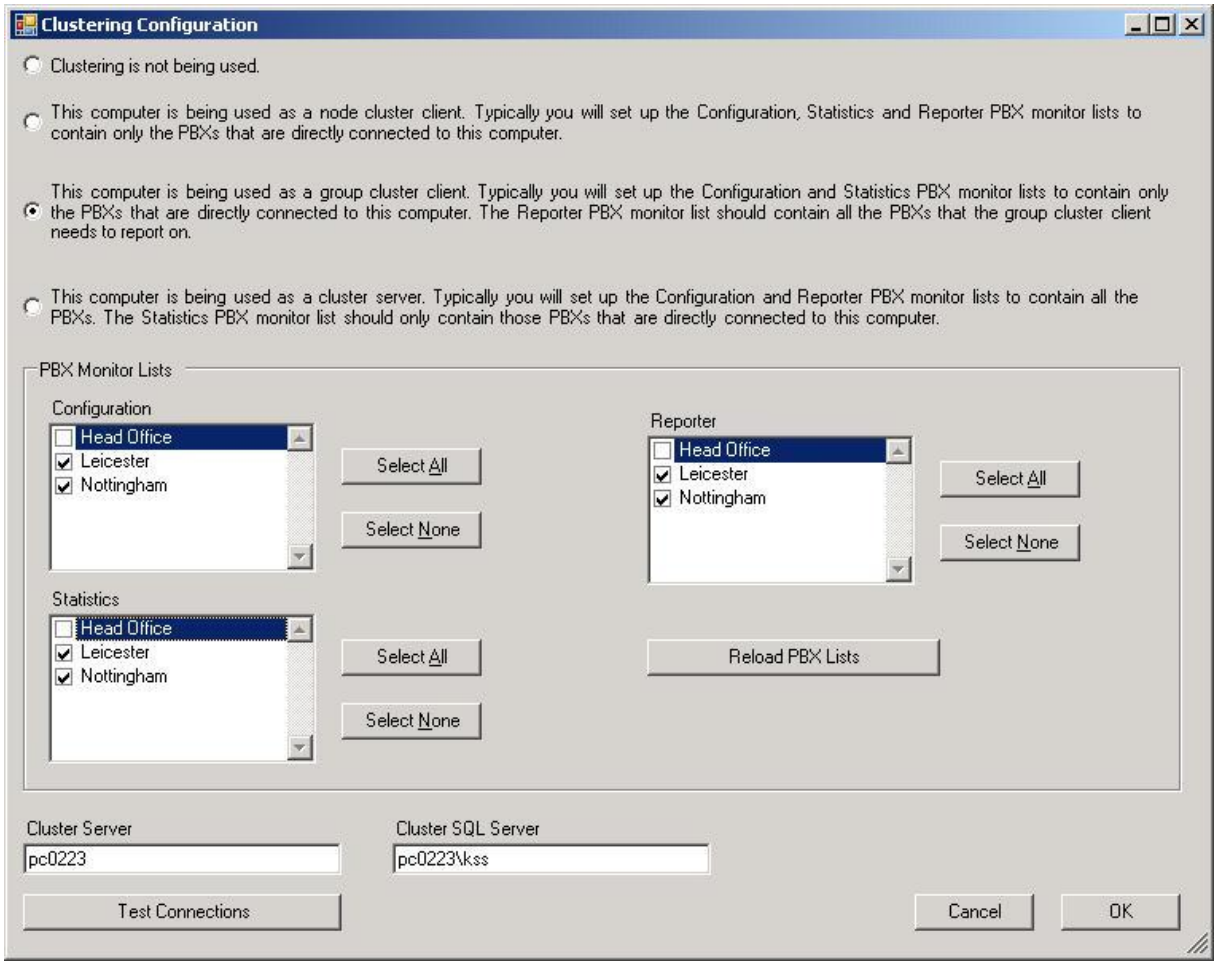
Again this procedure is similar to that from scenario 2. On the Group Cluster Client PC, firstly carry out a complete installation of MyCalls. Once the installation has completed, start the toolkit application from the C:\Program Files\NEC Infrontia\MyCalls folder.

The toolkit application will load.

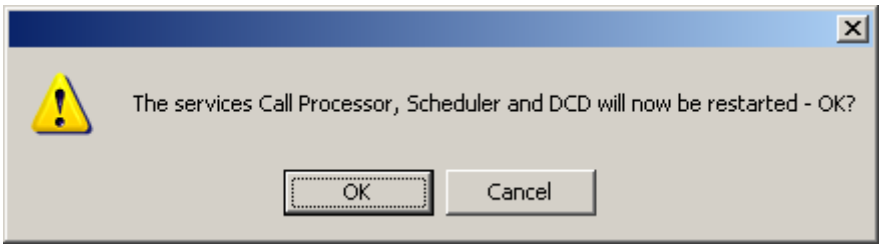


From the toolkit, click the clustering menu. From the Clustering configuration screen select 'This Computer is being used as a group cluster client.' At the lower section of the configuration screen, enter the name of the Cluster Server PC in the Cluster Server box. In the Cluster SQL Server box, enter 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.

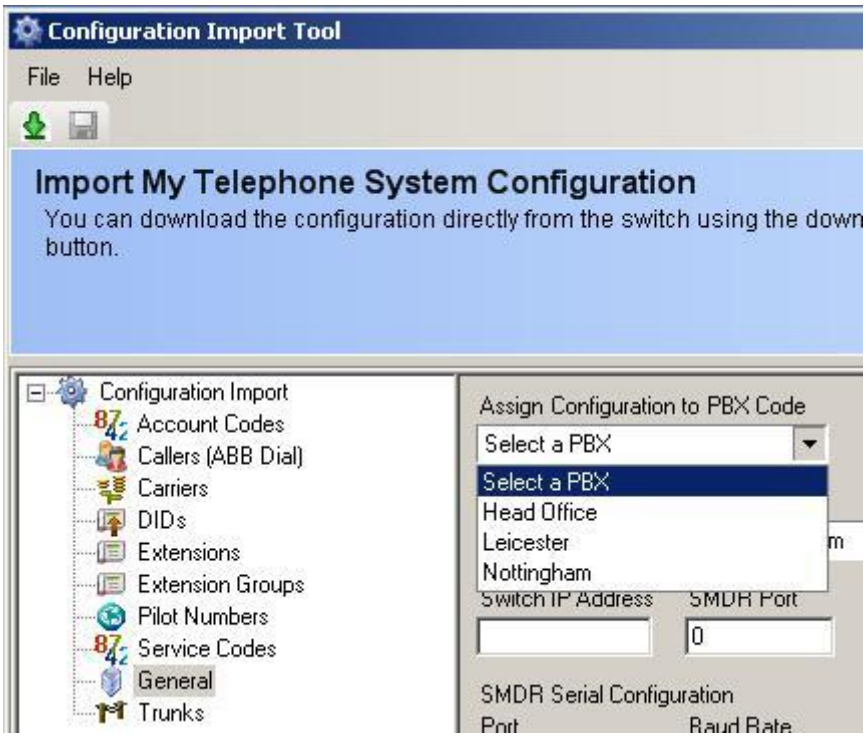


At the Clustering Configuration screen click ok to apply the changes. MyCalls will need to restart its services, click OK to continue.



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

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.



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.

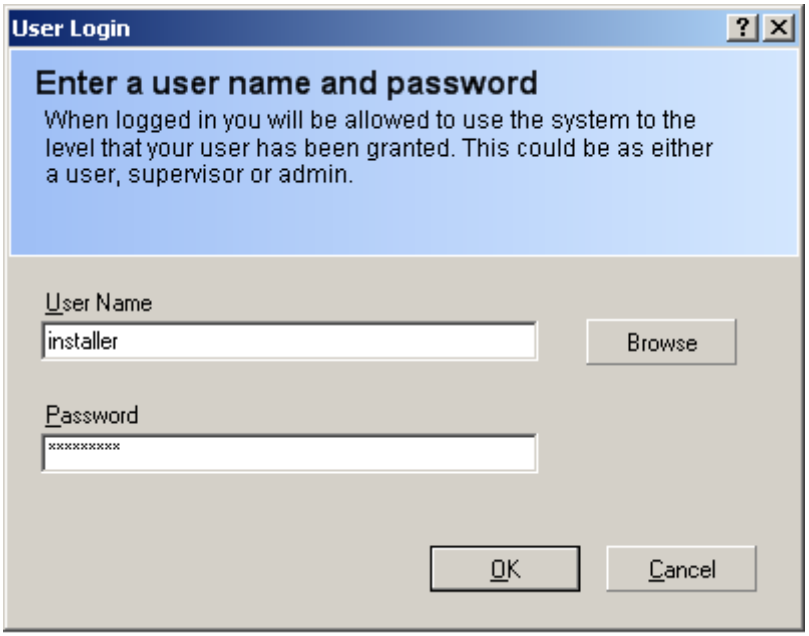
Collector Configuration Application

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.

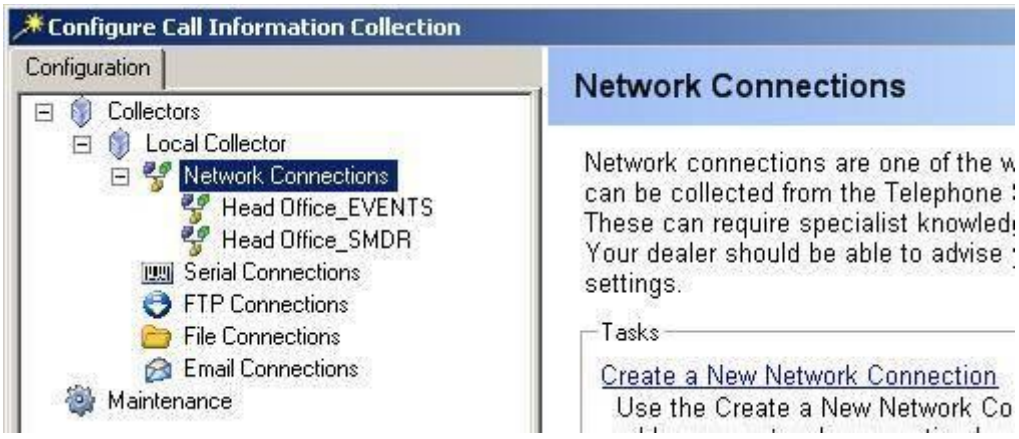
The following procedures can be used to manually add a PBX into a MyCalls installation. You should only really need to do this when it is not possible to use the config import tool. Before adding a PBX, make sure the relevant outputs are programmed correctly on the PBX.

Adding an SV9100

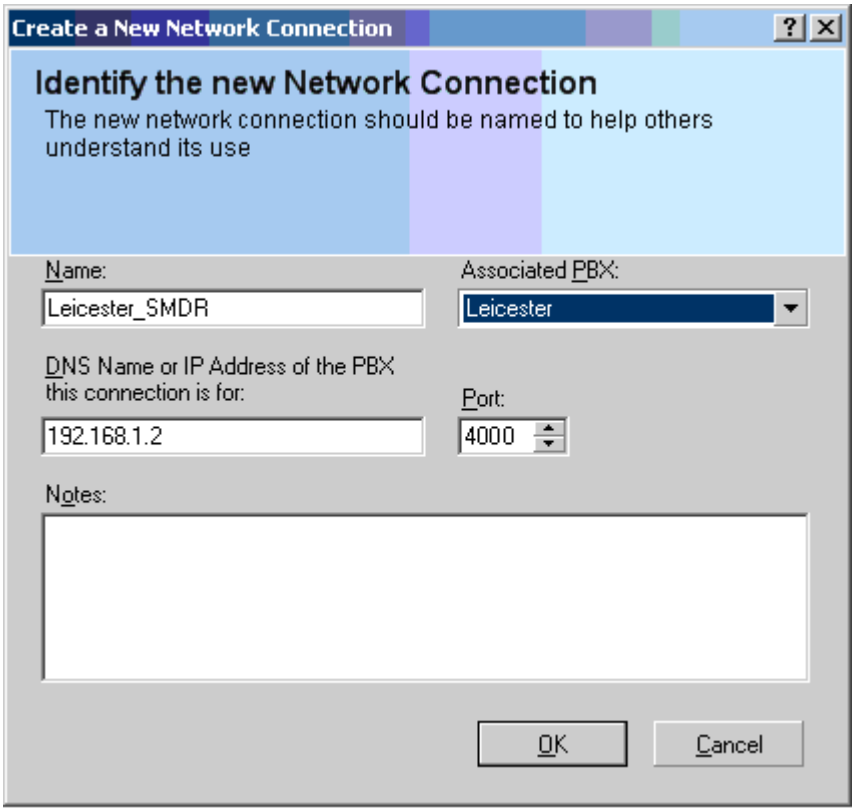
When adding an SV9100, you will need to create two connections, one for P Events and one for SMDR. From the Start/Programs/NEC Infrontia/MyCalls/ menu launch the Collector Configuration application. At the login prompt, enter the User name 'installer' and password 'Installer' note: the password has a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



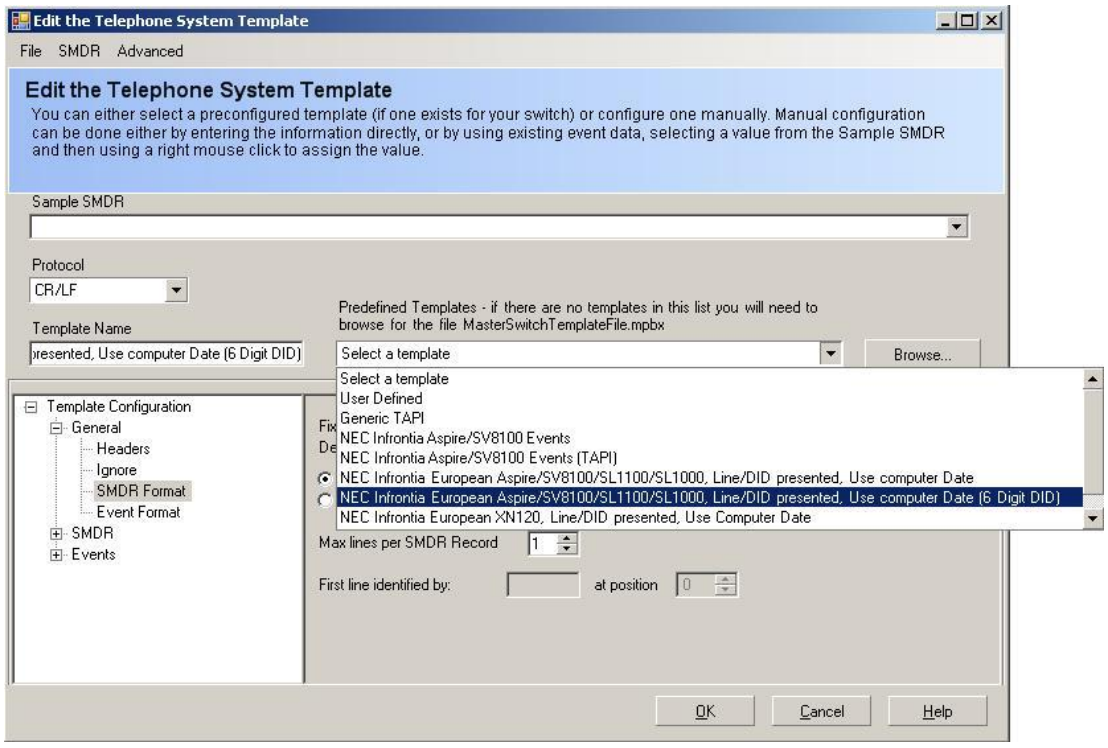
Expand Collectors / Local Collector / Network Connections and click 'Create a New Network Connection.'



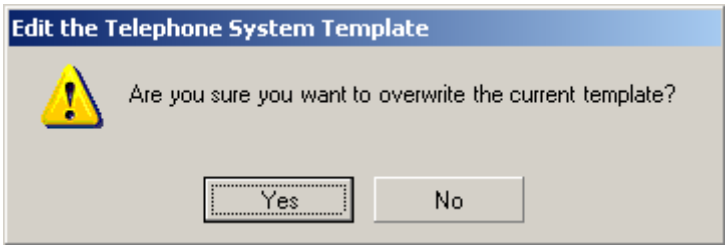
The first connection will be used for SMDR, so enter a meaningful name describing the PBX and the connection type. From the Associated PBX drop down menu, select the PBX you are configuring. Enter the IP Address for the PBX and the port number for the connection. Once you have configured each of the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



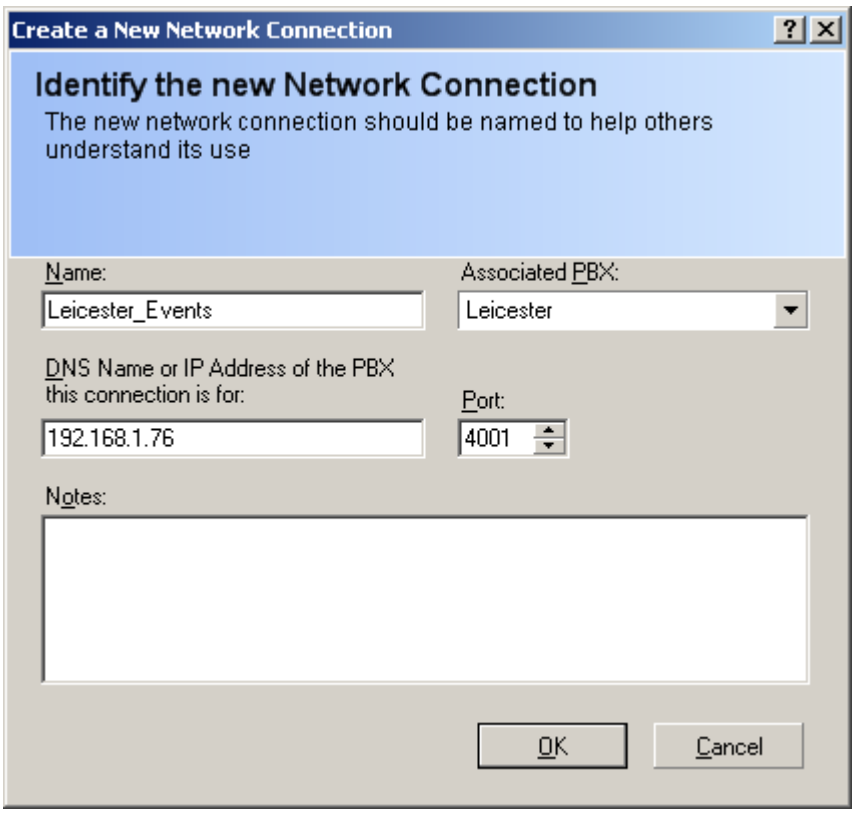
Locate the connection that you have just created and click on 'Edit Telephone System Template.' From the drop down menu select 'NEC Infrontia European Aspire/SV9100/SL1100/SL1000, Line/DID presented, Use Computer Date 6 Digit DDI' from the drop down menu.



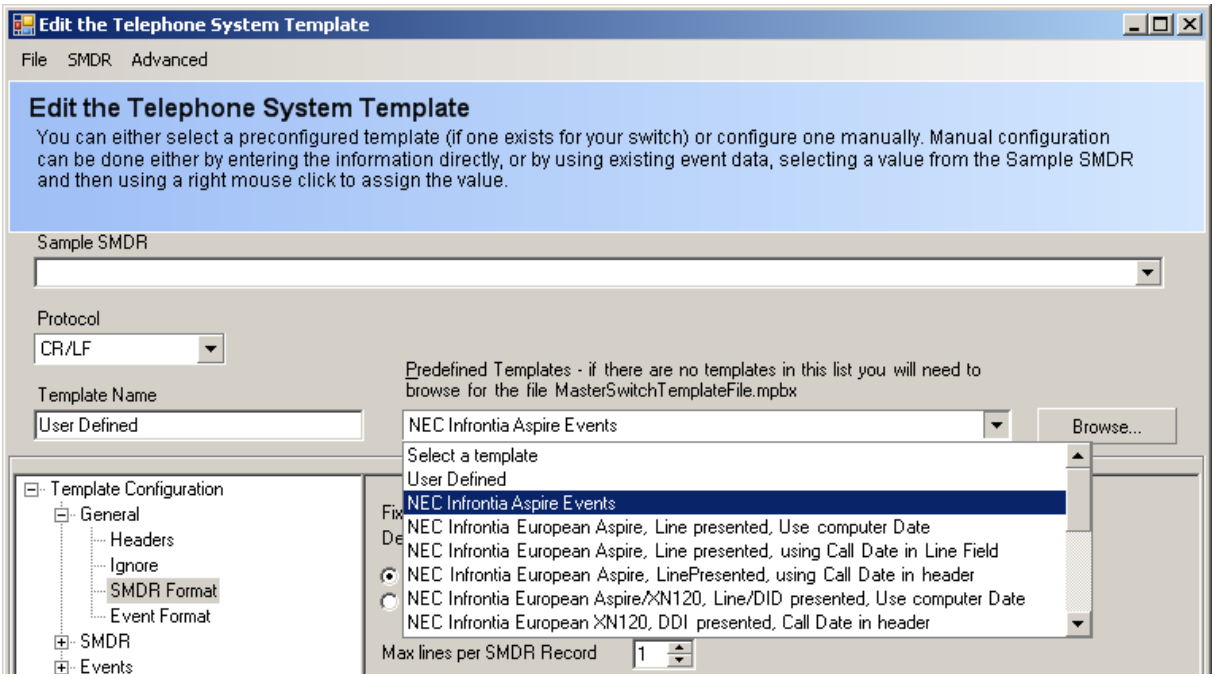
You will be ask if you wish to overwrite the current template, click yes and then OK.



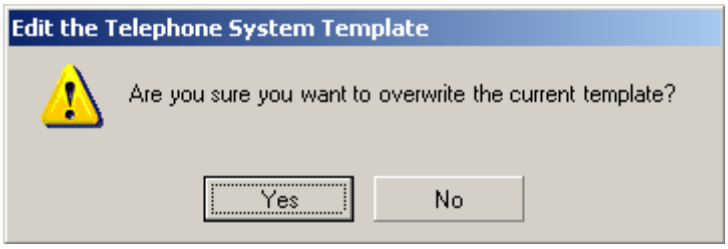
The connection for the SMDR has now been created. There is a similar procedure for creating a connection to the P Events. Start by creating a connection for the P Events and giving it a meaningful name relating to the PBX and the connection type. Proceed to select the associated PBX, enter the IP address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



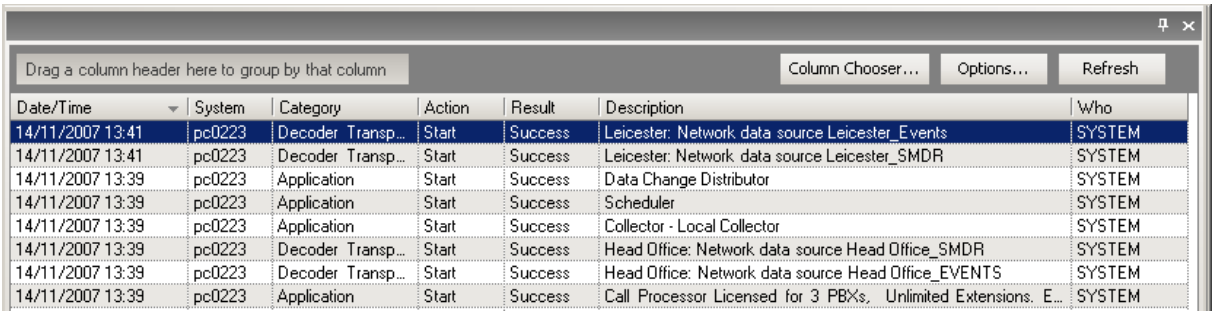
Locate the connection that you have just created and click on 'Edit Telephone System Template.' From the drop down menu select 'NEC Infrontia Aspire/SV9100 Events' from the drop down menu.



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

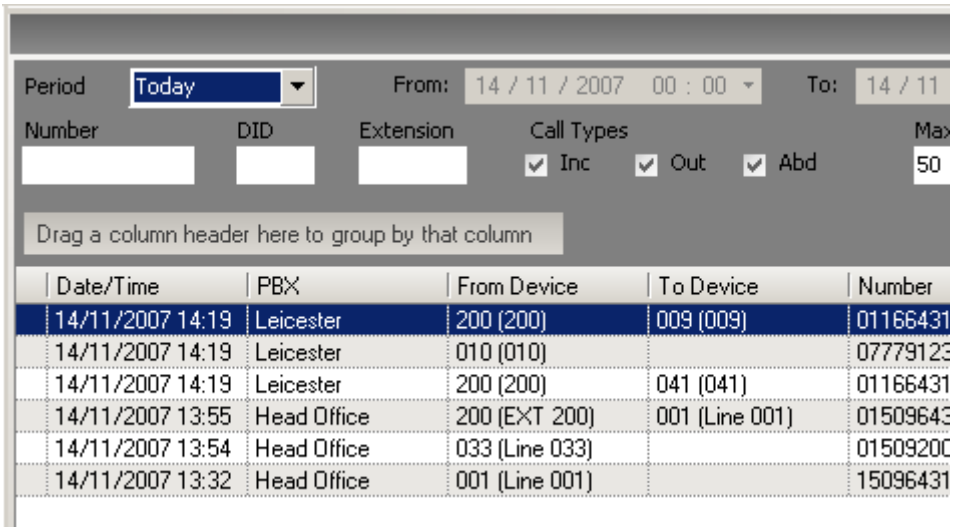


Click 'Close' to shutdown the Collector Configuration Application and start MyCalls. From the view menu select Audit Log Window.



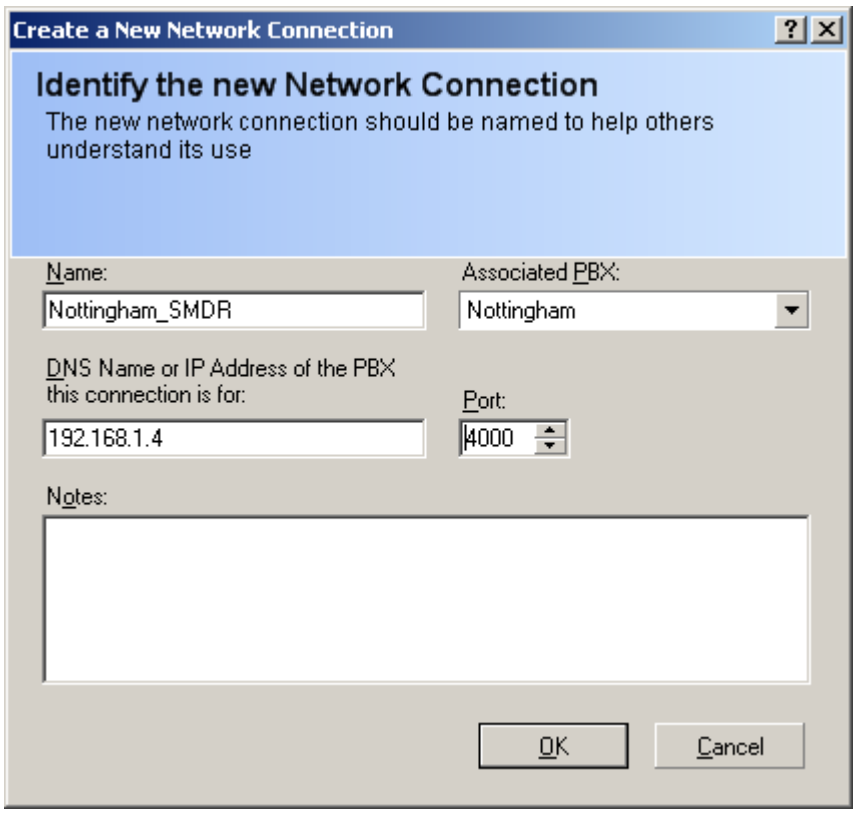
Review the audit log and make sure the connections that were created have started successfully. If they do not start check the PBX programming and review the IP address and port numbers entered in the collector configuration application.

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

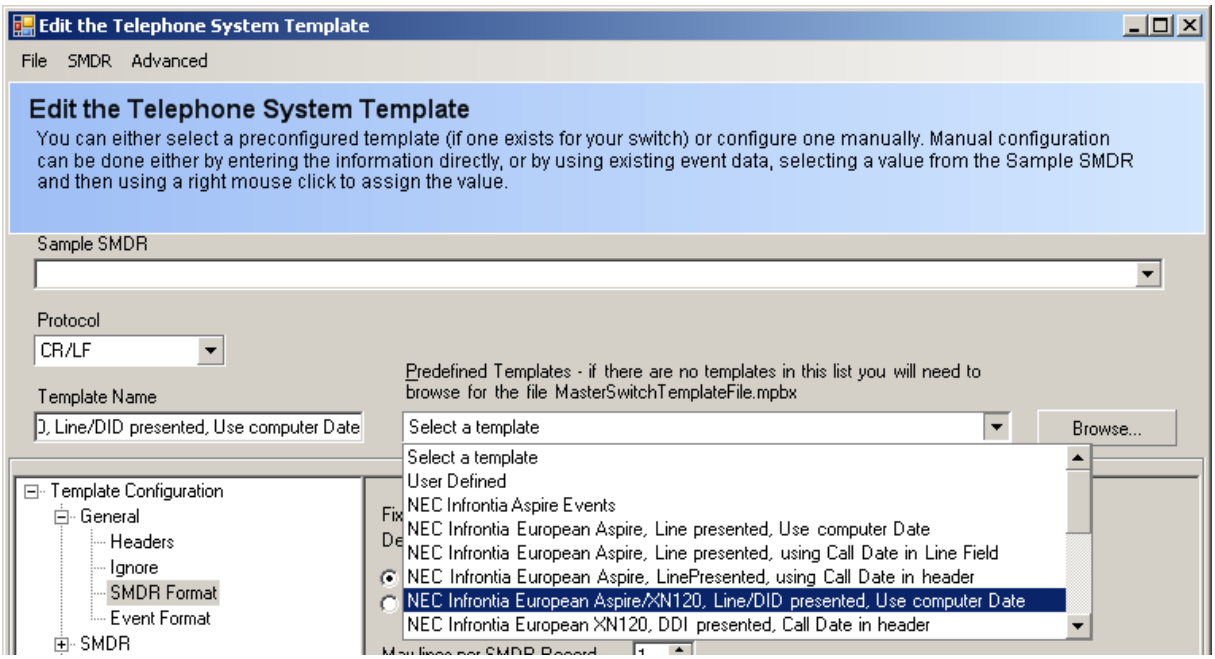


Adding an SL1100 / SL1000

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.

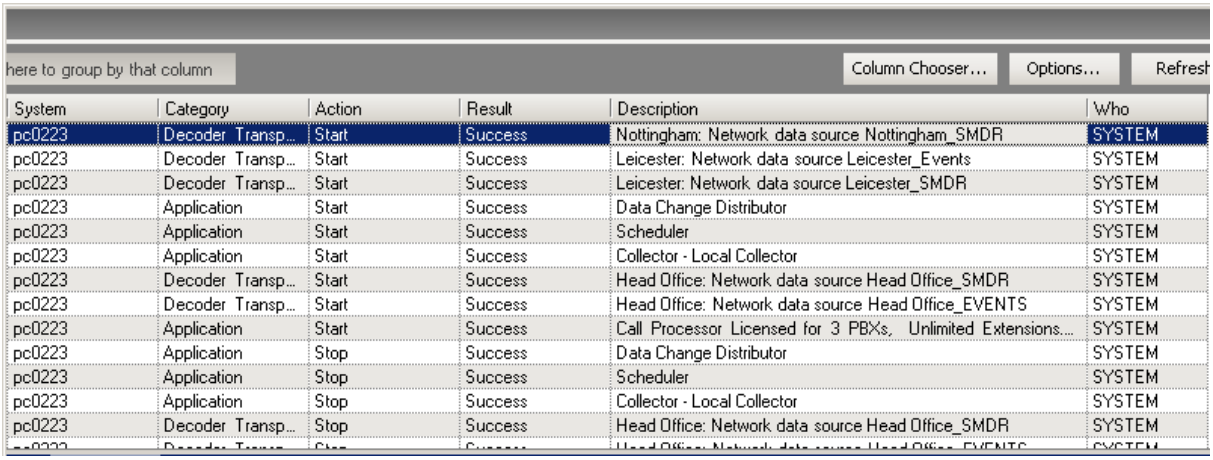


Select the connection that you have just created and click 'Edit Telephone System Template.' From the drop down menu under Predefined Templates, select 'NEC Infrontia European Aspire/SV9100/SL1100/SL1000, Line/DID presented, Use Computer Date 6 Digit DDI'



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.



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

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

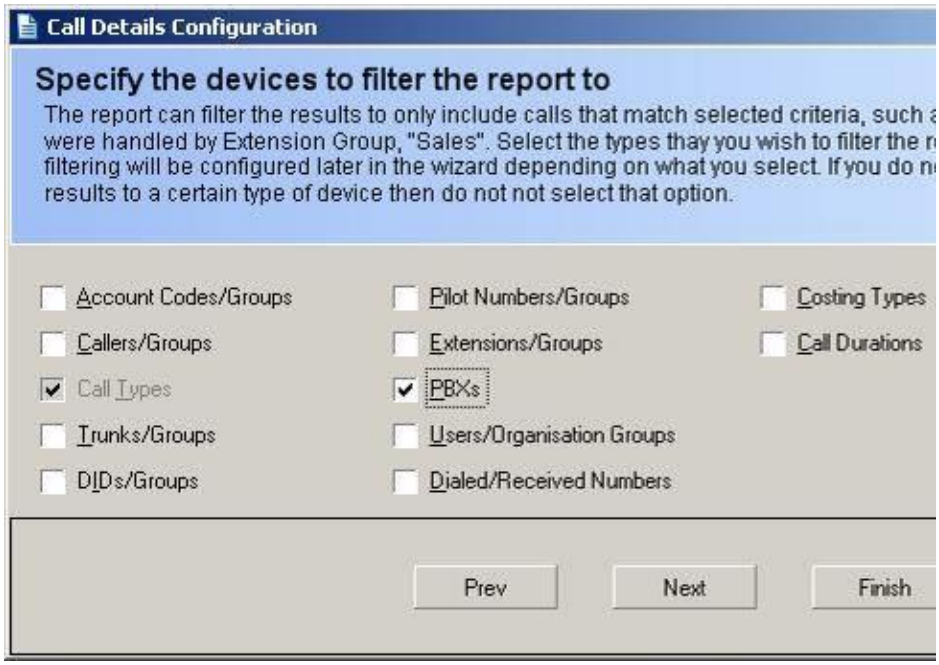
Using MyCalls Enterprise

Real Time Windows

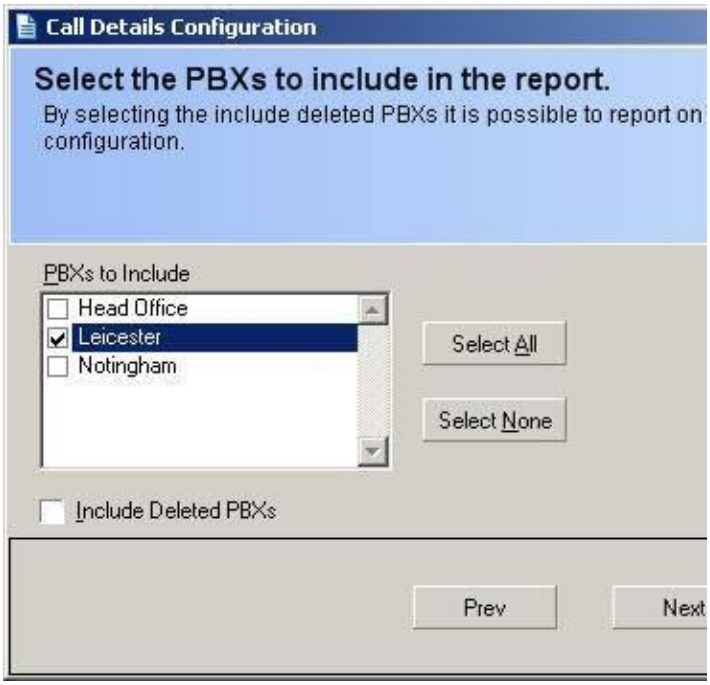
When creating real time windows, you can select which PBX's they will be for. If you are in a clustered mode, you will only be able to create real time windows for PBX's you have checked statistics for in the toolkit.

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.



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



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.

Users

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.

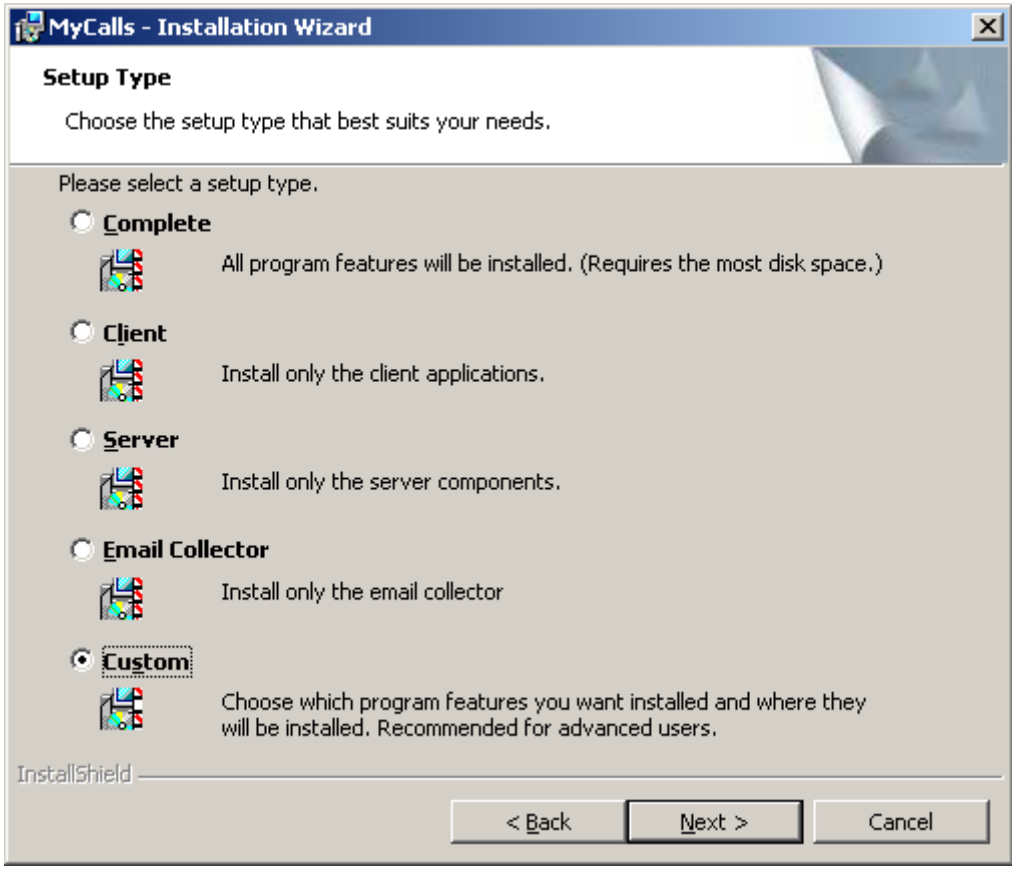
It is also possible to install the MyCalls databases into an existing SQL Server environment. For example, if a customer asks you to install MyCalls onto a PC that already has SQL 2008 R2 on, you can install MyCalls, asking it to create its own database within the SQL2008 R2 server. You will require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

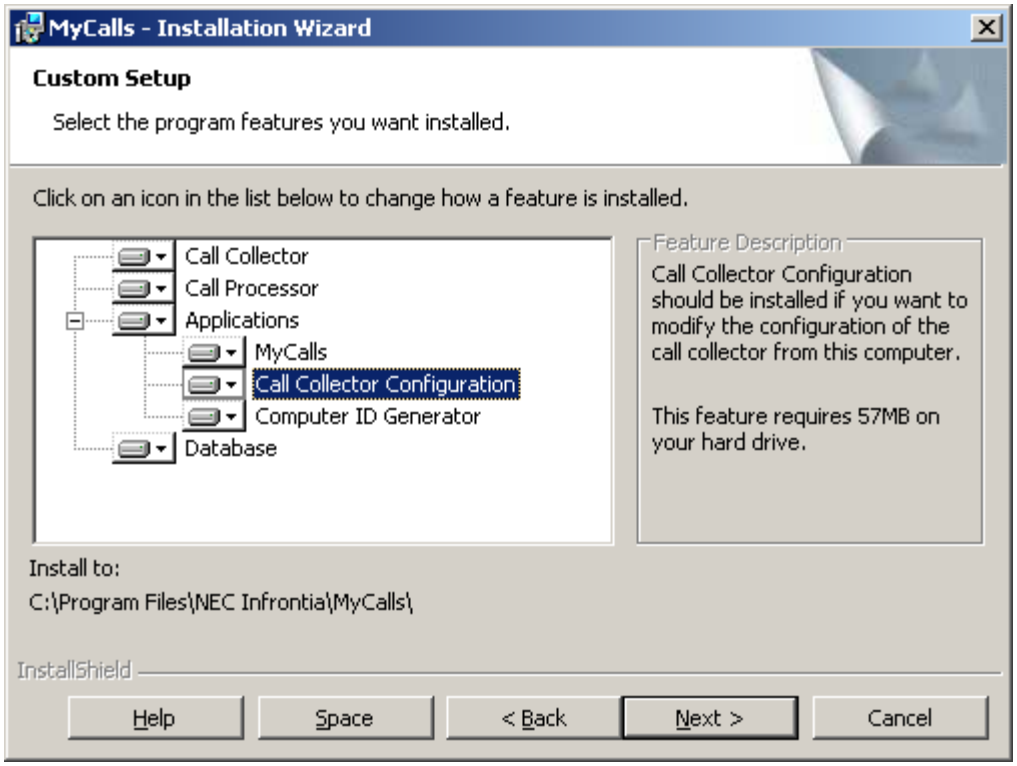
Installing the MyCalls and the MyCalls Database on a SQL 2008 R2 Server

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

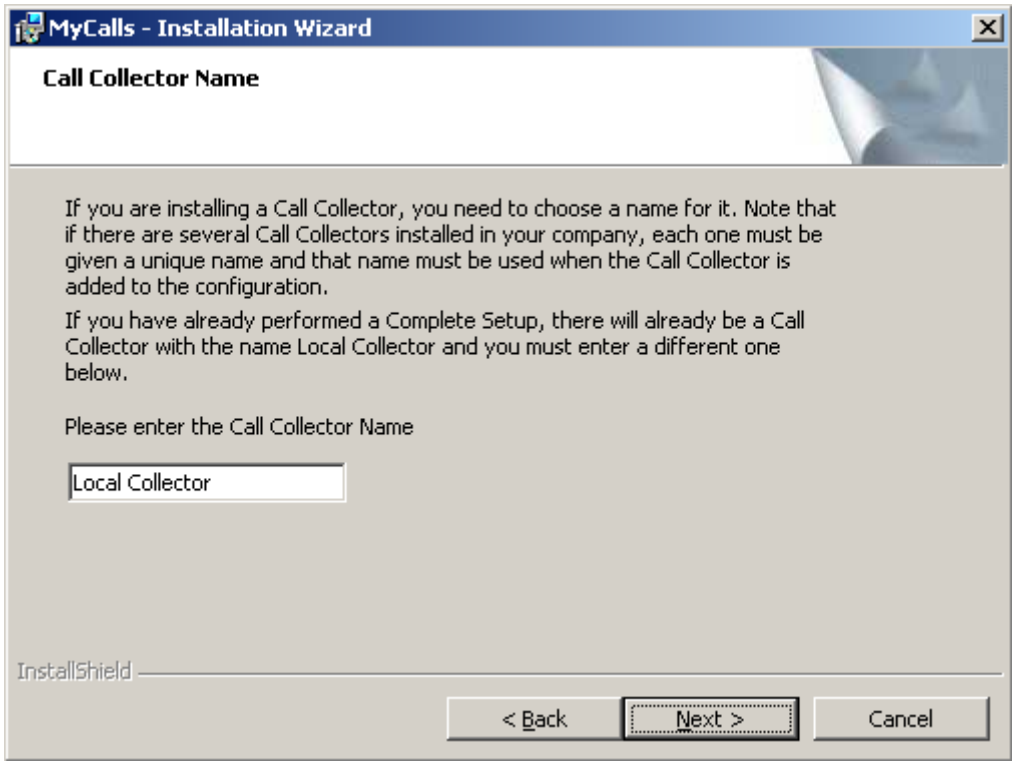
Start the MyCalls installation wizard, from the installation type screen, choose a custom installation type.



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

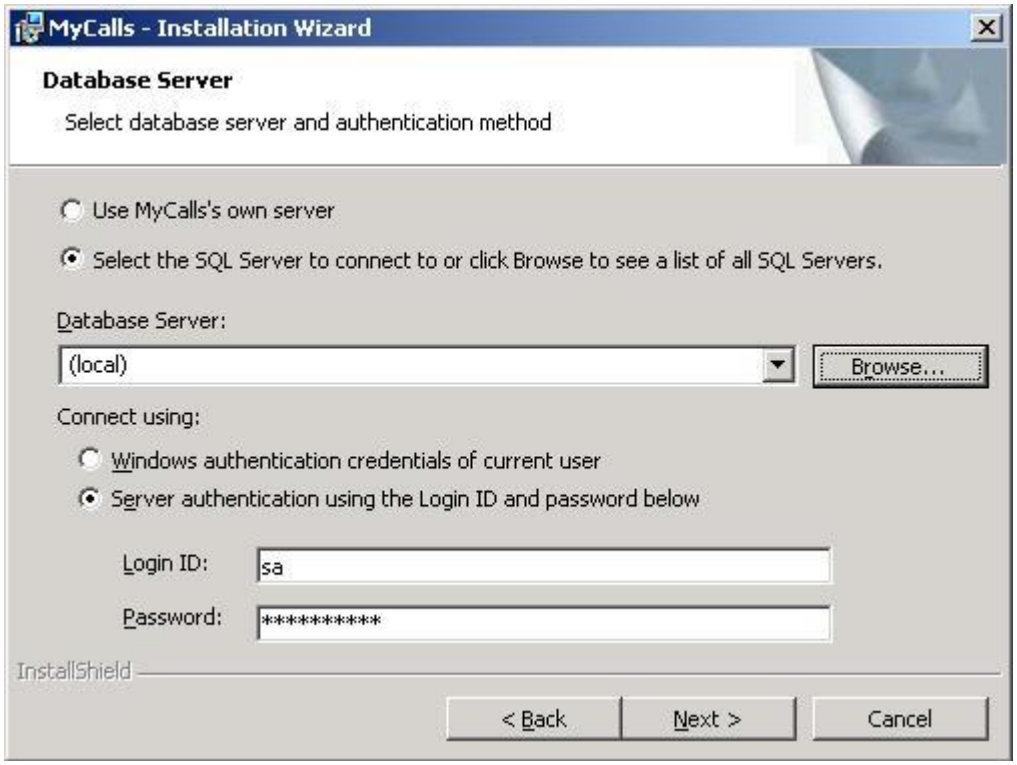


At the collector screen, leave the name as Local Collector and click next.

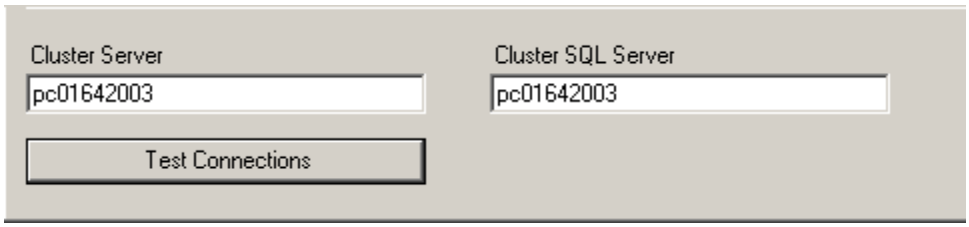


At the database server screen, select the option to 'Select the SQL Server to connect to or click Browse to see a list of all SQL Servers.' Click the Browse button and select the database server from the list provided. If the database if going to be installed on to a default instance on the SQL server 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.



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.



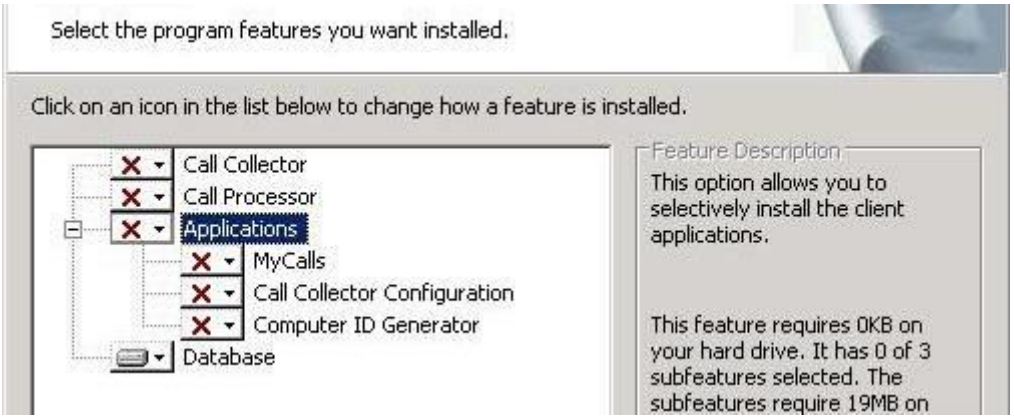
The Cluster Server will always be the PC elected as the cluster server.

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.

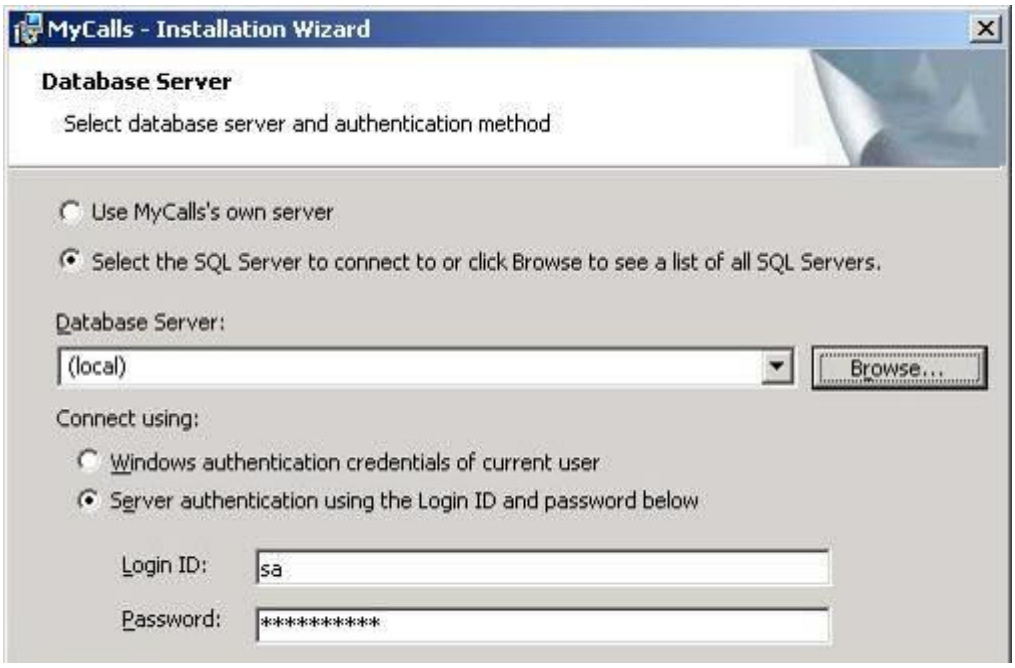
Installing the MyCalls Database

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

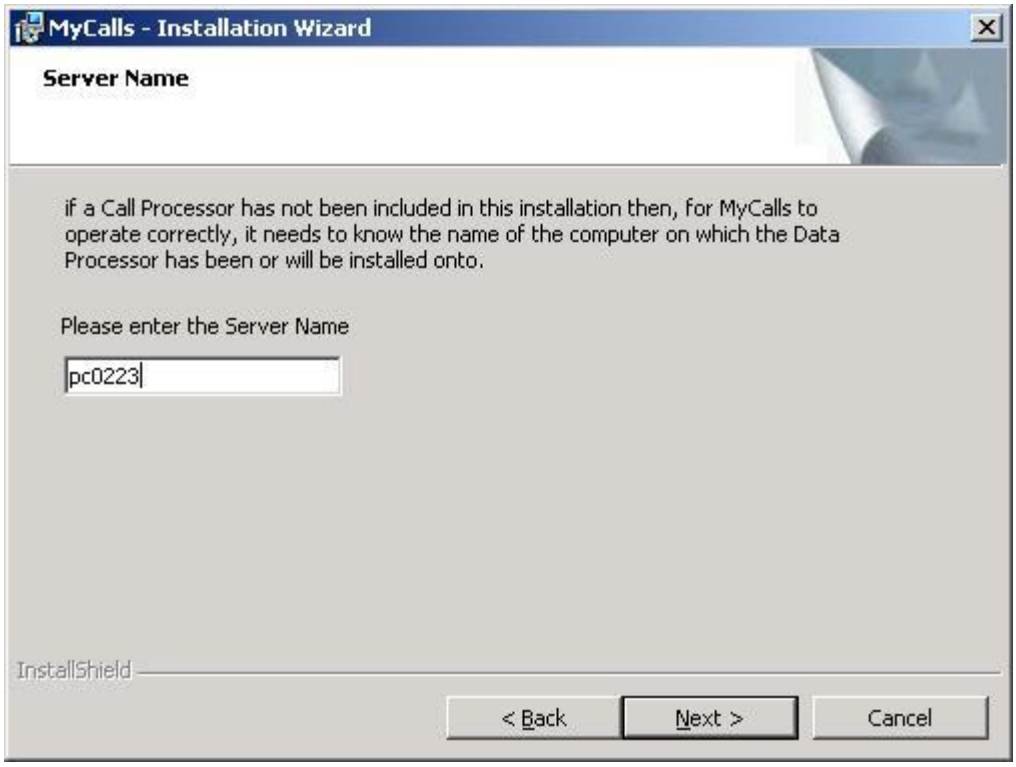


At the database server screen, select the option to 'Select the SQL Server to connect to or click Browse to see a list of all SQL Servers.' Click the Browse button and select the database server from the list provided. If the database if going to be installed on to a default instance on the SQL server 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.

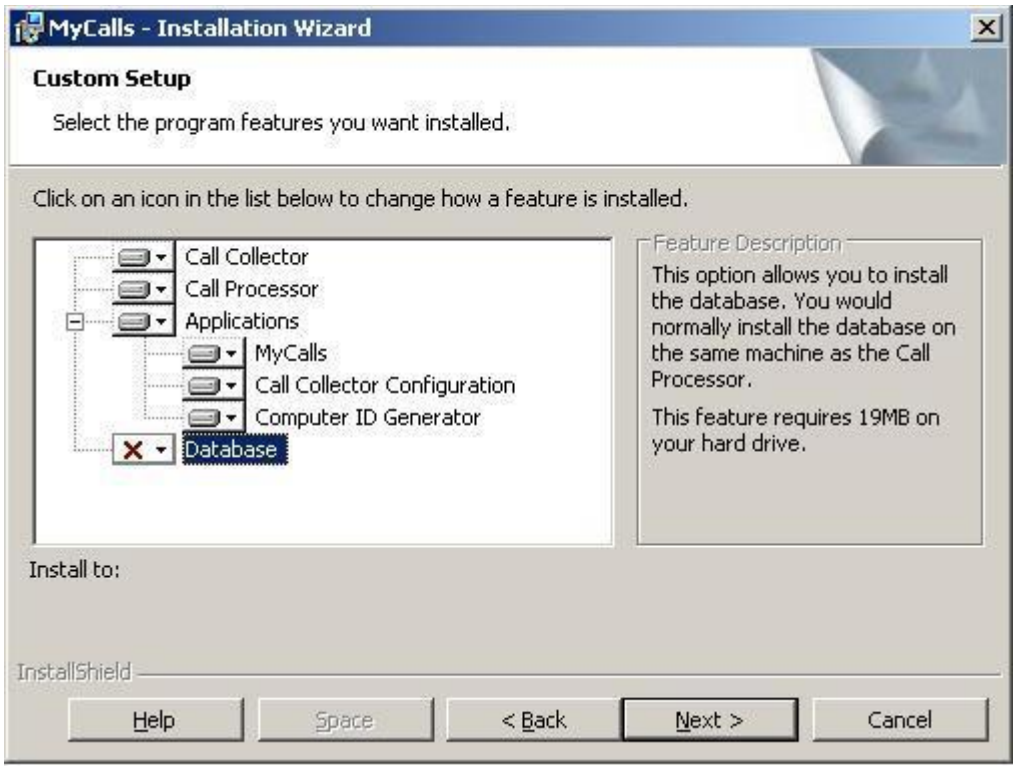
Then choose the option to connect using Server authentication using the Login ID and password below. Enter an appropriate login ID and password which will allow you to connect to the SQL Server.



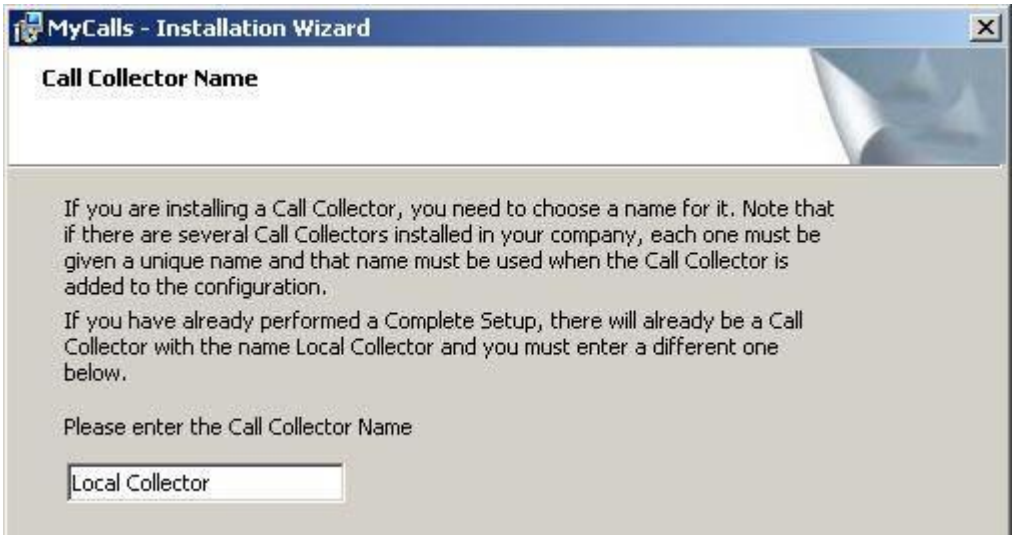
Click next until you are prompted to enter a server name. The server name will be the PC name of the computer that will have MyCalls installed on. Enter the name and click next.



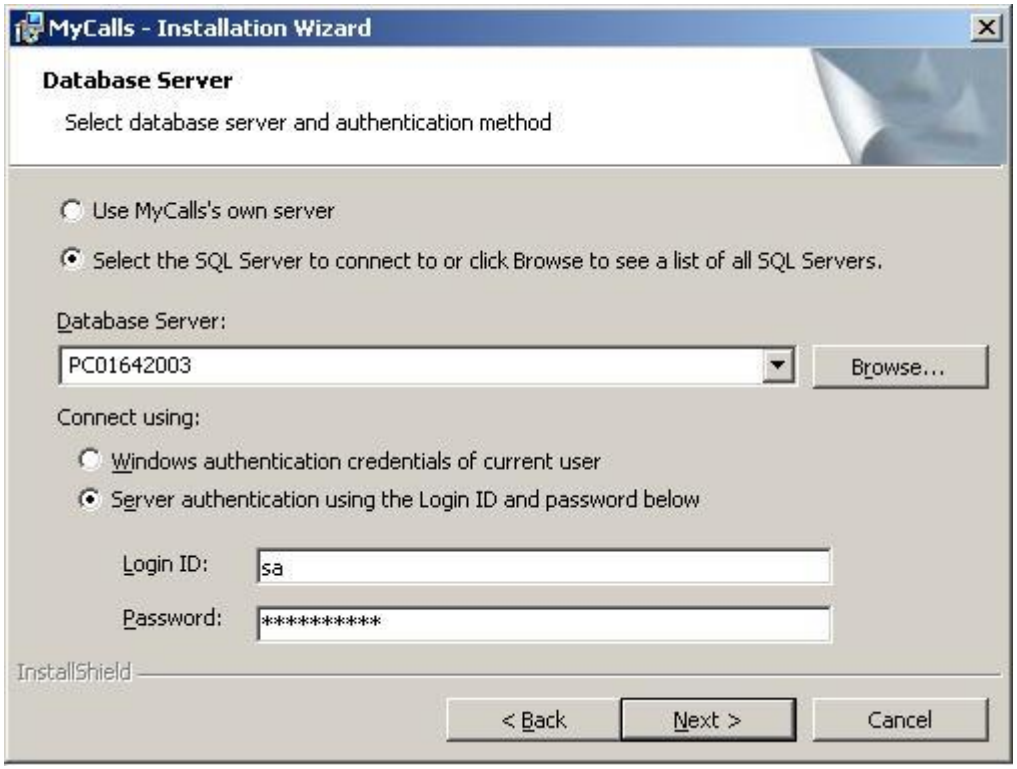
The MyCalls database will be installed and ready for use. On the PC that will be the MyCalls server, start the MyCalls installation and choose a custom installation type. Choose to install all components except for the Database.



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



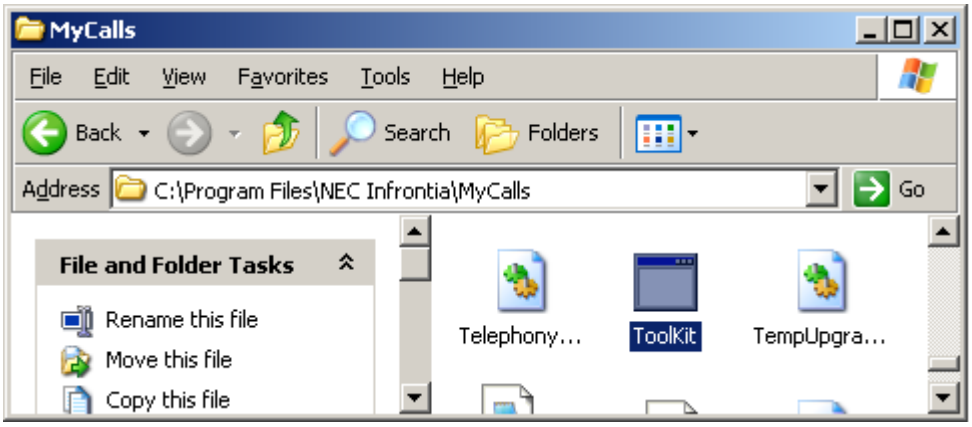
At the database configuration screen, choose to Select the SQL Server and click browse. When you click browse, select the PC name that the MyCalls Database is installed on. If the MyCalls database was installed into a named instance, then select the PC name followed by *instancename*. Once the database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



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

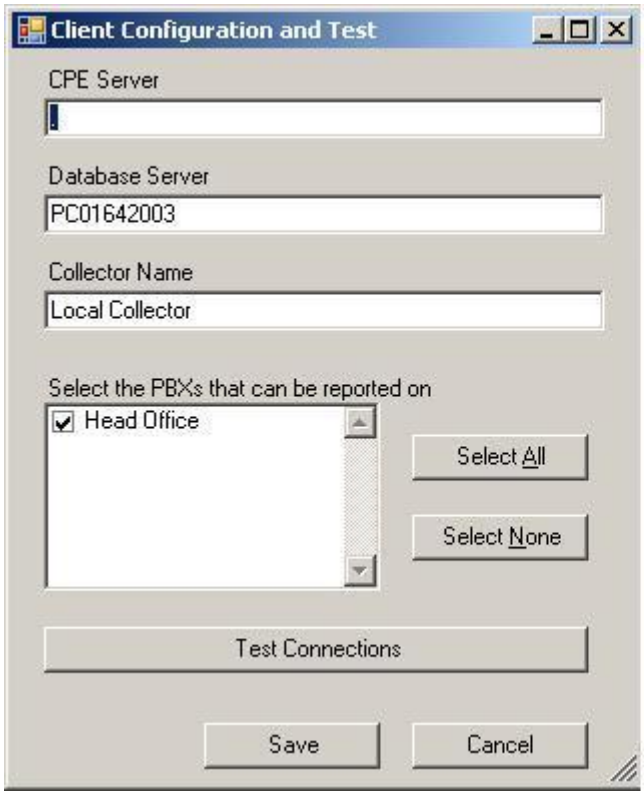
Testing The Connection to the MyCalls Database

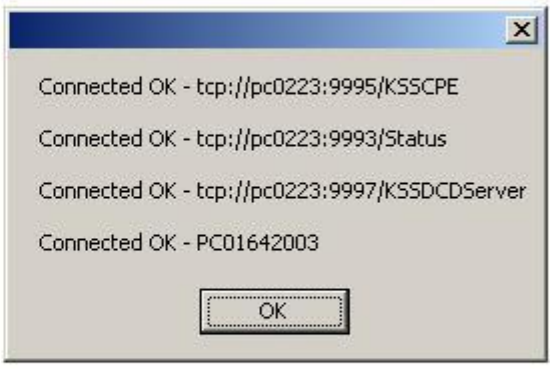
To test the connection to the MyCalls Database, start the toolkit application from c:\program files\necinfrontia\MyCalls folder.



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

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.





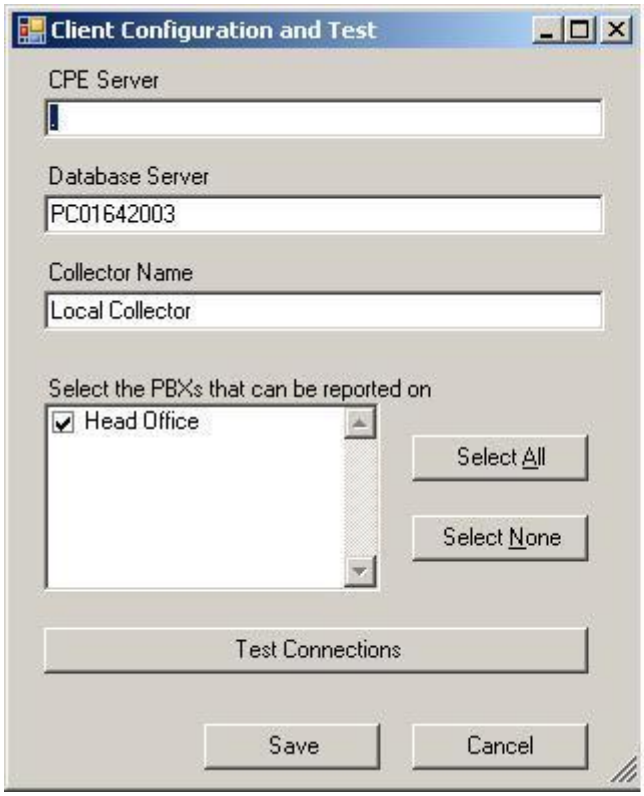
Client Installations with Custom Installations

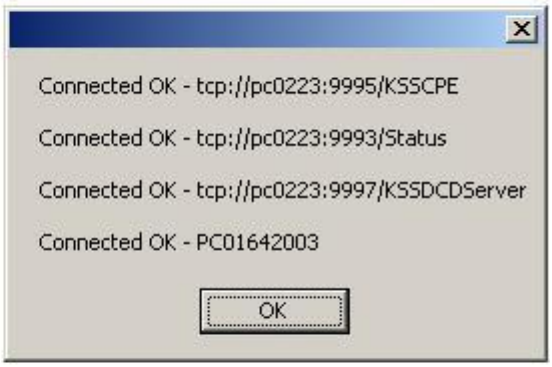
If a custom installation has been carried out then there is an extra configuration step after installing a client. When the client is installed the MyCalls server name is entered, if the database is on a different PC then this has to be entered in the toolkit after the client has installed. To do this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

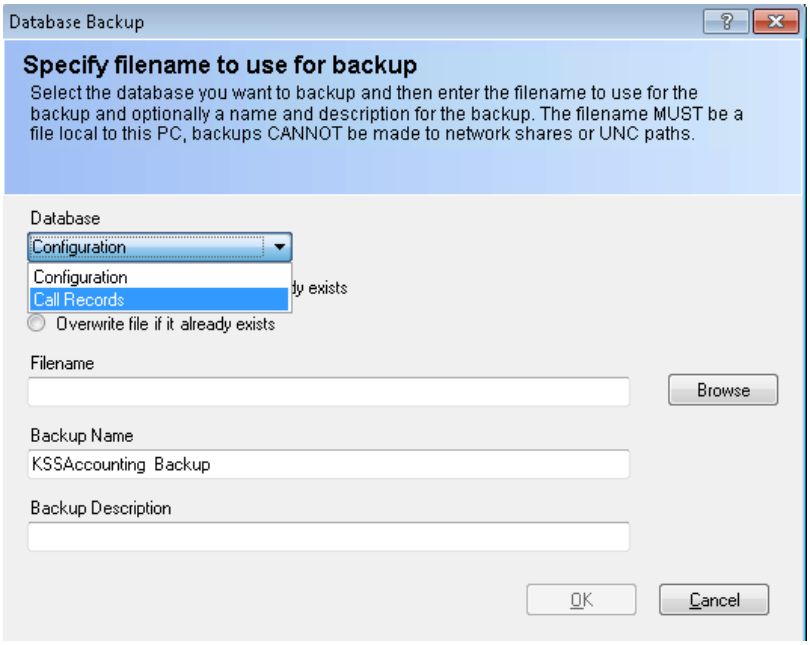
The client and configuration and test screen will load, enter the name of the database server in the appropiate text box, specifying an instance if required.





Backup and Restore

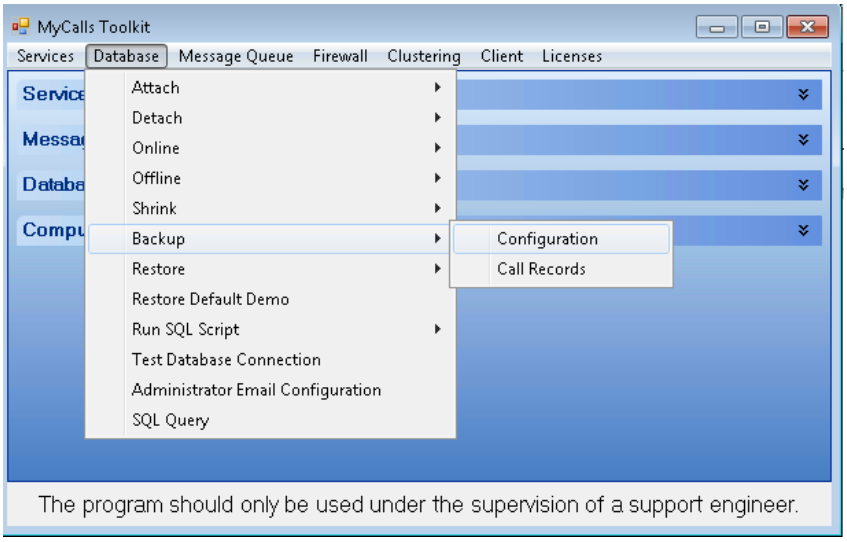
MyCalls stores all of its configuration and calls in the MyCalls databases, these are two separate databases. With a backup of these databases, MyCalls can be restored on to another PC. You can only restore a database from the same version of MyCalls, so if you have a version 3.0 MyCalls, you cant restore 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 seperately.



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

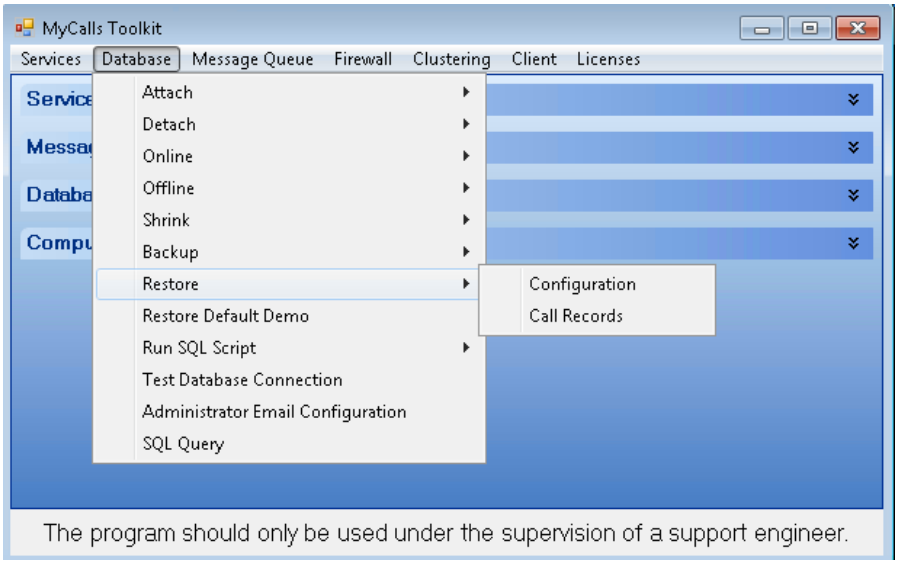
C:\Program Files (x86)\NEC Infrontia\MyCalls\tookit.exe

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



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.



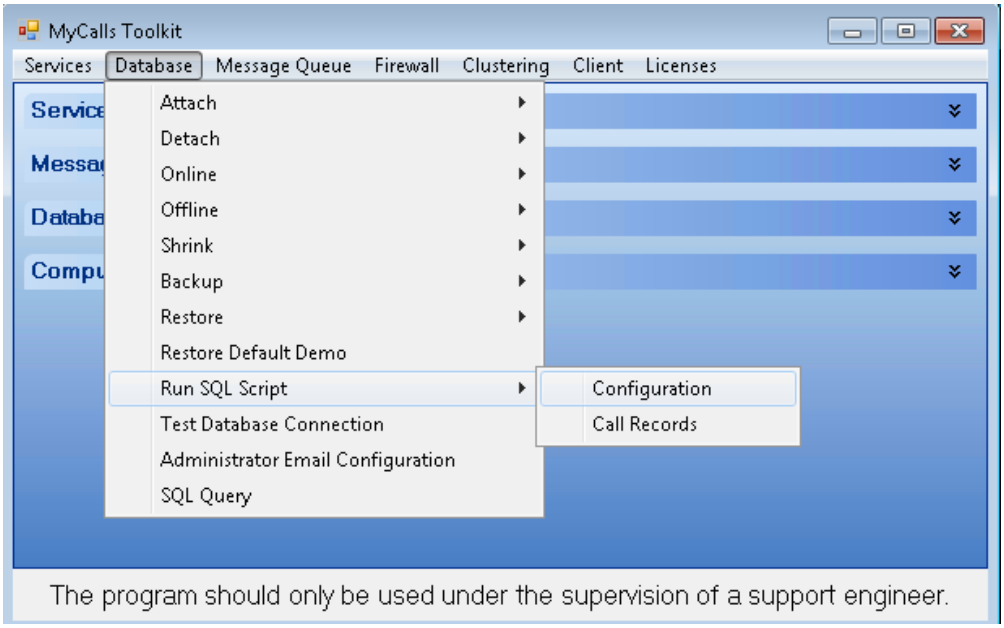
Browse to the file that will be restored and click OK. Before the process actually begins, the toolkit will stop each of the MyCalls in turn. After both databases have been restores you need to start the services again, this can be done in Services > Start > All.

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:

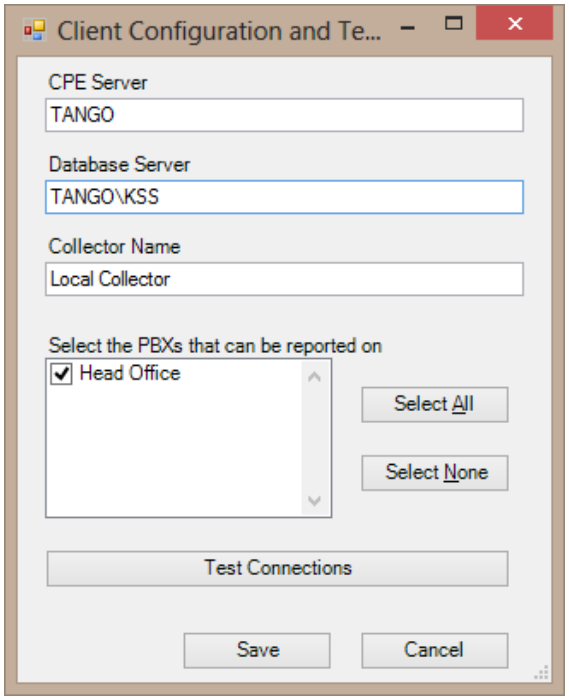
```
update reportdistriblists set cpeserver = 'TANGO'
update reportitems set cpeserver = 'TANGO'
update reportschedules set cpeserver = 'TANGO'
```

Once the file is correct and saved, open the toolkit and from the Database menu choose Run SQL Script > Configuration.



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.



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.

LIABILITY DISCLAIMER
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