

CallAnalyst Enterprise – CallAlert (Version 2.3)

CallAlert User Guide

Trivium Systems, Inc.

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1. Introduction to CallAlert

CallAlert comes along with TriVium System's CallAnalyst, the call tracking and accounting program. Used with your phone system, CallAnalyst records all inbound and outbound calls for later reporting and analysis.

In certain cases, a more immediate response to certain calls is needed. CallAlert monitors all calls in real-time and activates alarms based on the user-defined conditions. These conditions or triggers are the core of CallAlert. You can set up as many triggers as you want and can activate as many alarms as you want. Triggers that are activated are logged for historical reference and trend analysis.

Since most phone systems send out call records after the call is completed, CallAlert can react only after the call is over. CallAlert does not stop a "fraudulent" call that is in progress.

How CallAlert Works

The section assumes that you are familiar with the basic functionality of CallAnalyst.

CallAnalyst consists of two separate programs, which work together. To keep the PC resource usage to a minimum, the reporting and data collection programs are split into two.

1. CallAnalyst is the reporting tool and needs to run only when you make reports or other inquiries for the call activities.
2. Call Data Monitor (CDM) is the data collection part of CallAnalyst. It runs all the time to capture phone records that are sent from the phone system. CDM gathers phone records, save them to a database and send them to other programs like Call Alert. CDM do not use lot of PC resources to operate.

CallAlert, like CallAnalyst also consists of two separate programs, which work together.

1. CallAlert.exe. that manages the setting up of Triggers and alarms
2. CallAlarm.exe waits and watches the specific call records, which match a pre-defined set of criteria (Triggers). Once a trigger is evoked, the associated alarms are activated.

2. Getting Started

Starting the Application

To log on to CallAlert

- Click the Windows **Start** button, point to **Programs** and then click **CallAlert** from the **CallAnalyst Enterprise - CallAlert** shortcut folder.

The **Login Details** window appears. The login is necessary for CallAlarm and CallAlert Reports, if started from shortcut folder.

- Enter the user name and the password. If you do not have this information, contact your System Administrator.

Some of the functionalities in CallAlert are enabled only if you login as an Administrator. They are as follows:

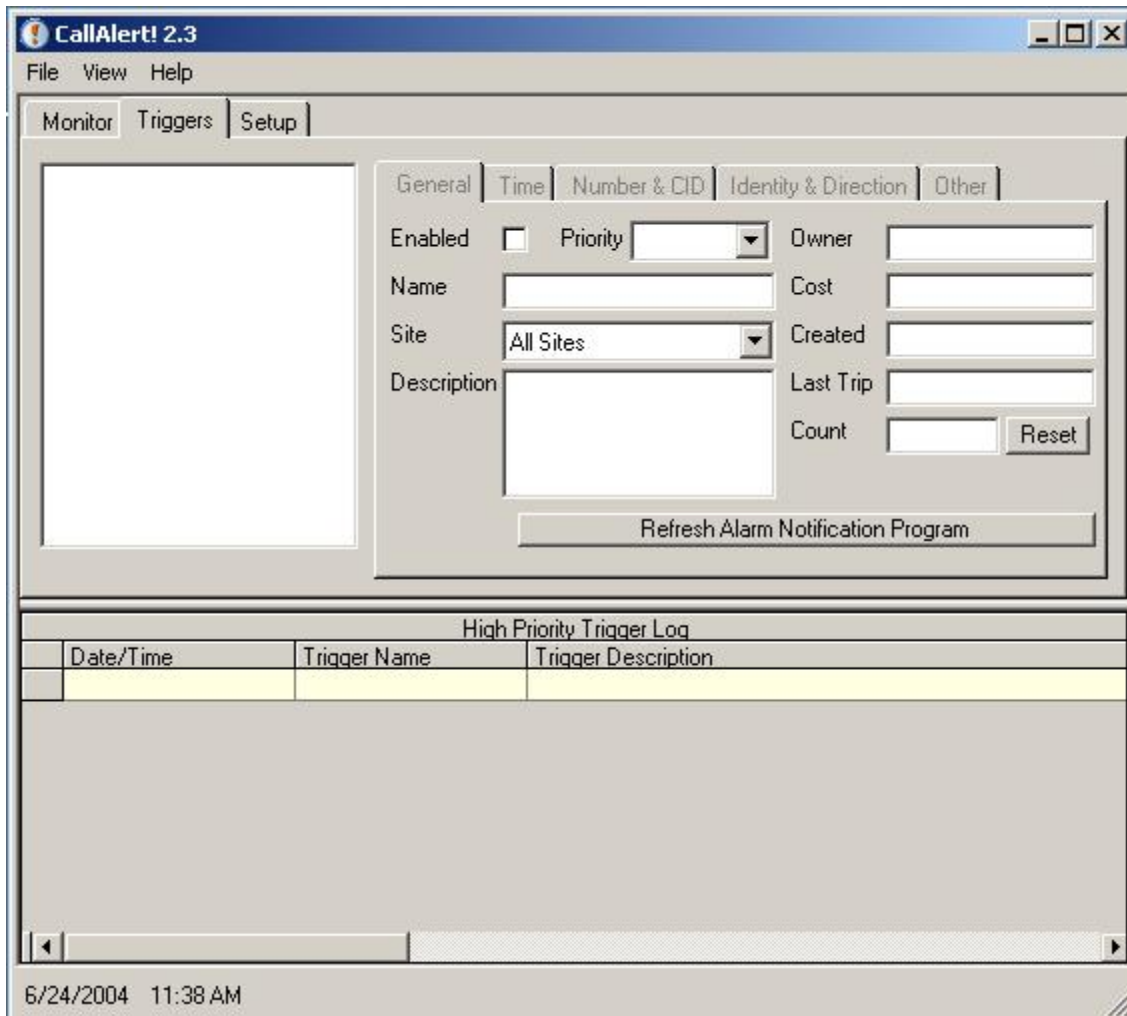
- Trigger/Setup tabs
- Create Trigger/Alarm menu options

- Delete logs menu options

Some of the functionalities in CallAlert are available both for the Administrator and Business Users. They are as follows:

- Reports (Can see data related to triggers with site associated to the user)
- Monitor tab/Graphs enabled (Can see data related to triggers with site associated to the user)
- Click **OK**.

The main **CallAlert!2.3** window appears.



Understanding the User Interface

CallAlert allows you to set triggers and alarms for various calls. It also allows you to monitor these triggers successfully.

CallAlert main window displays the following tabs:

- **Monitor:** The tab page displays the graphs for all the triggers. You can modify the characteristics of these graphs, if required.
- **Trigger:** The tab page allows you to set triggers and alarms for all the calls. By default, this tab is displayed. For details see Introduction to Triggers.
- **Setup:** The tab page allows you to setup the CallAlert. For details see Introduction to Alarms.

Each tab page shows a history of all the high priority triggers that have occurred. By default, the triggers are ordered by date and time. You can also sort the trigger-by-trigger name.

Setting up CallAlert

You can perform the following setup in CallAlert:

- Timer settings for alarms
- Pager settings to send messages to your pager.

To setup the CallAlert

1. Click the **Setup** tab.

The setup tab page appears.

CallAlert! 2.3

File View Help

Monitor Triggers Setup

Timer Settings

Popup Duration (s) 1

Inactivity Interval (h) 1

Pager Setup

Enable Pager Support

Hardware [Dropdown] Dialing Properties

Retries 4 Delay Between Retries (s) 1

CallAnalyst Server Settings

Server name or IP Address 10.1.1.41 Test

Mail Settings

Profile Name MS Exchange Settings Test

High Priority Trigger Log

Date/Time	Trigger Name	Trigger Description

6/24/2004 11:42 AM

2. In the **Timer Settings** pane, do the following:

1. From the **Popup Duration [s]** drop down; select the time after which the alarm should close automatically. To prevent the popup to close automatically, click the **HOLD** button on the popup window. If you select the select the popup duration as 0 (zero), the popup remains open, till you close the popup.

2. From the **Inactivity Interval [h]** drop down, select the length of the time CallAlarm.exe checks for the inactive triggers. This should be set to a number close to the shortest trigger inactive time (set in Setting Other Specifications for Trigger Execution).
3. In the **Pager Setup** pane, do the following:
 1. Select the **Enable Pager Support** option, to enable the pager support. You must install a modem, in order to use the pager functionality.
 2. From the **Hardware** drop down, select the hardware needed to use the pager functionality.
 3. To set the dialing properties, click the **Dialing Properties** button. Set the location and the area code, as required.
 4. From the **Retries** list box, select the number of times the pager number should be attempted, if the connection is not established.
 5. From the **Delay Between Retries [s]** list box, select the time gap (in seconds), after which the next attempt should be made to connect to the pager, if the connection is not established in the previous attempt.
4. In the **CallAnalyst Server Settings** pane, type the computer name or the IP Address of the CallAnalyst Enterprise Server, where the **Multi Site Process Manager (MSPM)** or **Data Manager** is running.

To test whether the server exists

1. Click **Test**.

The **Port Number** window appears.

2. Type the port number. The port number should be same as that of the TCP/IP Port number. For details refer to the Configure the Call Data Manager chapter in the Installation Guide.

The confirmation message appears, on successful test.

3. Click **OK**.

5. In the **Mail Settings** pane, type the profile of the person to whom the email alarms would be mailed.

To test whether the profile is existing

1. Click **Test**.

The confirmation message appears, on successful test.

2. Click **OK**.

6. Click **OK**.

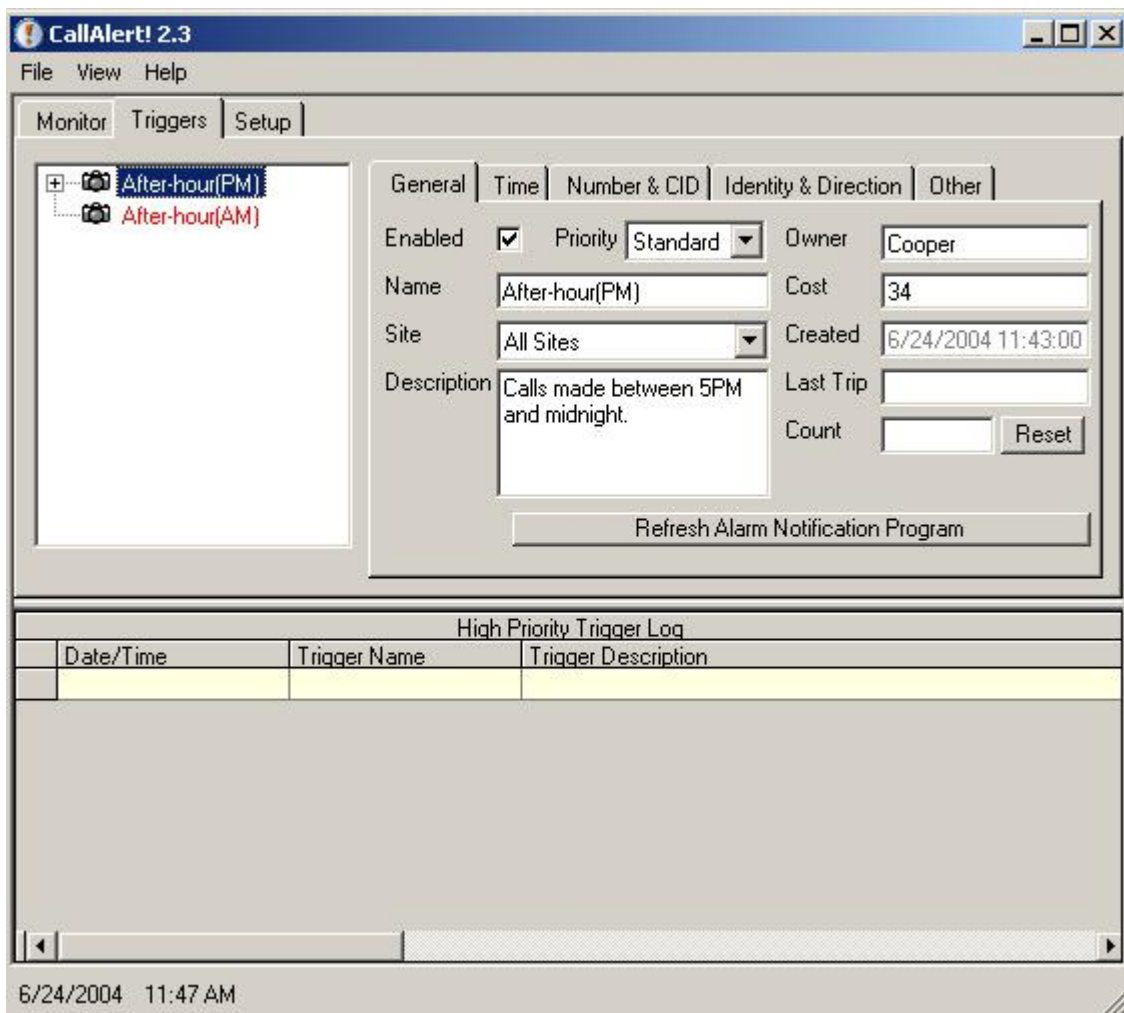
3. Setting Up Triggers

Introduction to Triggers

Triggers are special class of conditions that are defined to execute automatically. CallAlert can have multiple triggers. For details on some of the triggers used in CallAlert see Examples on Triggers.

To setup or view the triggers in CallAlert application

- Click the **Triggers** tab in the CallAlert main window.



The **Triggers** tab page is displayed. All triggers and the alarms associated with the triggers are displayed in the left pane.

The triggers are color coded as follows:

- High Priority Triggers appears in **red**. These triggers appear in the **High Priority Trigger Log**

section at the bottom of the CallAlert window.

- Standard and low priority triggers appear in [blue](#).
- The triggers that are disabled appear in black.

Each trigger has five sets of properties, which are displayed under respective tabs in the right pane. These tabs are:

1. General
2. Time
3. Number & CID
4. Identify & Direction
5. Other

Adding a Trigger

To add triggers

1. From the **File** menu, click **New**.
2. Click **Trigger**.

The trigger is added to the list.

3. To rename a trigger, select the trigger and press **F2**.

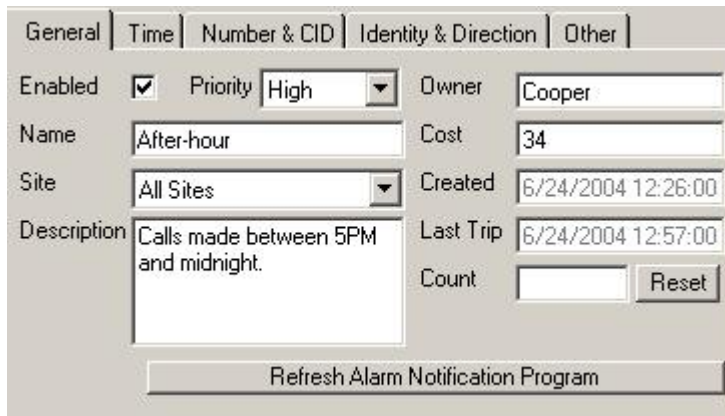
For other details see the subsequent sections.

Setting General Properties for a Trigger

To set the general properties for a trigger

- Click the **General** tab.

The **General** tab page appears.



The screenshot shows a configuration window with five tabs: General, Time, Number & CID, Identity & Direction, and Other. The General tab is active. It contains the following fields and controls:

- Enabled:** A checked checkbox.
- Priority:** A dropdown menu set to "High".
- Owner:** A text field containing "Cooper".
- Name:** A text field containing "After-hour".
- Cost:** A text field containing "34".
- Site:** A dropdown menu set to "All Sites".
- Created:** A date/time field showing "6/24/2004 12:26:00".
- Description:** A text area containing "Calls made between 5PM and midnight."
- Last Trip:** A date/time field showing "6/24/2004 12:57:00".
- Count:** A text field with a "Reset" button next to it.
- Refresh Alarm Notification Program:** A button at the bottom of the window.

- **Enabled:** Select this option to enable or disable a trigger.
- **Priority:** Set the priority of the trigger as low, standard or high priority, as required.
- **Name:** Type the name of the trigger.
- **Description:** Type a small description about the trigger.
- **Owner:** Type the name of the person, who has defined the trigger.
- **Cost:** Type the cost for each trigger execution.
- **Created:** Displays the date and time, when the trigger was created.
- **Last Trip:** Displays the date and time, when the trigger was activated.
- **Count:** Displays the number of times the trigger is activated since its creation or since last reset. To reset the trigger count to zero, click the **Reset** button.

- **Refresh Alarm Notification Details:** Click this button to inform the CallAlarm.exe program to refresh its database. If you have made any changes to the trigger data and want those changes to come into effect immediately, then click **Refresh Alarm Notification Program**. If CallAlarm.exe is not running, then you need to run it at this time.

Setting the Time for Trigger Execution

To set the time for trigger execution

- Click the **Time** tab.
The **Time** tab page appears.

The screenshot shows a configuration window with the following elements:

- Tabbed interface with tabs: General, Time, Number & CID, Identity & Direction, Other.
- Trigger On Day Of Week:**
 - Monday
 - Tuesday
 - Wednesday
 - Thursday
 - Friday
 - Saturday
 - Sunday
- Trigger On Time Of Call:**
 - Start Time: 5:00:00 PM
 - End Time: 11:59:00 PM
- Trigger On Calls With Durations Larger Than (mins): 0

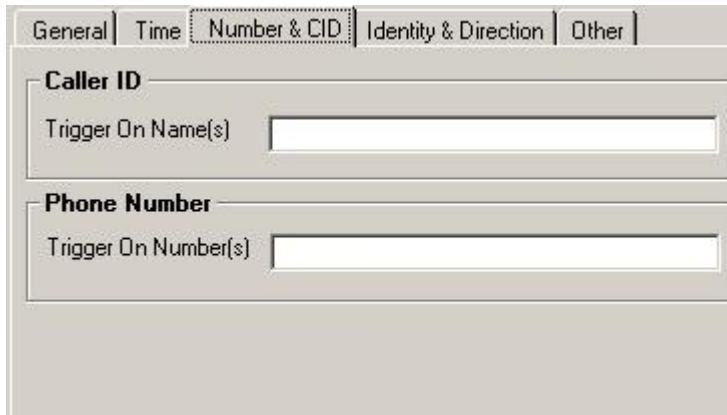
- **Trigger On Day Of Week:** Select the days, when the trigger should be active.
- **Trigger On Time Of Call:** Select the time of the call.
- **Note:** In order to cover a two-day span (for example, 11 pm to 2 am) you must create two separate triggers. One from 11 pm to 11:59:59 pm and another from 12 am to 2 am).
- **Triggers On Calls With Durations Larger Than (mins):** Set a minimum threshold of call duration, which must be exceeded in order to fire the trigger.

Setting Caller ID and Number for Trigger Execution

To set the caller ID and phone number for trigger execution

- Click the **Number & CID** tab.

The **Number & CID** tab page appears.



The screenshot shows a software interface with five tabs: 'General', 'Time', 'Number & CID', 'Identity & Direction', and 'Other'. The 'Number & CID' tab is selected. Below the tabs, there are two sections. The first section is titled 'Caller ID' and contains a text input field labeled 'Trigger On Name(s)'. The second section is titled 'Phone Number' and contains a text input field labeled 'Trigger On Number(s)'.

- **Trigger On Name[s]:** Type the incoming and outgoing Caller ID name, which will activate the trigger. Multiple names should be separated by comma.

Note: People with Caller ID enabled call tracking and monitoring programs can use this function.

- **Trigger On Number[s]:** Type the incoming and outgoing phone number, which will activate the trigger. You can include area codes, but cannot use any special punctuations. Multiple phone numbers should be separated by comma.

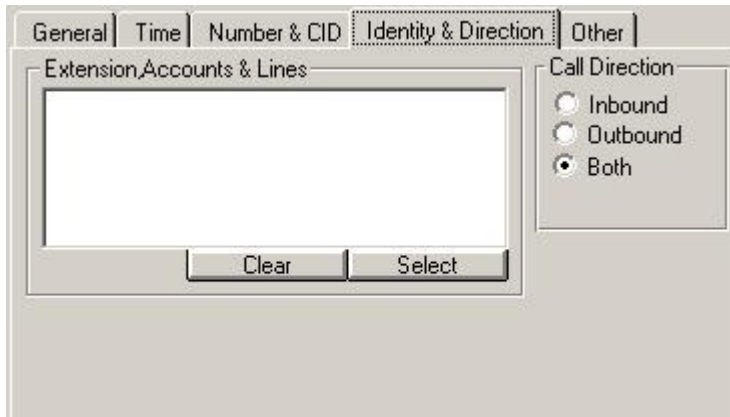
For example, John Smith's phone number is (503) 555-1212. In CallAlert you would add 5035551212. If you also want to check for another number (360) 555-1212, then you would use 5035551212, 3605551212.

Setting the Identity and Direction for Trigger Execution

To set the identity and direction for trigger execution

- Click the **Identity & Direction** tab.

The **Identity & Direction** tab page appears.



- **Extensions, Accounts & Lines:** Select the extensions, account code and lines that you want to use for this trigger. The selected extension, account code and line appear in the pane.

To select the extensions, account code and lines

- Click **Select**.

The **Selector** window appears.

- Select the extensions, account code or lines and double click.

Note: If you do not select any extensions, lines and account codes, then all the components execute the trigger.

- **Call Direction:** Select the call direction for which you want to execute the trigger. By default, the trigger is executed for both inbound and outbound calls.

Setting Other Specifications for Trigger Execution

To set other specifications for trigger execution

Click the **Other** tab.

The **Other** tab page appears.

The screenshot shows a configuration window with the following elements:

- Tabs: General, Time, Number & CID, Identity & Direction, Other (selected)
- Undefined Calling Sources**
 - Trigger On Undefined Ext.
 - Trigger On Undefined Lines
 - Trigger On Undefined Acct.
- Inactivity**
 - Enable Inactivity
 - Inactive Time (hours) []
- Trigger Threshold**
 - Alarm is activated after threshold. [0]
 - Current threshold count. [0] [Reset]
- Numeric Pager Code (Used For Non-Alphanumeric Pagers) []

- **Unidentified Calling Sources:** You can set the trigger to execute, whenever a call is made from or to an unknown source such as extension, line or account code. For details on specifying these sources see Setting the Identity and Direction for Trigger Execution.
 - **Trigger On Undefined Ext.:** If you select this option, then the trigger is executed whenever a call is made from or to an undefined extension.
 - **Trigger On Undefined Lines:** If you select this option, then the trigger is executed whenever a call is made from or to an undefined line.
 - **Trigger On Undefined Accts.:** If you select this option, then the trigger is executed whenever a call is made from or to an undefined account code.
- **Inactivity:** You can also set the trigger to execute, whenever the trigger remains inactive for a particular time period. In other words, you can detect the line or extension that was not used for than a day. For example, to detect the line inactivity, select the line (for details see Setting the Identity and Direction for Trigger Execution) and enable the inactivity option with a 24-hour inactivity time. If the line is not used for 24 hours, then the trigger is activated.
- **Trigger Threshold:** You can allow some occurrences in which the trigger should normally activate to accumulate until a certain threshold is reached. Once the threshold is reached, the trigger is executed.
 - **Alarm is activated after threshold:** Set the maximum number of Occurrences that should accumulate without executing the trigger.
 - **Current threshold count:** Number of times the trigger is detected but not executed. To reset this value, click **Reset**.
 - **Numeric Pager Code:** Set the numeric pager code against which the trigger Should execute. Whenever this numeric pager code is used to display alphanumeric pager messages, the trigger is executed.

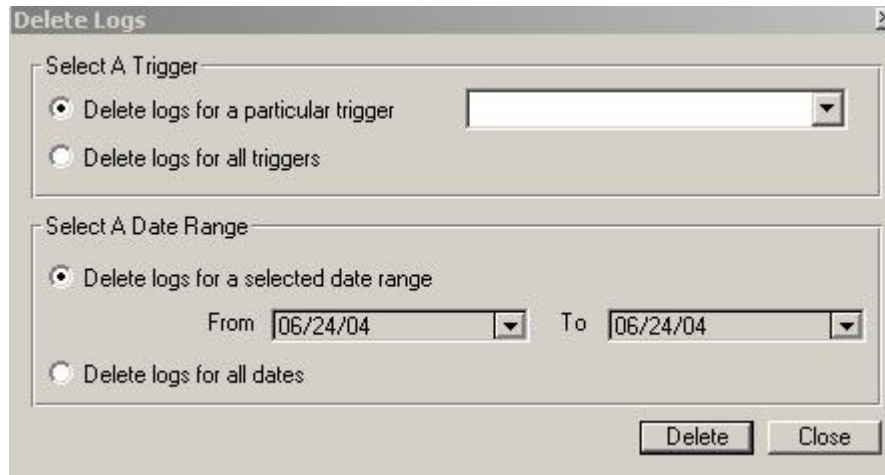
Deleting Trigger Logs

CallAlert allows you to delete trigger logs selectively.

To delete trigger logs

1. From the **File** menu, select **Delete Logs**.

The **Delete Logs** window appears.



2. To delete logs for the particular trigger, select the **Delete Logs for a particular trigger** option. Select the trigger from the drop down.

Or

To delete logs for all the triggers, select the **Delete logs for all triggers** option.

3. To delete logs for a particular period, select the **Delete logs for a selected date range** option. Select the **From** and **To** dates from the drop down.

Or

To delete logs for all dates, select the **Delete logs for all dates** option.

4. Click **Delete**.

If you have deleted the trigger, then you can type in the name of the deleted trigger and delete the history directly at any time. Make sure you spell the old trigger name exactly.

4. Setting Up Alarms

Introduction to Alarms

A trigger can have one or more alarms associated with it. You can also associate a particular alarm more than once to a single trigger. If you want, you can choose not to associate any alarms to a trigger. If the trigger is still enabled, then the occurrence of that trigger adds an entry into the trigger log.

Note: A call can trip multiple triggers causing many alarms to be activated. Define your Triggers and alarms wisely.

For more information on Triggers and alarms see Introduction to Triggers and Introduction to Alarms.

Alarm Types	Description
WAV	Plays an audio WAV file.
Beep	Beeps the system's speaker.
Append To Text File	Appends an entry to an ASCII text file.
Append To NT Event Log	Adds an entry to the Windows NT event log. This alarm is ignored if running on Windows 95/98.
Send Email	Sends an email to a specified user.
Popup	Displays a popup window on the CallAlert PC.
Send Page	Sends a numeric or alphanumeric page to a specified user.
Run External Program	Runs an external program.

Editing Alarm Details

To edit an individual alarm

1. Select the alarm that you want to edit and double click.
2. Make the necessary changes.

You cannot edit the **Beep** and **Update NT Event Log** alarm.

3. To rename an alarm, select the alarm and press **F2**.

Appending to Text File

CallAlert allows you to append the trigger execution notice to a text file. This is useful, if you already use other programs, which read a log (text file).

To append to a text file

1. Select the trigger, for which you want to set the alarm.
2. From the **File** menu, click **New**.
3. Point to **Alarm**.
4. Select **Append to Text File**.
The **Append to Text File** alarm is added to the trigger.
5. Double click the **Append to Text File** alarm.

The **Append to Text File** window appears.



6. Click **Browse** to select the text file, where you want to append.
7. Click **Close**.

Running An External Program

CallAlert allows you to run external programs, whenever a trigger is executed. The programs can be any notification utility that prompts the phone system to any action.

To run an external program

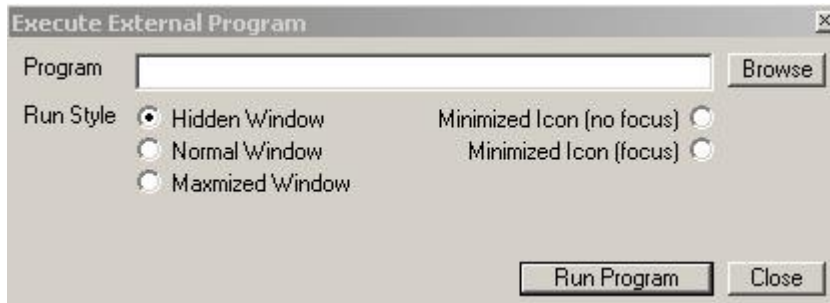
1. Select the trigger, for which you want to set the alarm.
2. From the **File** menu, click **New**.
3. Point to **Alarm**.

4. Select **Run External Program**.

The **Run External Program** alarm is added to the trigger.

5. Double click the **Run External Program** alarm.

The **Execute External Program** window appears.



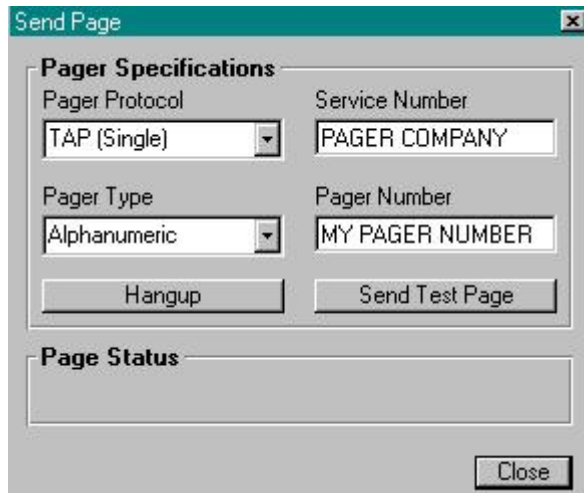
6. Click **Browse** to select the program that you want to run, when a trigger is executed.
7. Select any of the running style from given options.
8. To test the program, click **Run Program**.
9. Click **Close**.

Adding Send Page Alarm

CallAlert allows you to send numeric or alphanumeric messages to your pager.

To add a Send Page alarm to your trigger

1. Select the trigger, to which you want to set the alarm.
2. From the **File** menu, click **New**.
3. Point to **Alarm**.
4. Select **Send Page**.
The **Send Page** alarm is added to the trigger.
5. Double click the Send Page alarm.
The **Send Page** window appears.



You can send both the numeric as well as alphanumeric messages.

To send a numeric page

1. In the **Service Number** text box, enter your pager service provider.
2. From the **Pager Type** drop down, select Numeric.
3. In the **Pager Number** text box, enter your pager number.

You get a page along with the pager code that you specified under Trigger setup. When you send a numeric message, the pager number is dialed directly followed by a pause and then followed by your Trigger pager code.

To send an alphanumeric message

1. From the **Pager Protocol** drop down, select the protocol and modem access service number for your pager. You can get these information from your pager company. Most pagers in the United States use the TAP protocol.
2. In the **Service Number** text box, enter your pager service provider.
3. From the **Pager Type** drop down, select Numeric.
4. In the **Pager Number** text box, enter your pager number.

When you send an alphanumeric message, instead of dialing your pager number directly, the service number (a modem) of your pager company is dialed. Your pager number is included with your message during this brief transmission.

To test your pager setup

- Click **Send Test Page**. You are prompted to send a short message.

Adding Send Email Alarm

CallAlert allows you to send notifications of a Trigger event via your email program.

To send an email

1. Select the trigger, to which you want to send the notification.
2. From the **File** menu, click **New**.
3. Point to **Alarm**.
4. Select **Send Email**.

The Send Email alarm is added to the trigger.

5. Double click on **Send Email**.

The **Send Email** window appears.



6. Type the email address and click **Close**.

The trigger notification is sent to the person every time the trigger is activated. To send a trigger notification to more than one person add another **Send Email** alarm and type other person's email address.

Note: You need a MAPI compliant email program for email alarms to work. All Microsoft email programs and most Windows based email programs are MAPI compliant.

Adding a Wav Alarm

To add a Wav alarm to your trigger

1. Select the trigger, to which you want to set the alarm.
2. From the **File** menu, click **New**.
3. Point to **Alarm**.
4. Select **Wav File**.

The Wav file is added to the trigger.

5. Double click the Wav File.

The **Wav Edit** window appears.



6. Click **Browse** to select the Wav file.
7. To play the selected WAV file, click **Play WAV**.

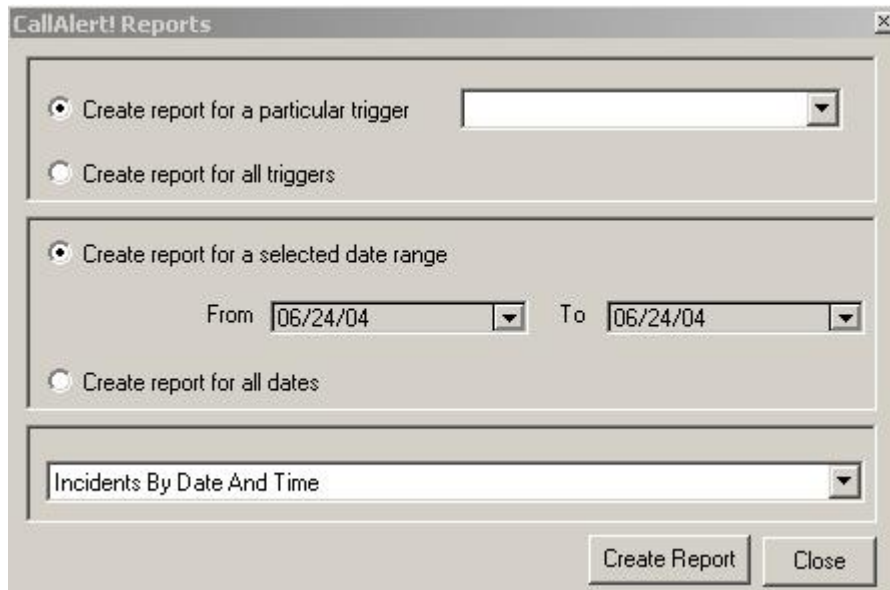
5. Running CallAlert Reports

Running CallAlert Reports

To run a report from CallAlert

1. From the **File** menu, select **Report**.

The **CallAlert! Reports** window appears.



Note: You can also run the report module separately without running CallAlert! The report program is named CALertReport.exe. CALertReport.EXE can also accept a myriad of command line parameters. For details see Running Advanced Reports.

2. To create a report for the particular trigger, select the **Create report for a particular trigger** option. Select the trigger from the drop down.

Or

To create a report for all the triggers, select the **Create report for all triggers** option.

3. To create a report for a particular period, select the **Create report for a selected date range** option. Select the **From** and **To** dates from the drop down.

Or

To create a report for all dates, select the **Create report for all dates** option.

4. Select a report from the **Select A Report** pane.

5. Click **Create Report**.

Printing a Report

You can also print the report content on a local or network printer.

To print a report

1. Click the **Print Report** icon.

The **Print** window appears.

2. Enter the necessary information.
3. Click **OK**.

Exporting a Report

You can export the report content to multiple file formats. Some of them are:

- Microsoft Excel sheet (*.xls)
- Acrobat (*.pdf)
- Crystal Report (*.rpt)
- Comma Separated Values (*.csv)
- Web Page (*.html, *.htm)

To export a report

1. Click the **Export Report** icon.

The **Export** window opens.

2. From the **Format** drop down, select the file format.
3. From the **Destination** box, select the folder where you want to save the report.

Important Information: When you export the report in .rpt format, you should use Crystal Report 9.0 to open and view the report.

Searching for a Text

You can search for a particular text in a report.

To search the text

1. Click the **Search Text** icon.

The **Search** window appears.

2. In the **Find what** box, enter the text that you want to search.
3. Click **Find Next**.

Running Advanced Reports

CAAlertReport.EXE accepts a myriad of command-line parameters so that you can use it in an automated fashion. If you have a scheduling program, then you can even schedule certain reports to be automatically run.

The command-line options available to CAAlertReport are:

CAAlertReport.exe /Rxx /BEEP /P /Fxx /Ofilename /Smm-dd-yyyy /Emm-dd-yyyy /TODAY /YESTERDAY where,

/Rxx	Selects a particular report. Replace xx with 0 = Trigger Incidents (Detailed) 1 = Summary Trigger Incidents By Day 2 = Summary Trigger Incidents By Week
/BEEP	Makes the PC beep when the report is done.
/P	Forces the output to the default printer.
/Fxx	Forces the output to a file. Writes the file in xx format, where xx is:
/Ofilename	Used with /Fxx above. This specifies the file path and name for output.
/Smm-ddyyyy	Specifies a starting date for a report.
/Emm-ddyyyy	Specifies an ending date for a report.
/TODAY	Specifies that the report should be run for all incidents, which took place today.
/YESTERDAY	Specifies that the report should be run for all incidents, which took place yesterday.

Certain command-line parameters should not be combined. For example, you cannot force a report to the printer and also to a file at the same time. If both /P and /F are on the command-line the /F will take precedence.

/TODAY and /YESTERDAY take precedence over any date ranges selected. Also you can combine /TODAY and /YESTERDAY to obtain a report for both days.