Table of Contents

Preference

The advantage of the advanced training manual is to explain to technicians how all the functions can work for your customer and to make it easy for you out on the field. This manual will cover all that your customer requires.

<u>Chapter 1:</u>	
LAN/ IP config and lantronix	2
Installing the lantronix	2
Assigning an IP to buffer	2
Setting up PABX settings	
Chapter 2:	
TCP/IP to Man3000/file to man	′
Active TCPIP	ـر ،
File to Man	
Passive TCPIP	
USB DRIVER INSTALLATION	
Chapter 3:	1 1
Budget controller	11
Chapter 4:	
Personal copies	20
r ersonar copies	20
Chapter 5:	
Alerts	27
- 1101 to	41
Chapter 6:	
Enterprise	30

Chapter 1: LAN/ IP config and lantronix

Introduction:

The LAN/IP buffer can be connected in two different configurations.

- 1. Serial to PC then LAN to your PABX.
- 2. LAN to PC then serial to your PABX.

In order to set your buffer up in these modes open your buffer box you will see four jumpers and next to them is marked PABX and PC.

On default the four jumpers are set to PABX.

Jumper set up:

- When all four jumpers are set to PABX now the buffer is ready to be set to connect serial to PC then LAN to PABX.
- When all four jumpers are set to PC now the buffer is ready to be set to connect LAN to PC then serial to PABX.

LAN/IP Buffer config in the Lantronix

Lantronix is the program you need to install in order to configure your LAN/IP buffer. The Device Installer is an all-in-one utility for detecting various Lantronix devices (device servers) on a network. You can view current device parameters and make more devices available for viewing.

To install your Lantronix

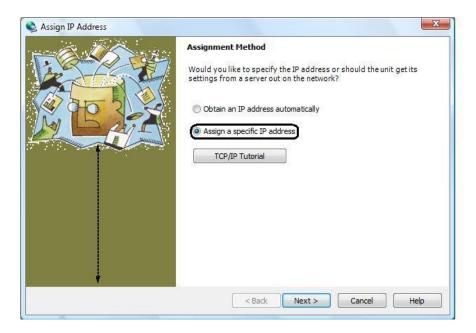
Open up your Man3000 directory and open the folder called App Feature Installation then open LAN_IP setup then run the Lantronix installation.

Assigning an IP to the buffer

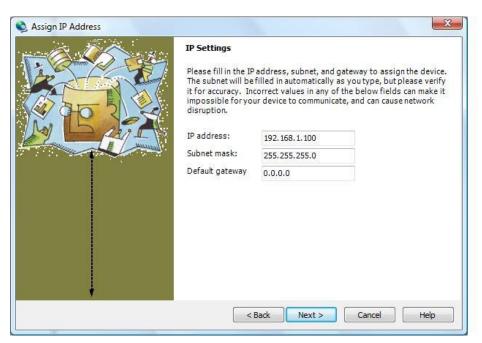
Setting up a IP to your buffer

- 1. Once installed, using a crossover cable, connect your buffer to the LAN port on your PC then set your PC IP in the same range as the buffer. Default IP on the buffer is 192.168.1.100.
- 2. Now open your lantronix. The location of lantronix will be, click on start all programs, lantronix then device installer.
- 3. You will now see on the left local area connection that will be your PC IP and on right will be the buffer IP.
- 4. Now to assign an IP to the buffer. High light the Xport 03 then click on assigns IP.

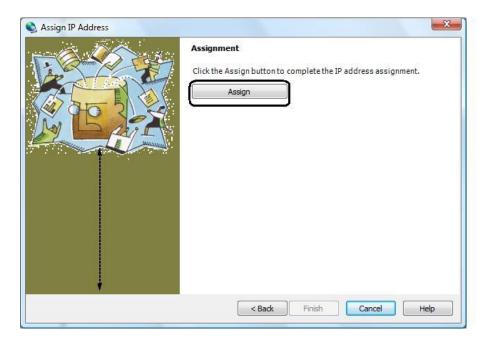




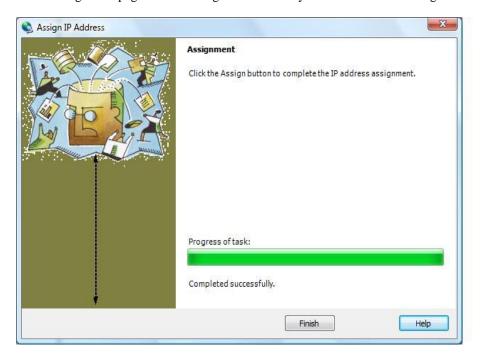
Then assign IP Address will pop up. Select assign a specific IP address Click next.



Now you can assign the IP to your buffer in the same range as your PABX. Once all is entered in correctly click next.



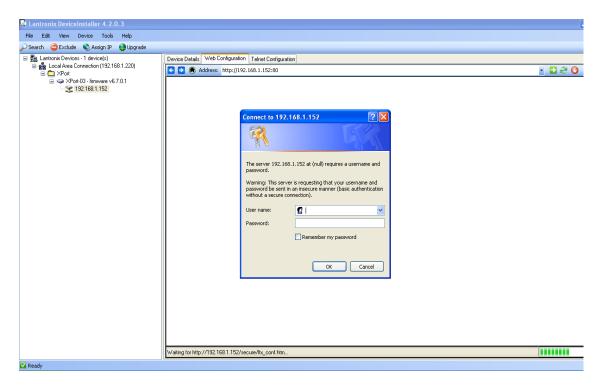
On the assignment page click on assign. Then the IP you have inserted it will get sent to the buffer.



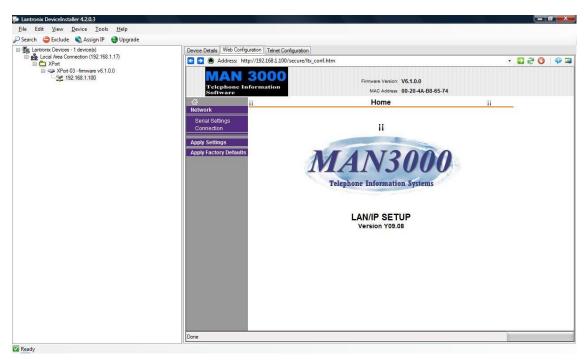
When it is done click on finish. Now your buffer would be assigned with a new IP address.

Setting your PABX settings

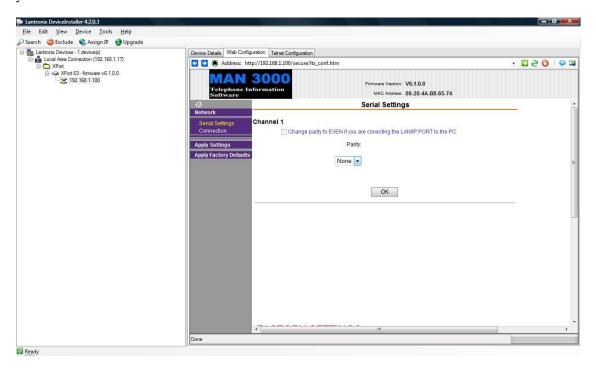
In lantronix the device that is shown on the right hand side with the IP address you have assigned and status is online double click. Then select Web Configuration click on the green arrow icon. Then a window will pop up and ask for a user name and password



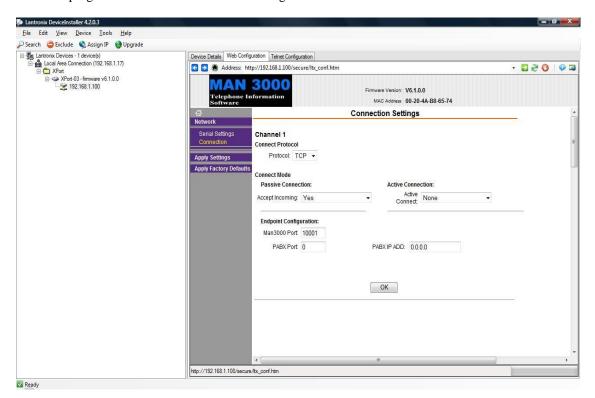
Simply click ok. No password is required.



Select serial settings and on default parity is set to none. Only if you were going to connect to a PC then you would select even.



Select connection and the only thing that needs to be changed is Accept incoming, Active connect, PABX port number and PABX IP address, to what ever your PABX requires. Please refer to the help menu on the man 3000 program for the individual PABX configes.



Once settings or correct click ok and apply settings.

Chapter 2: TCP/IP and file 2 Man

Introduction:

We have two solutions for soft OR IP PABXs.

USB Soft Dongle.

The USB Soft Dongle is used if the customer has no Internet Access at their office. This hardware
is connected VIA USB to the PC and the USB drivers need to be installed. Refer to pg 9 for USB
driver install.

The MAN3000 soft online Authentication.

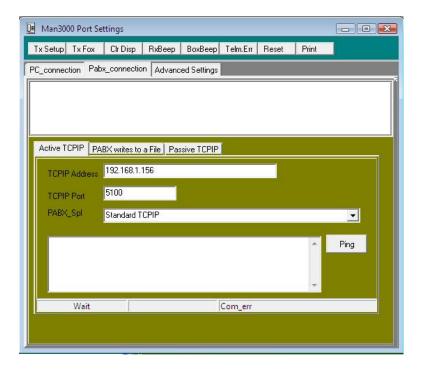
MAN3000 Soft online can be installed only if Internet access is available at your customer. There
is no hardware REQUIRED with MAN3000 Soft Online and once registered you have A 60 days
free trial but once the 60 days are up the Soft Online will stop working.

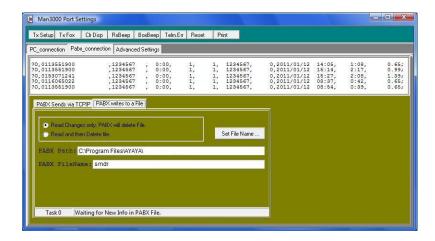
Setting up PABX connection

Enter in your password then click on settings, then comport settings. Click on the PABX_connection tab. This where you would configure your PABX settings.

Active TCPIP

- TCPIP Address: This will be where you would insert your PABX IP address.
- TCPIP port: This is where you would insert your PABX port number.
- PABX Spl: Is the specific format you would set for your PABX.
- The ping option: Is to test if your IP address is correct. Then once you get a reply you can click save.
- The two labels at the bottom indicate when your man3000 has communication.





File 2 man "PABX writes to a file"

There are now a number of SOFT PABX systems on the market. What this means is that the PABX does not have a RS-232 SMDR. The PABX writes CDR information to a file on the customers PC on the company's network.

The Man3000 requires call records to operate. File_2_Man is now integrated into the MAN3000 software it will take the call record file provided by the PABX system and bring it into the Man3000 software.

The soft PABX's can handle the call records in two different ways.

Read changes only:

Records are written to the file on a continuous basis. The file will get larger as more records are created. The SOFT PABX then renames the file on a daily basis. Man3000 will scan the stipulated file for any changes and only record the changes.

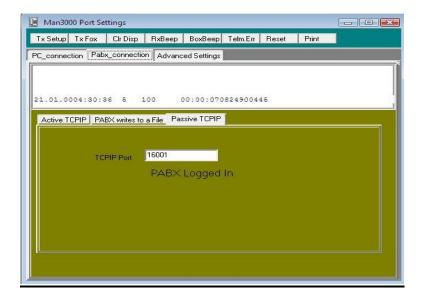
Read then delete file:

Records are written to the file on a continuous basis. When Man3000 reads this call record file we RENAME the file and then process it. The SOFT PABX will recreate a new file.

In the PABX Path you would select set file name and browse to where the PABX writes the file to the customers PC. Then once file path is correct you will see records running.

Passive TCPIP

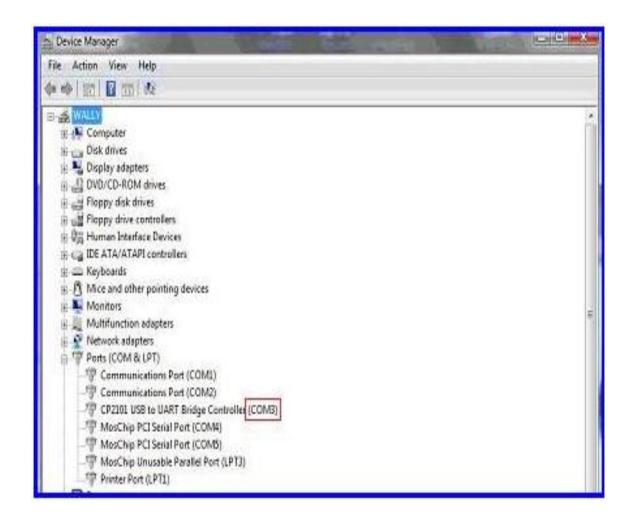
When **Man3000** is configured in a **PASSIVE TCPIP mode**. The PCs IP address is programmed into the PABX as well as the port number that the man3000 will listen on. The passive TCPIP is integraded in the man3000 software.



USB DRIVER INSTALLATION

- Install the latest man3000 software.
- Plug the USB connector into a USB port on the PC.
- Windows will now automatically find the new hardware. Windows 98 you have to install manually.
- Direct the driver installation wizard to search in a SPECIFIC location. (E.g. Program Files\Man3000\USB Drivers). If it is 32 bits operating system. If the operating system is 64 bits you will need to point it to 64 bit USB drivers in man3000 directory.





Once drivers are installed go to Device Manager.

Under the PORTS menu you will find CP2101 UART BRIDGE CONTROLER.

That will be your OPTO or your USB Dongle.

The COM port number in brackets will be the COM port to use in the serial COM port setting in your man 3000.

MANUAL DETECTION

- Open Windows CONTROL PANEL
- Select the ADD NEW HARDWARE Menu
- Tell the Wizard to search the PC for new hardware
- Follow the instructions above.

Chapter 3: Man3000 Budget Controller

The purpose of the Man3000_Budget_controller.exe is to **AUTOMATICALLY NOTIFY** you when the assigned budget on an EXTENSION or an ACCOUNT CODE is exceeded, this **Notification can be sent via:**

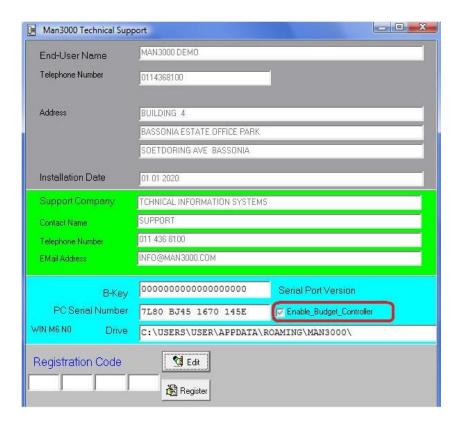
- EMAIL
- Write to File
- Screen Popup
- Printer

Extension or **Account Code Budgets** can be used with **ANY PABX**, optionally barring and unbarring can also be activated on your PABX system when an assigned budget is exceeded.

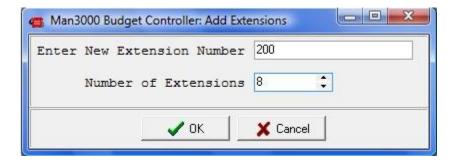
Barring is PABX dependant, meaning that it can only be applied to PABX systems that we have already done the development on. Some PABX systems can have this functionality on both EXTENSIONS and ACCOUNT CODES. Some may have it on only one or the other.

Setting up your budget controller.

Install Man3000 Software. Then install Budget Controller in the same directory as your man. Activate the "Enable Budget Controller" WHEN YOU REGISTER the Man3000 under the Technical Support menu as shown below:



Set Extension Info



This allows for adding of extension numbers.

- Select the Add Extension button.
- In the Add Extensions window enter your first Extension number and the amount of Extension that the client is using, they will run in numerical order.

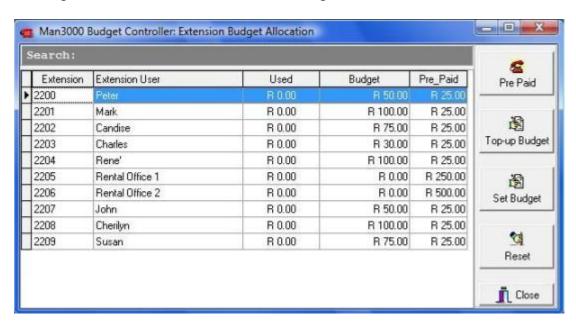
Set Account Code Info



This allows for adding of account codes. Make sure that when account codes are added to the system, that the Man3000 Account Code in the Budget Controller is the same as the Account Code shown in the Man3000 program.

- Select the Add Account Code button.
- In the Add Account Code window enter your first Account Code and the amount of Account Codes that the client is using, they will run in numerical order.

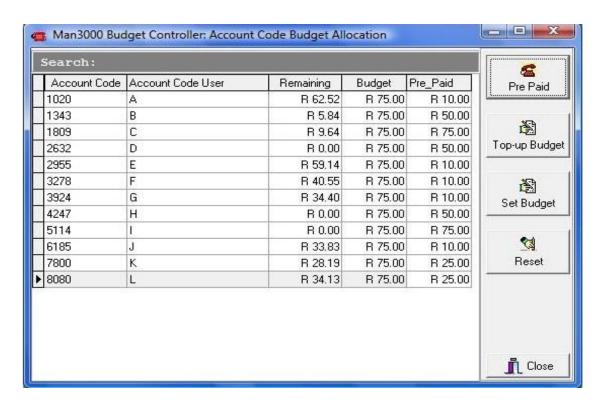
Editing extensions and account code budgets



Enter in your password it would be the same as man3000 password.

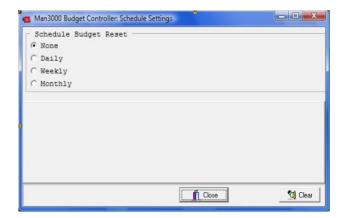
Select edit extension budget. Here you can edit the budgets on each extension.

- Your pre paid is an option to set a pre paid amount to any user.
- Top-up option is a once off adjustment and this will not be applied when budget is auto reset at the end of the Month, week or day.
- Set budget allows setting budgets for the extension.
- Reset budget allows you to set budgets back to the same budget that was set.

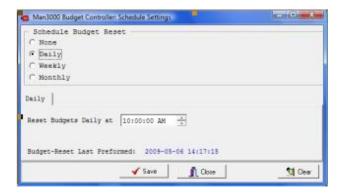


Schedule Automatic Budget Reset

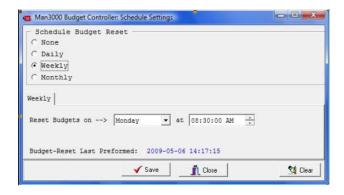
With schedule automatic budget resets you can reset the assigned budgets automatically. None, Daily, Weekly or Monthly or.



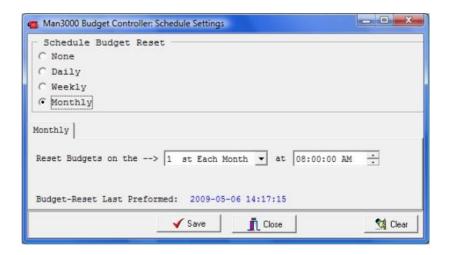
When selected to none the budget will never reset. Only until manual reset is done.



When daily is selected the budget will then be reset daily on the set time.

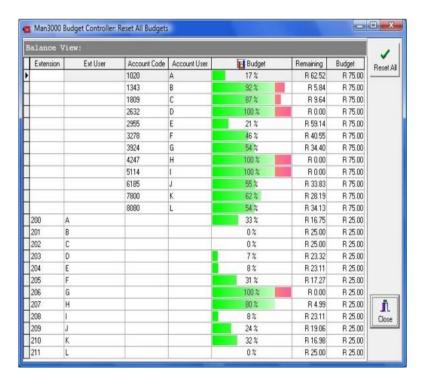


Weekly scheduled budget resets will reset every week on the set day and time scheduled.



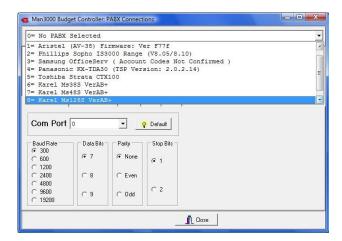
You may schedule to reset the budget on a specific day of the month at a specific time.

Reset All Budgets



This option allows you to do a manual reset to all budgets.

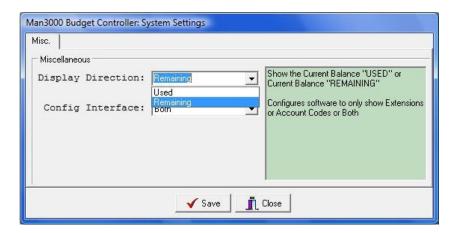
PABX Connections



Click on the drop down menu and select the PABX that your man3000 is connected to. For PABX setting see on the help file in the budget controller program under PABX list.

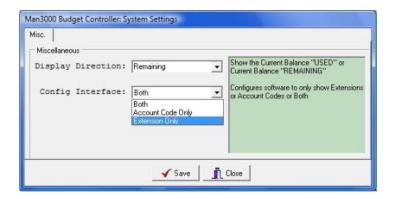
System Settings

Display Direction



Here you can select remaining or used, this will show how much budget is remaining or used.

Config Interface (Budget Controller System Settings)



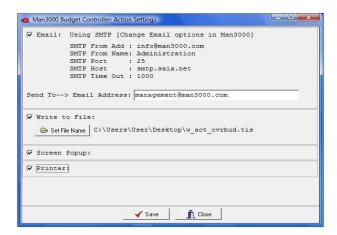
Selecting both on config interface then account and extensions is available to set budgets. Selecting account code you only will make the accounts available to set budgets. Selecting extensions you only will make the extensions available to set budgets.

Actions

Every time an extension or account code is over budget you can set an action how you want to be notified.

Over Budget Notification Settings

This is how you would set up a notification when a user is over budget.



Email

• When an extension or account code is over budget an email will be sent to the specific email. (Outlook or SMTP).

Write to file

• This will write to a file path when extension or account code is over budget.

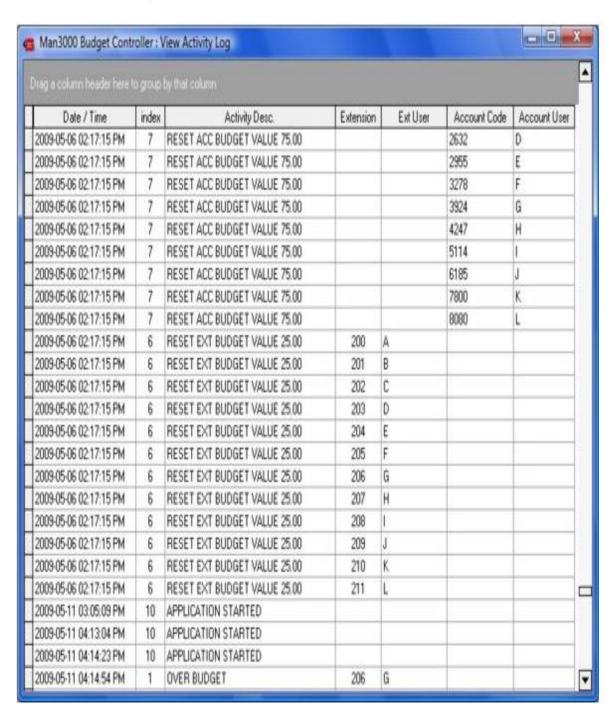
Screen popup

 This option will pop up a screen on the PC monitor every time an extension or account code is over budget.

Printer

• On the printer option when an extension or account code is over budget it will print to the default printer.

View Activity Log



View activity log is used as a reference on the activity of the budget controller software.

<u>Chapter 4</u>: Personal Copy and Cloud Copy

A personal copy allows you to monitor the man3000 from multiple PCs on the customers LAN, WAN or WIFI network. Install and register the software and hardware on your master PC as a normal standard installation. Once all working you can start to setup personal copy.

Man3000 Cloud Copy

Man3000 Cloud Copy allows you to now have access to your Live Man3000 Telephone Information System Anytime, Anywhere provided that you have Internet access. This is 100% through the cloud and runs independently off your computer network.

This now makes the Man3000 Telephone Information Software available to a host of users that were unable to easily access it before.

- Home office
- Remote Office
- Temporary rented office space
- Traveling executive
- Head office independent of WAN
- Hosted PABX services
- Cloud copies locally would not impact your LAN security policies

Man3000 Cloud Copy allows for multiple PC's to access the Man3000 remotely through the Internet cloud.

This is also a complete redundant "Back-up" of all your data on a different PC either on-site or off-site. In the event of a system failure, theft, etc No data will be lost.

The data seen in each Cloud Copy can be filtered to only show specific extensions I.E the manager of a department may only see the extensions that they are responsible for.

Synchronization with the Master Man3000 unit is possible. This means that changes made on the master Copy can update to all other Cloud Copies. You can create individual permissions per user as to what lists they would like updated.

Configuration

STEP 1 Install Master Man3000

Install the Man3000 software onto the host/master computer on the company's network. This copy of Man3000 will be connected to the PBX system either through a buffer or Software only installation.

Set the software up completely:

- PABX formats
- Com port settings
- Records being recorded on the Live screen
- All lists filled in under the edit menu.

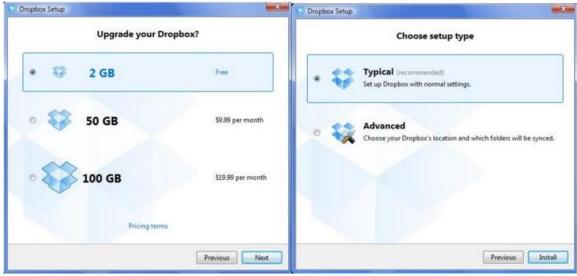
Once everything is working correctly register the software with T.I.S.

STEP 2 Install the transport protocol (Dropbox)

The Man3000 Cloud Copy makes use of a third party folder sharing technology called Dropbox.

- You would need to log onto <u>www.dropbox.com</u> to download the software.
- You would then install Dropbox onto the master Man3000 PC.
- Once installed you need to create a FREE Dropbox account.





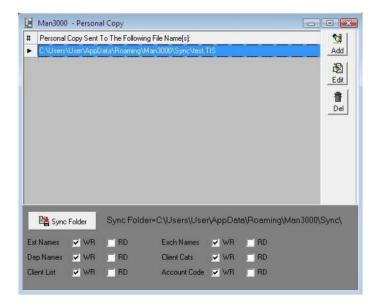
- There will now be a "Dropbox" folder under the "My Documents" or "User Documents" on the Master PC.
- You may open your Dropbox folder by double clicking the Icon on the task tray.
- Create a folder for each *Cloud Copy* in the Dropbox folder on the Master PC.

STEP 3 Exports to Cloud Copy

- Establish how many **Cloud Copies** are required. (How many remote users require access to Man3000).
- Open the Master Man3000 on the host/master computer.
- Enter your technical password.



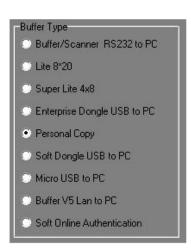
- Open the **File** menu.
- Open the Personal-Cloud Copy Menu.
- Click on Add.
- Select a file name.
- Note that this file name could have any name, e.g.: the name of the person/machine for the applicable **Cloud Copy**, e.g. Reception, Data, John laptop, Mike_Home_office etc.
- Select the save path to the unique folder name within the Dropbox directory.



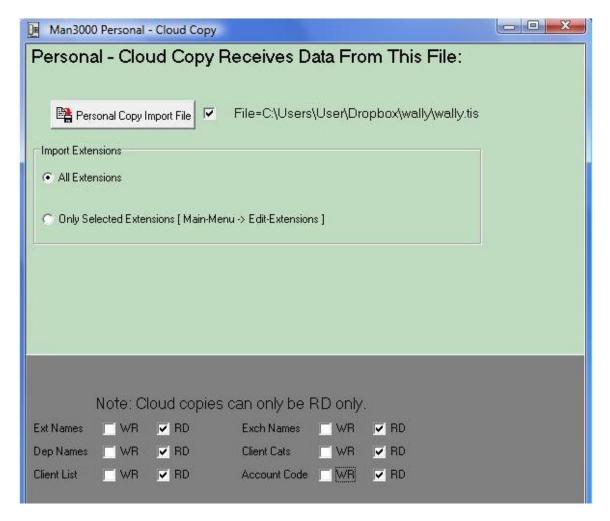
- Set the Sync location to the *Sync* folder on the Man3000 directory of the Master Copy.
- Enable all of the *WR* (Write) options. This will enable the Master copy to write all extension, exchange, client, departments, account codes and client cat lists.
- Click Save and Close.

STEP 4 Install and Import Cloud Copy

- Install and create a Dropbox folder on the remote PC.
- This Dropbox will be attached to the same account that you created on the Master Man3000 PC in STEP 2.
- Install the same version of Man3000 software on the remote PC that requires access to the Man3000.
- Enter your technical password.
- Under Settings Menu go to Com port settings.
- On the PC Connection TAB
- Select your Buffer type as Personal copy



- Open the **File** menu.
- Open the **Personal-Cloud Copy Menu**.
- Place a check mark in the available block to activate the import.



• Select **Personal-Cloud Copy Import file** button.

You would now browse to the Dropbox folder on the PC Find the specific folder and file that this **Cloud Copy** will use Select Save

• You now have two Importing options: -

All Extensions: All Extensions records from the Main Man3000 Software is Imported. Only Selected Extensions: If this option is selected ONLY records for the Extensions added Under Edit Extension information would be imported.

• ONLY tick the RD (Read) option

A Cloud Copy will only ever READ changes from the Master.

- Save and close the screen
- You will now have live records being recorded on the Cloud Copy.
- Register the software

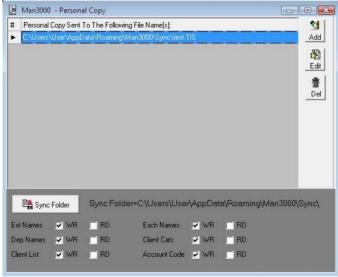
All the registration information has been brought over from the Master Man3000 Do not change anything just process the registration.

• Repeat this for every Remote PC that requires access.

Man 3000 Personal Copy on the network

Install Man3000 software and hardware on the master PC as a standard Man3000 installation. Setup formats ECT and once all is up and working then register the Man3000 with TIS. Then sync folder must be fully shared in Man3000 folder. Insert password and go to file then Personal-Cloud Copy in your man3000 program.





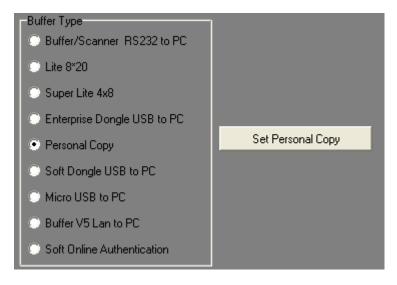
Click on add. Select a file name.

- Note that this file name could have any name, e.g.: the name of the person/machine for the applicable personal copy, e.g. Reception, Data, John, etc.
- ONLY tick the WR (Write) option while initially configuring the System.
- **NB!! Each personal copy must have a different file name!! NB

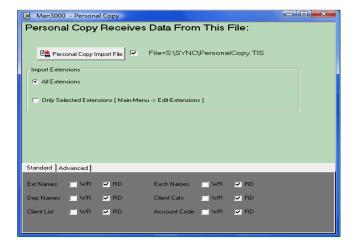
Setting personal copy on the network PC

Install the **same version** of Man3000 software on the personal copy computer that requires access to the host/master copy of Man3000.

- Enter your technical password.
- Under Settings Menu go to Com port settings.
- On default when the latest version software is installed personal copy is selected already.
- Simply click on the **Set Persona Copy** button.



- Then click on personal copy import file.
- Now browse the network for the master PC with the shared sync folder.
- Once you open the sync folder the pre-saved export file will appear.
- Select the file and save.
- Then tick the block next to the personal copy import file button. Then tick all the RD (READ).



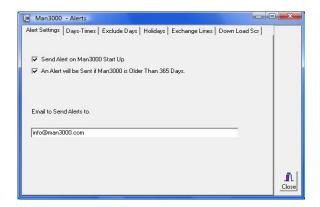
Once records are being imported, you must register the Personal Copy.

Chapter 5:ALERTS

Alerts will automatically sent via email to your office letting you know when the system is not working correctly.

- When the database is not downloading calls.
- When the software has aged more then 365 days.
- When an exchange line is not making or receiving a call.
- When software is restarted.

Alert Settings



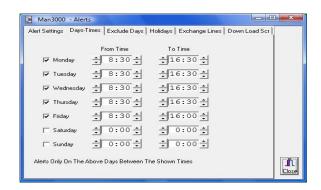
Send alerts on man3000 start up.

• This will give an alert via email every time man3000 is started up.

An alert will be sent if man 3000 is older than 365 days.

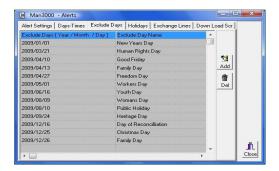
• The alert will then also be sent via email to the email entered.

Days - Times



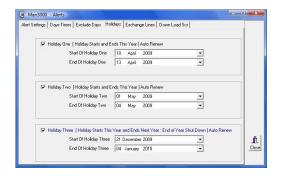
Day - Times alert is generally the customers' office hours.

Exclude Days



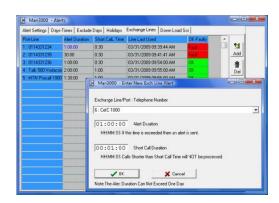
The exclude days are the public holidays when you would not want alerts to be sent out.

Holidays



You have up to three holiday shutdown periods which are auto renewable. Then alerts will not be sent out on these days.

Exchange Lines

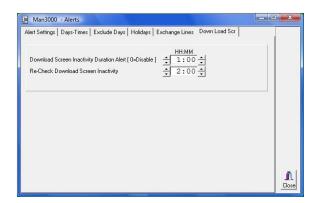


All exchange lines connected to the PABX. Up to 50 lines can be monitored at one time.

Duration can be set and if no outgoing call or incoming call is made with in the set duration the line will be flagged as faulty. Then an email will be sent.

You can also set a short call time and any call shorter than the set time will not be taken in account.

Download Screen



This Alert is used to monitor the Main Screen in the Man3000 Software, if no information is downloaded to the database (Main Screen) in the required time frame customized, an Email Alert will be sent, the Man3000 Alerts will re-check to verify that the Database has not been updated and will send another Alert till the Man3000 System is up and running.

<u>Chapter 6</u>: Man 3000 Enterprise

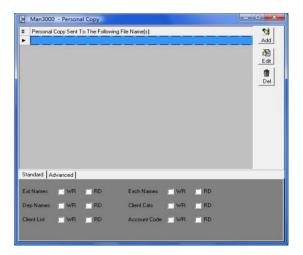
Man3000 enterprise is used to collect call records from multiple different MAN3000 Buffers. A technician will need to install a copy of man3000 software for each site either at head office on at site. Technician will only install one copy of man3000 software for the enterprise USB dongle to PC and then they will just set up personal copy or Cloud Copy import files from each site to import call records through enterprise over their network to the head office, of which they will need to share the sync folder on their network for write access on their net work through the sync folder or through the "Cloud".

Set up the different sites

The different sites will have different PABX's or the same PABX it does not matter. PABX's will send call records through TCP/IP, LAN/IP connection or RS232 to the buffer box or SoftDongle USB to PC and or Dual-LAN/IP buffer box depending on how the PBX sends call records to the man3000 buffer box. PBX can send data through man3000 hardware as long as man3000 hardware will have access through customer's network.

- Enter your technical password
- Open the file menu.
- Open personal copy.



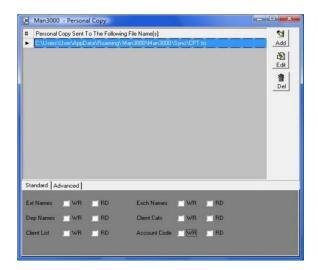


Click on Add.

Select a file name. Note that this file name could have any name, it is suggested that the name of the branch is used, e.g. CPT, JHB, DBN, etc.



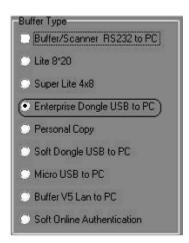
Click Save.



This will be repeated at each site.

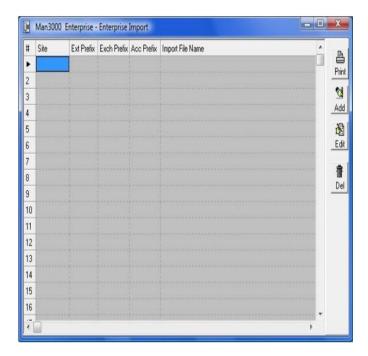
Setting up enterprise

Insert your technical password, then open settings menu then comport settings. Then under buffer types select Enterprise Dongle USB to PC.

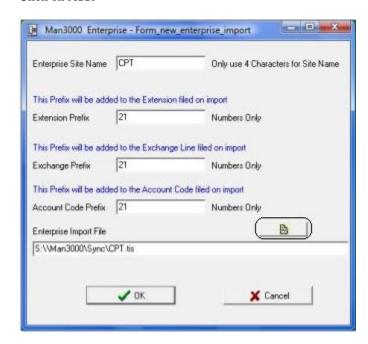




Open the File menu. Open the Enterprise Import menu.



Click on Add.

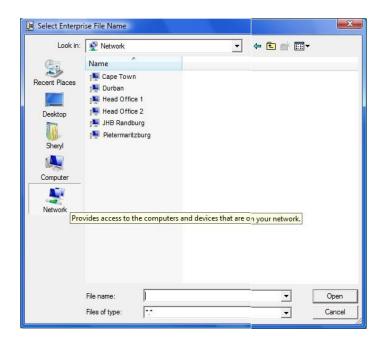


Enterprise Site Name:

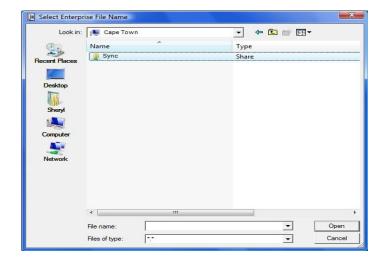
This is where you would insert the branch name of which the records are coming from.

Extension prefix, Exchange prefix and Account code prefix:

This is where you would enter any prefix number that is associated with the branch name. Then click on the **Enterprise Import File.**



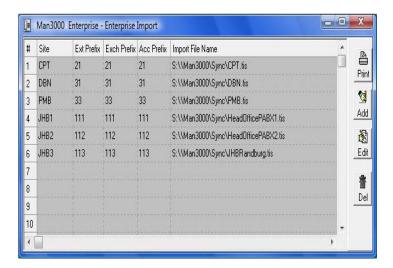
Browse through the Network for the specific branch PC.



Once you have selected the branch PC the shared Sync folder will be there.



Then open the sync folder and your import file will show. Then highlight your import file and click open.



A Specific Enterprise Dongle is required to activate MAN3000 Enterprise.