

Genesis Copyright & Trademark Notice

Copyright ©, 1985-2003 **Genesis Systems Corporation**, Langley, B.C. Canada. Information in this document is subject to change without notice or commitment by **Genesis Systems Corporation**. No portion of this manual may be reproduced in any form by any means without the prior written consent of Genesis Systems Corporation.

The Genesis Telephone Management System, SmartCall PC, and TeleCall (Plus, Lite, Ultra-Lite, & Mini) software programs are copyright © 1985-2003 by **Genesis Systems Corporation**. The software described in this document is distributed on an individual sales basis for the personal use of the original purchaser only. Further, the software described in this document is distributed under a license agreement and a non disclosure agreement. It is against the law to copy these software programs by any means except for the sole purpose of creating backup copies to be retained by the original purchaser.

SL-1 is a trade make of *Northern Telecom*

MS-DOS & Windows is a trade mark of *Microsoft Corporation*.

Genesis Telephone Management System, Genesis Plus, Genesis Lite, Genesis Ultra-Lite, Genesis Mini, Genestar, TeleCall Plus, TeleCall Lite, TeleCall Ultra-Lite, Inn TeleCall, COPS Toll Fraud, COPS Interrogator, Genesis 911 and Genesis ACD, are a trade marks of **Genesis Systems Corporation**.

All Right Reserved, Worldwide

Genesis Table of Contents

Introduction	2
General Business Applications	2
Hotel / Motel Applications	2
How does Genesis work?	2
Available Options	3
Part 1 Installing & Running Genesis	4
What hardware do I need?	5
How does the Windows Version work?	5
How does the DOS Version work?	6
Why should I leave the computer ON?	6
When does Genesis bill my calls?	6
How do I bring up Genesis ?	6
Installation Instructions	7
Common Problems & Solutions	9
Part 2 Using Genesis' Features	10
Genesis Do's and Don'ts	11
Entering Surcharges and Taxes	12
Entering Call Rating Information	13
Installing Updates	15
Performing Month Ends	16
Deleting Previous Periods' Call Data	17
Create / Restore Backup Copies	18
Setting Access Codes	19
Setting Printer Control Characters	20
Setting Screen Colors	21
Setting Data Collection Parameters	22
Printing Reports and Listings	23
Part 3 System Diagnostics	25

Introduction

Genesis' Telemangement systems are designed to be both "user-friendly" and "simple" to use yet pack the power of systems costing much more. **Genesis** Telemangement systems are available in Windows, Dos and Unix versions. The system developers have many years of both computer and telephone experience which you will see reflected in the fine quality of this product. **Genesis** always welcomes any comments or suggestions you may have.

Genesis is available in several versions:

Plus series - fully featured, extensive reporting, traffic, fraud, equipment inventory, directory modules

Lite series - for smaller companies less than 100 phones that require just basic reporting, and no fraud, equipment or directory modules.

Ultra-Lite series - for very small companies or home businesses that require very basic reporting at an affordable price. True V+H call rating tables are optional.

General Business Applications

The 1980 & 1990's gave birth to a new era of "cost consciousness" in organizations of all sizes. Companies can no longer let operating expenses escalate without some means of monitoring and controlling them. Until recently, telephone costs have represented one of the most expensive and yet hardest to control areas of expenditures. **Genesis Ultra-Lite** gives you that control.

Hotel and Motel Applications

Hotels and Motels are heavy users of telephone accounting systems. Many are using telephone accounting systems to allow their guests to make 1+(telephone number) as opposed to strictly 0+(telephone number) calls (DDD as opposed to operator assisted). In some cases, the telephone call information is sent directly to the hotel/motel's computerized Property Management System (PMS) that can be running on the same computer as the telephone management system, or a different computer located elsewhere.

How Genesis works

Genesis consists of software programs that run on your PC to provide you with **ON-SITE REAL-TIME** telephone call costing, allocation and reporting. **Genesis** is connected to your telephone system where it actively collects and processes raw Call Detail Records (CDR) and stores them in a file. These CDR records usually contain the date and time that the call was placed, the duration of the call, the extension

number placing the call, the trunk facility used, the telephone number dialed, and the account code number (if used).

Available Options

1. True V+H Rate Tables - (Ultra-Lite version only) where calls are billed in the same manner as your telephone company does. These tables are included with Plus & Lite series.

2. Remote site polling - allows you to poll the call information from multiple branch offices back to your office for processing and reporting. The system maintains separate configuration files for each branch office, just as though it was running its own independent system.

3. Multi-tenant package - allows your system to collect data for several different customers all sharing the same switchboard. Each customer has its own separate configuration files just as though it were running its own independent system.

4. Buffer boxes - (normally not required) for those customers who wish to use the entire PC to run other application programs, you may purchase a buffer box to temporarily store calls while you run your other programs. **Genesis** will then automatically process the calls later. Contact your dealer for more information.

5. A special "DATA EXPORT" utility - is available that extracts calls from **Genesis** ASCII call record files and re-formats them into various different formats so other programs like Lotus, ACCPAC, Easy Law, etc. can read them. This utility can be run as often as desired and only extracts the calls since the last time it was ran.

6. Auxiliary rate tables - permit your system to bill calls placed over OCC (other common carriers) like Sprint, MCI, etc.

7. Multi-switchboard versions - are also available where calls are collected from multiple independent switchboards simultaneously. These calls are either kept in separate files and treated as an entirely different systems, or combined for unified reporting. The multiple switchboards can be different makes and models.

8. HOBIC Merge and Property Management System Interfaces - are available for Hotel/Motel systems to automatically track 0+ calls and transmit guest calling information directly to another computer for posting to customer folios.

9. COPS Interrogator - is an optional module for Northern Telecom Meridian 1 and SL-1 series switchboards, that works with the existing COPS Toll Fraud module to actually DISCONNECT fraudulent calls in progress! The COPS Interrogator takes aggressive action against toll fraud calls.

10. Database Exchanger (Adds, Moves & Changes) - is an optional module for Northern Telecom Meridian 1 and SL-1 series switchboards, that allows the exchange of configuration between **Genesis** and your switchboard to avoid dual entry. It can also perform **Adds, Moves & Changes** to your switchboard database.

Part 1:

Installing & Running Genesis

- **What Hardware do I need?**
- **How does the Windows Version work?**
- **How does the DOS Version work?**
- **Why should I leave the computer ON at all times?**
- **When does Genesis bill my telephone calls?**
- **How do I bring Genesis up?**
- **Installation Instructions**
- **Common Problems & Solutions**

Installing & Running Genesis

Genesis is available in **DOS, Windows & Unix versions**. **DOS** and **Windows** versions **are included on the same disks**. MANY IMPORTANT TOPICS ARE DISCUSSED BELOW so please read the appropriate notes below regarding **DOS** or **Windows** BEFORE you install the system.

Any phone system programming instructions are supplied with your phone system.

What hardware do I need?

Genesis programs can run on your PC without interfering with most of the programs you would normally run. If you already have a PC in your office or you plan to purchase one, ensure it meets the specifications outlined below.

The system requires the following PC specifications to operate correctly:

- IBM PC or true compatible PC micro-computer
- PC-DOS or MS-DOS (release 3.3 or later)
- Minimum of 640K memory
- Real-time clock (battery backed-up)
- 1 serial communications port (COM1:)
- 1 parallel printer port (LPT1:)
- 1 hard disk with at least 20 megabytes free
- 1 floppy disk drive

If you plan to run the Windows version then your computer must meet Windows' minimum requirements as well.

Both Windows and DOS version are available. Each version has the same features and capabilities. All future enhancements and modifications will be done to both versions.

How does the Windows Version work?

The primary difference between the **DOS** and **Windows** version, other than the mouse, is the manner in which call data is collected from your phone system. **Regardless of the version, the system must always be alive collecting call records from your phone system "uninterrupted", and have full control over the data collection serial port on your computer.**

If you are running the Windows version of **Genesis** under **Windows 3.1**, you **MUST ALWAYS REMAIN IN WINDOWS OTHERWISE CALL COLLECTION WILL CEASE WHEN YOU EXIT TO DOS. IN OTHER WORDS YOUR COMPUTER MUST ALWAYS START WINDOWS AUTOMATICALLY EACH TIME THE COMPUTER IS BOOTED AND STAY THERE.** If this creates a problem for you consider these alternatives:

1. Switch to Windows 95 or higher
2. Get Windows versions of the other DOS programs
3. Run the DOS version

How does the DOS Version work?

Call data collection with the **DOS** version is performed by a special memory-resident (TSR) program (called GCOM.EXE) that loads into memory each time your computer is started. This program displays a little happy face in the top left corner of your screen when a call record is received. This program uses very little memory (defaults to 16K and can be changed), leaving lots of memory for other programs.

During the **DOS** installation process, your AUTOEXEC.BAT file is automatically modified to add the commands to automatically start the collection program every time your computer is started.

Why should I leave the computer ON at all times?

1. **Genesis** performs an automatic nightly processing cycle.
2. The **Genesis** data collection program must remain running 24 hours / 7 days per week in order to collect call data from your phone system. The data collection program is automatically started each time the computer is started.

When does Genesis bill my telephone calls?

In both the **DOS** and **Windows** versions call data billing and allocation is done **each time you enter the system by bringing up the main menu**, or each night automatically. When the main menu is up, you can observe call records from your phone system being costed on the screen. It quickly "catches up" by processing any outstanding calls records already received from your phone system. If you leave this menu up, your calls will be processed in "real-time" as they occur and be ready for report printing immediately.

How do I bring up Genesis?

DOS version: type **CD \CDR** (press enter key)
GO (press enter key)

Windows version: Click on the **Genesis** icon

Installation Instructions

Step 1: Ensure the computer's DATE and TIME are correct.

Step 2: Mount the "Genesis Installation Diskette #1"

Step 3:

DOS version: From DOS type **A:**
INSTALL

Windows version: Click **Start » Run** then enter **A:\WINSTALL**

Unix version: Refer to the UNIX instructions

The system's installation program will automatically copy and create the necessary programs and files on your hard disk. These programs and files will be copied into a newly created sub-directory on your hard disk called **CDR**.

Step 4: Insert the remaining diskettes when prompted.

Step 5: Enter the serial port settings to be used for collecting call data. Enter the PC's serial port number, and the speed, and parity that matches your telephone system. Ensure you select a PC serial port not used by other programs. **Restart your computer.**

(**Dos version:** If you plan to use a PC serial port other than COM1 or COM2 refer to "Setting Data Collection Parameters")

Step 6: If your switchboard attaches Access Codes, Alternate Carrier Codes or Telephone Feature Dialing Prefixes (other than *66, *67,*69 that has already been added to your system's configuration) directly onto the front of the dialed digits, then you must enter them into the **Access Codes** screen.

Step 7: After the computer "boots" bring up the system's main menu by typing:

DOS version: type **CD \CDR** (press enter key)
GO (press enter key)

Windows version: Click on the **Genesis** icon

Step 8: Construct a cable that links your PC to the phone system's CDR data port. **Genesis** requires only 2 wires from your switchboard, receive and ground, You can start by using a standard serial cable but **depending on your phone system, you may need to use a null modem adapter or strap some pins (join together) at the phone system end of the cable to make it happy so it will send CDR records continuously! Check your phone system documentation if you need further information.**

CDR port pin number	Computer COM1 port pin number
transmit 2 or 3	3 receive
ground 7	7 ground

If this doesn't work, you may need a null modem connector.

Step 9: Program the telephone system to send **ALL** call records, and at the speed & parity you previously set.

Step 10: You should now see call records being displayed on the Main screen as they occur. If your phone system is not very busy, place some test calls and watch for the records to appear on the screen when you hang up. Make sure the call is at least 1 minute in duration.

Common Problems & Solutions

I don't see any call records:

- a. check the phone system's programming instructions
- b. try using a null modem connector
- c. check the cable for assembly errors or loose connections.
- d. ensure the cable is connected to the correct ports
- e. have the operation of the PC's serial port tested
- f. check the PC's serial port for conflicts with other software or hardware

I see call records but they are garbled:

- a. speed and parity settings don't match
- b. PC serial port conflicts with other software or hardware

I get this error message: "INVALID FORMAT - RECORD IGNORED"

-check the records for uniformity, completion and the correct Date and Time. If the records seem correct press the computers' **Print Screen** key and call technical support.

Part 2:

Using Genesis' Features

- **Genesis Do's and Don'ts**
- **Entering Surcharges and Taxes**
- **Set Call Costing Rates**
- **Installing Updates**
- **Performing Month Ends & Deleting Call Data**
- **Create/Restore Backup Copies**
- **Setting Access Codes**
- **Setting Printer Control Characters**
- **Setting Screen Colors**
- **Setting Data Collection Parameters**
- **Printing Reports and Listings**

Using Genesis' Features

To enter the **DOS** version of the system you must change to the **CDR** sub-directory by typing **CD \CDR**, and then type **GO**. For the **Windows** version, click on the Genesis icon. The main entry screen will then be displayed. From here you can proceed deeper into the detailed menus that are required to modify the system files, print reports, or perform the other functions of the system.

You will also notice the screen displays **CALL RECORDS** as they are received from your telephone system. Any calls that have been received from your telephone system, while you were out of **Genesis**, will be quickly processed, then records will be processed in "real time" as they are received from your telephone system. Exiting from the Main Menu forces the system to store the raw records in a temporary accumulation file for future processing when you re-enter the system's Main Menu again.

Genesis Do's and Don'ts

Rule 1: THIS IS THE MOST IMPORTANT RULE OF THEM ALL! Simply check to see **Genesis** is operating correctly **EVERY** day by performing the following tests:

Bring up the system's main menu and check the following items:

- a. **Raw Call Records** - are being collected and processed on your screen.
- b. **Current Computer date and time** - is displayed on the top of the screen.
- c. **Current Telephone System date and time** - is correct in the records.
- d. **Warning Messages** - note any warning messages displayed on the screen.

Refer to **System Diagnostics** for procedures to follow, if you encounter problems with any of these items.

If you FAIL to do this, Genesis or your telephone system's CDR port could be down for a long period of time before anyone would know. If the system is down, call record collection is suspended, so data is lost. If the dates are wrong, system cycles and call billing could be dramatically effected.

Rule 2: NEVER turn the power **OFF** to the computer because call data collection will be terminated while the power is off and automatic cycles will not run.

Rule 3: If the computer hangs or freezes, **PRESS THE COMPUTER'S RESET BUTTON IMMEDIATELY SO THE COMPUTER CAN RECOVER and call collection can resume.**

Rule 4: ALWAYS remove diskettes from the floppy disk drive when you are finished with them otherwise your system will not restart.

Rule 5: ALWAYS make backups of your system files and store them in a safe place. Backup procedures are discussed in this manual.

Rule 6: NEVER confuse the letters "O" (oh) and "I" (el) with the numbers zero and one.

Entering Surcharges and Taxes

Genesis uses the Surcharge & Tax information you enter into this screen to rate your calls. True V+H call rating tables for the Ultra-Lite version are optional. Contact **Genesis** for further information.

Explanation of Terms:

Basic Call Cost - is the telephone company's charge for the call as computed from the system's optional V+H rate tables. You can ignore this item unless the optional V+H rate tables have been installed.

Local Calls - calls where you **do not** have to dial a special prefix like 0,1,011 or 01 (in North America) are treated as local calls by the system.

Long Distance Calls - DDD or, 1+ calls.

Operator-assisted (domestic & overseas) - 0+ and 01+ (overseas) calls.

Overseas Calls - DDD overseas or 011+ calls.

Directory Assistance Charge - is a service charge for locating telephone numbers.

800 and 900 Service Calls - 800 toll free & 900 calls billed using these amounts.

Maximum Surcharge and Markup Ceiling - is a user-determined dollar amount that any combined surcharges and markups will not exceed.

Percentage Markup - is a user-determined percentage factor between -99.99% and 999.99% that is added to the V+H rate table cost of each call. This feature **only works** if you have the optional V+H call rating tables. If you plan to use both a "Call Percentage Markup" and the "Surcharge per Call" or "Surcharge per Minute" features together, **Genesis** applies the percentage markup first, followed by the surcharges.

Surcharge per Call - is a user-determined surcharge between \$0.00 and \$99.99 that will be added to each call regardless of its length.

Surcharge per Minute - is a user-determined surcharge between \$0.00 and \$99.99 that will be added to each minute of the call's duration.

Tax 1, Tax 2, and Tax 3 - are the government-determined tax rates you are charged for your telephone calls. The system "features" 3 levels of taxation. Tax amounts are percentage factors between 0% and 999.99% that are added to the cost of each call. If you wish to apply taxes to the surcharges and markups simply fill in the tax columns with the appropriate rates. If you have the optional V+H rate tables, then you should fill in the tax rate next to the basic call cost item as well.

Apply Tax on Tax - in some locations taxes are added on-top of other taxes resulting in a compounding tax rate. To accommodate these instances simply ensure the compounding taxes are entered in either column 2 or 3 and the "tax on tax" indicator at the bottom of the appropriate columns is changed to Y.

Entering Call Rating Information

Genesis allows you to enter your own rates to be used when billing calls from your telephone system, if you do not wish to purchase the optional True V+H rating tables. Basically, with this feature you can enter the area code or any portion of the telephone number and the rates you wish to be applied.

How does it work?

This feature provides you with three extremely powerful tools:

1. It allows you to optionally change the actual dialed digits, reported in the call records, from one telephone number to another. The call is then billed according to the replacement telephone number.
2. It allows you to specify a special Surcharge, Markup and Tax Table to be applied when billing particular telephone numbers, in addition to the rates you enter here.
3. It allows you to enter billing rates for specific telephone numbers. So, basically this feature allows you to create your own custom rate table.

What terms do I need to understand?

Original Dialed Digits - is the actual telephone number or speed call code reported by your phone system in the raw call records, **including any dialing prefixes like 0 or 1**.

Replacement Digits (optional) - is the actual telephone number or portion thereof that you want to use as the replacement number, **if any**. The call is then billed according to the Replacement Digits.

Apply on Partial Match (optional) - this option determines whether the special handling you specify here will be performed on all numbers containing an exact, or just a partial match (leftmost digits) of the Original Dialed Digits specified above.

Apply Surcharges and Taxes - if you wish to have your entries in the Surcharge, Markup and Tax table apply then simply enter a **"Y"**. Ensure you enter the Surcharges and Taxes you wish to use into the table.

First Interval Rate (cents) (optional) - is the rate (in cents) you wish to bill calls based on the Original or Replacement digits discussed above, for the first period of time (normally 60 seconds). This feature allows you to charge a different rate for the first time period (minute) if desired. Many telephone companies charge more for the first time period (minute) than each subsequent time period (minute). The difference between the two rates is referred to as a "Message Charge" or "Call Set-up Charge".

First Interval Length (seconds) (optional but **must be used** if a First Interval Rate has been specified) - is the number of seconds in the first billing interval. Typically the first interval length is 60 seconds, unless your telephone company or you wish to bill calls using some other interval like 30 or 6 seconds.

Second Interval Rate (cents) (optional) - is the rate (in cents) you wish to bill calls based on the Original or Replacement digits discussed above, for the second period of time (normally 60 seconds). This feature allows you to charge a different rate for each additional time period (minute) if desired.

Second Interval Length (seconds) (optional but **must be used** if a Second Interval Rate has been specified) - is the number of seconds in the second billing interval. Typically the second interval length is 60 seconds, unless your telephone company or you wish to bill calls using some other interval like 30 or 6 seconds.

Local Call Flag (optional) - is used internally by the system to determine whether this call is in your local calling area. You should use this feature to specify whether the number you have entered is to be treated as a local call.

Any Dialed Digits changes take effect immediately.

Installing Updates

Genesis offers a Maintenance Subscription Service where system enhancements and updates (and optional V+H Call Rating Tables) are sent to you regularly on diskette. Rates are constantly changing and new area/exchange codes are continuously being added. This service ensures your system never becomes obsolete or outdated and reflects changes to the computer and telecommunications technologies.

The system is optionally capable of costing calls using up to 9 different rate tables **simultaneously!** So if you are using an OCC "Other Common Carrier" such as Sprint, M.C.I. etc. you may order special rate tables from your distributor so those calls are costed at the correct rate. Contact your distributor for further details.

When installing updates follow the instruction sheet included with your update disk(s).

Performing Monthends & Deleting Previous Call Data

Monthends are required to close off call accumulation files for a specific period and open fresh files for the next period. Basically you have two options. You can have Monthends performed automatically the same day each month without any user involvement, or you can initiate Monthend processing on demand by specifying the starting and ending dates.

Automatic Monthends

Automatic Monthends are performed automatically each month on the day you have specified. No user involvement is required for these cycles to run. Simply specify the date and ensure your computer is left running the night the Automatic Monthend cycle is to be performed. Automatic Monthends work well for users who are not concerned with telephone bill reconciliation, or for users whose telephone company use a consistent cut-off date each month when preparing your bill.

Enable Automatic Monthends: if you wish to use the automatic Monthend feature, this must be set to "Y" otherwise set this to "N" and perform them manually.

Automatic Monthend Date: Simply select the day of the month you wish to be the last day of each reporting period. A new file will be opened immediately to collect the data for the next reporting period. Before you choose your Monthend date you should consider the following important points:

1. You may wish to set the month end date so it aligns with your telephone company's billing date.
2. **Never select 29, 30, or 31** as your Monthend date because these dates do not occur in some of the shorter months. **Select "0" as your Monthend date if you wish the month end date to be at the actual end of each month, regardless of how many days are in that month.**

The Automatic Monthend cycle will happen during the midnight cycle **AT MIDNIGHT ON THE DATE YOU HAVE SPECIFIED SO ENSURE YOUR PC IS LEFT RUNNING OVERNIGHT SO THIS CYCLE CAN EXECUTE!**

Manual Monthends

Manual Monthends can be performed at any time by simply specifying the Period Starting and Ending dates you wish to use. The system never performs a Monthend until you manually enter the dates and initiate the Monthend cycle (either right now or wait until midnight).

Another important feature with Manual Monthends is that it can be used to "override" your Automatic Monthends if required. For example, in the event you are using Automatic Monthends and for some reason your system fails to perform your

Automatic Monthend (ie. the computer was turned OFF that night). You can manually force a Monthend by specifying the Period Starting and Ending dates.

When performing manual Monthends, any call data occurring AFTER the specified "Period Ending Date" will remain in the current month's call accumulation file. Any call data occurring BEFORE the specified "Period Starting Date" will be stored in a separate previous month file.

Deleting Previous Month's Call Data

Genesis NEVER AUTOMATICALLY DELETES ANY PREVIOUS OR CURRENT MONTH CALL DATA FILES! You must manually select the periods you wish to delete. You may wish to "archive" those old call files using a tape drive or some other backup software, so they can be put back into the system at a later time if additional reporting is required.

The Call accumulation file names are:

CURR.*	- contains today's calls only
CROO0000.*	- contains current month's calls except today's
CRyymmdd.*	- contains call data for a previous period.

Create / Restore Backup Copies

After entering your configuration information **YOU MUST MAKE A BACKUP COPY OF THE CRITICAL CONFIGURATION FILES AND STORE IT IN A SAFE PLACE.** If you have to reload your system's software, these backups can save you an enormous amount of time, money and frustration. Simply insert a blank formatted diskette into the floppy drive and follow the instructions on the screen.

Note: The call record files are not backed up onto floppy disks by **Genesis** because of their potential size. A tape drive, backup or compression programs can be purchased to back up these files if desired. The call record file names are:

CURR.*	- today's calls only
CRO00000.*	- current month's calls except today
CRyymmdd.*	- previous month's calls where yymmdd is the cut-off date

When the desired files have been backed up or restored from floppy diskette, remove the diskette immediately and store the backup diskette in a safe place.

Setting Access Codes

You must enter any access codes you dial if they are **attached directly to the front** of the dialed number such that they appear to be part of the number (i.e. No spaces between the access codes and the actual phone number). **Enter any "Equal Access" codes you dial to route your call through a different carrier (i.e. 1022, 1023, etc.) FAILURE TO DO SO WILL MOST DEFINITELY RESULT IN CALL BILLING ERRORS! Ignore this section if these codes are separated by spaces from your dialed telephone numbers.**

Access Codes are also used to activate "Auxiliary Rate Tables" so calls placed over special facilities or carriers can be billed correctly. Auxiliary rate tables must be purchased from your system dealer.

You may also enable or disable the printing of access codes on your reports. The default setting is to **suppress** the printing of access codes.

If you are unsure and need to determine whether access codes are used, watch the calls being captured in the Main Menu screen and make note of any codes.

Setting Printer Control Characters

(Dos Version Only)

Unfortunately different makes and models of printers use different software commands to control various printer functions. You may have to refer to your printer's manual to determine what some of relevant commands actually are. It is then necessary to identify them to the system so it can control the spacing and printing of your reports. Basically the system must control the number of lines to be printed on each page, the form feed character(s), the compressed print characters, the reset compressed print characters and the actual port number your printer is connected to.

When you are entering these software commands you will have the option of entering them in either "Decimal" or "Hexa-decimal" format. Depending on your printer's manual, these commands may be given in either or both formats.

Form Feed Character: is the software command to force your printer to advance to the top of a new page (usually a decimal 12 or hexadecimal 0C).

Number of Lines Per Page: is the number of lines you wish to be printed on each page before a form feed command is sent to the printer. Default is 56 lines per page.

Printer Port Number: Select the port number that your printer is connected to, either LPT1, LPT2, LPT3, or LPT4. The default setting is LPT1.

Set Compressed Mode: the compressed command allows your printer to print the required line widths of 132 characters. These settings must correspond exactly to your printer's specifications otherwise your reports will not be printed in compressed format. If you plan to use 14 inch wide paper, compressed printing is not required. The system defaults to a Decimal 15.

Reset Compressed Mode: (optional) is the command to reset your printer and cancel the compressed settings. Typically the system sends the reset command to the printer after your reports have been printed.

Setting Screen Colors

(Dos Version Only)

All types of monitors are supported by **Genesis** (Monochrome, CGA, EGA, VGA, etc.) However if you have a color screen, you can change the screen colors to suit your tastes. The background, foreground, box and heading colors can be adjusted.

Follow the instructions displayed on the screen.

Setting Data Collection Parameters

This section discusses how to set-up the serial port used by your system for collecting raw call information from your telephone system.

COM Port Number - is the serial port used by **Genesis** to collect calls data from your phone system (COM1, 2, 3, or 4). You must enter the port number to be used by the system to collect this data. The system defaults to COM1.

DOS Versions Only:

- The use of COM3 and/or COM4 for data collection is permitted, However due to the "lack of industry standards in this area" you must read the following information for COM3 and COM4 to ensure correct system operation:
- **IBM PS/2 Computers (COM3 or COM4 only)** - if your computer is a true IBM PS/2 series and you plan to use COM3 or COM4 here, then you can simply enter the COM port number (3 or 4) like you would for COM1 or COM2. You **MUST** ignore the **Port Address** and **IRQ** on the **Set Data Collection Parameters** screen!
- **Non PS/2 Computers (COM3 or COM4 only)** - You must ignore the **COM Port Number** and instead enter the **Serial Port Address and IRQ** and leave the **COM Port Number blank**. The system can not share an address or IRQ with another port because it is running 24 hours a day! **Hint: try to use IRQ5 for COM3 or COM4. Refer to the serial card's documentation for further information.**

Speed - is the data transmission speed used when receiving call records from your phone system. For example it could be 300, 1200, 2400, 4800 or 9600 bps.

Parity - is the parity used when receiving the call information. The valid settings are "N - for None, E - for Even, O - for Odd, M - for Mark, and S - for Space".

Data Bits - valid settings are "7 and 8 data bits".

Printing Reports and Listings

The best way to learn about the reporting features of your system is simply to print some reports. All printing instructions are displayed on the screen when you make your selections.

You can print any report upon request. Simply select the period(s) you wish to print reports for. If you wish to include several periods' calls on your reports, simply "tag" the desired periods by entering a "Y" in the "Print" column next to the period. If you wish to print reports for periods previously archived on floppy disks or tapes, then restore them first. **If restoring call record files from your archives, the system always checks to ensure any indexes are intact before allowing any printing. If indexes are required, the system may take a minute to create them. Please be patient.**

You may print reports for either the current or any previous reporting period **at any time.**

Three output options are available to you for your reports:

- 1. Display the report on the screen** - If you choose to display the reports on the screen, you will notice some data fields normally seen on the printed reports are missing (i.e. like city names). This happens because the screen is only wide enough to display 80 characters on one line. Therefore you may have to print the report on the printer or write it to a disk file to get all the desired information.
- 2. Print the report on the printer** - If you have chosen to print the reports on the printer all data fields are printed.
- 3. Write the report to a disk file** - If disk file output is selected, the system asks for the name of the file to which the report will be written. Valid file names can be any alpha-numeric names no longer than 8 characters. The system will generate the three digit file suffix name of 001. (i.e. CORPSUMM.001).

If you wish to abort the printing of any report JUST PRESS THE ESC KEY AND WAIT. If your printer has an internal buffer, it could take several seconds to stop printing.

The Reports

We recommend you generate some reports and experiment with the system's printing features. Follow the instructions displayed on the 23rd line of the screen.

All summary and detail reports feature **OPTIONAL** call selection parameters. These selection parameters allow you to "customize" your reports to include or exclude calls containing certain characteristics as opposed to always printing every call. You may select any combination or just PRESS THE <ENTER> KEY TO IGNORE THEM and proceed with report printing.

1. **Corporate Summary Report** - is a one-page report that summarizes ALL telephone charges. The report breaks down the telephone charges and durations by extension or local number.
2. **Account Code Summary Report** - is a one-page report that summarizes ALL telephone charges by account code.
3. **Extension Detail Report** - is a multiple page report (one separate report for each extension or local) that details the telephone charges. Each report breaks down the call duration, charges, number dialed, trunk used, etc. for telephone calls placed from each extension.
4. **Account Code Detail Report** - is a multiple page report (one separate report for each account code) that details the telephone charges. Each report breaks down the call duration, charges, number dialed, trunk used, etc. for telephone calls placed using account codes.
5. **Chronological Detail Report** - is a multiple page report that details telephone toll charges and duration in chronological order. Each report breaks down the call duration, charges, number dialed, trunk used, etc. for all telephone calls. It is especially useful when reconciling the system reports with your telephone bill because the calls are usually printed in the same chronological sequence.
6. **Rejected Calls Report** - is a report that prints all "miscellaneous" information between 2 specified dates, that was received from your telephone system. Typically this information could include any telephone system alarms, diagnostics or invalid calls.

Part 3:

System Diagnostics

- **To ensure reliable system operation**
- **Warning messages**
- **Calls are being produced by the phone system**
- **Current computer date & time**
- **Current phone system date and time**

System Diagnostics

To ensure reliable system operation, the system operator **MUST** observe the main menu screen at least once each day to ensure correct system operation. If you fail to perform these checks, the system or your telephone system's CDR port could be down for a long period of time before anyone would know. If the system is down, call record collection is suspended and valuable call data is lost. Check these items from the main menu screen:

Warning messages - look for any system warning messages in the middle of the screen. Press the <PrtScr> key to print this warning on the printer or write down the entire contents of the message. Follow the trouble reporting procedure described below if you need help.

Calls are being produced by your phone system - ensure raw call records from your phone system are being displayed on the main menu screen. If no calls are seen, turn the computer OFF for 20 seconds (this resets the computer) and check all cable connections. Turn the computer back ON and bring up the system's main menu. Place a test call and watch the screen. If call records are still not seen, check your phone system or contact your phone system's vendor and inform them that "the phone system is no longer sending CDR or SMDR information to your call accounting system". **FAILURE TO CORRECT THIS WILL RESULT IN PERMANENT LOSS OF CALL RECORDS. THIS COULD RESULT IN LOSS OF REVENUE ESPECIALLY IF CALLS ARE CHARGED OUT TO GUESTS, CUSTOMERS OR PROJECTS.**

Current computer date and time - ensure this is correct. The computer date and time is displayed in the top right corner of the main menu screen. Adjust computer date and time if required, reset computer and verify the change. **FAILURE TO DO SO WILL RESULT IN AUTOMATIC MONTH END CYCLES RUNNING AT THE WRONG TIME.**

- ensure the date is the same as the computer, and the time is fairly close. Adjust the date and time on your phone system if required. Watch new calls appearing on the screen to verify change. **FAILURE TO DO SO WILL RESULT IN BILLING ERRORS DUE TO INCORRECT TIME OF DAY AND DAY OF WEEK DISCOUNTING.**

The system comes with a complete self-diagnostic utility. This diagnostic utility is designed to help both the user and technical support staff troubleshoot any problems occurring with your system. If you suspect problems with your system, do the following:

1. Ensure you are in the system's main menu and your printer is turned ON. Press the <PrtScr> key (**DOS** Version) on the keyboard to take a "picture" of the main menu screen.
2. Select the last item in your main menu "**PRINT Trouble Report**". Print the report on the printer. On the first page of the report, explain your problem in writing in the space provided.
3. Fax the report and the screen printout to your system's support centre.