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SYSTEM REQUIREMENTS

Metropolis telemanagement applications do not require a dedicated PC/Server. Virtual environments, such as VMware may also be used. Please contact the Metropolis Technical Support department for installation.

System Requirements

- 2 GB RAM (32-Bit) or 4 GB RAM (64-Bit)
- 20 GB hard drive space (for raw data retention)
- Adobe Reader and/or Microsoft Excel (to output reports in those formats)
- Internet Connection*

**NOTE:** Windows User Account Control would need to be disabled and the application will need administrative permissions to run. These are the minimum requirements necessary to run the telemanagement system. Your operating system/equipment may have additional or higher requirements. Web access functionality requires Windows 7, Windows 8, Windows Server 2008, Windows Server 2012.

*Internet connection required for subscription-based products and/or for Remote Support access.
FEATURE OVERVIEW

Status Indicators (Traffic Lights)
The software includes a status indicator on the dashboard screen to provide an at-a-glance view of the system status. A green light indicates that the system is operating optimally, a yellow light indicates a potential problem and a red light signals that there is a problem with the system that needs to be addressed immediately.

PBX Indicator
If the PBX has not transmitted any call records over the pre-configured time period, the PBX indicator light will change to yellow followed by red if the problem is not resolved. Refer to the Alarms section of the user guide for instructions on the configuration of PBX alarm thresholds.

Support Indicator
The Support Indicator reflects the expiration status of the support subscription. A unique support subscription code is required each calendar year in order to update the system with new rate tables, area codes and software upgrades. Green indicates a valid support subscription code, yellow indicates the subscription code will expire within 30 days and red indicates the code has already expired. If the Support Indicator is red, updating with new rate tables without obtaining a new support code will prevent calls from being correctly processed because the system will determine that the updates were obtained without a proper license.
Call Volume Graphs

The Call Volume Graph can be found in the lower left corner of the main screen and displays the amount of calls by hour, day, week or month.

The Call Graph may be used for several purposes:

- To determine if the system has been processing calls (if not, the call graph for the Day option will be flat).
- To determine peak call times by selecting Day and viewing the time(s) of day when call volume peaked.
- To review call activity to find trends for the week (select the Week option).
- To view call activity, peaks and trends for the month when selecting the Month option.

Hour

This graph displays call volume during the past hour. The far left edge of the graph indicates call traffic one hour ago and the far right edge indicates current traffic.

Day

The Day Graph is similar to the Hour Graph and is useful for determining when the majority of calls are made during the current day.

Week

The Weekly Call Graph indicates the amount of calls that were made during the past seven days and compares the call volume of various days of the week. The x-axis indicates the day of the week, while the y-axis shows call volume.

Month

This graph displays the call volume over the past 30 days. The x-axis indicates the date (for example, “16” means the 16th of the month) and the y-axis shows the call volume for that particular date.
Calling Locations

World, Regional and Local maps are displayed in the center, lower panel of the main screen. Click on the World, Region or Local tab option to view the corresponding map. Calls are plotted on each map as colored dots corresponding with the department they are assigned. A variety of colors can be assigned to represent different departmental phone call destinations. The color assignments may be changed by the user in the Assign Departments screen.

Map Hotspots

To get more information on dialed calls to a particular area on a map, click on a dot and select Find Calls to This Hotspot from the menu; a screen will pop-up containing the details of each call to the area.

Redrawing Maps

To redraw call locations on all maps, click on any section of a map. Select Redraw Maps - Today from the pop-up menu.

Clearing Map Plots

To erase all call plots from the maps, click on any section of a map and select Clear Maps from the pop-up menu.

NOTE: To customize the Maps, refer to the Customization section of the user guide.
Shortcut Icons

The shortcut icons, across the top of the main screen, allow one-click button access to frequently-used screens.

- **Rates:** Select rate tables and set markup rates
- **Special:** Set markups for special numbers such as toll free numbers, etc
- **Users:** Assign extensions and their correlated department
- **Depts:** Assign departments
- **Cost:** Display the cost of a call or determine “what-if” charges
- **Reports:** Create call reports from one of over two hundred report templates, create graphical reports or schedule reports for automated delivery
- **Dataspy:** View the live CDR / SMDR received from the PBX
Cabling

Cabling is defined here as the process of physically connecting the PBX with the telemanagement computer. To connect the systems: connect one cable from the PBX to the telemanagement PC and another cable from the property management system (if applicable) to the telemanagement PC. A straight-through serial cable, with or without a null-modem converter or a crossover cable may be used. Usually, cabling is already in place or will be installed by a technician, but for do-it-yourself users, these topics are discussed below.

Serial Cables

Serial cables are manufactured with one of two possible connector sizes: DB-25 or DB-9. The DB-25 connector has 25 pins and a DB-9 has 9 pins. DB-25 and DB-9 connectors do not use the same pin configurations to transmit data, as shown in the brief table below.

<table>
<thead>
<tr>
<th>SIGNAL NAME</th>
<th>DB-9 PIN #</th>
<th>DB-25 PIN #</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transmit</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Receive</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Ground</td>
<td>5</td>
<td>7</td>
</tr>
</tbody>
</table>

If the computer in use has a different connector than what is required on the cable, a simple adapter or converter may be purchased from an electronics supply store. The converter is often called a “DB-25 to DB-9 adapter” and performs the necessary pin translations.

Serial cables are usually manufactured as “straight-through” cables meaning that each pin on one end of the cable is directly connected to the corresponding pin on the opposite end. These cables also contain a male connector on one end and a female connector on the opposite end.

Null Modem Connectors

Computers with DB-25 connectors should transmit on pin 2 and receive on pin 3. A null modem cable is used to connect one computer’s transmit pin to the other’s receive pin and vice versa. The null modem also has male connectors at both ends to allow the cable to attach to each computer. A null modem is often used with a straight-through serial cable to connect two computers, instead of using a crossover cable, which is usually custom-built by a technician. Null modems also perform other features, but those features are not relevant here.

Crossover Cable

A crossover cable has the transmit and receive wires crossed so that the transmit pin on one device is connected to the receive pin on the opposite device. The signal ground wire is not crossed and connects to the ground on the opposite device. If the wires were not crossed, neither device would be able to communicate with the other. The crossover cable is usually custom built and has male connectors on each end.

NOTE: A straight-through cable paired with a null modem connector performs the same function as a crossover cable.
A diagram of a standard crossover cable follows:

**DB25 – DB25 Standard Crossover Cable**

1 2 3 7 13 14 25

**DB25 – DB9 Standard Crossover Cable**

1 2 3 7 13 14 25

6 9 12 3 5
REGISTRATION

Before the system can begin to calculate charges for phone calls, the software must be configured to operate with the user’s PBX. This initial setup process encompasses the minimum steps that are required to bring the system online. Once the initial setup is complete, the rates and extensions may then be configured.

Software Registration

The software will run in evaluation mode until it has been registered. To register the software, select Help I Register Software and complete the fields as required, then click OK.

Register Software

To register this software, these fields must be filled in exactly as the fields appear on your registration form.

- **Registration Name:** METROPOLIS TECHNOLOGIES
- **Location:** FORT LAUDERDALE, FL
- **Telephone:** 19549411010
- **Registration Code:** AAAA-BBBB-DDDD-EEEE-FFFF-GGGG

Registration Name
The name of your organization or property.

Location
The location (city, state) of your organization or property.

Telephone
The complete telephone number including the exchange and area code.

Registration Code
The registration code must be entered exactly as it appears on your registration sheet. If the code or any other data on this screen is not entered accurately, the registration box on the main screen will turn red and calls will not be processed.

**NOTE:** All fields must be entered exactly as they appear in the registration subscription as received from the manufacturer.

Multi-Site users should refer to the Multi-Site Configuration section of the user guide for additional details.
**COMMUNICATIONS SETUP**

**PBX Communications**

To configure the communications parameters required by the PBX, select **PBX I PBX Communications**. Select the applicable CDR / SMDR data collection method from the **Receive Data Using** dropdown. The available methods are Serial Com Port, IP Port (TCP/IP), IP as Client (TCP/IP), File Delivery or Folder Delivery.

**Serial Com Port**

Connect the serial cable directly from the PBX to the computer. Select the com port and enter the bits per second, data bits, stop bits and parity.

**IP as Port**

In this configuration the system is setup to listen for incoming SMDR data via IP. Enter the IP communications port number.

**IP as Client**

In this configuration the system is actively going to the PBX to pick up the data. Enter the PBX IP address and the communications port number.

**File Delivery**

This selection would be made when the PBX will be sending SMDR files to a designated folder accessible by the server/PC. The file folder path and partial file name would be entered here.

**Folder Delivery**

This selection is similar to the File Delivery method. The difference with this option is that there is no need to define the partial file name; the system will pull all the files in that folder. This option should only be used for SMDR files that would be deleted after being read.

**NOTE:** The PBX communications are determined by the PBX model. Contact your PBX technician for clarification or assistance with PBX values.
**PBX CONFIGURATION**

To configure the application to process data from the specified PBX, go to **PBX | Select PBX**. Select the applicable PBX from the list provided.

**PBX Modifications**

If the PBX is not listed or if the PBX SMDR format does not exactly match the predefined PBX format, click **Modify PBX**. Users can manually adjust the configuration options for virtually any PBX.

**Live PBX Data**

The top portion of the screen displays the PBX data after it is received by the system. It is useful when determining the starting position and lengths of the SMDR fields. To determine the starting position of each field in the PBX record, place the cursor over the data and check the “Data Received from PBX Position = xx” text at the top of the data (highlighted in green for easy identification).

**Outgoing Calls Format Tab (Required)**

The **Outgoing Calls** tab identifies the position and length of the fields of the outgoing call data records in the raw SMDR/CDR data. All call data is determined to be "outgoing" unless otherwise defined.

The **Time**, **Date** and **Duration** field formats should be selected from the drop-down lists and the remaining fields require the position and length of the specified fields.

**Incoming Calls Format Tab (Optional)**

To process incoming calls, the value of a character that appears at some permanent position in every call record must be specified. For example, if the letter "I" appears in the first position of each incoming call record, "I" would be entered in the position field, then “equals” would be selected in the drop-down option, and ‘l’ entered into the **Text field**.

If other values for incoming calls (time, date, etc.) appear in the same positions as the records for outgoing calls, click the **Duplicate Outgoing Format** button to copy the values from the Outgoing calls tab.
Internal Calls Format (Optional)

Internal calls typically match the outgoing format, but in cases where the format is different, the Internal Calls tab may be used to configure the settings. To enable, check Display Internal Call Tab on the Misc tab. An new tab labeled Internal will appear.

To process internal calls utilizing this tab, as for incoming calls, the value of a character that appears at some permanent position in every internal call record must be specified. For example, if the letter "I" appears in the first position of each incoming call record, “1" would be entered in the position field, then “equals” would be selected in the drop-down option, and ‘I’ entered into the Text field.

If other values for internal calls appear in the same positions as the records for outgoing calls, click the Duplicate Outgoing Format button to copy the values from the Outgoing calls tab.

**NOTE:** The internal identification value cannot be the same as the incoming value, if utilizing both tabs.

Model

The PBX Model field should show the name of the selected PBX, the record format and delimiter. The name may be edited here and the new name will appear in subsequent sessions. The exact name is not important, but meaningful names are helpful.

The PBX Record Format describes the layout of each SMDR record received from the PBX. The most common format is the Carriage Return / Line Feed option. However, other PBXs (e.g. NEC s) may use a “start of text” (STX) character to denote the start of a new call record and an “end of text” (ETX) character to denote the end of each call record.

Filters

This section is provided to filter out certain PBX records.

- **Process call record only:** Only processes calls when designated characters are in the assigned position(s).
- **Ignore record if:** Will not process calls when designated characters are in the assigned position(s).
- **Print record if:** Prints the record to the default printer when designated characters are in the assigned position(s).

CDR Filter

Allows the user to limit the data shown in the display window.

Other PBX Options

Options on the Translations, Misc, Aux 1 and Aux 2 tabs and under the Show Advanced button on the selection screen should only be used under direction of your PBX vendor or a Metropolis Technologies Support technician.
DATA SPY

When all fields are properly configured, the Data Spy will display valid data from the PBX in all fields on the Data Spy screen. To view the Data Spy, use the shortcut icon at the top of the main screen or click on PBX | Data Spy.

At the bottom of the screen (shown in gray) are the processed data fields, which is useful to determine if the PBX data stream matches the configured PBX settings. The Message field will display whether the data processed or why it might not have.
DISPLAYING PBX DATA

To view raw data sent by the PBX, select the **Display PBX Data** option on the **PBX** menu. This option allows the user to select which day’s SMDR data they wish to view.

To search for a specific call record, click on the log file for the desired date, then click the **Find Text** button to enter a search string to locate the record.
CONFIGURING RATES AND CHARGES

To select rate / tariff tables and set markups for phone calls, select Charges | Rates. Alternatively, click on the Rates shortcut icon from the main screen.

Actual Cost calls and "other" rate plan calls: "Actual Cost" calls typically reflect the actual price charged by the phone carrier. Other rate plan calls are calls that will be billed out, have markups or surcharges applied.

Call Classifications

- **Local Calls**: Local calls may be seven digits in length or may be distance-sensitive, as opposed to area-code sensitive. For example, calls dialed to a location within twelve miles proximity from the calling party area code/exchange may be billed at a fixed local rate, while calls outside this range may be billed at local toll rates. To modify the local call range, go to Charges | Regional Settings and edit the information under the Local Calls tab.

- **Local Toll Calls**: Call to locations beyond a carrier's defined local range, but still within the LATA (Local Access Transport Area or Service Area), are Local Toll calls. These calls and are billed by the minute based on the distance to the called party. To modify the Local Toll region and define the area codes assigned as Local Toll, go to Charges | Regional Settings and edit the information under the Local Toll Calls tab.

- **In-State (In-Province) Calls**: Call to locations outside the LATA, but within the home state or province of the caller.

- **Long Distance Calls**: Calls that are not In-State or Local Toll and are area-code sensitive are billed as Long Distance. They are also distance sensitive and are billed by the minute based on the distance to the called party.

- **International Calls**: Calls made outside of the country.

Additional Rate Plans may be added or decreased by selecting the Advanced option in the upper left hand corner and selecting Increase/Decrease Rate Plans.

These additional rates (up to 25 separate tables) may be assigned to areas such as meeting rooms and conference halls. To rename the Rate Plans, choose the rate plan you wish to rename and edit the New Rate Plan Title located on the upper left hand of the screen.

To charge toll-free calls, refer to the Special Number Charges section of the user guide.
Rate Plans

To configure rate plans, select a plan (e.g. Actual Cost) and choose the desired rate tables for call costs associated with local, local-toll, in-state, long-distance and international calls.

The application comes installed with a set of premium retail rate plans from several providers. The default AT&T rate tables, as well as the other predefined provider rates, are determined by the carriers. These rates are best described as "retail" or "MSRP" rates.

Rate Tables

Premium Carrier Rate Tables

The premium rates for select carriers have been preloaded into the system. To utilize a premium rate, select the desired carrier in the drop-down list.

Per-Minute Rate Tables

Charges can be configured for a timed call and can be enabled for up to three tiers of calling periods - **Per-Minute (Simple), Per-Minute (2 Steps), Per-Minute (3 Steps)**. Select the desired per-minute option next to the call classification to be entered. Enter the initial cost and the first time period, followed by the additional cost for each additional time period, up to three tiers. For example, to allow free local toll calls that are 10 minutes (600 seconds) or less, but charge $0.10 for each minute thereafter, enter $0.00 for the initial cost and 600 for the initial time period followed by $0.10 for the additional cost and 60 for the additional time period.
User-Defined Rate Tables

For a more detailed customization of a rate table, select a "User-Defined" option from the rate table selections. Click the Edit button positioned just above the drop-down list to access the rate file for further editing.

For more precise control of charges throughout a 24 hour period, click the Manual Edit button on the Custom Rates screen. Edit the charges in the Notepad file, then click File I Save.

Markup and Surcharges

To apply markups and/or surcharges to rates, select a user-defined rate and enter the markup percentage and/or surcharge to be applied to each call class.

Charge Calculation Example

A call that originally costs $10.00 based on the administration rate with a 40% markup and a $2.00 surcharge will be billed $16.00. ($10.00 + $4.00 (markup) + $2.00 (surcharge) = $16.00)

Charging Incoming Calls

Enter the amount to charge for each call in the Charge Incoming Calls field. For example, to charge incoming calls at ten cents per minute, enter 0.10 in the fields on the screen.

NOTE: Incoming call charging must be enabled first (see the Charge Incoming Calls section of the user guide).
Least Cost Routing

Most call costs are based on the pattern of digits dialed. In some cases, such as for T-1 traffic, it is useful to calculate administration call costs by associating rate tables with outgoing trunk numbers. **Least Cost Routing** can be configured by selecting the **Advanced** option in the upper left corner of the Rate screen and clicking **Least Cost Routing**.

Check the **Enable Least Call Routing** checkbox is selected and configure the costs associated with the trunk range.

Special Number Charges

The Special Numbers screen allows users to define and set charges to dialed numbers that do not match local, long distance or international dialing rules. These include toll-free numbers and operator assisted dialing. To configure, select **Charges | Special Numbers** from the main screen, select the **Rate Plan** to be edited and the Charging Method. Edit the prefix, description, class, seconds and cost columns to edit the charges.

Prefix

The first digits of the number dialed or a full number may be entered. To match a string of numbers, the leading digits "***" should follow the numbers to be translated. Question marks ("?") may be used as wildcard characters. See examples in image and following:

- "1???5551212" will match 16195551212, 16205551212, etc.
- "1800" will match 1800
- "1800*" will match 18005551234, 18007779876, etc.
Description

The description will be used as the "location" of the call in reports and on the main call screen. May not contain spaces.

Class

The class determines how the call will be classified in reports. LOC = Local call, LD = Long Distance call and INT = International call. Entering EMG for the class will cause any calls matching the prefix digits to be treated as emergency calls and appropriate alarms will sound.

Cost/Initial Cost

The cost of a call matching the dialed prefix.

Seconds

The amount of time, in seconds, to which the costs will be applied

Grace Periods

Most PBXs cannot detect if a dialed call was answered or if it rang for an extended period of time. To compensate for this, grace periods are used so that calls that ring out (are not answered) or are busy do not get charged if their duration is less than a preset period. Typically, long distance and international calls are given longer grace periods.

To configure grace periods for all call classifications, select Charges I Grace Periods and enter the desired period for each call classification. Typical grace periods are 20, 30 and 45 seconds for local, long distance and international calls, respectively. Grace periods apply to all calls.

Some PBXs may provide “answer detection”, which means the reported call duration was calculated from the time the call was answered, not from when the receiver was taken off the hook. In these cases, the grace periods may be set to 0 (zero).

**NOTE:** If you are unsure whether your PBX supports answer detection, contact your PBX vendor.
Tax Calculation

The tax is calculated by multiplying the charge by the tax rate. The total charge of a call equals the charge of the call plus the sum of all taxes. For example, a call charge of $1.00 with a tax of 9% and a tax of 10% results in a total charge of $1.19.

To configure taxes for actual cost or marked up calls, select Charges I Taxes.

In the Tax % column, specify the tax amount (as a percentage) and select the appropriate call classification from the Applies To column. Enter the appropriate text to describe the tax in the Description column for each field.

Regional Settings

A geographic area serviced by local telephone company is called a LATA (Local Access Transport Area). Calls within the LATA would be considered local. Calls to locations beyond a carrier’s defined local range, but still within the LATA, would be considered local toll calls. The application will automatically calculate the mileage for every phone call and bill calls within the local call radius mileage at the local call rate. Calls outside of this mileage will be billed as local-toll, in-state or long distance calls. These calls and are billed by the minute based on the distance to the called party. To configure the local and/or local-toll parameters, select Charges I Regional Settings.

Local Calls

Calls within the local call radius mileage will be billed as local calls. To adjust the local call radius, specify the distance to be calculated and edit any local exchanges that should also be identified as local calls.

Local Call Prefixes: To force certain prefixes that have a mileage greater than the “Local Call Radius” to be billed as local calls, enter the prefixes in the “Local Call Prefixes” box. If needed, the area codes may be entered in front of the prefix, such as 1212488.

10-Digit Dialing: In some localities it is possible to dial just the area code and phone number without the use of a Long Distance Prefix. In these areas it may be required to indicate this special dialing option by placing a checkmark in the This Location Uses 10-Digit dialing checkbox.
Local Toll Calls

Calls that are outside of the local call range but that are within the same LATA are called intra-LATA or Local-Toll calls. In some areas, the mileage boundary between local calls and local toll calls may not be well defined. To define calls that lie within the mileage boundary to be billed as local toll calls, edit any local exchanges that should also be identified as local calls. If needed, the area codes may be entered in front of the prefix, such as 1212488.

Call Class Over Ride

To over-ride default class call assignments for certain call prefixes, for instance to edit a local call to classify it as a local toll call, in the Prefix column, specify the unique numbers and select the appropriate call classification from the Call Class column.

Determining the Cost of a Call

To calculate a projected call charge, select Charges | Display Cost of Call or by using the Cost shortcut icon on the main screen. Enter the extension number of the call, the number to be dialed and the duration of the call. Once this information has been entered correctly, click the Get Cost button.

The call location, distance, calls cost and call charge are displayed at the bottom of the screen. To process the call as an actual dialed call, click the Add to Database button.

NOTE: The current date and time are automatically entered into the Date/Time fields; however, these fields may be edited.
CREATING DEPARTMENTS

Departments are used to cluster extensions and for grouping extensions in reports. To define department assignments, select Assign I Departments or by using the Depts shortcut icon on the main screen.

To create a new department, select a row in the Departments Name field and enter the department title and enter the applicable user description under Notes.

Advanced Options

Exporting Department Names

Department names can be exported to a .csv file containing a list of Department names. To export departments, select Advanced I Export.

Deleting All Entries

To clear all department entries, select Advanced I Export. This action will delete all the departments in the system and cannot be undone. Click Yes to delete all entries.
DIVISION AND HIERARCHY LEVELS (SL PROFESSIONAL ONLY)

For Enterprise Users: If the user’s business has multiple levels to their hierarchical structure, the user may wish to assign further distinction between the departments, categorizing them using additional division levels, for example, Divisions, Branches, Organizations and Regions.

To enable each division, select **Assign I Divisions** then ensure the **Enable Division Level** is checked. Enter each division level under the **Division Name** field and applicable user notes describing the location under **Notes**. Click **OK** to apply changes. Repeat these steps to further define up to four levels of hierarchy by customizing the Branches, Organizations and Regions settings.

To rename the division type, edit the **Display Name** fields.

Advanced Options

Exporting Division Names

Department names can be exported to a .csv file containing a list of Department names. To export departments, select **Advanced I Export**.

Deleting All Entries

To clear the division of all entries, select **Advanced I Export**. This action will delete all divisions entered in the system and cannot be undone. Click **Yes** to delete all entries.

**NOTE:** Divisions and hierarchy levels are available only with Enterprise versions of the software and will not appear on the menus of stand-alone systems.
CONFIGURING EXTENSIONS

To define extension assignments, select Assign Extensions or use the Extensions shortcut icon on the main screen. Extensions can be assigned to rate plans, map plot colors and departments or additional hierarchies, for reporting purposes. Any extensions not assigned in this screen will automatically be assigned to the default department.

**Add**

To add additional extensions, click on any row or column in the fields and click Add.

**Delete**

To remove an extension, click on the extension to be removed and click Del.

**Find**

To find a specific extension, enter the search criteria (the extension, the name or partial name) into the find field and click the Find button. If the first match is not the correct one, click Find again to continue the search.

To add an extension, click the Add button or click in the next available empty cell. Enter the extension number and user ID (they will be the same number), a name and assign a department. Ensure the extension is highlighted, then use the Departments drop-down menu, located at the bottom of the screen, to select a department. Enter any additional information email, account number or notes, if desired.

Use the Rate drop-down menu at the bottom of the screen to assign a rate to the extension (the default is Actual Cost).

Use the Color drop-down menu to assign a map plot color to the extension (the default is black).

**NOTE:** Users with activated division levels are able to affiliate extensions to the appropriate divisions by using the additional drop-down options at the bottom of the screen. This option will only be present if the user has the Enterprise version of the software and the division option has been enabled.
Advanced Extension Options

Importing Extensions
To import extensions into the database, select **Advanced I Import Extensions**, then click Browse to locate the import file. The accepted formats are .csv or .txt. Map the applicable fields (user ID, extension, name, departments, division, site, notes, account and rate) to the appropriate headings. If the first line of the file contains a header row, check **Skip first line in file**. If the import should be appended to the existing extensions, check **Add to existing exts**. Select **Import Now** to begin the import. Click **Hide** to exit the import window once the import is completed.

Export Extensions
To export the extension data in the system to a .txt and a .csv file, select **Advanced I Export**. Note: The files will be located in the application folder.

Delete Unknown Extensions
To remove all unknown (unassigned) extensions from the system database, select **Advanced I Delete All ‘Unknown’ Extensions**. Click **Yes** to delete all entries.

Delete All Extensions
To clear all extension entries from the system database, select **Advanced I Delete All Extensions**. Click **Yes** to delete all entries.

**NOTE:** Changes to the Extension screen will not be written to the database until the user click **OK** and closes out of that screen. **At this point, these actions cannot be undone.** Click **Cancel** if you do not want to make the changes.
ACCOUNT CODES

Account Codes may be entered before or after a dialed number to permit telephone access or to assign billing codes to calls. To define account code assignments, select Assign I Account Codes from the top navigation on the main screen.

Add Account Codes

To add or modify an account code, click in the next available empty cell and enter the applicable code and description.

Add Code

To add additional account codes, click on any row or column in the fields and click Add.

Delete Code

To remove an account code, click on the extension to be removed and click Del.

Find Code

To find a specific Extension, enter the search criteria (the extension, the name or partial name) into the find field and click the Find button. If the first match is not the correct one, click Find again to continue the search.

Leading Zeroes in Account Codes

The system will recognize “012345” and “12345” as two unique codes unless configured to strip leading zeroes. To strip leading zeroes, check the box at the bottom of the screen.

NOTE: Account codes may alternatively be defined at the extension level by entering the data into the Account column in the Extension Configuration screen.

Advanced Options

Import

To import account code data into the system, select Advanced I Import, then click Browse to locate the applicable file (the format must be "code-space-description", e.g. 123 Sales Group).

Export

To export the account code data to a .txt file, select Advanced I Export.
AUTHORIZATION CODES

Authorization codes allow the user to assign PIN/authorization codes to extensions. PIN codes may be utilized to assign the extension number that corresponds to that particular code to all call records with that code, regardless of what extension they may have actually used to make the call. This feature is useful when roaming callers must have their calls mapped back to their primary extension.

To configure authorization codes, select Assign I Authorization Codes and ensure the Use Authorization Codes option is checked. Enter the code and correlating extension in the fields. Select OK to confirm entries.
CALLER PROFILES

Caller profiles allow the user to define telephone numbers of outside callers and generate a Caller Profile Report to determine call volume to or from a particular outside caller. Outgoing and/or incoming caller-id telephone numbers are supported and each outside caller can have an unlimited number of corresponding phone numbers. To setup caller profiles, select Assign I Caller Profiles from the main screen.

Caller Name List

Click on an empty field under the Caller Name List tab to enter the names (or company name) of outside callers to be tracked.

Telephone Number List

After entering the names of outside callers, click on the Telephone Number List tab to configure the telephone numbers associated with the callers. Enter the phone number under the appropriate field, then use the drop-down menu to associate the phone number field with the appropriate caller name.

NOTE: To generate a Caller Profile Report, refer to the Reports section of the user guide.
SMTP EMAIL SETTINGS

In order for the system to email alerts or reports SMTP server information must be configured. The system has a built-in email server with TLS (Transport Layer Security) protocol available (to enable, enter a valid email address in the SMTP settings screen). Customers may alternatively use their own SMTP server settings if desired. To access the settings, select Setup | SMTP Email Settings.

From Name
Enter the name to appear on the “from” section of the email message.

Reply To Email Address
Enter the email address to appear on the “from” section of the email message.

Outgoing Mail (SMTP) Server
Enter the name or "address” of your Outgoing SMTP server.

Outgoing Mail Server Username / Password
If applicable, enter the SMTP server login user name and password, as provided by your system administrator or Internet service provider.

Send Test
For instant verification that of your settings, click the Send Test button to immediately send a test email to the "Reply To" email address. If the test email is not received, please contact your IT Administrator for further assistance.

Default Email
Use this field to set a default email address that will automatically be added when generating reports to email.

Favorites
This field may be used to enter email addresses that may be used multiple times throughout the system. Click the Favorites button, enter your email addresses and click Save. When you see an ellipsis (...) next to an email field, you can click on it to access your favorites.
ALARMS

PBX Alarms

The system may be set to trigger notification alarms if it has not received data from the PBX for a prescribed period of time. These alarms may indicate that call traffic might be unusually low or that the PBX may be offline. To customize PBX alarms, select Alarms | PBX Alarms.

Alarm Periods

Select the Alarm Periods tab and enter the inactivity time threshold and set the hours the alarm should monitor (typically the business hours). The time periods should be configured in military time. If call traffic is expected to be very low on weekends or after hours, the hours should exclude these time periods and the Include Weekends option should be unchecked.

For example, for business hours from 8:00 am to 6:00 pm, Monday through Friday where there should be at least one call every 45 minutes, the threshold alarm would be configured as in the sample image.

Email

To enable PBX offline alerts to be emailed, select the Email tab and check the Send Email Notification checkbox. Enter desired email address(es), edit Subject Line, if applicable and enter any optional user text in the Extra Text field.

Click the Send Test button to immediately send a test email to the defined email address(es). Click the Email Settings button if you need to verify the SMTP settings.

Text Message

To enable PBX offline alerts via SMS text message, select the Text Message tab and check the Send SMS Text Notification checkbox. Enter the desired SMS text address(es) (e.g. cellnumber@txt.att.net, cellnumber@vtext.com, etc.) and enter any optional user text to be sent in the Extra Text field.

Click the Send Test button to immediately send a test email to the defined email address(es). Click the Email Settings button if you need to verify the SMTP settings.

NOTE: An SMTP email server must be configured to allow email and SMS text message alerts to function. Please see the SMTP Email Settings section for more information.
Emergency Call Alarms

To customize the emergency alarms, select Alarms | Emergency Call Alarms. When an emergency call is dialed, such as 911, the system may be set to trigger notification alarms via pop-up, email and/or SMS text. The notification will also include the extension, name and department that dialed the call.

Visual Pop-up Alarms

To configure the emergency alarm, select the Visual Pop-up Alarms tab. Use the Sound dropdown menu to customize the audible alert option. Use the Repeat dropdown menu to select how many times the alert should sound.

Email

To enable emailed Emergency Alerts, select the Email tab and check the Send Email Notification checkbox. Enter desired email address(es), edit Subject Line, if applicable and edit or add additional user text in the User Text field.

Click the Send Test button to immediately send a test email to the defined email address(es). Click the Email Settings button if you need to verify the SMTP settings.

Text Message

To enable PBX offline alerts via SMS text message, select the Text Message tab and check the Send SMS Text Notification checkbox. Enter the desired SMS text address(es) (e.g. cellnumber@txt.att.net, cellnumber@vtext.com, etc.) and edit or add additional user text in the text field.

Click the Send Test button to immediately send a test email to the defined email address(es). Click the Email Settings button if you need to verify the SMTP settings.

NOTE: An SMTP email server must be configured to allow email and SMS text message alerts to function. Please see the SMTP Email Settings section for more information.
Toll Fraud Alarms

Users can set toll fraud alarms to closely monitor specific outgoing phone call activity. To set up toll fraud alarm triggers, select Alarms → Toll Fraud. To activate, check the Enable Toll Fraud tracking checkbox.

Add Toll Fraud Trigger

To add a new alarm trigger, click on Add New. Create a short and long description name for the trigger, then configure the parameters to be monitored. Toll fraud may be monitored by during specific hours, for specific extensions or departments or by dialing prefix, charge amount and/or duration.

To enable the toll fraud triggers to be sent via email, check the Email Alerts checkbox, enter desired email addresses and edit the Subject and Text fields for the message. Click OK when complete.

If you do not need the alerts to pop-up on the system PC, uncheck Display Alerts On Screen.
CUSTOMIZATION

Processing
To select the type of call data records to be processed, select **Setup I Call Processing Options** and select the **Processing** tab.

**Process Incoming Calls**
To process incoming calls for billing and review on reports, select the **Processing Incoming Calls** option.

**Charge Incoming Calls**
To apply rates or charges to incoming calls, ensure that both the **Process Incoming Calls** and **Charge Incoming Calls** options are selected. To configure incoming call charges, refer to the **Rates** section of the user guide.

**Process Free Calls**
To process calls with a zero total charge, such as regular incoming calls, free local calls or internal calls, select the **Process Free Calls** option.

**Process Extension-to-Extension Calls**
Internal calls or extension-to-extension calls, may be processed and stored in the database. If selecting this option, set the maximum internal extension length. Calls with more digits than the maximum set limit will be processed as a local, long distance or international call.

**Mirror and Store Both Sides of Internal Calls**
To collect and store internal calls for both sides of the call, that is both the dialing extension, as well as the receiving extension, check the **Mirror** option.

**NOTE:** The application must be receiving the data for the additional call types. Processing additional call types will increase the size of the call database and may slow report generation speeds.
Rounding

To apply rounding settings to processed call data records, select Setup | Call Processing Options and select the Rounding tab.

Rounding Duration

The duration of each call may be rounded up to the next time increment. The default for rounding is one second, but any rounding amount may be entered. The duration shown on the main screen will reflect the rounding increment you choose. Please note that a rounding increment of one second will result in the charge of the phone call being calculated to the nearest second, rather than to the nearest minute.

Rounding Charges

All total charge amounts may be rounded to the nearest currency increment, if desired.

Translations

To set translations, select Setup | Call Processing Options and select the Translations tab.

If dialed numbers must be either translated to other numbers or stripped out completely, the translate screen allows you to specify which dialed number and/or prefixes to translate. To translate, enter the digits being delivered in the CDR in the “From” box and enter the digits to translate it to in the “To” box. To simply strip the digits, leave the “To” box blank. To search string of numbers to translate the leading digits "***" should follow the numbers to be translated. See examples in image and following:

- "9911" will be translated to "911"
- "911" will be translated to "911"
- "917185553600" will be translated to "17185553600"

Incoming numbers and/or prefixes, extensions or trunks may also be translated.
Country Information

To change country settings, select Setup I Call Processing Options and select the Country Information tab.

For users outside of the United States: set the system country to the user’s home country and edit the prefix information and currency details in the fields provided, as applicable. To further customize, enable Use Custom Location Files.

Miscellaneous Options

To setup privacy masking and configure advanced call processing options, select Setup I Call Processing Options and select the Misc tab.

Privacy Masking Options

If privacy masking is configured, the trailing digits of the dialed number or account code will be replaced with an ‘x’ in all reports to provide privacy and security.

NOTE: Please consult your System Administrator or contact Metropolis Support to configure additional Misc. call processing options.
Customizing the Database Fields

To customize which database fields are shown on the main screen, select Setup | Customize then ensure the Database Fields tab is selected. Choose the fields to display by placing checkmarks next to the desired options.

Maps

To customize the regional and local map shown on the main screen, select Setup | Customize then click the Maps tab.

Regional Map

Select the regional map from the column on the left. This map will display on the main screen on the Regional tab in the Calling Locations view.

Local Map

Select the local map from the column on the left. This map will display on the main screen on the Local tab in the Calling Locations view.

Enlarged Map

The large USA map should be enabled by default. However it is not, check the Enable Custom Map checkbox and click the "Load" buttons. To view the map, go to Tools | Custom Map.
Display

To show additional options on the main screen, select Setup I Customize then click the Display tab.

Show Account Codes

Select the Show Account Code Option on Assign Menu checkbox to enable the account code definition screen.

Show Authorization Codes

Select the Show Authorization Code option on the Assign Menu checkbox to enable the authorization code (or pin code) definition screen. These would be codes entered by users on roaming phones to provide the ability to map the call back to the user’s actual extension.

Show Large Icon Buttons

To view the large shortcut icons on the main screen, select the Show Large Icon Buttons on Main Screen option.

Maintenance Options

To configure the maintenance options of the software, select Setup I Customize then click the Maintenance tab.

Reset Maps Daily

To begin each day without any calls plotted on the map on the main screen, select the Reset Maps Daily option.

Shutdown without User Confirmation

To exit the system without first prompting the user to verify the shutdown, select the Shutdown without User Confirmation option.

Schedule a Regular Shutdown

To automatically terminate the application at a specified weekly time, select the Schedule a Regular Shutdown option and set the desired day of the week and time.
Miscellaneous Options

To configure the maintenance options of the software, select Setup I Customize then click the Misc tab.

**Lines per Report Page**
Specify the maximum number of lines per report page by changing the Lines per Report Page field to desired number.

**Center Password Window**
To automatically center the password window, ensure the Center Password Window option is selected.

**Remove Report Charges**
To remove charged amounts from all reports in the system, ensure the Remove Report Charges option is selected.

**Incoming Call Plot Color**
Set the color for incoming plot colors on the Calling Locations map on the main screen.

**NOTE:** Please consult your System Administrator or contact Metropolis Support to configure additional options on the Misc tab.
Passwords

Passwords are used to control access to reports and administrative functions from the main installation. They may be set to have a grace period to allow users to enter screens in a given time period without having to re-enter a password. The options are **No Security**, **Basic Security** or **Enhanced Security**. To access the Password Maintenance screen, click on Setup I Passwords.

**No Security**

This is the default setting (seconds logged in is not applicable in this setting).

<table>
<thead>
<tr>
<th>Security Level</th>
<th>No Security</th>
<th>Remain Logged in for</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>500</td>
<td></td>
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</tbody>
</table>

**Basic Security**

The default passwords for Basic Security are “phone” or the pin code “2222”. This level has a default grace period of ten minutes (600 seconds). Users have the option of defining the passwords to limit access to reporting options and/or administrative screens.

<table>
<thead>
<tr>
<th>Security Level</th>
<th>Basic Security</th>
<th>Remain Logged in for</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>600 seconds</td>
<td></td>
</tr>
<tr>
<td>Report Password</td>
<td>Phone</td>
<td></td>
</tr>
<tr>
<td>PIN Code</td>
<td>2222</td>
<td></td>
</tr>
<tr>
<td>Administration Password</td>
<td>Phone</td>
<td></td>
</tr>
<tr>
<td>PIN Code</td>
<td>2222</td>
<td></td>
</tr>
</tbody>
</table>
Enhanced Security

The Enhanced Security options allow for greater restriction to screens. This level has a default grace period of ten minutes (600 seconds).

To set a new user, enter the user information as follows, then click the "Create Account" button to save entries.

- **Full Name** – User’s full name.
- **Username** – Enter a login name for the user.
- **Password** – Enter a password for the user (may be alphanumeric).
- **Level** – Provides either Administrator (Level 2) or Reports-only (Level 1) access.
- **Active** – Set the user’s login to Active (1) or Not Active (0).

To edit an existing user, click on the name, make the desired changes, then click the "Modify Account" button. To remove a user, click on the name, then click the "Delete Current Entry" button.
DATA UTILITIES

Printing Call Records
To print calls as they arrive from the PBX, select File I Print Call Records. Select the department records to be printed by placing checkmarks next to the desired options. The user may also select the printing font and font size, as well as whether or not to include zero-cost and/or incoming calls.

Pause Processing
To pause the system from processing data, select File I Pause Processing from the main screen. The data text on the main grid will change to red and "freeze" to allow scrolling. To resume processing, select File I Resume Processing.

Reprocessing CDR Backups
Raw SMDR/CDR data is saved in log files, for 365 days by default and may be used to reprocess calls from previous days. To reprocess calls from the SMDR/CDR log data, select File I Reprocess CDR Backups. Select the file(s) to be reprocessed and click OK.

Export Call Records to a Text File
To export call data from the database, select File I Export Call Records. Configure the date range to be exported and select the destination of the file in the Output File field. Click Export then OK to export the screen.
Exiting the Software

To close the software, go to File I Exit. To shutdown the database and close the software application, go to File I Shutdown Database and Exit.

NOTE: The software must be running in order to process and collect data.
MAINTENANCE

Purging Call Data

To purge data that has processed into the database, select Maintenance | Purge/Archive Call Data. Select the date range of call data to remove, select the Purge Only option and click OK.

NOTE: "Purge" is currently the only available option. There is no need to archive the MySQL database as it can hold large amounts of data.

Viewing the Event Log

The Event Log contains a record of all system events. An entry is automatically added to the Event Log whenever the system is started or stopped, as well as when any system alarms are activated. To access the Event Log, select Maintenance | View Event Log. The Event Log is viewed using the Windows Notepad editor.
REPORTS

The system contains over 200 report templates that can be easily customized to the user’s needs. To create a report, select Reports I Report Generator from the menu or click the Reports shortcut icon.

Report Generator

By default, reports are generated to the .html format and are viewed with the default web browser. They may also be sent to a printer, saved to a file or emailed to a list of users.

To generate a report, select the report type from the top navigation menu, then set the selection criteria, sorting options, call types and output options. Click Report to create the report.

Report Type

Main reporting options include extension, department, division, account code, profit, trunk, time, stage, other and custom report types.

Call Types

Select the type of calls to include in the report, options include outgoing, incoming or internal calls. Calls can be further broken down by using the Custom button to select call classification.

Output Format

Reports can be output to .html, .xls, .csv or .pdf formats (version dependant).

Delivery Method

Select the method of delivery for the report generator by choosing from the Send To checkbox options to view the report on the screen, send it to the default printer, save to a file or email it to. If choosing email, multiple recipients can be added by separating the email addresses with commas.

NOTE: Print options will send to the default printer of the server or PC that the system resides on.
Scheduled Reports

Reports can be scheduled to run automatically and sent to a printer, email address or saved to a folder. All previously scheduled reports can be accessed and managed from the Reports I Scheduled Reports menu. Reports may be activated/deactivated, edited, copied or deleted from this screen.

Create a Scheduled Report

To create a report, select Reports I Report Generator. Select the report criteria, then check the Schedule It option. This will enable additional scheduling options.

Report Schedule Frequency / Date

Select the desired frequency for the report in the interval drop-down menu. Reports may be scheduled to run on specific days of the month or an interval of the month (first Friday, etc), day of the week or a specific calendar date.

Time

Enter the time of day in military time format to configure when the report should be automatically generated.

Repeat Frequency

If selecting the "Day of the Week" or "Specific Date" options, you may also set a Repeat frequency. You may select an interval of minutes, expiring at a prescribed time for reports run on multiple days of the week or to repeat for a defined set of days, such as every 14 days, for the specific date reports.

Report Description

Enter the title to describe the scheduled report. This title will be shown in the Scheduled Reports list.
Memorized Reports

Frequently used reports that do not need to be scheduled on a recurring basis, can be saved for quick access by creating a Memorized Report. To access or view previously saved reports, select Reports | Memorized Reports from the menu. From here, reports can be generated by clicking Load or removed by clicking Delete.

Create a Memorized Report

To memorize a report, select Reports | Report Generator from the menu. Select the report criteria, then check the Memorize It option. Enter a description for the report. This title will be shown in the Memorized Reports list.
TRAFFICWATCH (SL PROFESSIONAL ONLY)

For Enterprise Users: TrafficWatch is a unique trunk analysis utility that allows users to efficiently monitor call traffic and analyze trunk usage. This screen provides interactive bar and line graphs present users with up-to-the-minute information on the number of incoming and outgoing calls and trunk statistics. To access the TrafficWatch tool, select Trunks I TrafficWatch from the top navigation menu.

**NOTE:** TrafficWatch is only available for users with the Enterprise version of the software.
MULTI-SITE CONFIGURATION

For Enterprise Users: Users with multiple sites that wish to centralize their data should utilize the multi-site options built into the Enterprise version of the software.

Multi-Site Registration

To register multiple sites, select Help I Register Software from the menu. Enter the registration details from the codes provided in the applicable fields. Also, enter a Long Name and a Short Name field. The Short Name will be seen in the customization screens for applying options per site. Select Build Locations and click OK. For additional registration details, refer to the Software Registration section of the user guide.

Multi-site Configuration

After registering each site, you may configure the system to recognize data from the additional locations so that all data will be processed and classes according to the origination location of the of the call. Each location is identified in the Multi-site Assignments screen by specifying unique characters within the PBX CDR data for each additional location.
To configure the Multi-site Assignment, click on PBX > Select PBX, then select Modify PBX Settings. From the lower menu, select the Site Assignments tab.

Configuring Multi-Site Options

Once multi-site assignments have been enabled, the system will have additional configuration options throughout the system customization screens to further customize the system per site.
FREQUENTLY ASKED QUESTIONS

Why is the PBX traffic light yellow or red?

The application has no method by which it can query the PBX to determine if the PBX is functioning properly, so it assumes that if a preset period of time has passed with no phone traffic, the PBX must not be functioning properly. If no data has been received from the PBX recently, the traffic light will first change to yellow and, if after an additional period of time data still has not been received, the traffic light will turn red.

If enabled, audible alarms will sound when the PBX status changes to the yellow or red condition. The time periods are user-definable. (Refer to the Traffic Lights section of the user guide.)

The PBX traffic light is yellow or red. What should I do?

First, make a test phone call. If any data is received from the PBX, the traffic light will turn green. If this solution doesn’t work, check the communications connections (e.g. if it is a serial connection, check the cable connected to the application PC and make sure they are tightly connected). If this still does not solve the problem, try rebooting the application computer.

Why is the PMS traffic light yellow or red?

For Hospitality Users: Similar to PBX traffic lights, the PMS traffic lights signal that the property management system (PMS) is not receiving data from the application. During night audit periods, the PMS interface is usually offline, so the application may be configured to only generate alarms during non-night audit hours.

The PMS traffic light is yellow or red. What should I do?

For Hospitality Users: The most common error resulting in a PMS alarm is that the PMS interface controller has stopped working. Rebooting the interface controller usually fixes the error.

A guest/customer is disputing that they made a phone call.

Create an Extension Details report for the extension and date in question. If the call contains unusual digits, the call may be billed incorrectly. If the call appears normal, go to PBX I View Raw CDR Data to verify the call was dialed and is in the raw data. Once you locate the call, it is easy to verify the duration and digits dialed for the call. The PBX data shown is the actual data sent by the PBX and is not modified by the application.

Staff members seem to making personal long distance calls. Can I verify this?

Create a Dialed Number Details report for the extension in question. This report can be selected from Reports | Report Generator | Other.

Do I have to enter every single extension for the application to work?

No. The system processes all extensions received from the PBX and automatically assigns them to the Default department.

For Hospitality Users: Any extension not explicitly entered as an administration extension will automatically be added to the Default department and be billed at guest rates. However, it is recommended that you enter administration extensions in order to gain better control over phone expenses and for more accurate profit/loss reports.
**What is the default password and pin code?**

The default password is "phone" and the default pin code is "2222".

**I have forgotten my password. What do I do now?**

The Metropolis Technical Support team can issue you a 1-day password to gain access to the password maintenance screen where you can either view or change your password.

**I am getting an "xxx Extension limit exceeded" error. What does that mean?**

The system may be receiving data from additional extensions beyond your licensed extension count and an extension upgrade license is required for the system to operate properly. The system processes data for every extension delivered by the PBX. These may include phone extensions, Agent IDs, modems, VDNs, fax lines, voicemail ports, virtual extensions and any other device capable of transmitting data tied to the PBX. The system processes data for the first extensions delivered in the data set. The extension limit counter is reset whenever the software is restarted.

**I am getting red banner on my reports. What does that mean?**

The banner is to advise that the support subscription has expired and to let the user know that the rate tables provided by Metropolis may be out of date, as they are provided in updates and that they are no longer eligible for training, software updates or technical support.