

Telemanagement Installation Checklist

Following is a checklist that will enable you to get your new Metropolis Telemanagement System up and running quickly.

<u>Before You Begin</u>

Extensions: Create an importable copy of your extension list and save as a text file (save file as .csv or .txt). If you are using ProfitWatch we recommend that you add only your administrative extensions. All other extensions will automatically default as room extensions.

NOTE: You may be able to export a list of extensions directly from your PBX.

Rates: If not using the pre-defined rates in the system, obtain your rates from your telecom company and your markups and/or surcharges.

PBX (and if applicable PMS) Setup Info: Gather information on model, connection type (e.g. Serial Com Port; IP Port (PBX pushes data); IP As Client (data is pulled from PBX); File Delivery) and the connection settings based of the type of your connection. For the PMS you will also need Post Format, Block Check (Acknowledgement) and Enquire Settings.

Email Identity: In order to receive alarms and reports via you will need to setup your email identity. You will need your outgoing SMTP mail server information (i.e. mail.servername.net) and password, if applicable and an email to send a test to.



Let's Get Started!



Install Software: Check your Registration Code email for download information or visit the Metropolis website, <u>www.Metropolis.com/install</u> and click on the button to download the OfficeWatch or ProfitWatch software.



Erase: Click on **Erase** to remove default extension assignments, as well as any call data created for demo or testing purposes.

METROPOLIS TECHNOLOGIES FT. LAUDERDALE, FLORIDA

PBX: OK

World

Region

PMS: OK

Alerts

Week Cay Day 👧 Hour

Month

Status: OK

NOTE: Departments are not erased, but may be erased manually by going to the Department screen. The "Default Guest/Staff" department is permanent and cannot be deleted or renamed.

Register: Click on **Register** and enter the registration codes that were emailed EXACTLY as noted.

PBX: Click on **PBX** to set your PBX model and communications settings.



PBX Model:	PBX Communications:
My PBX Model	Receive data using: Serial Com Port (PBX sends data over serial cable)
Modify PBX Settings	Not used Serial Com Port (PBX sends data over serial cable) I.P. Port (PBX sends data until application pulls data via IP) File Delivery (Application extracts calls from a file on PBX) FTP Download (Application periodically downloads data via FTP) Com Port: Bits per second Data bits: Stop bits: Parity: Not Set 1200 8 1 none
	Advanced

Dataspy: Click on the **Dataspy** button to open up a window where you can verify if you are receiving data from the PBX.

Departments: If you have your importable extension list you can skip to the next step. If not, click on **Depts**. Double-click in each field and delete to erase the sample departments. Enter your departments and assign a rate to be used, a map color and if desired a location. (Locations help to further define areas for alarm notifications, i.e. Human Resources, Building H.)

NOTE: The "Default Guest/Staff" department is permanent and cannot be deleted or renamed.

Con	figure Departments					
Ad	vanced					
Mair be a dep	ntain departments here. The "D. added and the appropriate rate a artments. To delete departments	efault Staff'' de ssigned. Use t s delete the dej	partment is permaner he ''Assign Extension partment name.	nt and can not be Is'' menu to assig	e deleted. Other departmer in extensions to these	nts may
	Department (max 25 chars)	Rate To Us	e	Map Color	Location (optional)	
1	Default Staff	Actual Cost		Lime		
2	Human Resources	Staff Rate		Red	Building H	
3 4						
5						
6						
7						
0						
8						
8						



Extensions: If you have your extension list in an Excel format, you may import them directly into the system. You must have a minimum of 3 columns containing Extension, Name and Department for import. Save as a "Text (Tab delimited) (*.txt)". Click on **Exts**, then the **Import Extensions** button. On the import screen you will see the valid formats for your file. Click on Browse to find your file, then Import.

NOTE: If you already have extensions in your list and wish to add to them, check the Append Extensions to end box before importing; leave unchecked to overwrite existing extensions.

d	Update Calls in Database Import Exte	nsio
Configure Extensions		
Create import file using Microsoft Excel's "save as" option and	d select Tab delimited (".txt) or CSV Comma delimited (".csv) formats.	
Valid formats are		
Taid formed die.	(Microsoft Excel Example:)	
Extension + Name + Department	A B C D E F 1 2423 AndyBrown Accounting	
Extension + Name + Department + Notes	A B C D E F 1 2423 AndyBrown Accounting FacIne	
Extension + Name + Department + Notes + Division	A B C D E F 1 2423 AndyBrown Accounting Failine VesternDivision	
Extension + Name + Department + Notes + Division + Organ	nization 1 2423 AndyBrown Accounting FaxIne Vestern Division NAmerica	
. Turns the location of the " lot or " one insert file		
Emport bet	Ann View File	

Rates: If you are using custom rates, such as the rates from your telecom company, click on **Rates** to edit. On the **Actual Cost** tab, select a rate option, such as a flat "**per-minute**" charge. For per-minute, enter the rate and any surcharge there might be. You may use User-Defined for international calls.

Click on additional tabs to edit additional rates (i.e. for clients, guests, etc.).



Actual Cost	Guest Meeting Ro	oms VIP Rate 5	Rate 6 Rate 7 Rat	e 8 Rate 9 Rate 10	
1	Local Calls	Local Toll	In-State	Long Distance	International
late Table:	(see below)	AT&T Direct Dial	AT&T Direct Dial 💌	AT&T Direct Dial	AT&T Direct Dial
		AT&T II ATA	0 % Markup	0 % Markup	0 % Markup
7 Ilea Thra	shold Local Billing	Reserved Reserved Reserved Reserved	0 \$Surcharge	0 \$Surcharge	0 \$Surcharge
ocal calls co	ost \$ 0.00 for the fi	Reserved User-Defined 1 User-Defined 2 User-Defined 3 User-Defined 4	us \$ 0.00 for each a	dditional 60 seco	nds.
				21 101	
Recost Calls	s in Database			Rate Til	le: Actual Cost

Special Numbers: Use this screen to set or edit special rates, such as toll-free numbers or information.

Email Identity: Select **Identity > Email Identity**. Enter your outgoing SMTP mail server information (i.e. mail.servername.net), username, password, if applicable, and an email to send a test.



Metropolis Telemanagement System Requirements

Metropolis Telemanagement applications do not require a dedicated PC/Server. You may use any PC/Sever as long as the user login has full administrative permissions. Virtual environments, such as VMware may also be used.

Minimum Requirements

- Windows 32-bit or 64-bit
- Pentium-Class PC/Server
- 1 GB RAM
- 1 GB available hard drive space
- Sound Card (for system audio alerts)
- Internet Connection (for Remote Support access and Web versions)
- Serial port (if using serial-based communications; 1 for PBX connection and/or 1 for PMS connection, if applicable)

NOTE: These are the minimum requirements necessary to run the telemanagement system. Your operating system/equipment may have additional or higher requirements.