CAS for Windows™
Installation

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Related Resources

CAS for Windows Administration and Operations (555-006-521) provides blank installation worksheets and instructions to set up and operate the system.

CAS for Windows™ Installation

This guide was prepared to help you install CAS for Windows and to customize it for your specific needs.

The installation process is divided into the following tasks:

- *Task 1: Prepare Equipment*

- *Task 2: Gather Information*
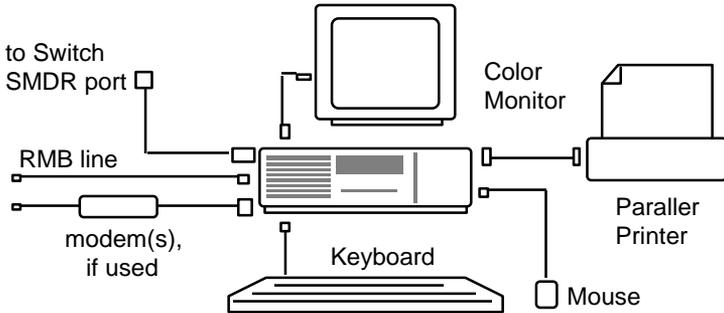
- *Task 3: Set Up System*

Task 1: Prepare Equipment

Verify that the following equipment is in place and properly set up, as documented in its intstallation manuals:

- A PC meeting the following minimum requirements:

  — Single-site systems: 386 processor, with 6-Mb RAM,80-Mb hard disk,120-Mb tape drive

  — Multi-site systems: 486 processor, with 16-Mb RAM, 340-Mb hard disk, 525-Mb tape drive

- A "bus" mouse, keyboard, graphics monitor, parallel printer & cable, and RMB (Remote Maintenance Board)

- MS-DOS 5.0 and Windows 3.1 (see caution, next page)

- Two to four serial ports, with Hayes-compatible modems for each port not directly connected to the source (or destination) of data.

  — Built-in ports: one 9-pin (for SMDR input) and one 25-pin (for options such as Call Sender or Remote Control)

  — Equinox Mark-IV board: four RJ45 ports (for SMDR input and options)

- Interface cables and adapters for direct switch and modem connections. See Table 1 for connecting the switch to the PC.

Table 1. Switch Interface Cabling

Switch	Item
System 75 R1V1, V2 or V3, DEFINITY Generic 3r	From: digital line circuit pack TN754 port* • 103A connecting block • 7400A, cable & power supply • DB25-to-modular adapter • RJ45 modular cable
* A DEFINITY Generic 3r also uses the data line pack TN726B and packet data board TN553 ports	
System 75XE, DEFINITY Generic1, 3i or 3s	From: DCE port on PPN cabinet • DB25-to-modular adapter • RJ45 modular cable
System 85 R2V4 DEFINITY Generic 2	From: PCC pack TN474B • 103A connecting block • D8W-87 cable • ADU w/EIA and aux power kit • DB25-to-modular adapter • RJ45 modular cable
System 85 R2V1, V2, V3, Dimension PBX	From: SMDR-DO (15-word formatted ASCII) or LSU-DO (18-word formatted ASCII) • DB25-to-modular adapter • RJ45 modular cable
System 25, MERLIN LEGEND, or Spirit 2448	From: SMDR port • RJ45 modular cable
* Cabling items are listed in the order they are connected from the switch. If you are using the 9-pin port on the PC for your direct switch connection, it requires a DB9-to-modular adapter.	

! If your PC's autoexec.bat file contains a SHARE statement, you must temporarily disable it ito install CAS for Windows:

Access autoexec.bat and look for the share.exe line. If it exists, prefix it with 'rem' , save the change, and reboot.

After installation, access autoexec.bat and delete 'rem' . Save the change and reboot.

Task 2: Gather Information

To collect information about your company and its telephone services and equipment, you should meet with your information contacts and complete the worksheets provided in Appendix A of the *CAS for Windows Administration and Operations* manual.

These worksheets contain the same information as in the dialog boxes used for data entry at installation. Make as many copies of the worksheets as necessary, then consult the material referenced in the table below to complete them.

Worksheet	Reference*
CUSTOMIZATION PART I	*Customization Functions* NOTE: Complete part II only if you are not using the default currency ($) or tax names (federal, state, and local).
CARRIER SERVICES PART I	*Configuring Call Rating Functions - Carrier Services* NOTE: Complete other parts only if special costing methods are required.
CALL COLLECTION PART I	*Configuring Call Collection Interfaces* NOTE: Part II is for multi-site systems, to be completed at a later date after adding your polled sites.
TRUNKS & FACILITIES	*Configuring Call Rating Functions - Trunks*
ORGANIZATION	*Administering the Organization Table*
* All references to sections in Chapter 4, *System Management,* in *CAS for Windows Administration and Operations* manual.	

Task 3: Set Up System

This task involves loading the application, entering worksheet information, and verifying call processing.[*]

Loading the Application

1. Retrieve the following diskettes from the software package:

   — *Setup*
   — *Program 1 , 2 ,* and *3*
   — *Configuration*

2. Insert the *Setup* diskette in any disk drive.

3. Execute **Run** in Window's Program Manager **File** menu.

   At the command line, type the drive letter followed by "**:setup**" (for example, **a:setup** for the A drive) and press **ENTER**.

4. When a dialog box similar to the one below appears, follow its instructions, then click the **OK** button to continue.

_____

[*] CAS is shipped with a basic package that enables call collection, but not rating. Do not enable call rating until you have received and installed custom rates for all your carriers via *Fixed Rates Update* diskettes.

5. As the installation progresses, follow the screen prompts to load the *Program* and *Configuration* diskettes one at a time.

6. When a dialog box similar to the one below appears, enter the start-up drive if it is other than "**C:**" and then click **OK**.

```
┌─────────────────────────────────────────────┐
│ ▬         CAS for Windows Installation        │
├─────────────────────────────────────────────┤
│ The Autoexec.bat and Config.sys files need to be │
│ updated.  Please enter the start up drive for this │
│ machine:                                      │
│                                               │
│       Drive: C:                               │
│                                               │
│        ┌──── OK ────┐    ┌──── Cancel ────┐   │
│        └────────────┘    └────────────────┘   │
└─────────────────────────────────────────────┘
```
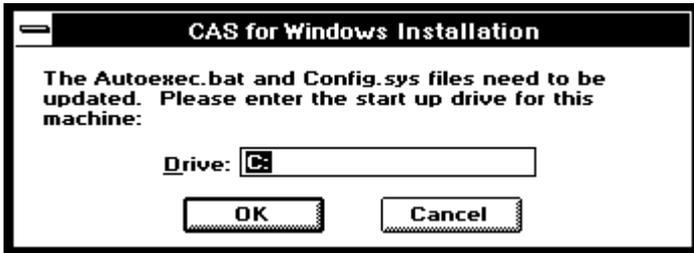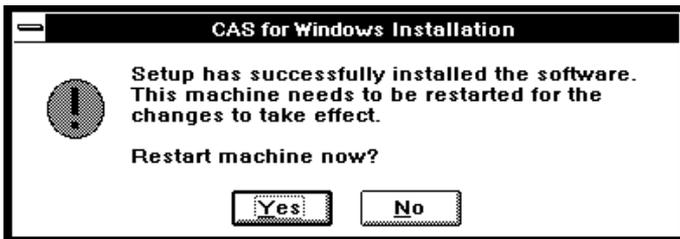
7. When a dialog box similar to the one below appears, remove the last diskette from the drive.

```
┌─────────────────────────────────────────────┐
│ ▬         CAS for Windows Installation        │
├─────────────────────────────────────────────┤
│  ┌──┐    Setup has successfully installed the software. │
│  │ !│    This machine needs to be restarted for the │
│  └──┘    changes to take effect.              │
│                                               │
│          Restart machine now?                 │
│                                               │
│          ┌── Yes ──┐    ┌── No ──┐            │
│          └─────────┘    └────────┘            │
└─────────────────────────────────────────────┘
```

8. To continue the installation, select **YES**; to postpone the rest of the installation, select **NO**.

   When you are ready, collect your completed worksheets and proceed to the next section, *Entering Worksheet Information*.
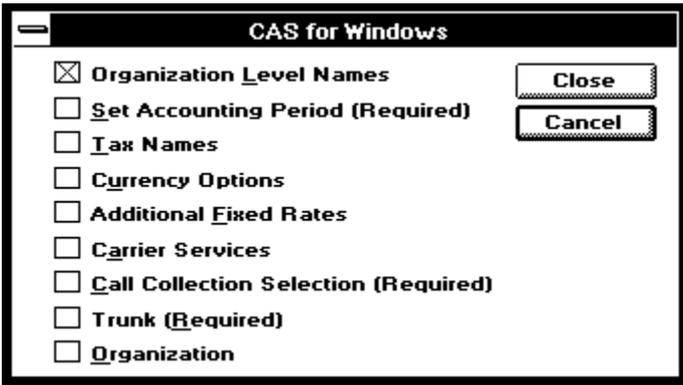
Entering Worksheet Information

1. Retrieve the two *Call Collection* diskettes from the CAS for Windows software package.

   ➡️ If you have received your custom rates, retrieve the *Fixed Rates Update* diskettes (one per carrier) as well.

2. Restart the PC if you have not done so already. The setup dialog box appears on display.

   ```
   ┌──────────────────────────────────────────────┐
   │ ▬             CAS for Windows                 │
   │ ☒ Organization Level Names        ┌─────────┐ │
   │ ☐ Set Accounting Period (Required)│  Close  │ │
   │ ☐ Tax Names                       └─────────┘ │
   │ ☐ Currency Options                ┌─────────┐ │
   │ ☐ Additional Fixed Rates          │ Cancel  │ │
   │ ☐ Carrier Services                └─────────┘ │
   │ ☐ Call Collection Selection (Required)        │
   │ ☐ Trunk (Required)                            │
   │ ☐ Organization                                │
   └──────────────────────────────────────────────┘
   ```

   ➡️ When you select an item, a dialog box to verify or enter worksheet information appears. When you close it, the above display reappears so that you may proceed to the next item.

   For help, press **F1** or see Chapter 4 of the *CAS for Windows Administration and Operations manual.*

3. One at a time, select the first four items to enter information from the CUSTOMIZATION WORKSHEET.

4. Select **Additional Fixed Rates** ONLY if you have custom rates to install (via *Fixed Rates Update* diskettes).

   For each diskette, select a drive, insert the diskette (any diskette, order is not important), and follow instructions to complete the operation.

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5. Select **Carrier Services** ONLY if you installed custom rates via *Fixed Rate Update* diskettes*.*

   a. One at a time, select each *carrier service* whose fixed rates you installed in step 4; check (and edit, if necessary) that it shows the correct information from the CARRIER SERVICES WORKSHEET—PART I.

   b. Select the "Default Outgoing" carrier service and click on the **RATE METHOD** button.

   c. Use **EDIT** to set the rate method to "Fixed Rates Table" and select *your primary carrier's rates* from the list box. Apply the changes, then close the dialog boxes.

6. Select **Call Collection Interfaces.**

   a. Use the **ADD** button to load *Call Collection Interface* diskette #1. Follow screen instructions. Repeat for #2.

   b. Select the *protocol* , *format*, and *protocol options* from the CALL COLLECTION INTERFACE WORKSHEET—PART I.

7. Select **Trunk**. Use the **ADD** button to enter information from the TRUNKS & FACILITIES WORKSHEET.

8. Select **Organization**. Use the **ADD** button to enter information from the ORGANIZATION worksheet.

9. When the setup display reappears, use the **CLOSE** button.

   The main menu and system icons appear on the screen.
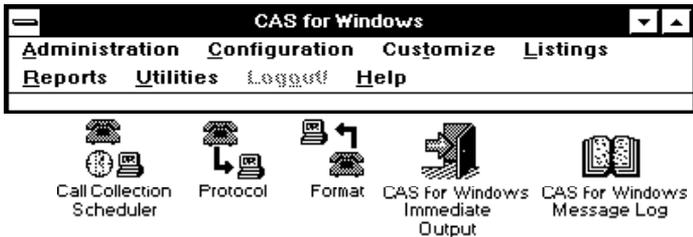
➡ CAS for Windows added the following lines to the named DOS file
(DO NOT CHANGE THESE MODIFICATIONS).

In CONFIG.SYS:
   FILES=60   (if this line already existed with a
                                 value ³ 60, it was left unchanged).

In AUTOEXEC.BAT:
   PATH %PATH%;*home*\BIN   (where *home* = C:\CASW —
                                 unless changed at installation)
   WIN   (appended to the file)

Verifying Call Processing

1. At the PC, double-click on the Protocol icon.

   A window similar to the one below appears.[*] 🔂

```
┌─────────────────────────────────────────────────────────┐
│ ▬                        Protocol                    ▼▲  │
│  Display  Purge!  Help                                   │
│ Port errors:  Break    =0          Framing   =0          │
│               Overrun  =0          Parity    =0          │
│ Characters:   Received=2370                              │
│ Records:      Received=30          Discarded=0           │
│ Timeouts:     Input    =0          Output    =2          │
│ ─────────────────────────────────────────────────────── │
│ 123456789a123456789b123456789c123456789d123456789e12345678│
│ C 04/17/90 15:00        305-835-0038  00:01:00      2 9809│
│ C 04/17/90 14:00        304-898-0037  00:01:00      1 8853│
│ C 04/17/90 13:00        304-325-0036  00:01:00   1111 8825│
│ C 04/17/90 12:00        304-226-0035  00:01:00     90 8824│
│ C 04/17/90 11:00        303-632-0034  00:01:00     80 8823│
│ C 04/17/90 10:00        303-292-0033  00:01:00   1007 8550│
│ C 04/17/90 09:00        302-227-0032  00:01:00   1116 7560│
│ C 04/17/90 08:00        301-997-0031  00:01:00   1006 7455│
│ C 04/17/90 07:00        301-421-0030  00:01:00   1115 7223│
│ ◄▯                                                     ►│
└─────────────────────────────────────────────────────────┘
```
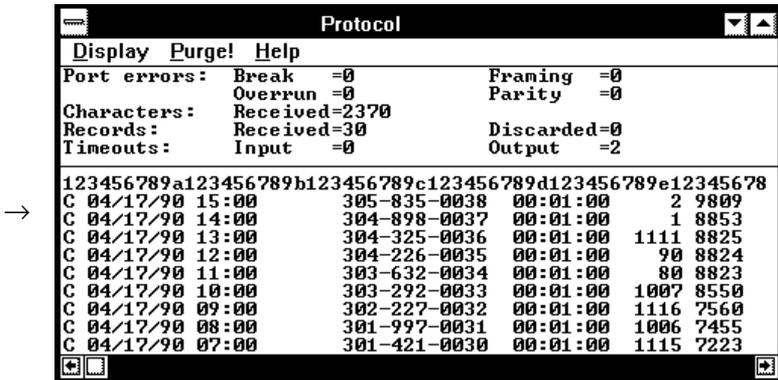
$\rightarrow$

   If SMDR output is enabled at the switch and your phones are
   in use, call records should appear below the line marked ($\rightarrow$).

   Click the button ⬛ (top, right) to minimize the window.

   ⇒   If calls do not appear, locate and correct the problem:

   — Check that *protocol options* (in the Call Collection
     Interface) match switch SMDR port values.

   — Check the switch interface cable connection.

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[*] The Protocol window is a diagnostic tool used to monitor transmissions
from the source of call records. Its menu options are:

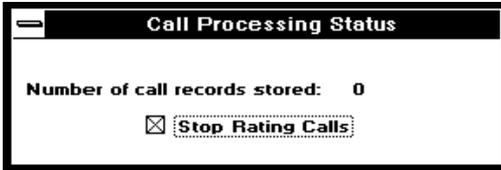**Display** toggles (on/off) information on display:

- ASCII or HEX call record representation
- COUNT of characters and records received and/or discarded
- Input/output TIMEOUTS
- Port ERRORS (breaks, overruns, framing, or parity errors)

Purge moves the contents of the input buffer into the task that interprets
call records (normally, call processing waits for a full buffer).

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> ⚠ *If you did not install custom rates, leave your system collecting calls without rating them. When you receive your rates update package, resume installation at this point.*

2. Select **Call Processing Status** under the **Utility** menu.

```
┌──────────────────────────────────────────┐
│ ▭        Call Processing Status           │
├──────────────────────────────────────────┤
│                                          │
│ Number of call records stored:   0       │
│           ☒ Stop Rating Calls            │
│                                          │
└──────────────────────────────────────────┘
```

a. De-select the "Stop Rating Calls" option.

```
┌──────────────────────────────────────────┐
│ ▭        Call Processing Status           │
├──────────────────────────────────────────┤
│ Number of call records stored:  10       │
│           ☐ Stop Rating Calls            │
└──────────────────────────────────────────┘
```

this number increases as calls are processed

b. If calls appear to be processing properly, close the window by double-clicking on the top, left corner.

⟹ If calls do not appear within 5 to10 minutes, you have the wrong *format* in the Call Collection Interface. Correct the problem and repeat this step.

3. If you wish to print calls after processing, open **Selection** under the **Reports** menu, then, **Detail**.

When the dialog box appears, click **OK** to start printing.

You have completed a successful installation.

Loading Options

If you have ordered software options, install them now as instructed in the documentation included in their packages.

CAS for Windows offers the following options:

- Multi-Site (up to 4 sites, 25 sites, or 100 sites)

- Remote Control — Carbon Copy™ Host and Guest

- HackerTracker™