CAS for Windows™
Version 2.2 Addendum

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CAS for Windows™ Version 2.2 upgrades your CAS software for use with Windows 95®. Use this addendum as a supplement to the *CAS for Windows Installation and User's Guide* (555-006-517, issue 1, August 1995). The specific page numbers affected by the new software version are indicated by a 📖. The changes include:

- ■ New PC hardware requirements

- ■ Windows 95 Startup utilities to install CAS software

- ■ New, Windows 95-compatible version of the Remote Access software (Carbon Copy 3.0)

- ■ New FAX driver for the HackerTracker pager/FAX options

- ■ Windows 95 Backup and Restore utilities to support tape and floppy disk backups

- ■ Windows 95 network sharing utilities for the G3-MA Data Transfer Option

- ■ Creating CAS for Windows icons in color and viewing them on the Windows 95 Task Bar

- ■ Setting up an audible HackerTracker alarm

Please review the following pages and make the necessary notations in your *CAS for Windows Installation and User's Guide*.

> ➭ The CAS dialog boxes and icons now have a Windows 95 "look." These elements, however, retain their original functions.
>
> Familiar icons appear as buttons at the bottom of your screen and dialog boxes — except for the title bar — appear exactly as their Windows 3.1 counterparts shown in the *CAS for Windows Installation and User's Guide*.

Hardware Requirements

The recommended minimum PC configurations are shown below.

Processor	Class/ Speed	RAM (Mb)	Monthly Call Record Volume	Available Hard Disk (Mb)	
				1 month	min 2 mths
	486 / 33	8	250,000	60	200
	486 / 100	12	500,000	80	250
	Pentium / 90	16	750,000	100	300
	Pentium / 133	16	1,000,000	140	500
	Pentium / 166	16	over 1,000,000	280	1200
Software	Windows 95 default settings + Backup Disk Tools, *NO disk compression tools*				
Devices	Windows 95-compatible bus or PS/2-type mouse, VGA color monitor, parallel printer				
	Windows 95-compatible multi-port boards such as the Comtrol Rocket Port Board (if more than 2 serial ports are needed)				
	Windows 95-compatible tape drive — 120, 525, or 1,000 Mb				
Serial Ports	Single site: COM1 = Remote Access; COM2 = SMDR input. Systems using the Call Sender and/or HackerTracker FAX/pager modems require a compatible multi-port board (options, Remote Access may share either modem).				
	Multi-site systems require multi-port boards: COM1 = Remote Access; COM3 - COM10 (or higher, if using more than one 8-port board): — 1 port per direct SMDR input — 1 port per modem polling 10 sites — 1 port for Callback Receiver modem (optional) — 1 port for HackerTracker FAX/pager modem (optional, Remote Access may share this modem)				

These changes affect Pages 2-2, C-2 in the *CAS for Windows Installation and User's Guide*.

Software Installation

To install the CAS for Windows software, insert its *Setup* diskette in any disk drive, select **Run** from the **Start** menu, and enter the drive letter followed by "**:setup**" (for example, **a:setup** for the A drive).

📖 This change affects Page 2-4 (Step 2) in the *CAS for Windows Installation and User's Guide*.

Remote Access

You will be shipped the new version of the Remote Access software (Carbon Copy 3.0), compatible with Windows 95. This includes updated documentation to install and configure the "Host" package. If you are using the "Guest" package, you will receive its documentation, *Microcom Carbon Copy Version 3.0 for Windows* (Microcom 24-0000839-001).

📖 This change affects Page viii (*Related Resources*) and Appendix F in the *CAS for Windows Installation and User's Guide* (use information from the new documentation).

HackerTracker FAX Setup

The system now uses Microsoft Exchange to fax HackerTracker alarms. This requires installing Windows 95 Microsoft Exchange and Microsoft Fax and performing a preliminary setup.

Installing Microsoft Exchange

▭▷ If the **Inbox** icon appears on your desktop, Microsoft Exchange is already installed and you may proceed to *Installing Microsoft Fax*.

1. From the **Start** menu on your desktop, select **Settings** and then **Control Panel**.

2. Double-click on the **Add/Remove Programs** icon, select the **Windows Setup** tab, and check the **Microsoft Exchange** box.

3. Follow the on-screen instructions to complete the installation.

Installing Microsoft Fax

⇒ First, check if Microsoft Fax is installed: double-click on the **Inbox** icon on your desktop (if the **Choose Profiles** dialog box appears, simply click **OK**) and select **Services** from the **Tools** menu. If Microsoft Fax appears as one of the services, it is already installed and you may proceed to *Setting Up Microsoft Exchange*.

1. From the desktop, select **Settings** from the **Start** menu, and then **Control Panel**.   Double-click on the **Add/Remove Programs** icon and select the **Windows Setup** tab.

2. Scroll down to **Microsoft Fax** and check its box, then click **Details** to verify that **Microsoft Fax Services** and **Microsoft Fax View** are both checked.

3. Follow the on-screen instructions to complete the installation.
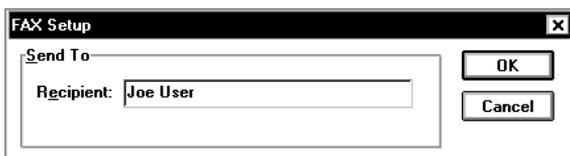
Setting Up Microsoft Exchange

1. If this is a "first-time" configuration, double-click on the **Inbox** icon on your desktop. When the **Choose Profile** dialog box appears, click on the **New** button and proceed to Step 3.

2. If a configuration already exists, double-click on **Start**, select **Settings** and then **Control Panel**. Open the **Mail and Fax** icon, click **Show Profiles** on the resulting dialog box, and then **Add**.

3. When the **Inbox Setup Wizard** dialog box appears, select **Manually configure information service**, click **Next>**, enter a **Profile Name** (**CASW22** is recommended), and click **Next>**.

4. When the **CASW22 Properties** dialog box appears:

   a. Click **Add** and select **Microsoft Fax**. Under the User tab, enter **Your full name** (the sender of HackerTracker faxes) and his/her **Fax Number**. All other information is optional.

   Click **OK**, then **Yes**. When the **Modem** dialog box appears, select the appropriate modem and click **OK**.

   ⇒ It is advisable to use a dedicated modem (i.e., other than the HackerTracker pager modem) to avoid port contention when an alarm occurs and CAS tries dialing out to both devices.

b. Back at the **CASW22 Properties** dialog box, click **Add** and select **Personal Folders**. Enter the file name (**casw22.pst**) under your CAS for Windows directory — for example, **c:\casw\casw22.pst** — and click **Open**.

When the **Create Microsoft Personal Folders** dialog box appears, click **OK**. *DO NOT ENTER A PASSWORD*.

c. Back at the **CASW22 Properties** dialog box, click **Add** and select **Personal Address Book**. Under the Personal Address Book tab, enter the file name (**casw22.pab**) under your CAS for Windows directory — for example, **c:\casw\casw22.pab** — and click **OK**.

5. Back at the **CASW22 Properties** dialog box, click **OK** to keep these settings and exit.

6. If this is a "first-time" configuration or your Inbox is not in your Start-up group, the **Inbox Setup Wizard** includes the option **Add Inbox to the StartUp Group**. Check this option to have Microsoft Exchange running at the same time CAS for Windows is operating. Click in succession **Next>**, **Finish**, and **Close**.

    ⇒ A "first-time" configuration starts Microsoft Exchange automatically after completing the above — so if this is the case, you may proceed directly to Step 8.

7. Back at the desktop, start Microsoft Exchange by clicking on the **Inbox** icon. Then complete the following steps:

    a. Select **Options** from the **Tools** menu. Then select **Always use this profile** and verify that **CASW22** is displayed. Click **OK** to save settings.

    b. Select **Address** from the **Tools** menu. Then select **New Entry** from the **File** menu.

    c. Select **Fax** and click **OK**. Enter the **Name to show on cover page** (the recipient of HackerTracker fax alarms) and his/her **Fax Number**. Click **Apply**, then **OK**. Close the dialog box and leave Microsoft Exchange running.

8. Access CAS for Windows and select **HackerTracker Criteria** from the **Administration** menu, then **FAX Setup**.

```
┌─────────────────────────────────────────────────┐
│ FAX Setup                                    [×] │
│ ┌─Send To──────────────────────┐   ┌──────────┐  │
│ │                              │   │    OK    │  │
│ │ Recipient:  Joe User         │   └──────────┘  │
│ │                              │   ┌──────────┐  │
│ │                              │   │  Cancel  │  │
│ └──────────────────────────────┘   └──────────┘  │
└─────────────────────────────────────────────────┘
```

Enter the name the recipient of HackerTracker faxes (the name entered in Step 7c) and click **OK** to complete this procedure.

📖 These changes affect Pages 8-2, 8-3 (Steps 1b - 1l are not needed), and 8-7 in the *CAS for Windows Installation and User's Guide*.

Backup and Restore

The Backup and Restore functions have been enhanced to support tape as well as floppy diskette backups. CAS backups copy the full system or the current or archived period's data onto removable media. You now use the Windows 95 Restore function to restore prior CAS backups to the original locations — typically, to run reports on archived data or to rebuild CAS files after a system failure.

Tape backups are recommended for installations with a large call record database. Other recommendations:

Backup	When	Comments
Full*	Upon initial installation and any time you install an upgrade or update	Keep two backup sets, rotating them as needed: one with the latest data and the other, with the prior backup
Archive	After a period closes	Keep each backup set, do not reuse
Current	Weekly or daily, depending on the volume and importance of your data	Keep two backup sets, rotating them as needed: one with the latest data and the other, with the prior backup
* Remember that a full backup is current up to when it was made and that "current" backups contain only partial data. Used together, they minimize the need for full backups, which might interfere with call collection and polling schedules. Thus, for a full restore you need the latest "full" plus the "current" backup.		

📖 These changes affect Pages 7-2 and 7-3 in the *CAS for Windows Installation and User's Guide*.

Addendum-6

Backup / Restore Initialization

The CAS Backup function requires you to pre-define *file sets* containing specific instructions. To do so, proceed as follows:

1. If the Windows Backup tool is already installed, proceed directly to Step 2. Otherwise, complete these steps:

   a. From the **Start** menu on your desktop, select **Settings**, then **Control Panel**. Double-click on **Add/Remove Programs**.

   b. Select the **Windows Setup** tab, check the **Disk Tools** box, then click **Details**. Check the **Backup** box and click **OK**.

   c. Follow the on-screen instructions to complete the installation.

2. Back at your desktop, open the **Start** menu, select **Run**, enter **backup**, and click **OK**.

3. Click **OK** if the Welcome to Microsoft Backup notice(s) appears (you may elect not to show these again by checking the appropriate box on the notice window).

4. Select **Options...** from the **Settings** menu.

   a. Click on the Backup tab and select these items:

      Quit Backup after operation is finished
      Type of backup — **Full: backup of all selected files**
      Advanced options — **Use data compression**

   b. Click on the Restore tab and select these items:

      Quit Backup after operation **is finished**
      Restore backed up files to: — **Original locations**
      Advanced Options — **Overwrite files**

   c. Click **OK** and proceed to the next step.

The next three steps define (respectively) the source, destination, and file name for a specific type of backup. Start with a "full" backup; repeat for a "current" backup, then for an "archive" if it exists (new installations do not have an archive. You must define its *backup set* after the file is created at the closing of the first accounting period).

5. Back at the main dialog's Backup tab, select what to back up:

   a. Double-click on the drive where you installed CAS, then check the box by **Casw** in the right side of the window. (See

sample on the next page.)

Addendum-8
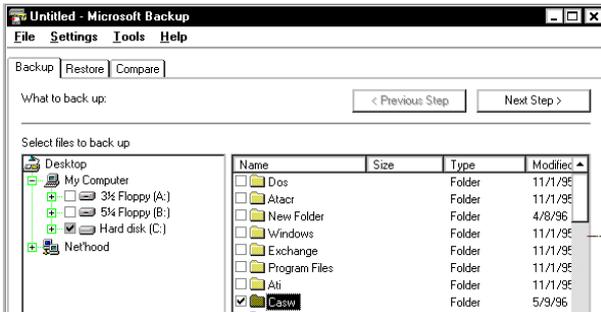
b. If defining a full backup, you may proceed to Step 6. Otherwise, double-click on **Casw** to display CAS subdirectories. Check the box by **Cur** (for a current backup) or by **Archive.acv** (for an archive backup, if it exists).

6. Click on the **Next Step>** button. When a dialog box similar to the one below appears, select where to back up: for tapes, click on your tape drive; for floppy disks, click on your floppy drive.
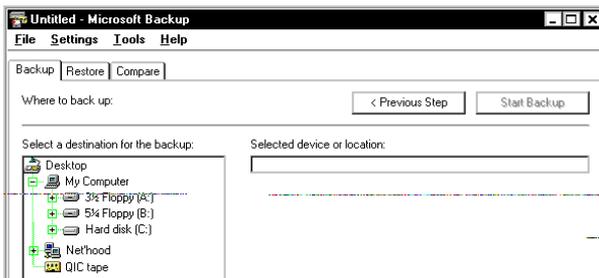
7. Select **Save As...** from the **File** menu.

a. When a dialog box similar to the one below appears, select to save in the **Bin** directory under the **Casw** directory.
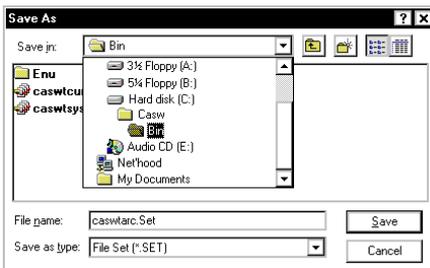
b. Type the file name for the type of backup and media that you want to define (use the table below) and then click **Save**.

Backup	Media	Set File Name
Full CAS system	floppy diskette	**caswdsys.set**
	tape	**caswtsys.set**
Current CAS data	floppy diskette	**caswdcur.set**
	tape	**caswtcur.set**
Archive CAS data	floppy diskette	**caswdarc.set**
	tape	**caswtarc.set**

8. Repeat Steps 5 to 7 until you have completed the definition of all backup sets (full, current, and archive) for the type of media you will be using. When complete, exit the Backup function.

Backing Up Data

1. Have your supply of formatted backup media ready, then load it into the appropriate drive.

2. Access CAS for Windows and select **Backup** from the **Utility** menu.

3. When the dialog box appears:

    a. Select the media and the accounting period to backup and click **OK**. Follow the prompts to continue.

    b. When complete, label the tape or diskettes with the backup dates and sequence (if necessary).

Restoring Data

> **⚠ CAUTION**   *Restore overwrites data. Do not restore to your current directory. Also, do not proceed unless you have a recent backup of your full system, current, and archive databases. Finally, before performing a full or current restore of data, shut down CAS for Windows.*

1. From your desktop, select **Run** from the **Start** menu, enter **backup**, and click **OK**.
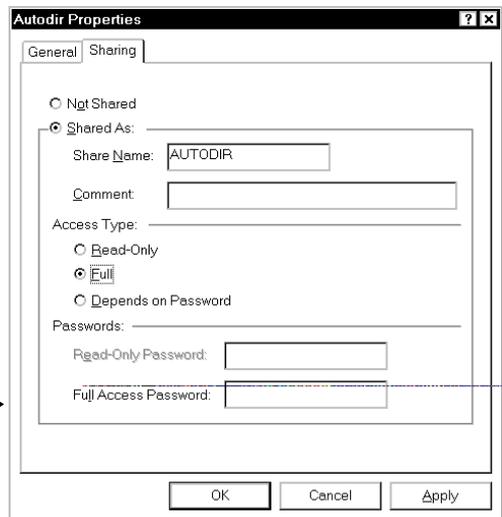
2. Click the **Restore** tab. Then in the **Restore From** field, choose the media type that contains the data you are restoring.

3. Select the **Backup Set** you wish to restore, then click **Next Step**. You may experience a delay while Backup searches for it.

4. Check the box next to **casw** and click **Start Restore**.

5. When complete, close Microsoft **Backup**. If a CAS for Windows shutdown was necessary, select **Run** from the **Start** menu, enter **emlog**, and click **OK**.

G3-MA Data Transfer Option

If you are using CAS for Windows with a DEFINITY® Enterprise switch, you may use Windows 95 network sharing tools to set up the G3-MA Data Transfer Option.

For example, at the G3-MA PC, after you set up the G3-MA data transfer directory ("**AUTODIR**" under **C:\G3-MA**), proceed as follows:

1. Use the **Explorer** to find and select **AUTODIR**.

2. Open its **Properties** under the Explorer's **File** menu.

3. Click on the **Sharing** tab and select **Share As**, **Full** access type, and no passwords.

    (see sample)⟶

Autodir Properties

General | Sharing

○ Not Shared
⊙ Shared As:
  Share Name: AUTODIR
  Comment:
Access Type:
  ○ Read-Only
  ⊙ Full
  ○ Depends on Password
Passwords:
  Read-Only Password:
  Full Access Password:

OK   Cancel   Apply

📖 This change affects Pages E-3 and E-4 in the *CAS for Windows Installation and User's Guide*.

Creating Colored Icons

If CAS for Windows icons appear in black and white, use the steps below to change them to colors.

1. Shut down CAS for Windows and return to your desktop.

2. Click the right mouse button and select **Properties** from the resulting menu.

3. Select the **Settings** tab and set the **Desktop area** for at least 800x600 pixels.

4. Change **Font Size** to **Large Fonts** and click **Apply**.

5. Click **Yes** to Restore PC. This causes CAS and Windows 95 to automatically restart.

▧ Monitor resolution and card styles can vary. If this procedure does not produce color icons, repeat the procedure except for Step 4. Instead of changing to large fonts, click **Custom** and enter a font scale of *150%* or greater.

Viewing CAS Icons on the Task Bar

Recommendations for viewing CAS icons on the Windows 95 task bar are listed below:

■ If your have multiple CAS sites, your task bar may have too many icons to view clearly. Increase the size of your task bar to fully view all icons.

■ If you set the task bar's properties to "auto hide" you may not see CAS alarms when they occur.

Enabling HackerTracker Audible Alarms

HackerTracker now has the option of an audible alarm. If you wish to hear a "beep" when an alarm is issued, follow the steps below:

1. Access CAS for Windows and select **HackerTracker Criteria** from the **Administration** menu.

2. Complete the dialog box to setup a site's criteria and click **Apply**.

3. Click **Edit** and check [X] **Beep on Alarm**.

   ⇒ The Beep on Alarm feature is either enabled or disabled globally for HackerTracker. This includes all criteria sets and, in a multi-site system, all sites.

4. When complete, click **Apply** then **Close**.

📖 This change affects Pages 8-4 and 8-5 (new feature "Beep on Alarm") in the *CAS for Windows Installation and User's Guide*.