

# **PhoneJournal Documentation**

## **User Documentation**

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# Installation Manual

## Requirements

The system requirements depend on your operating system and the amount of information you want to process.

### Installation on Windows 95 OSR2 or OSR2.1

Windows 95 is no longer supported by Microsoft and it is an obsolete operating system. Our application can run on this platform but we do not offer technical support for it. One of the side effects is that the application generates an exception when it is closed.

- Internet Explorer 5.5 (newer versions require at least Windows 98)
- Microsoft Data Access Components 2.7 SP1 - this component requires DCOM95 that is included in Internet Explorer 4.01 SP2 or later)
- Microsoft Jet 4.0 Service Pack 3 (required by JET4SP6)
- Microsoft Jet 4.0 Service Pack 6

### Installation on Windows 98, Windows 98 SE, Windows Millenium

- Internet Explorer 6.0 SP1
- Microsoft Data Access Components 2.7 SP1 - this component requires DCOM95 that is included in Internet Explorer 4.01 SP2 or later)
- Microsoft Jet 4.0 Service Pack 3 (required by JET4SP6)
- Microsoft Jet 4.0 Service Pack 6

### Installation on Windows NT 4.0

- Windows NT SP3 or newer -- Service Pack 6a is recommended (you must install it manually)
- Internet Explorer 6.0 SP1
- Microsoft Data Access Components 2.7 SP1 - this component requires DCOM95 that is included in Internet Explorer 4.01 SP2 or later)
- Microsoft Jet 4.0 Service Pack 3 (required by JET4SP6)
- Microsoft Jet 4.0 Service Pack 6

### Installation on Windows 2000

- Install Service Pack 2 (recommended, you must install it manually)
- Internet Explorer 6.0 SP1
- Microsoft Data Access Components 2.7 SP1 - this component requires DCOM95 that is included in Internet Explorer 4.01 SP2 or later)
- Microsoft Jet 4.0 Service Pack 3 (required by JET4SP6)
- Microsoft Jet 4.0 Service Pack 6

## Installation on Windows XP

- Install Service Pack 1 (recommended, you must install it manually)
- IE60SP1
- Microsoft Data Access Components 2.7 SP1 - this component requires DCOM95 that is included in Internet Explorer 4.01 SP2 or later)
- Microsoft Jet 4.0 Service Pack 3 (required by JET4SP6)
- Microsoft Jet 4.0 Service Pack 6

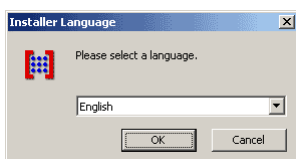
## Application installation

### Running the setup application



If you have the PbxTools PhoneJournal CD, insert it in the CD-ROM drive. When the autorun screen is displayed, choose Install application, otherwise open My Computer, right click on CDROM drive, choose Browse, open PbxTools folder and double click on the file setup\_pbxtools.exe.

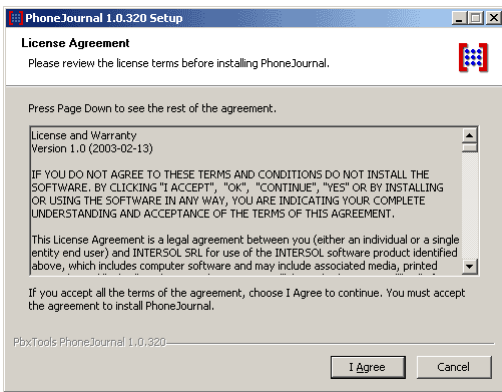
If you do not have the installation kit, you can download it from <http://www.phonejournal.com/download.shtml>. The size of the installation kit is under 2 Megabytes and it is the same installation program as the one from the CD. The operating system components required by the application are not included in the installation kit downloaded from our site. The setup program will try to download them as required from the internet if they are not found in the updates folder.



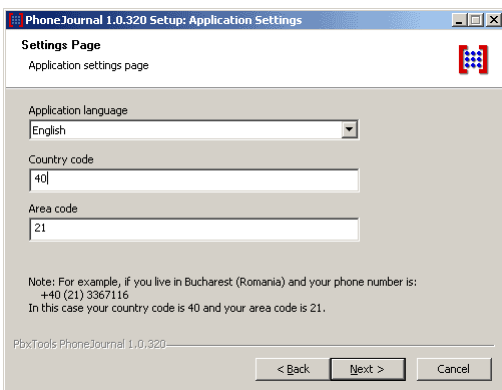
If you want, you can update your CD by writing a new session on it that contains the updated setup\_pbxtools.exe downloaded from the internet.

The first screen that will appear will be the language selection dialog for the setup program. After you choose your preferred language the setup will remember it and it will not ask you again about it. The installation language is not necessarily the same language used by the application.

After the installation is completed, in the Settings window you can choose the language you want to use for the application. You'll be able to switch the language from the user interface after installation. We recommend you to use English language in order to get better support from us.

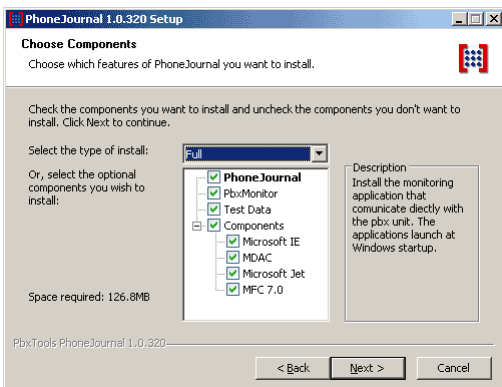


The next screen will show the license agreement. Please read it carefully because it is the contract that gives you the right to use the application. Once you press the I Agree button the contract will be considered valid. If you do not agree with the terms of the license, do not install the program and contact us for more information.



The next two parameters are very important to make the application recognize the calls. You should write down your country code without +, 0, or 00. For example USA uses country code 1, France uses 33, Romania uses 40.

The area code must be written without any prefix.



In the Components window you should choose the installation type for your system.

## Full install

This installation type is recommended if you are going to install the monitoring application (PBX connection) and the main application (PhoneJournal) on the same computer.

## Install with remote monitoring

You should use this type of installation if you want to install the PhoneJournal and the database on this

computer and you are going to capture the data with another computer from the local network. You should do this only after you install the monitoring application (PbxMon) on the network computer.

## PbxMonitor installation

This option will install only the monitoring application (PBX connection) on this computer. The application will capture, parse and store the data for the PhoneJournal application. After installation you'll need to share the PbxTools folder, with read/write access in order to give access to the PhoneJournal application to the data captured by PbxMon.

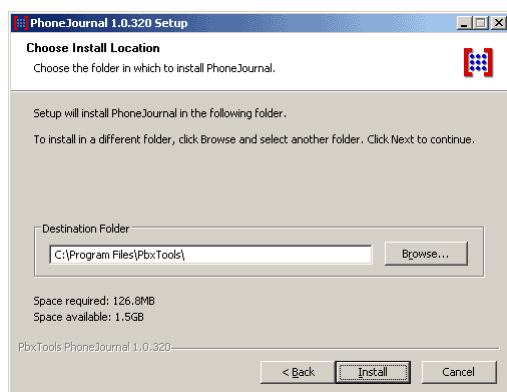
## Network client installation

This option will install a copy of PhoneJournal application that connects to a database from the network. This copy will not receive calls and it will be used only for reporting.

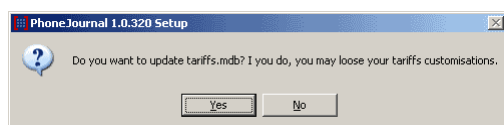
## Custom installation

This options will let you choose manually the components you want to install.

In this page you can select the folder where you want to install the application. We recomend you to use the default location.

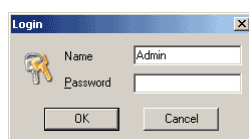


The following message box will appear if the installation program detects an existing tariffs database on the target computer. You should choose overwrite if you haven't customized your tariffs with the tariff editor.



## PhoneJournal first setup

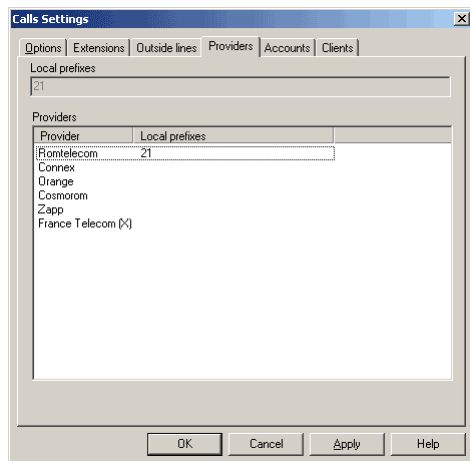
First you have to start the application by accessing Start Menu > Programs > PbxTools > PhoneJournal. At the every application start the login windows will appear. The default administrator account is admin and the password is blank (no password). So if you are running PhoneJournal for the first time just click on the OK button.



Now select in the Options menu, the Calls Setup option and select the tab page named Providers. Here are listed all telephony providers supported by the program. If you have providers that do not require you to dial the prefix for local numbers you must write the local prefixes separated by commas. This option is very important because the application uses this information in order to determine the complete phone numbers.

Example: You are using country code 40 and area code 21 (Romania - Bucharest). In this case you are using the RomTelecom provider and setup 21 for local prefix. So if you dial 12345678 the application will know that the complete number is +40 (21) 12345678 and it will know also that 21 area code is a local one

and it will use the local tariffs for it. If you do not set the local prefixes correctly the application will not know to make difference between local calls, dialled without area code, and long distance calls.



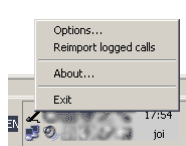
Next, you must set the correct telephony provider for every outside line (trunk) used by your PBX unit. Access this option by clicking on the tab named Outside lines. The number of trunks you can configure is based on the license you have purchased. For each trunk you must set its number (the number reported by the pbx unit), the telephony provider and the method used for calculating costs. You should use pulses only if your telephony provider is sending on the phonline charge pulses. Otherwise the application will charge

the calls based on their duration. If you do not select a provider for a trunk it will record the calls with no cost (zero cost).

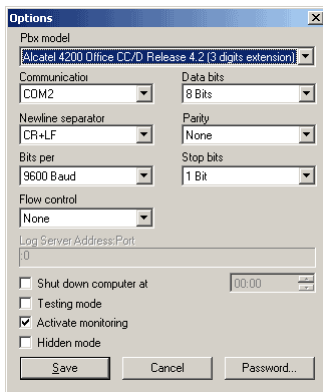
Next you have to choose you default currency. To do that you have to access the Currency from Options menu. Do not forget to updatre the exchange ratio.

## PbxMon - setting up the monitoring application

After restarting the system, the monitoring application will start. If the monitoring application is running you see it in the System Tray region, next to the clock. To configure it you'll have to right click on the icon symbolizing a phone and choose Options.



In order to setup the communication parameters you'll need to know your PBX model and how it is programmed to send the data to the computer.



This document does not contain information about how to setup your PBX in order to communicate with your computer. It is likely that the company that offers technical support for your PBX unit can assist you in this matter. Remember that the setting from this window must match the settings from the PBX unit in order to allow the program to work properly.

After you choose the correct setting, check the 'Activate monitoring' option and press the 'Save' button. If this option is not checked, the application will not communicate with the PBX unit.

Once monitoring is activated, when the application is receiving data from the PBX, you'll see a red or green circle near the application icon, on the System Tray. If the circle is green, it means that the application has just received a call from the PBX; otherwise, the red circle symbolizes data received from the PBX in an unknown format.

## Receiving first calls with the application

After you've completed the steps above, you receive the calls when you start the application. If the application is already running and PbxMon is running on the same computer, you will see the new calls in real time, as they arrive, in the calls list. If you have followed all the steps above and you are not receiving data, please read the Troubleshooting chapter.

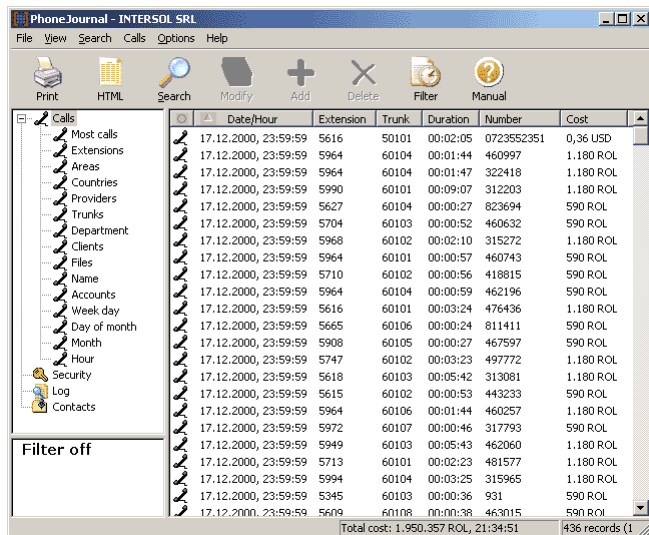
## Uninstall application

In order to remove the application from your computer, you must close the PbxMon application by right-clicking on the system tray icon and choosing 'Exit'. Then you can access the uninstaller in Control Panel > Add/Remove Programs or using Start Menu > Programs > PbxTools > Uninstall.

# Using PhoneJournal

## Calls

After you start the application you'll see the main window. In the left area there is a tree view displaying the main sections of the application. If you select the Calls branch, you are going to see in the right panel the list of calls. If you left click on any column header, the application will sort listing based on the clicked column. Also if you right click on the column headers bar, you can add or remove columns from the current view.



The screenshot shows the PhoneJournal application window. On the left is a tree view with the following items: Calls, Most calls, Extensions, Areas, Countries, Providers, Trunks, Department, Clients, Files, Name, Accounts, Week day, Day of month, Month, Hour, Security, Log, and Contacts. The 'Calls' branch is selected. On the right is a table with the following columns: Date/Hour, Extension, Trunk, Duration, Number, and Cost. The table contains 20 rows of call records. At the bottom of the table, it shows 'Total cost: 1.950,357 ROL, 21:34:51' and '436 records (1'.

Date/Hour	Extension	Trunk	Duration	Number	Cost
17.12.2000, 23:59:59	5616	50101	00:02:05	0723552351	0,36 USD
17.12.2000, 23:59:59	5964	60104	00:01:44	460997	1.180 ROL
17.12.2000, 23:59:59	5964	60104	00:01:47	322418	1.180 ROL
17.12.2000, 23:59:59	5990	60101	00:09:07	312203	1.180 ROL
17.12.2000, 23:59:59	5627	60104	00:00:27	823694	590 ROL
17.12.2000, 23:59:59	5704	60103	00:00:52	460632	590 ROL
17.12.2000, 23:59:59	5968	60102	00:02:10	315272	1.180 ROL
17.12.2000, 23:59:59	5964	60101	00:00:57	460743	590 ROL
17.12.2000, 23:59:59	5710	60102	00:00:56	418815	590 ROL
17.12.2000, 23:59:59	5964	60104	00:00:59	462196	590 ROL
17.12.2000, 23:59:59	5616	60101	00:03:24	476436	1.180 ROL
17.12.2000, 23:59:59	5665	60106	00:00:24	811411	590 ROL
17.12.2000, 23:59:59	5908	60105	00:00:27	467597	590 ROL
17.12.2000, 23:59:59	5747	60102	00:03:23	497772	1.180 ROL
17.12.2000, 23:59:59	5618	60103	00:05:42	313081	1.180 ROL
17.12.2000, 23:59:59	5615	60102	00:00:53	443233	590 ROL
17.12.2000, 23:59:59	5964	60106	00:01:44	460257	1.180 ROL
17.12.2000, 23:59:59	5972	60107	00:00:46	317793	590 ROL
17.12.2000, 23:59:59	5949	60103	00:05:43	462060	1.180 ROL
17.12.2000, 23:59:59	5713	60101	00:02:23	481577	1.180 ROL
17.12.2000, 23:59:59	5994	60104	00:03:25	315965	1.180 ROL
17.12.2000, 23:59:59	5345	60103	00:00:36	931	590 ROL
17.12.2000, 23:59:59	5609	60108	00:00:38	463015	590 ROL

The aggregated reports are under the Calls branch. You'll see at least 10 types of reports. If you select on one of them, the application will calculate in realtime the statistics and it will show them on in the panel on the right. If you want to modify users, groups and access rights, you have to select Security branch. The log branch contains information about login/logout operations and other warnings and errors encountered by the application. By selecting the Contacts branch you have access to the list of contact. For further information please refer to the Contacts section.

## Filter

This section will explain how to use the filter dialog. You must know that pressing the

Reset button will clear all the filtering option you have selected. All the empty fields have no effects on the filtering.

Extensions, Departments, Trunks, Accounts, Clients and Client Folders are shown based on your configuration in Options > Calls Setup. In order to be able to filter by these fields you must add them in the configuration section.

If you want, you can hide special numbers. To use this function you must hide some numbers by right clicking on them and choosing Hide selected number while you are in the Calls view. The selected numbers (s) will be marked

as hidden and you can generate reports excluding them, by activating the corresponding filtering option from the filter dialog.

If you want to see only international calls you can write 00 in the number field. If you want to select only some numbers based on the number format you can write it in the number field.

## Contacts

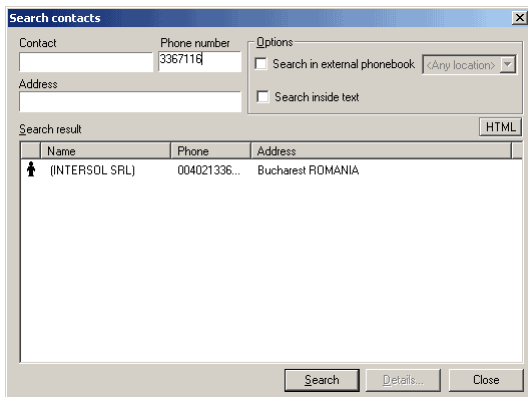
This section permits you to add, remove and delete contacts. To edit a contact you can double click on it. The most important element in the contacts dialog is the phone numbers field. In this field you can add more than one

phone number. You should use the canonical format for these numbers like +CountryCode (Area code) number. If you do not use this format the application will format your number based on the default country code and area code you entered in configuration dialog. The phone number must be separated by ; or written on separated lines. You can add comments inside the list of numbers, the application will ignore them and will recognize the numbers automatically.

The disabled fields cannot be used due the license limitation or because the feature was not been implemented yet.

## Searching contacts

The Searching contacts dialog is very powerful because it permits not only to search contacts from the internal database. You can use it to search in external database (phonebook). If the contact is found in the external database the application will display it with a green icon and it will permit you to add to the internal database and modify it.



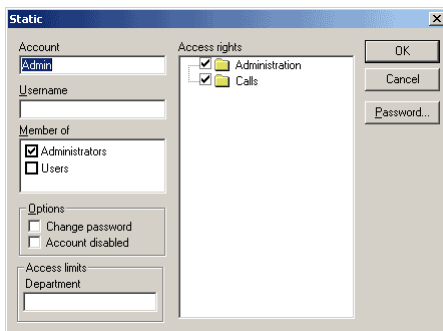
By pressing HTML button you'll be able to export the search results in HTML format.

Please use search inside text option only if it's absolutely necessary. It is a very slow operation and can cause the application to stop responding for some time if you use it.

## Security

This chapter explains how you can limit access to the application. The users must be members of one of more groups. The rights are set per group, not per user. Normal users can interrogate the database, while the administrator can reset and modify the database, assign right etc.

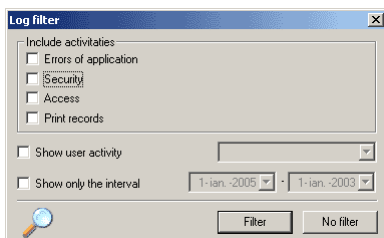
## Users



## Groups

The Groups tab is used for defining the rights of the selected group. Password valability is measured in days. From the Members tab you can add or remove users from the current group. Please be carefull with the administrator group and user because you can easily lock the access to the programs if you remove these accounts. If you do something like this you should contact the technical support for unlocking the application.

## Log



## Options

## Currency

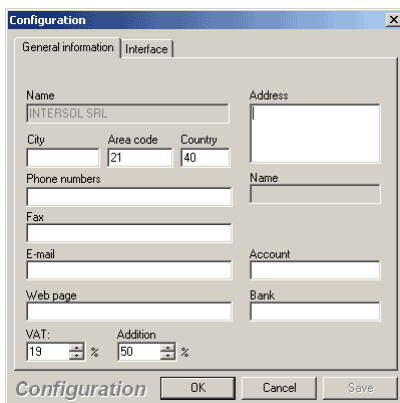
This dialog can be used to modify the exchange rates for the currencies and for setting the default currency you want to use. All the costs will be converted in the default currency for the "Price" and "Cost ref" fields. In the database, the costs are stored in original currency and in the default currency. You can calculate totals only for columns that use the default currency. If the currency you want to use is not listed in this window, you can replace one of the currencies that is not useful for you with your currency.



## Configuration

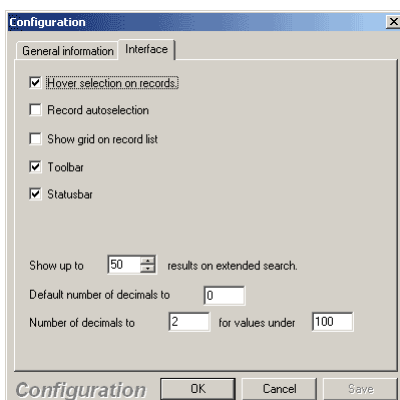
The configuration window can be opened by selecting Options > Configuration. The Name field cannot be modified because it is set to the license owner. The rest fields are used to generate reports and should be completed with the license owner data.

The Value Added Tax (VAT) and Addition are important to be set because these fields are used to calculate the price based on costs. The cost does not include VAT and Addition. The Addition is how much you want to add to the costs - your profit.



In the Interface dialog you can customize how the application's user interface works. Important fields are Default number of decimals.

Example: Default decimals = 0, Number of decimals = 2 for values under 100. If you use these values, the application will show the costs and the prices in this way: 202.34 USD will appear as "202 USD" and the 1.2433 USD will appear as "1.24 USD".



## Calls setup

This section explains important settings about recording and reporting calls for the application.

### Options

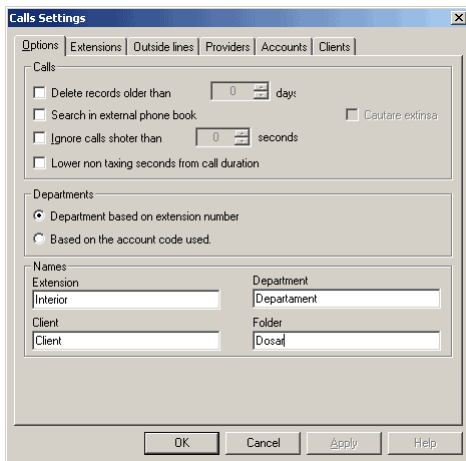
The option "Delete records older than ... days" will tell the application to remove, at the startup, all the calls older than the number of days you set here.

Search in external database option will activate the automatic search for names in the external phonebook (phonebook.mdb) by phone number, for the recorded calls.

If you check the "Ignore calls shorter than ... seconds" the application will not charge the calls that match this criterion.

The next option will subtract from the duration reported by the pbx the non taxing seconds. This option will modify the data received from the pbx unit.

If you want to customize the application you can rename the Extension, Department, Client, and Folder based on your needs. For example if you use the application in a hotel you may want to rename the Extension to Room. The values of these fields are used in all printable reports.



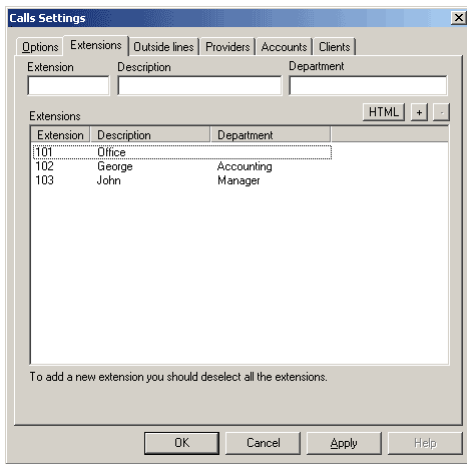
### Extensions

In order to be able to filter by extension you must add all you extensions to this window. All extensions must have descriptions. The extension number and name fields are mandatory.

Please be carefully when you choose the department name because you must use the same case, the "Department A" and "department a" are considered different departments.

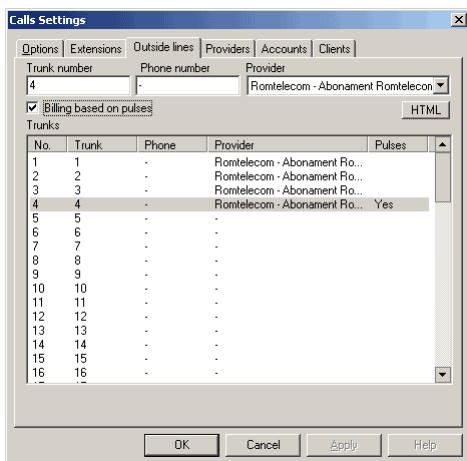
In order to to modify a field you must select the record and modify the text. If you want do add new records you must deselect the current selection first, edit the fields and press the "+" button.

To delete a record you must select it first and press the "-" button.



## Trunks

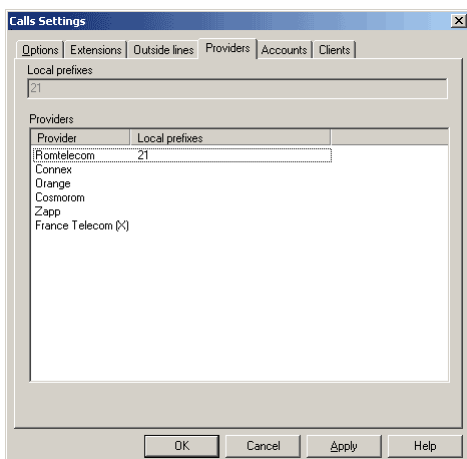
In this window you will have to select the telephone network which every trunk in your PBX unit is connected to. If you do not assign every line, the program will try to set this options up automatically as calls arrive.



## Providers

In this window you can enter the default prefixes for your providers. The default prefix is the prefix your provider does not require you to dial in the front of local numbers. Some providers use this facility and if you do not set it, the application will be unable to make the difference between local numbers and long distance numbers.

Warning ! You should insert the prefix WITHOUT zeros in the front of it.

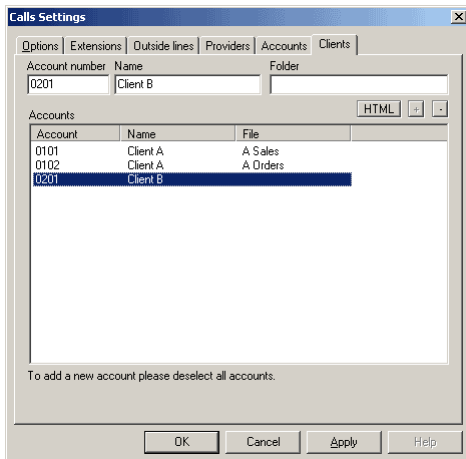


## Accounts

The editing of this window is similar to the Extensions window. The difference is that you can use wildcards like 1234??, to match all codes from 123400 to 123499.

## Clients

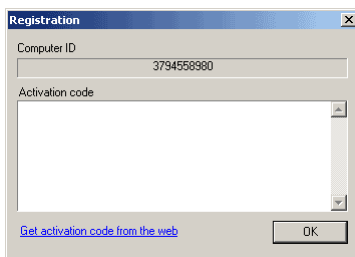
The editing of this windows works in the same way as the Accounts window, the diffence is that the charged is not the account but the client defined here. The folder is attached to the client. This options works as a department of the Client. You should include the client name in the Folder name.



## License activation

The license activation window can be accessed by using Help > Modify lincese. In this windows you should insert the activation code obtained from the registration web site.

This window is also used for upgrading your license. The upgrade works the same way as the registration process.



After you press the "Get activation code from the web" link the browser will open you the registration web page. Please be carrefully when you complete the date because you will not be able to change this information later.

All the updates notification will be sent to the e-mail address registered.

The serial number must be written in the XXXX-XXXX-XXXX format. The serial number indentifies your license and you should have received it from the company who sold you the product.

PbxTools PhoneJournal - Software call monitor with full reports enabled - Microsoft Intern...

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Media

Address http://www.phonejournal.com/registration.shtml?computerid=3794558980 Go Links

Installing PbxTools PhoneJournal.

You will NOT be able to change the registration data after registration in any way.

**Name**  
Sorin Sbarnea

**Company**  
INTERSOL SRL [2]

**Email**  
sorin@intersol.ro

**Serial Number / BETA for free evaluation**  
1234-1234-1234

**Computer ID**  
3794558980 [3]

**Country**  
Romania

Additional information [4]

Submit Clear

Internet

# Troubleshooting

This chapter is intended to solve most common problems encountered by the users. Please Read it carefully and you'll be able to solve most of the problems without contacting technical support.

## Error messages running application

### Selected Collating Sequence Not Supported

This error appears when the international support for the operating system is not installed or it is damaged. Please read the Microsoft Knowledge Base article Q202150

## Data communication problems

### Not receiveing data from the pbx unit

You should check the following elements that are ordered by the frequency of their occurrence:

- The serial cable is connected to the computer and pbx unit. The plug must be securely attached to the serial port at both ends.
- The monitoring application is not running.
- The monitoring application setting are not correct, including Activate monitoring checkbox and the flow control. Most of the pbx units use hardware flow control.
- The application must be registered (activated). If the application is running in the demo mode you will not be able to record data.
- The settings from the pbx unit, including baud rate, start and stop bits, are the same as the setting from the pbxmon application.

### Receiving unknown data from the pbx unit

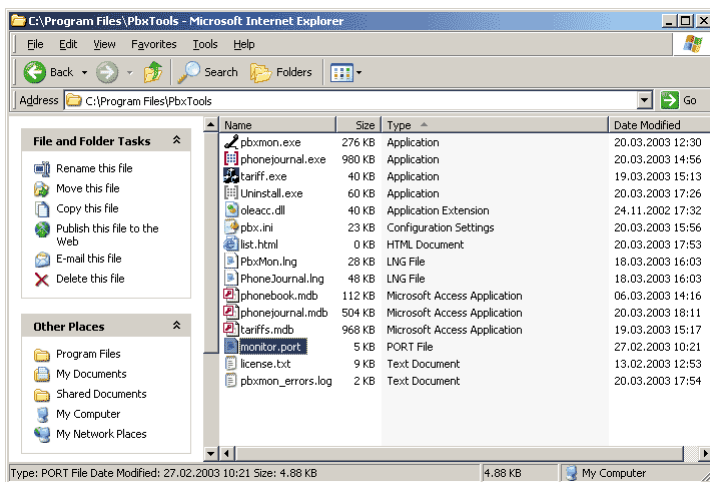
First open the monitor.port in a text viewer and check if it contains valid information. If the pbxmon does not support your pbx model please send to technical support the monitor.port file with information about your pbx make and model in order to add support for your pbx unit. Such requests are generally solved in maximum 24 hours.

### Some calls are not recorded by the application

First you have to start PhoneJournal and check the Log folder. If there are log entries with the message that the calls received on a trunk were not recorded because the total number of trunks was exceeded, you should contact our sales department in order to upgrade your license. If there are no such error in the Log you should check the file pbxmon\_invalid.log, if this file contains the calls not recorded it means that the parsing engine does not recognize them as valid calls. This could happen if there are some errors in the communication between the computer and the pbx unit or if the pbxmon application has only partial support for your pbx. If the lines do not contain errors, you should send the file monitor.port to technical support, mentioning the pbx make/model, and a list of specific calls were not recorded. A call can be uniquely identified by dialed number, date, time and trunk.

### The pbx model is not listed on the pbx list

If your pbx is not listed on our list you'll need to send us some data captured with pbxmon. The data captured by PbxMon is stored in the file named monitor.port that is located in the application folder, usually C:\Program Files\PbxTools\. Such requests are generally solved in maximum 24 hours.



## Tariff problems

### Recorded calls have zero cost

Check if the correct telephony provider subscription is selected for the trunk used by the call. This option is configured in Options > Calls Setup > Outside lines. Also check, in the same location, if the application is using pulses to calculate costs or the duration of the call.

### The charged costs are not correct

In this case you should check if the correct subscription is selected for the trunk and if the local prefixes are set in Options > Calls Setup > Providers

## Access security

### Limiting access to PbxMon

It is possible to password protect the access to the PbxMon settings. To do this access PbxMon > Options > Password. If you want better protection against normal users, you can run the application in hidden mode, which removes the system tray icon. The hidden mode is activated from the Options window.