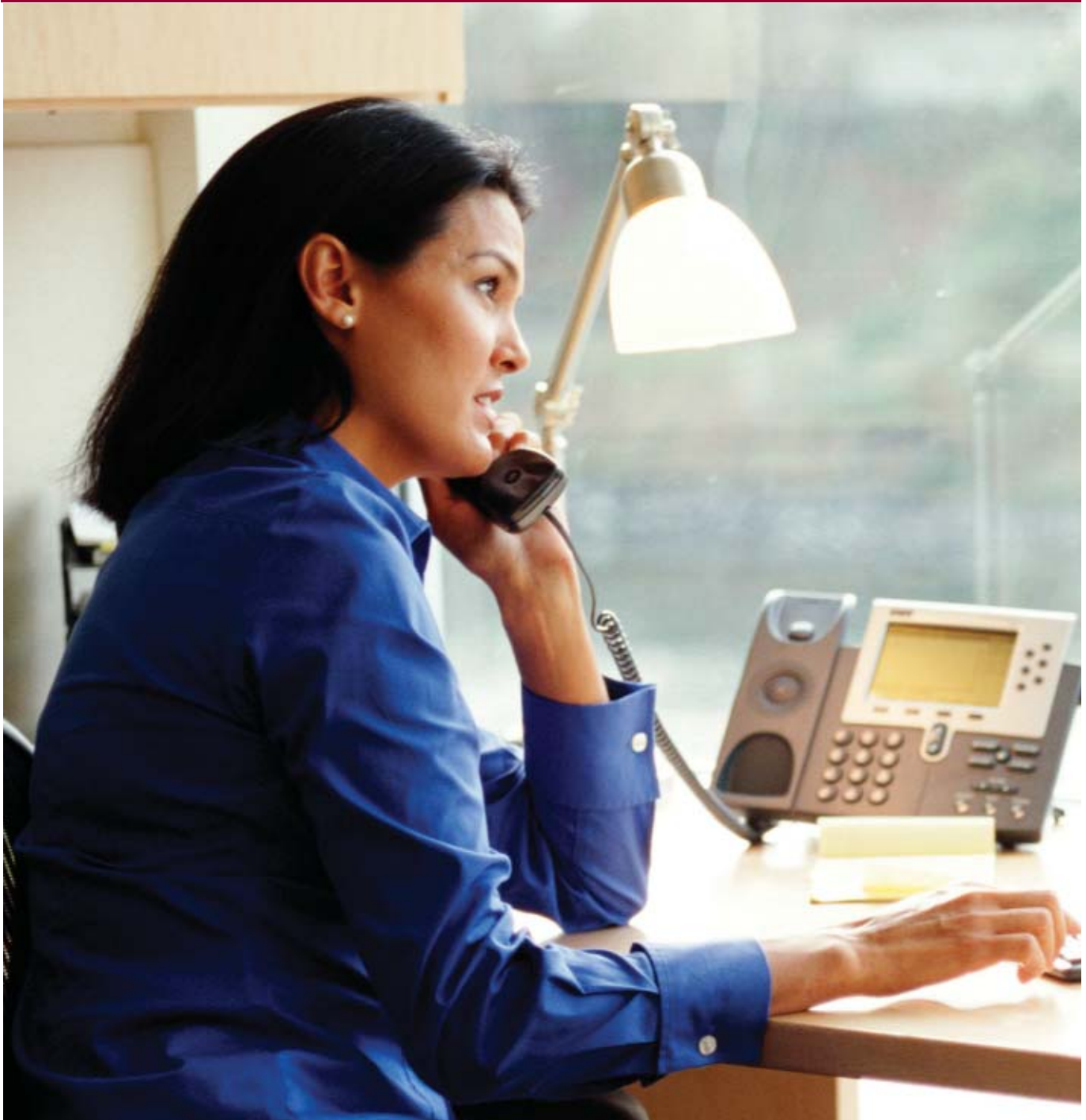


# ***TeleMate™***

## Unified Call Accounting Software

**Installation Guide**



# TELEMATE UNIFIED CALL ACCOUNTING REPORTING SOFTWARE

Thank you for choosing our TeleMate® Unified Call Accounting Software, the industry's leading call accounting solution for monitoring, analyzing and managing the use of analog and IP voice networks. Designed to work with any PBX, IP PBX, and voice enabled gateway, TeleMate delivers robust call accounting features that will enable you to control and allocate telecom costs to maximize the performance of your most critical resources.

Once installed, TeleMate will enable you to:

- Optimize network resources
- Enhance capacity planning and budgeting
- Improve network security
- Control and allocate costs
- Maximize employee productivity
- Protect against fraud

TeleMate.Net Software is committed to the successful installation and maintenance of your new TeleMate software tool. If you have any questions or need technical assistance, please contact our customer response helpdesk at 678-589-7120 or email us at support@telemate.net.

## INSTALLING THE PRODUCT

You can easily install TeleMate with just a few clicks of your mouse. The Install Shield wizard “reads” your system to determine what components will need to be installed. It is highly recommended that you close any applications that are running before you begin the installation process.

### STEP 1: GETTING STARTED

Insert CD 1 into your CD-ROM Drive

The auto-run feature of the CD will launch the main setup menu automatically. If the process doesn't automatically start for some reason, follow the directions below:

1. Click **Start** on the Windows taskbar and select **Run**.
2. In the box provided, type “X:\SETUP.EXE”, where “X” is your CD-ROM drive.
3. Click **OK** to launch the main setup menu.

TeleMate should be installed into a Windows XP using SP2 or greater, 2003 Server with SP1 or greater, Vista with SP1, and Virtual Server or Terminal Server. For operating systems not listed here please contact TeleMate Technical Support at 678-589-7120 for current compatibility results and recommendations.

Note: Users performing the installation should use a LOCAL SYSTEM ACCOUNT with sufficient rights to install server class software. TeleMate's Windows NT Services require access to network resources including email, printers and LDAP sources including Microsoft® Active Directory and Novell® eDirectory.

# TELEMATE UNIFIED CALL ACCOUNTING REPORTING SOFTWARE

## STEP 2: PERFORMING THE INSTALLATION

1. On the Welcome screen, click the FIRST STEPS ONLINE MANUAL button if you want to reference an online document that describes how to configure TeleMate. Click NEXT on the Welcome screen once you are ready to proceed.
2. On the License Agreement screen, read the agreement and, upon acceptance, click ACCEPT.
3. On the Setup Type dialog, select TYPICAL. If you wish to perform a Custom Installation, please consult the First Steps: Installation and Overview guide.
4. Choose the destination folder for TeleMate by clicking BROWSE. The default folder for TeleMate is C:\TELEMATE SOFTWARE. Click NEXT when you are ready to proceed. If you have a compatible database already installed, the installation wizard will locate the database and ask you to specify a login name and password. If you do not have a database installed, TeleMate will install on for you.
5. If you are satisfied with the default program group folder, click NEXT. Otherwise, choose a program group folder from the list provided.
6. Click INSTALL. Please note that your system may need to be rebooted during the installation or upgrade process. The system will automatically continue following the reboot.

## STEP 3: RUNNING TELEMATE FOR THE FIRST TIME

1. After the installation is complete and you launch the product for the first time, you are prompted to provide contact information and a serial number. Use the serial number on the CD jacket for this purpose. If you have already purchased the product, the Product Licensing section of this document will walk you through obtaining your permanent license.
2. You will then be asked to either evaluate the product or license the product. Note: OEM versions will not have this option due to automatic licensing.
  - a. Evaluating the product allows use of the product for 30 days before it must be licensed. Failure to license the product within the evaluation period will disable access to TeleMate once the period has been exceeded.
  - b. Licensing the product requires the entry of a license key code that has been obtained via the TeleMate Vendor Registration Services group (see the Product Licensing section for contact information).
3. On the Evaluation Type screen you will have the ability to either evaluate the product working with your own data, or utilizing a Demo database supplied with the product.

There are two modes of the product: DEMO and MAIN database. DEMO database mode allows you to view a complete set of demo data for specific areas of the product, such as Report, Directory, Voice, CVM, etc. If you want to jump right into running reports and working with your own data, you must first switch to use MAIN database by selecting 'Use Main Database' from the FILE menu. Note that the thirty day evaluation is limited to only one live datasource.

## TELEMATE UNIFIED CALL ACCOUNTING REPORTING SOFTWARE

4. Once you have selected to evaluate TeleMate with 'your own data', you can begin to configure the product to work with your voice datasource. In most cases, you can refer to the First Steps Guide: Installation and Overview document for these instructions. For instructions on how to set up and configure your actual datasource to work with each component, please reference the First Steps Guide. You can access the First Steps Guide from the TeleMate Program group.

### STEP 4: LICENSING YOUR TELEMATE REPORTING SOFTWARE

1. From the product, select TOOLS, LICENSE UPDATE from the menu bar.
2. Please not the CODE ENTRY number and COMPUTER ID, and SERIAL NUMBER.
3. Email these numbers to registration@telemate.net
4. You will receive a return email with your CODE 1 and CODE 2. Entering the codes will license your product to this server.

**Note:** When requesting a license, you must go to TOOLS, LICENSE UPDATE and email the current numbers as they will change with each application.

### CLIENT INSTALLATIONS

There are two forms of TeleMate Clients: Full Client and TeleMate Browser clients. The Full Client has the same interface and accessibility options as the TeleMate Server. User rights can be configured to limit application functions and datasource data. The Browser Client allows access reporting and report automation, directory maintenance and LDAP synchronization, expense management, and performance monitors via your browser.

Client prerequisites are listed in the First Steps: Installation and Overview guide and in the TeleMate on-line help.



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