TK Suite Instructions

for Administrators and Users

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1. TK Suite Set

TK Suite Set is a valuable addition to your PBX. Besides a convenient configuration interface for setting up and managing your PBX, TK Suite provides a contact database, resubmission, call time distribution and many more possibilities as detailed in the following.

TK Suite is a network and multi-user software package consisting of a server and client application. Separation of the components allows the software to be used in a network.

1.1. How Does TK Suite Function?

The application TK Suite Server forms the basis of TK Suite, and is referred to in the following simply as TK Suite Server.

TK Suite Server is installed on a computer from where a connection is made to the PBX via a USB or serial interface. TK Suite Server provides its services to all computers in a network.

A thin application is installed on these computers only. They then communicate with TK Suite Server via a network. This application is called TK Suite Client and allows dial-up links, notes and a variety of other functions.

Server and Client can also be installed on a single computer.

TK Suite Server contains a database and provides various web interfaces which can be used by other computers in a network with a web browser.

The core applications in TK Suite are also included in these interfaces.

- TK Suite Set (configuring the PBX)
- TK Suite Bill (call time monitoring)
- TK Suite Contact (contact management)

Although these applications can be reached directly via a standard web browser, it is easier to start an application using the appropriate button in TK Suite Client.

1.2. Rights

The basis of all multi-user applications is a rights system. This prevents users in a network being able to edit other people's private contacts, or even see the last numbers they dialled.

Each user is issued a user name and password for this reason. The respective user enters this combination once in the client application at his workplace. Only the Administrator has permanent access to all the data on the server and can enter or delete users and rights.

Normally a company appoints an officer to the position of administrator. If a user forgets his or her password, the administrator simply has to issue a new password or find the old one. The administrator function exists as standard in TK Suite and cannot be deleted. Under User Administration the administrator can assign telephones and issue specific rights to the users.

If multi-user capability is to be used, the first step after installing TK Suite Server is to set up users and important rights (see Page 10). The administrator's user name is 'admin' and does not require a password as standard.

As soon as the basic settings have been made, the administrator needs to secure his account with a password. Normally, a user is set up for each telephone allowing him or her access to this telephone alone.

2. TK Suite Client

TK Suite Client allows you to use the convenient CTI functions of your PBX. Depending on the firmware version installed on the PBX, you can control all the essential exchange functions via TK Suite Client.

Please consult the instructions for TK Suite Client supplied separately for detailed information on this programme. The following merely supplies a brief summary of the most important settings.

2.1. Show TK Suite Client

If TK Suite Client is placed in the Autostart Programme Group during installation, it will start automatically after you log on to Windows. Left-click on the TK Suite icon in the taskbar to show TK Suite Client.

Figure 1 The TK Suite icon in the taskbar

2.2. TK Suite Client Settings

2.2.1. TK Suite Server IP Address

Click ***File*** and then ***Settings*** to enter the computer name or server IP address so that the client knows how to reach the server. The server address can be obtained from the administrator or by entering the command line ‘ipconfig’ in the MS-DOS command prompt window on the server (for Windows systems).

If the server is running on the same computer as the Client, then enter 'localhost' or '127.0.0.1'.

2.2.2. User Name and Password

The user name and password are entered in the same dialogue.

The user name and password are sent to the server, which checks the log-on details every time TK Suite Client is started. As soon as a connection has been set up to the server and the log-on details have been verified, a green section appears underneath the client on the right. If the section stays red, either no server is available, or the user name could not be verified by the server.

2.3. Starting TK Suite Applications

Click the appropriate button (circle icons) or right-click on the TK Suite icon in the taskbar, and select an application from the menu to start TK Suite applications which run in the browser.

2.4. TK Suite Modes

2.4.1. Passive Mode

If you have just selected a passive interface in TK Suite Server (see Page 10), TK Suite Client merely functions as a starter application for the TK Suite applications, TK Suite Bill, TK Suite Contact and TK Suite Set Configurator.

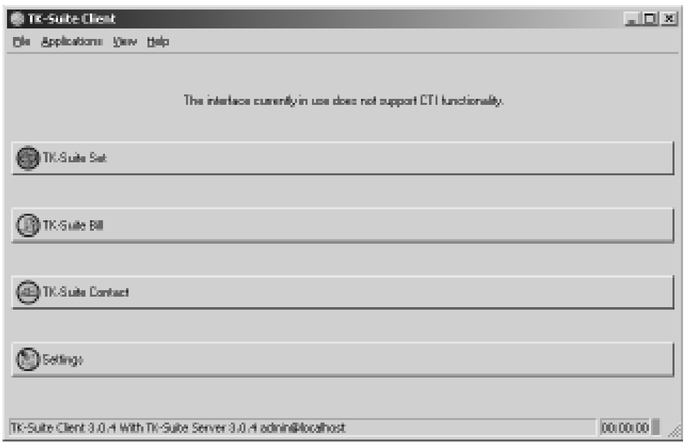


Figure 2 TK Suite Client in passive mode

The functions detailed in the following are not available in passive mode!

2.4.2. Active Mode

If, in contrast, you have selected an active interface in TK Suite Server, all CTI functions are available in addition to the applications.

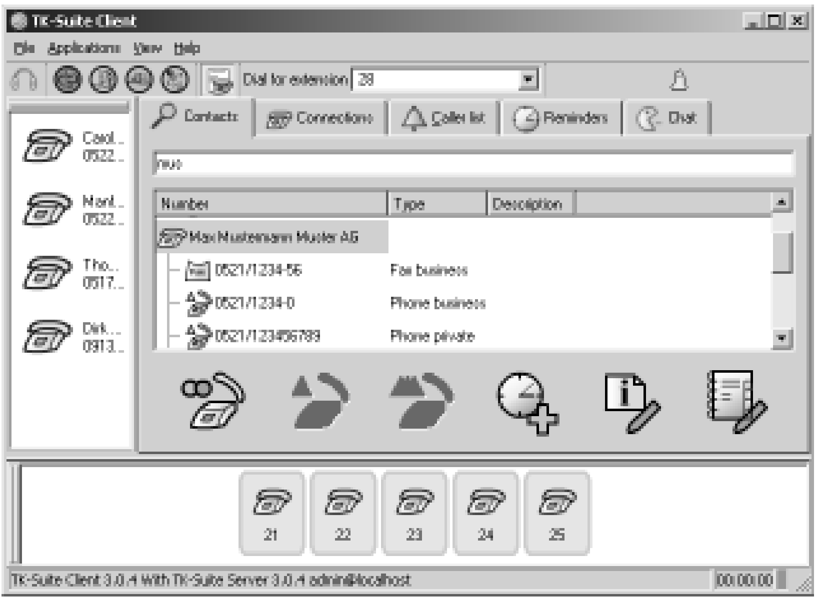


Figure 3TK Suite Client in active mode

CTI allows you to use computer-aided telephony. You can call numbers with TK Suite Client and stay informed of incoming calls.

Along with the note and resubmissions functions, this provides you with a professional CTI workplace. Several computers can even communicate with TK Suite Server via TK Suite Client in a network.

3. TK Suite Menu

The TK Suite menu allows you to toggle between the various TK Suite applications and log-in using another password.

3.1. Showing the TK Suite Menu

You can go to the TK Suite menu using the context menu in TK Suite Client in the Windows taskbar (right-click the icon to do so).

If you are working in TK Suite Bill, TK Suite Contact or TK Suite Set, you can also go to the TK Suite menu by clicking the applications icon in the top-right of the window.

3.2. Changing to an Application

The TK Suite menu shows you all TK Suite Applications you are authorised to use. Click on an icon to go to the respective application.

TK Suite Set

TK Suite Bill

TK Suite Contact

TK Suite Set Settings

3.3. Logging On as Another User

Click on the key ring icon to log on using another password.

New Log-on

3.4. Further Views

At the end of the page you will also be shown the TK Suite Server version, the name and version of the operating system used, and the address of the computer. This information can be especially useful in networks.

4. TK Suite Settings

Among other things, you can set the interface to the PBX and administer users under TK Suite Settings.

4.1. Starting TK Suite Settings

The menu for the TK Suite settings is started directly from the client via the Settings icon. You can also use the TK Suite menu as an alternative.

4.2. Interface Settings

You have to set the appropriate interface for TK Suite Server to communicate with the PBX.

Normally, this is carried out automatically during installation. However, if the interface has been changed in the meantime, you can reset the interface in this menu.

4.2.1. Active Interfaces

If you select one of the active interfaces, this is opened when TK Suite Server is started and closed again first when you quit TK Suite Server.

Since CTI messages need to be received by TK Suite Server, so that for instance, a pop-up window with information on the caller appears on your computer when a call comes in, you need to select an active interface to use the CTI functions.

4.2.2. Passive Interfaces

If you select a passive interface, this is only opened for data transfer purposes such as transferring configuration data. You cannot use CTI functions in this case.

4.3. Setting up Users

Besides 'admin', which always exists as a user, you can set up other users who are then able to use the services provided by TK-Suite Server.

Whereas TK Suite Bill and TK Suite Contact as applications can almost be used in their complete entirety, TK Suite Set as a configuration application is limited to user-relevant settings.

4.3.1. Telephones Assigned

Here you can set which telephones the user has access to. Telephones available to the user for selection in TK Suite Client and the telephones provided for choice on the TK Suite Set configuration pages are concerned here.

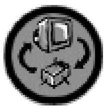
4.3.2. Rights

You can issue the following rights:

Rights	***Meaning***
Phonebook	The user can edit the PBX phonebook with TK Suite Set.

Rights	*Meaning*
Telephone Settings	The user can edit telephone settings with TK Suite Set (for instance, external allocation).
Telephone Redirects	The user can set up telephone lines with TK Suite Set via the PBX.
Timing Control	The user can edit a timing control functionally assigned to his telephone with TK Suite Set. Only the time profile can be edited.
Bill Call Data	The user can analyse the call data for the telephones assigned to him or her, but not delete or move them to an archive.
Setting up Users	The user can set up other users.

5. TK Suite Set Configurator



TK Suite Set Configurator allows you to programme your PBX. You can also print, save and load configurations.

5.1. Starting TK Suite Set

TK Suite Set is started directly from the client via the TK Suite Set icon. You can also use the TK Suite menu as an alternative.

5.2. Configuration Options

Configuration options depend on the PBX used. Please use the TK Suite Set Configurator Online Help Glossary for explanations on the configuration options available.

A menu with a variety of PBX settings is shown after the read out. Optionally, you can select a chosen item from this menu, or be guided through the most important settings by a wizard.

5.2.1. Configuration Assistant

Use the Configuration Assistant to be guided though the most important basic settings. Start the assistant by clicking on the question mark.

5.2.2. Configuration Menu

Click on an entry in the configuration menu to use all the configuration options available.

5.2.3. Using the Glossary

You can go to the Online Help Glossary by clicking the question mark, or the terms highlighted in the Help texts on the configuration pages. You can also jump to pages in the configurator directly from the Glossary. These links are highlighted in the text.

5.2.4. Resizing the Display Area

With smaller screens, it can be of benefit to create more room for displaying configuration tables by hiding the configuration menu. Click on the Minus sign above the configuration menu to do this. Click the Plus sign to show the menu again.

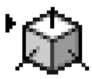
5.3. Menu Bar

5.3.1. Receiving

Click ***Read Out Configuration and Process*** to load the full configuration from the PBX to the computer.

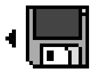
Clicking ***Edit Last PBX Configuration Read Out*** only allows you edit the last version saved. This is updated after each complete read out and changes are sent to the PBX every time.

5.3.2. Sending



Click Send to send all changes made to the PBX. If you have loaded the configuration from a file, all data will be sent. If you have read out the configuration from the PBX previously, only the changes will be sent.

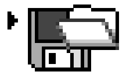
5.3.3. Loading



Click ***Load*** to see a selection of the PBX settings last saved on the server. Simply click the item required to make a selection.

You can also load an appropriate configuration file from the hard disk, or an external data carrier (for instance, a diskette). Click ***Search*** and select a file with the ending .tfk from the standard file dialogue to do this. The name selected will be adopted by the entry field and you can load it by clicking ***Import***.

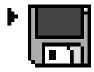
5.3.4. Saving as



Click ***Save as*** to save the last configuration in a file. This can either take place at a default location in TK Suite Server (files on the server), or exported (your local file system). Exporting also allows you to save a configuration on a disk, CD or other portable data medium.

Click the ***Save Copy*** checkbox to avoid modifying the configuration source when saving. For instance, if you have read out a configuration from the PBX and saved it in a file (on the server), the configuration is treated like one which was loaded from a file from this point onwards. This results in all data being sent following a small change being made to the configuration. Click ***Save Copy*** to prevent this.

5.3.5. Saving



Save as a menu item is only available if you have read out a configuration from a file. Click the button to write the changes back to the same file.

5.3.6. Printing

Click ***Print*** to print the full configuration or selected configuration pages.

Click ***Select All Pages*** to select all configuration pages. Alternatively, click the ***Checkbox*** next to the pages required. The pages selected can then be printed by clicking ***Click Here To Open Print Window***. Another browser window will open where the Print option can be selected from the menu.

6. TK Suite Bill

With TK Suite Bill, TK Suite provides you with an advanced tool monitoring call durations and costs.

Depending on the rights issued, connections can be shown filtered according to various criteria. A user only sees the calls made from a telephone which he has the appropriate rights for. Filters which have already been set up can be activated or disabled at the press of a button so that you do not have to re-enter all filters for each session.

Besides the connection list, which automatically resolves all telephones numbers listed via TK Suite Contact, TK Suite Bill also provides various statistics views. You can generate and view bar charts for statistics relevant to particular users per month and day of the week here.

6.1. Starting TK Suite Bill

TK Suite Bill is started directly from the client via the TK Suite Bill icon. You can also use the TK Suite menu as an alternative.

6.2. Menu Bar

6.2.1. Read Out New Data

A connection is made to the PBX and all new call data records added since the last read out are transferred to the database. The most recent data records are highlighted with a blue hash.

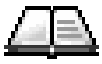
6.2.2. Read Out All Data

A connection is made to the PBX and all data records stored in the PBX are transferred to the database. Double entries are recognised automatically and not added to the database.

6.2.3. Printing

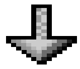
Use this function to print currently filtered data records. A PDF file is created for this purpose, which can be printed out in your browser using Acrobat Reader.

6.2.4. Showing Phonebook/Showing Numbers



Click this button if you want to specify whether numbers present in the TK Suite Contact database are to be displayed according to name.

6.2.5. Exporting

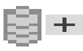


Click this button to save filtered data records as a text file so that they can be reprocessed with a spreadsheet programme.

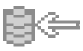
6.3. Archives

The administrator (admin) has the right to create new archives, change current archives and move data records to other archives. Select the appropriate archive to see the actual number of data records in the archive.

Creating various archives (personnel-related archives, months etc.) allows you to reduce the size of the actual data records. For instance, you could move all the connections for a previous year to an archive for this year.

 Show archive

 Hide archives

 Move filtered data from the current archive to this one

Create new archive

Delete archive

Edit archive (change name)

6.4. Filters

You can filter connections in the active archive according to various criteria.

Create filter

Delete filter

Edit filter

Filters can be activated or disabled at any time. To ensure a good overview, disabled filters are normally hidden. You can use the following buttons to activate or disable filters:

Show all filters of this type

Hide all disabled filters of this type

6.4.1. 'Time Period' Filter

The last six months are provided for selection and can be added to the filter list with a simple click of the mouse. Deviating time periods (quarter, week, specific days etc.) can also be created. Click the icon for the new filter to open a calendar sheet where the start and stop point can be selected and confirmed. A time period filter can also be set up very easily by clicking a date in the connectivity list. The period of time only appears on the user interface.

You also have the option of setting a tick to activate or disable a time filter, or link several filters or edit them. The time period is first deleted (and cannot be restored) after clicking the crossed out icon.

Examples:

- Compare October 2002 to October 2001
- Compare two time periods with regard to call duration
- Compare the call charges incurred on specific weekdays

6.4.2. Filtering 'Numbers’

Click the icon to open a display where the number to be selected can be entered. If the phonebook display is activated, the system compares the number with the database and the contact selected appears in the filter list. A number filter can be very easily set up by clicking a number in the connection list. Linking several number filters is also possible here.

Examples:

- Linked to the time period filter: how frequently was a number called during a specific time period.
- Linked to the line filter: which line was used most frequently to talk to business partner XY?

6.4.3. Filtering 'Lines'

The line filter allows you to name selected telephone lines according to the method described above. A line filter can very easily be set up by clicking a line in the connectivity list.

6.4.4. Filtering 'LCR Carriers'

Use this filter to show connections made via a particular carrier. A carrier filter can be set up very easily by clicking a carrier in the connection list.

With this menu item you can compare how often carriers are used.

Click ***Create List*** to search all data records according to appropriate carrier prefix codes, compare them with the database, and create a new list with named details of the provider, if available.

6.4.5. Filtering 'Parties'

Use this filter to show connections made by a particular party. A party filter can be set up very easily by clicking a party in the connection list.

6.5. The Connection List

The following items are displayed in the connection list taking the filter criteria selected into consideration.

- Date and time
- A choice of the numbers called or phonebook display
- Carriers used to set up the call
- Line (which line/MSN was used to make the call)
- Parties
- Call duration
- Call type (incoming or outgoing)

You can highlight specific column entries with a click in the connection list and use them as a filter. For instance, click on a number to add it automatically to the number filter. The same method can be used for dates and times etc. as well. The grey filter icon highlights these filter options.

A blue hash sign refers to all new data records added since the last read out.

6.6. Comparing Statistics

This menu item compares all parties according to time in a bar chart. Individual parties can also be selected in order to make a direct comparison.

Example:

Compare employee A with employee B with regard to the call duration.

6.7. Statistic Progression

Time progression per party is shown for the time period selected using a chart. Click the month to open a second chart with a detailed view of the days for a specific time period.

7. TK Suite Contact

TK Suite Contact provides you with a complete contact database for all users in the network.

Instead of contacts doubling or tripling up on various computers, TK Suite Contact saves contacts just once on a central server. Something like an address change only has to be carried out once instead for each computer. This means that users always find the most up-to-date addresses and telephone numbers in TK Suite Contact. Instead of prescribing a predefined selection of addresses, any number of telephone numbers, e-mail addresses, post addresses and even notes can be saved in one contact in TK Suite Contact.

Even the privacy of a user is taken into consideration in TK Suite Contact, because each contact has specific rights assigned to it on the server. Meaning that a private contact remains private and no other user can view or edit it. The various rights' levels range from ***private*** (hidden from view for other users), and ***read only*** to ***read and write***.

7.1. Starting TK Suite Contact

TK Suite Contact is started directly from the client via the TK Suite Contact icon. You can also use the TK Suite menu as an alternative.

The application consists of two different views: the ***Contact Overview*** and the ***Contact Editing Mode***.

7.2. Contact Overview

In the Contact Overview, all database contacts which are not private contacts belonging to another user are displayed alphabetically.[1].

7.2.1. Filterbar

The filterbar allows you to jump to a particular letter of the alphabet quickly. The Search field allows you to search for a particular name or firm easily. Clicking a number shown in the overview induces TK Suite Client to invoke it immediately. Clicking an e-mail address opens the edit window in your mail programme if you have one installed and set up.

7.2.2. Editing Contacts

Click the name of a contact to edit it in Edit Contact mode.

7.2.3. Adding Contacts

Click ***Add Contact*** underneath the contact list to create a new contact.

 Add Contacts

7.2.4. Clearing Contacts

Click ***delete*** in the Contact Overview to delete contacts following confirmation.

1 The TK Suite administrator sees all contacts.

Clear Contacts

7.2.5. Leafing

If more contacts are available than fit on the page, use the Leafing button underneath the contact list.

7.3. 'Edit Contact' Mode

Only one contact is shown for editing if you use this mode. Go to this mode by clicking a name in the Contact Overview or clicking ***Add Contact***.

Besides always visible contact data (name, first name and firm), further headings can be added by clicking the Heading button.

7.3.1. Contact Data

Personal information on a contact is always shown beneath the menu bar in Edit Contact mode. Click on ***Edit*** on the right in the window to edit the contact data.

Edit Contacts

Clear Contacts

7.3.2. Contact Rights

Rights can be specified for each contact. You can only edit rights for a contact if you are the owner (creator) of the contact or the administrator.

Rights	***Meaning***
private	Only the owner sees the contact
read only	Other users can read the contact, but not edit it.
read+write	Other users can edit the contact, but not delete it.

7.3.3. Communication Heading

You have the option of adding various telephone and fax numbers and e-mail and web addresses for a contact here. Select the type of connection (for instance, 'mobile') in connection with the criterion 'private' or 'business', and then enter the appropriate call data under Number/E-mail.

Delete Entries

Edit Entries

Create Entries

Sequential Dialling

Sequential dialling provides a quick and easy method of reaching a party if you do not know where they are at any time. With sequential dialling, you can call the number at work first and then the private and the mobile number afterwards. Besides the sequence of numbers to be called, you can also set how often a number is to be called before going on to the next number. This is very useful if you want to put down before an answering machine switches in, so that you can try the next number.

Contact Overview

You can view numbers or mail addresser in the Contact Overview to call them from there directly.

Link to the PBX Phonebook

You can link a number to an entry in the phonebook as an option. Click ***Phonebook*** and select a any position available to do this. You can also adapt the names used in the PBX phonebook, for instance, to achieve homogenous vanity number dialling.

7.3.4. Addresses Heading

Several addresses can be entered for each contact. To do this click, ***Add Address*** or ***Edit*** for an existing address.

You can then fill out the address fields and specify the address type.

Delete Addresses

Edit Addresses

Add Addresses

7.3.5. Notes Heading

You can save notes for each contact if required. The current data is preset but can also be modified.

When a call comes in, TK Suite Client shows the name of the contact person and next to it a button which you can use to call up notes before taking the call. This lets you prepare yourself for the call in advance. A note edited in this way is a special note referred to as a ‘TK Suite Client Notepad’. The note is only available for viewing in the TK Suite Contact interface.

Delete Notes

Edit Notes

Add Notes

7.4. Resorting Numbers

If you want to move the number for a contact to another, click ***Cut Entry*** to cut the number and then ***Paste Number From Clipboard*** to add it to another contact.

 Cut Entries

 Paste Entries

7.5. Dialling Numbers

If you click on the required number in the contact person list, a connection to the party is set up immediately. TK Suite Client needs to be running on the same computer for this to work.

7.6. Writing e-Mails

Click on an e-mail address to open the e-mail window and write a message.

The standard mail programme set in your browser is started here.

8. More Information

8.1. Network

Since TK Suite is a client-server application, a functioning network infrastructure is required for its successful use in a network. For single-user installation without a network, a TCP/IP protocol is merely required, which is activated as standard in all current operating systems.

You should also note that any firewall installed on the TK-Suite Server computer may release ports 5080 and 5081.

8.2. Server Protection

In TK Suite Set, all data is stored on the server.

To secure all data (PBX configuration, contacts, call times) you simply have to backup the `var` directory below the `tkserver` directory on the server. The `tkserver` directory itself is located in the directory set when the server was installed (normally `c:\programmes\AGFEO\TK Suite Basic-2\` on Windows platforms).

In `var\dbf` you will find the databases for TK Suite Contact and TK Suite Bill (`contact.bd` and `bill.db`).

In `var\files` you will find the files containing the PBX configurations(ending.`tkf`) and an mirror of the configuration for the PBX connected (`local.ltkf` and `local.ed`).

In the `var` directory you will find a list of TK Suite users (`users.xml`) and the TK Suite Server configurations file (`tksock.ini`).

In the rare case of a hardware failure, it is useful to have a current backup of these files to be able to restore the functioning system as rapidly as possible.