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CallLume Management Manual

Complete guide for administrators: installation, phone system, people and access, alerts, security, backups, licence, troubleshooting and every user guide.

Every call. Clear insight.

by NurIQ Technologies · Version 1.0.8.0 · 2026-11-11

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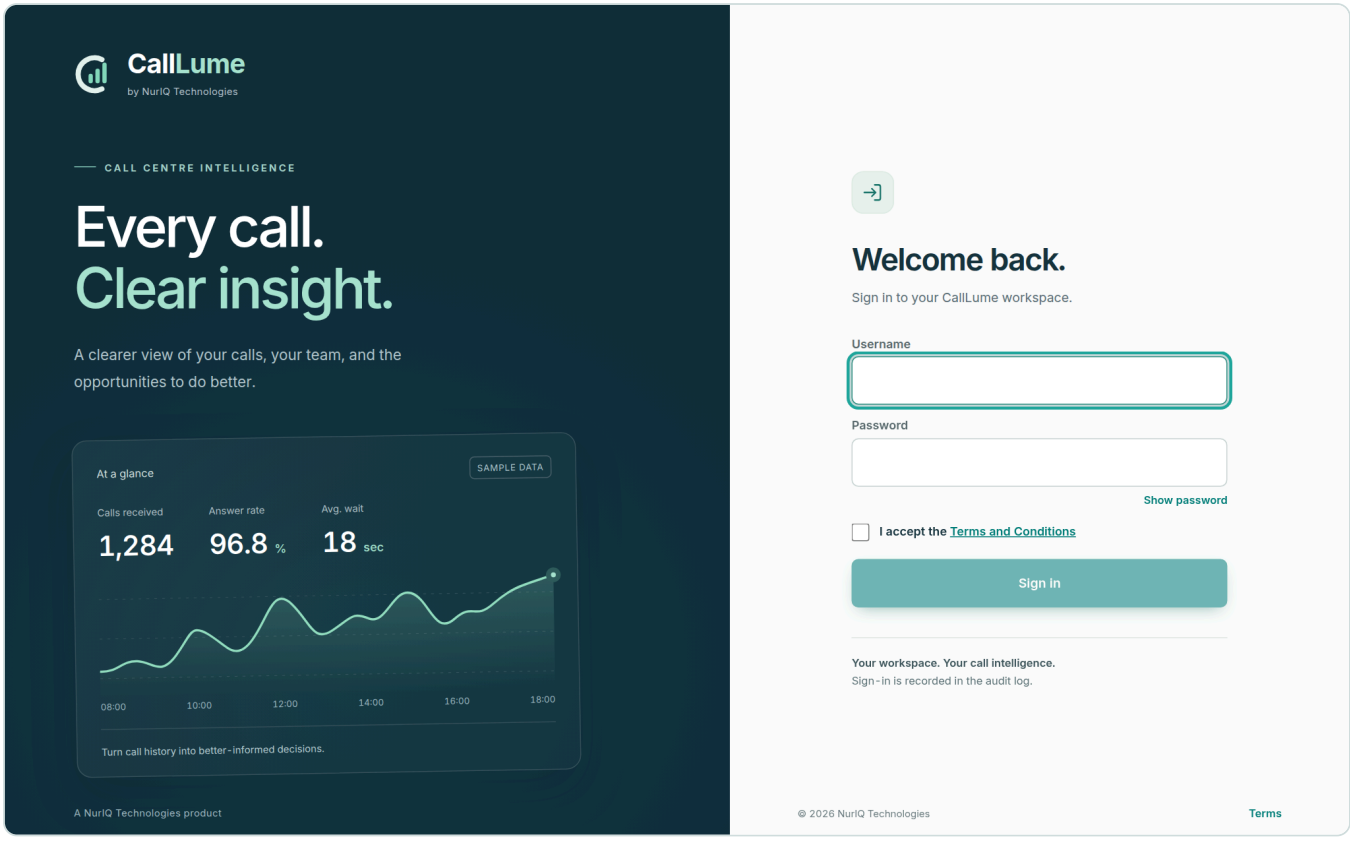
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1. Getting started

CallLume turns your phone system's call records into clear numbers: how many calls came in, how many were answered, who missed what, and when it is busiest. This chapter is for everyone.



Signing in

1. Open the address your administrator gave you, for example `https://calllume.yourcompany.local`.
2. Type your username and password.
3. Tick **I accept the Terms and Conditions**. The sign-in button stays grey until you do. You can read the terms from the link next to the tick box.
4. Select **Sign in**. If two-step verification is on, type the 6-digit code from your authenticator app.

> **Note** The first time you sign in with a temporary password you are asked to choose your own. Use a long passphrase; the rules (length, history) are shown on the screen.

Finding your way around

The menu on the left has groups. You only see the pages your role is allowed to use.

Group	What is in it
Daily work	**Dashboard**, **Call history**, **Missed calls**
Insights	**Analytics**, **Operator performance**, **Busy hours**, **Staffing plan**

Group	What is in it
Reports	**Reports**, **Recordings & quality**
Administration	**All settings**, **Data health** (administrators)
Restricted	**Call investigations** (only for people given that permission)

At the top you find the page path, your organisation name, the **Help** button (opens the chapter for the page you are on) and your name. Select your name for dark or light theme, **My account**, this manual and **Sign out**.

My account

Open **My account** from your name menu to change your password, set up or reset two-step verification on your own sign-in, and see or end your own sessions.

If you are signed out

You are signed out automatically after a period of no activity (your administrator sets this). Sign in again and you return to where you were.

Where to go next

Open the chapters listed on the left. Each one is written for a role.

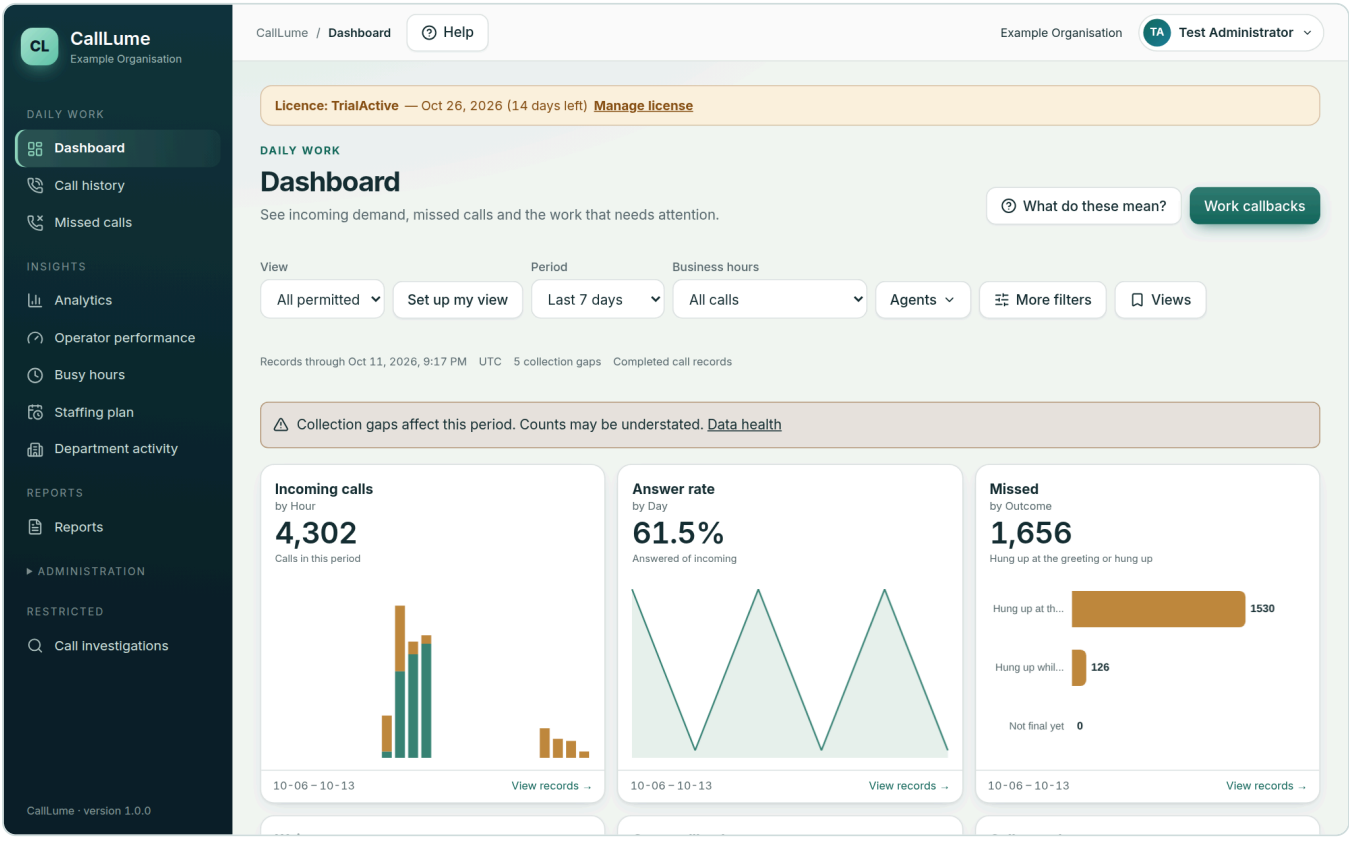
2. The Dashboard

The **Dashboard** is the first page after sign-in. It shows the numbers most people want at a glance for a period you choose (the last 7 days by default).

Reading the cards

- **Calls in** and **Calls out**: how many came in and went out.
- **Answered %**: the share of incoming calls a person talked to. A falling number is the first sign that something is wrong.
- **Missed**: callers who were not served. Select the card to open the **Missed calls** list.
- **Waiting time**: how long callers waited before someone answered.
- Charts show the day-by-day trend, the busy hours and how calls ended.

Select any chart or card to open the matching detail.



Changing what you see

- Use the period buttons (Today, 7 days, 30 days) or pick dates.
- Use the filter panel to narrow by hunt group, operator or direction.
- If you set up **My operators** (see Set up my view), the dashboard starts with that selection. The chip at the top shows it; remove the chip to see everything you are allowed to see.

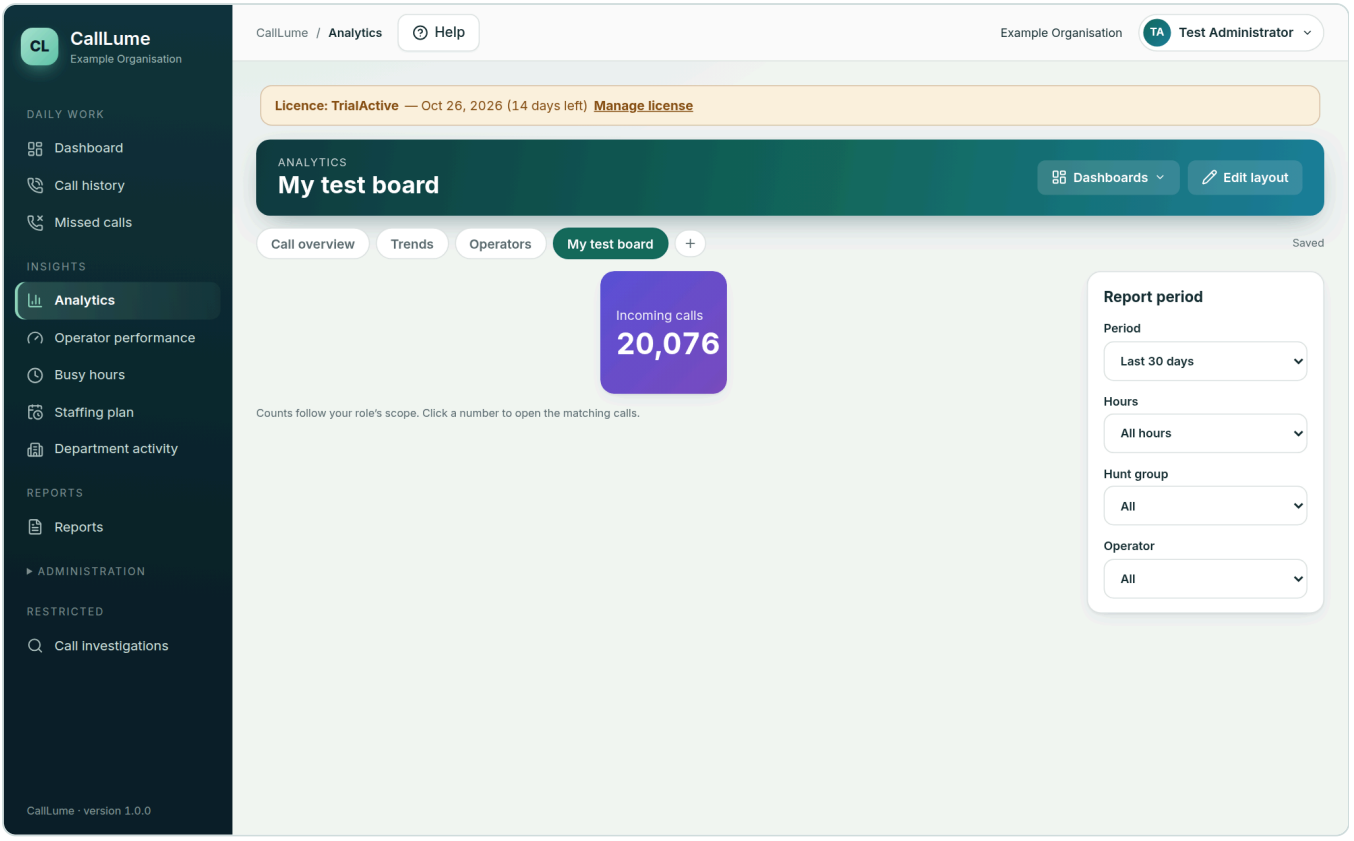
> **Tip** What the call outcomes mean is explained in Call outcomes. The **Statuses** button on the dashboard opens the same list.

Wallboard

Administrators can open a read-only **wallboard** for a wall screen from the name menu (**Open wallboard**). A wall screen signs in with its own token created in **All settings → Wallboard screens**.

3. Analytics dashboards

Analytics lets you build dashboards the way you want them. You can have as many as you like. Each one belongs to you; other people do not see your changes.



Using a dashboard

- Pick a dashboard from the tabs at the top.
- Use the filter panel to change the period and the people or groups shown. Every widget follows it.
- Select a chart to see its detail.

Changing a dashboard

1. Select **Edit**.
2. Drag a widget by its title bar to move it, or drag its corner to resize it.
3. Select the settings icon on a widget to change what it shows, or the bin icon to remove it.
4. Select **Add widget** to pick from the list: numbers (KPIs), outcome donut, calls per day, busy-hours heat map, answer rate, waiting time, operator chart and table, opening-hours table, and free text notes.
5. Select **Done**. Your layout is saved automatically.

Creating a new dashboard

Select **New dashboard**, give it a name and choose a starting point (a ready-made layout or an empty page). You can rename or delete it later from the dashboard menu.

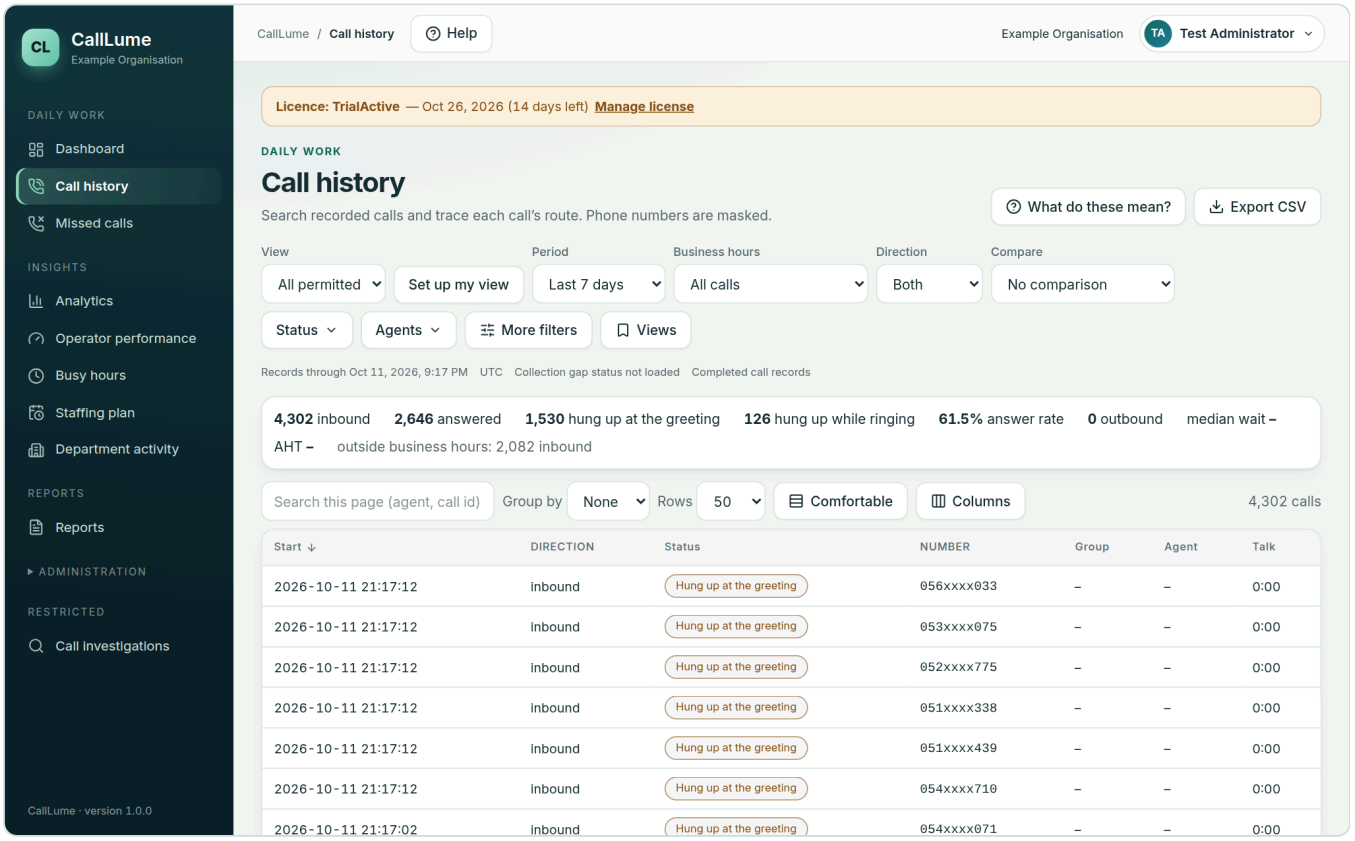
> **Note** Your dashboards are stored in your account, so they follow you to any computer.

4. Call history

Call history lists the individual calls. Supervisors and operators see only the calls they are allowed to see (for example their own team).

Finding a call

- Use the filter bar for the period, direction (in, out), outcome, hunt group and operator.
- Use **Search this page** to find an operator name or call number among the rows shown.
- Select a column title to sort.



Opening a call

Select a row. A large window opens with everything about the call at once: when it started, who called, which number was dialled, how long it rang and talked, where it was transferred, and how it ended. Select outside the window or press `Esc` to close it. No scrolling is needed on a normal screen.

> **Note** Phone numbers are shown partly hidden for most people. Showing full numbers needs a permission and a reason, and is recorded.

Exporting

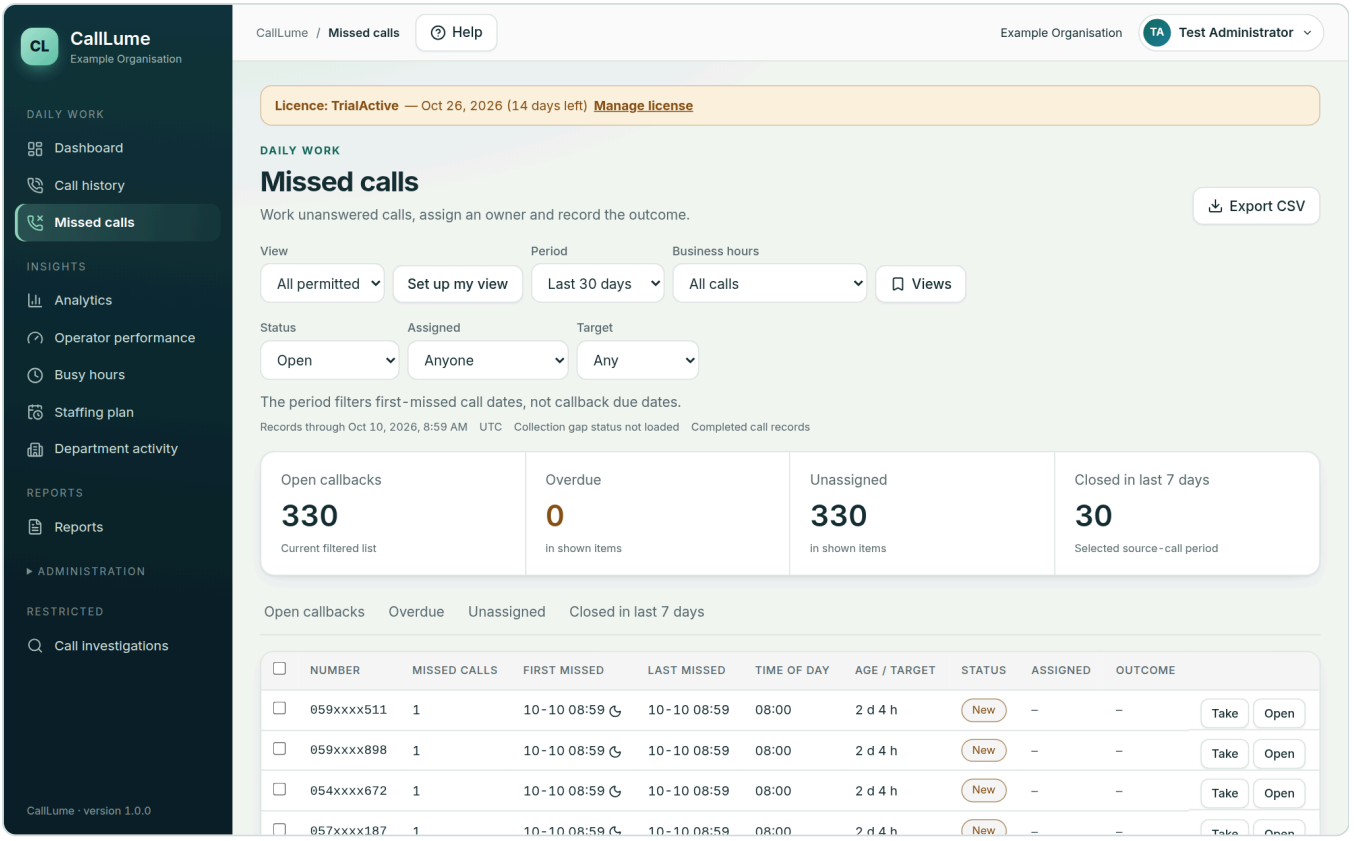
Select **Export CSV** (shown if you are allowed to export) to download the filtered list as a spreadsheet file. The export respects the same filters and the same permissions as the screen.

5. Missed calls and call-backs

Missed calls is the work list of callers who rang and were not served. Each row is one caller, however many times they rang, so the same person is not listed ten times.

The cards and tabs

The cards at the top show how many are **Open**, **Overdue** (past the call-back target time), **Unassigned** and **Closed**. The tabs below them switch the list to the same four views.



Reading a row

You see when the caller first rang, the number, the hunt group, how long ago, the target time, who it is assigned to, and its status. A moon icon means the call came outside business hours. A red **overdue** badge means the target has passed.

Status	Meaning
New	Nobody has worked on it yet
In progress	Someone is dealing with it
Reached	The caller was reached
No answer	The caller did not pick up when called back
Wrong number	The number is not usable

Status	Meaning
Not needed	No call-back is necessary
Recovered	CallLume saw the caller get through on a later answered call, so it closed itself

Working the list

1. Filter to your group, to yourself (**Assigned: Me**) or to **Overdue**.
2. Select a row to open the details window. It shows every attempt, a notes box and the outcome.
3. Phone the caller, then set the status and write what happened.
4. To change several at once, tick the boxes and use **Assign selected to** or **Set status**.

Missed-call emails

Your administrator can schedule a **missed-call email**. Phone numbers in it are hidden unless the person was chosen as a call-back operator.

Line faults

A missed call marked **line fault** rang one of your phone lines but never reached the greeting or any extension. When many happen within an hour, CallLume raises the alert **Calls are not reaching the phone system** (Administration → Alerts & notifications → Who is told, and how), so a line or routing fault is noticed at once. The Missed calls report shows how many of the missed calls were line faults. Administrators can switch the counting off under All settings → All other settings → Classification ("Count line faults").

6. Call outcomes explained

Every call ends in one outcome. These are the names used everywhere in CallLume: screens, reports and emails.

Name you see	What happened
Answered	A call-centre operator picked up and talked to the caller.
Answered by someone else	Someone who is not a call-centre operator, such as a department, picked up and talked to the caller.
Hung up while ringing	The call was put through, nobody picked up, and the caller hung up while it rang.
Hung up while ringing, marked "line fault"	The caller rang one of your phone lines, but the call never reached the automated greeting or any extension: usually a line or call-routing fault. It counts as a missed call and as a call received, so your totals match your phone system's own records. CallLume warns you when many of these happen within an hour.
Hung up at the greeting	The caller reached the automated greeting or menu and hung up before being put through to anyone.
Not final yet	Too recent to judge. It settles after a few minutes.
Outgoing, answered	An outgoing call that was answered.
Outgoing, not answered	An outgoing call that nobody answered.

> **Note** Both kinds of hung-up call (and the "line fault" calls) count as **missed**. A caller who hangs up at the greeting was never put through, so that is often a menu or opening-hours issue, not an operator issue.

Other words you will see

- **Hunt group**: a number that rings several extensions together, such as your call-centre line.
- **Extension**: the short number of a desk phone.
- **Wait time**: from the moment the call was put through until someone answered or the caller left.
- **Service level**: the share of calls answered within your target time.
- **Transferred**: the call was passed from one extension to another.

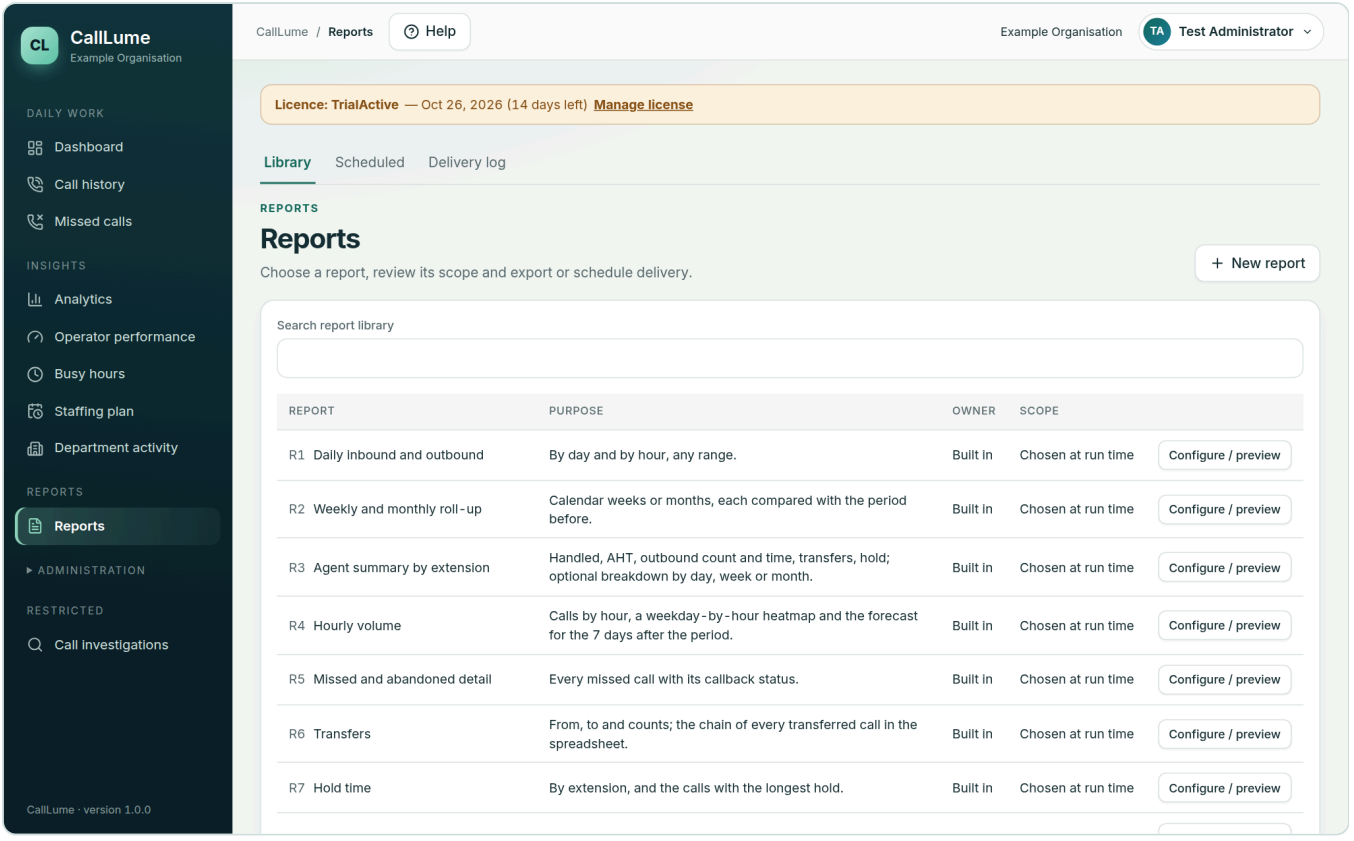
7. Reports

Reports has three tabs: **Library** (run a report now), **Scheduled** (reports sent by email on a timetable) and **Delivery log** (what was sent and whether it arrived).

Running a report

1. Open **Library** and choose a report, for example the daily call log, the missed-call list or the operator summary.
2. Choose the period and filters. The preview updates.
3. Choose a format (spreadsheet, PDF, web page) and select **Run** or **Download**.

Reports show the same data and respect the same permissions as the screens: a supervisor's report contains only that supervisor's team.



Showing full phone numbers

By default numbers are partly hidden. If you need full numbers (for example to dial them), tick **Full phone numbers**, then write the **Reason** in the box that appears. The reason is saved in the audit log with your name. Leave it off unless you truly need to dial the numbers.

Scheduling

1. Open **Scheduled** and select **New schedule**.
2. Choose the report, the filters, the days and time, and the recipients.
3. Save. The first email arrives at the next scheduled time.

A schedule keeps the filters you saved, including the selection of operators. To change them, edit the schedule and save again.

8. Set up my view

Set up my view lets you narrow every page to the operators and hunt groups you care about. It never gives you more access than your role allows.

How to set it up

1. Open your name menu and choose **Set up my view** (supervisors are taken here the first time they sign in).
2. Tick the hunt groups and extensions you want. The first suggestion is your team.
3. Select **Save**. You land on the Dashboard.

What changes

The Dashboard, Call history, Operator performance, Busy hours, Missed calls and Reports start with your selection. A chip at the top shows **My operators**. Remove the chip, or choose **All permitted**, to see everything your role allows. Choose **My operators** again to return.

> **Note** An empty selection shows nothing. It never silently falls back to everything.

If your team changes later, your view is trimmed to what you are still allowed to see.

9. For operators

As an operator you see your own calls and your own call-backs. You cannot see other people's calls and you cannot change settings.

Your day

1. Sign in and look at the **Dashboard**. It shows your own numbers for the week: calls answered, calls made, talk time.
2. Open **Missed calls**. Callers assigned to you are listed under **Assigned: Me**.
3. Phone each caller back, then open the row, set the status (for example **Reached** or **No answer**), and add a short note.

Your own call history

Call history lists only your own calls. Select a call to see its details.

What you cannot see

Other operators' calls and numbers, team totals, and settings. If you need that, ask your supervisor.

Privacy

CallLume records call details (who rang, when, how long), not what was said. Signing in and viewing data is logged.

10. Recordings and quality review

Recordings & quality appears only when your organisation has turned recordings on and has a recorder that saves audio files. The phone system's call log contains no audio, so recordings come from your recorder; CallLume links each file to its call.

Listening

1. Open **Recordings & quality** and find a call by date, extension or caller.
2. Select the play button. Every playback is logged with your name.

Scoring

Open a call and fill in the **scorecard**: tick the items, add comments and save. Supervisors can see scores for their team.

Complaints

A complaint case links a call, a reason and notes, and tracks its status until closed.

> **Warning** Recordings can contain personal data. Listen only when you have a work reason; access is audited.

Administrators turn the module on in **All settings → Optional features** and choose the folder in **Recordings folder**.

11. Staffing plan

Staffing plan helps you decide how many people to put on and when.

Tab	What it does
Forecast	Predicts calls per half hour for the next 7 days from your history
Staffing	Turns the forecast into the number of people needed to meet your answer-time target
Roster	Who is planned to work, and when
Adherence	Compares the roster with the calls people actually handled
Targets	Your goals, such as answer rate and wait time, per department or person

All figures come from call records, not from live presence. A gap in the call capture is treated as missing data, not zero calls; the page warns you when that happens.

Using it

1. Open **Forecast** and check the last-week comparison to see how reliable it is.
2. Open **Staffing** and read the suggested number of people for each slot.
3. Enter the roster in **Roster** if you want adherence reports.

Add notes such as "new greeting" or "routing change" as **annotations**; they show on the chart so you know why a pattern changed.

12. Call investigations

Call investigations finds internal (extension-to-extension) calls for an authorised investigation, for example a complaint about a call that was transferred between two desks. It shows who called whom and when, **not** what was said. It is search and export only.

> **Warning** Use this only for the case you were authorised for. Every search, result page, detail view and export is recorded with your name, the case reference and your reason.

Before you can use it

- Internal calls are stored only if an administrator turned on **Store internal calls** after your privacy and HR owner approved it. Calls from before it was turned on are not available unless older log files are imported.
- You need the Investigator role (or be an administrator).
- If second-person approval is on, another person must approve your search first. Approvers see the case and reason, never the results.

Example: calls between two extensions on one day

1. Open **Call investigations**.
2. Type the **case reference** and the **reason**.
3. Choose **Calls between extension A and extension B** and pick the two extensions.
4. Set **From** to the day and **To** to the next day.
5. Select **Search**, then select a row to see every leg, transfers and the raw record.
6. Use **Excel** or **CSV** to export. The export starts with the case, reason, filters and your name.

Results list any **capture gaps** in the period: a missing call may only mean the connection was down.

Extension directory

Extension directory keeps who or what each extension was over time. When a desk changes hands, close the old entry and add a new one so older calls keep the right name.

13. Installing and first-time setup

This chapter is for the person installing CallLume.

What you need

- A Windows Server or PC for CallLume (64-bit). The Windows installer (MSI) sets up everything, including the database.
- An administrator account on that machine.
- The licence arrangements from NurIQ Technologies (the trial starts when setup finishes).

1. Install

1. Run the MSI as an administrator and accept the defaults, or choose the port and data folder when asked.
2. When the installer finishes, services start automatically.

Silent install. To install without screens, run the MSI from an administrator command prompt and accept the terms on the command line, for example `msiexec /i CallLume-<version>-x64.msi /qn ACCEPT_TERMS=calllume-1`. Without `ACCEPT_TERMS` a silent install stops with a clear message and nothing is changed.

2. Get the setup token

The first sign-in to the wizard needs a **one-time token**. It proves you have access to the server. You can get it three ways:

- **Start menu shortcut (easiest):** open **Finish CallLume setup** from the Start menu while signed in as the installing administrator. The browser opens with the token already filled in.
- **Token file:** open `C:\ProgramData\CallCentreOps\setup\setup-token.txt` as an administrator. Open `https://<server>:<port>/setup` and paste it.
- **Command line:** in an administrator PowerShell, run `ccops setup-link` and open the link it prints.

The token works for 24 hours. If it has expired, restart the **CallCentreApi** service and a new one is written.

> **Tip** If your licence arrangement uses a **setup code from NurIQ**, choose *I have a setup code from NurIQ* on the first screen, copy the Installation ID, send it to NurIQ and paste the code you get back.

3. The wizard

1. **Terms**: read and accept.
2. **Administrator**: create the first administrator (name, username, password). You will set up two-step verification at first sign-in.
3. **Your organisation**: name, optional logo, time zone, first day of the week.
4. **Data retention**: choose how long to keep each kind of data. Nothing is chosen for you.
5. **Phone system (optional)**: **Connect later** is the default, and you can select **Skip this step**. Nothing is connected and no call records are collected until you connect the phone system, so you can set up your users, teams and settings first. Choose **Connect after setup completes** only when you are ready to cut over. See Connecting the phone system.
6. Review and finish. Sign in with the new administrator and set up two-step verification.

4. Keep the keys safe

Copy the key files from `C:\ProgramData\CallCentreOps\secrets` to your organisation's secure key storage straight away. Without them a restored backup cannot be read.

5. The setup checklist

All settings → **Setup checklist** lists what is left: connect the phone system, import history, choose operators, create users and schedule reports.

14. Setting up from a questionnaire

This chapter is for the person setting up CallLume for a customer. It replaces a long call or e-mail exchange with one offline file.

How it works

1. **Send the questionnaire.** In **Administration > Setup from questionnaire**, choose **Download the blank questionnaire**. It is a single file, `calllume-setup-questionnaire.html`. Send it to the customer, or put it on your website.
2. **The customer fills it in.** They open the file in any browser (no internet, no account). They answer what they know, press **Download draft** to stop and **Resume draft** to carry on later, and **Print / Save as PDF** to keep a copy. When done they press **Download answers** and send you `calllume-setup-answers.json`.
3. **You upload the answers.** Choose the file under **Upload the completed answers**. The file is checked and shown for review. **Uploading changes nothing.**
4. **You review.** Every question shows where its value came from, what it is now, and what it will be after applying.
5. **You apply.** One button, **Apply and save configuration**, saves everything in a single step.
6. **You finish the handover.** The page lists what a person still has to do (users, certificate, mail server and so on). Download it as a checklist.

What the review shows

Part	Meaning
Source	*From the customer*, *Default*, *Recommended*, *Kept as it is* (blank answer, current value kept), *Your edit*, *Not decided* (never invented)
Needs attention	Things to check: a number pointing to a group that does not exist, an extension in two groups, hours that do not make sense, unknown fields in the file
Confirmations	Decisions the file can never make for you: retention periods, shortening them, recording flag, storing calls between your own extensions, deleting items, switching the phone-system connection on
Groups, numbers and names	Each one is new, updated, kept or removed
Not in the file	Existing groups, numbers and members that the file does not mention. They are **kept** unless you tick them
Handover checklist	Tasks for a person: they are never applied

You can **Edit** any answer in the review. Edits are saved as a new review version with **Save review**; the apply button works only on a saved review.

What blank means

A blank answer is never treated as "No". It never invents a value:

- **Opening hours, retention periods, KPI targets, organisation name, extensions** have no default. If the customer leaves them blank they stay unresolved and appear under **Needs attention**.

- If the customer chose **Use recommended**, the recommended value is used, because that was their explicit choice.
- On an installation that is already set up, a blank answer keeps the current value.
- **Retention** is applied only if every kind of data was answered, and only after you confirm it.

What the file can never do

It cannot create users or roles, change sign-in security or two-step verification, accept the terms, change the licence, install a certificate, set passwords or keys, or point at folders on the server. Alert recipients in the file are listed as proposals in the handover checklist; nothing is switched on and no e-mail is sent. The phone-system address is saved but **the connection stays off** until you tick the separate confirmation (or switch it on yourself later).

> **Note** Opening hours are saved as "to be confirmed" unless the customer ticked that they are correct and final.

Safe to apply

- Applying is **one step**: if anything fails, nothing is changed.
- If anyone changed the configuration after you reviewed it, applying is refused and you refresh the review first.
- Pressing apply twice (or a retry after a network error) never applies it twice.
- A before-picture is kept. **Undo this questionnaire** puts back what it changed. If any of those things were changed again afterwards, undo is refused and tells you which; change it back by hand.
- Every upload, review, apply and undo is in the audit log, with the SHA-256 of the file you uploaded.

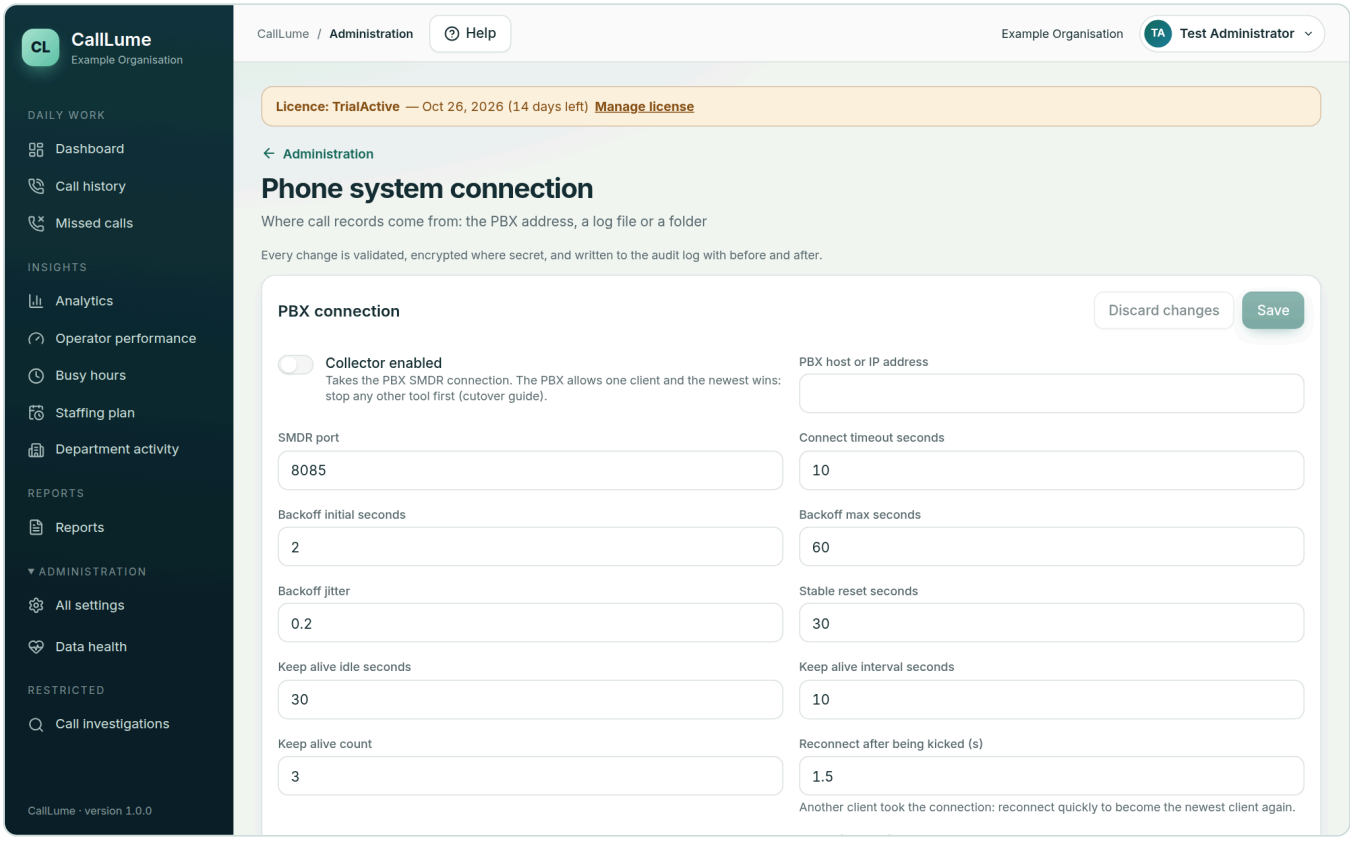
After applying

1. Download the **handover checklist** and work through it.
2. Create the people and their sign-in accounts in **Administration > User accounts**.
3. Switch the phone-system connection on only when the phone engineer confirms call records (SMDR) are being sent.
4. If calls were already stored, reclassify them (run `ccops reclassify`) so new groups, numbers and hours apply to them.

15. Connecting the phone system

CallLume reads the **SMDR** call records that the PBX sends on a network port (8085 by default). You can connect during the first-time wizard or later in **All settings → Phone system connection**. Many sites finish all setup first (users, teams, settings) and connect afterwards: in the wizard choose **Connect later** or **Skip this step**.

> **Warning** The PBX allows **one** SMDR reader at a time and the **newest** connection wins. If another tool (your old call-log software) is connected, CallLume and that tool will keep taking the connection from each other and both will lose records. Plan the switch.



Cut-over steps

1. Stop the old call-log tool and disable its automatic reconnect.
2. Open **All settings → Phone system connection**.
3. Choose source **tcp**, enter the PBX address and port **8085**, and switch **Enabled** on. Save.
4. Do **not** use **Test connection** on a live PBX: it takes the connection for about 10 seconds.
5. Make a test call and look for it under **Call history** within a minute.

History before today

Older call records can be loaded from your previous tool's log files. Open **Data health** and import the file. Duplicates are skipped.

After connecting

- **System health** shows the connection state and the last record received.
- **Data health** shows gaps: periods when no records arrived.
- **Hunt groups & numbers** (All settings → Your organisation) tells CallLume which groups and dialled numbers are the call centre. Check these before trusting the first reports.
- **Business hours** decides what counts as an out-of-hours call.

Internal calls

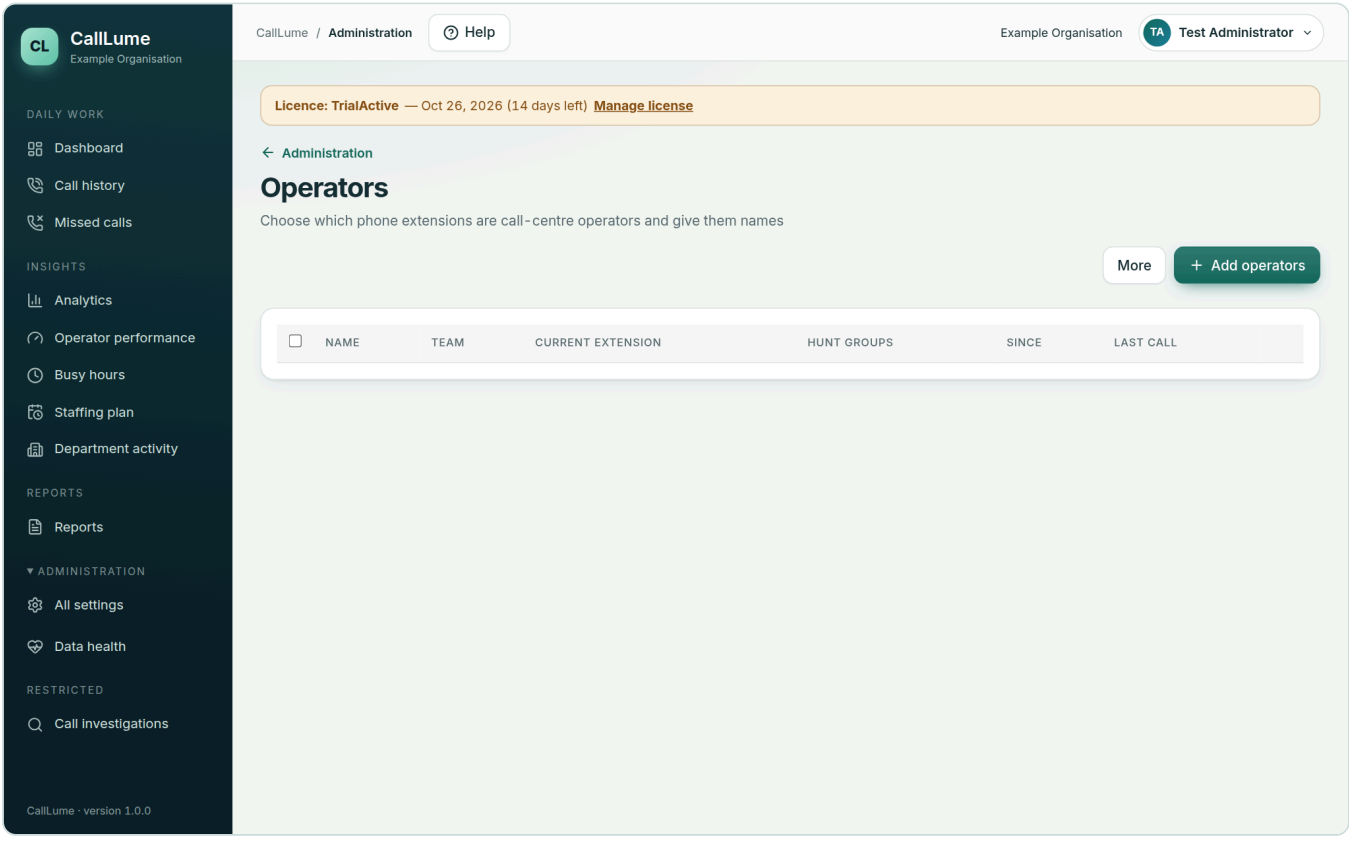
Calls between two extensions are not stored unless you turn that on in **Optional features**, after your privacy owner approves it. See Call investigations.

16. People, teams and roles

This is the chapter to follow when you set up your supervisors. The idea is simple: **operators** are people with phone extensions, a **team** is a group of operators, and a **supervisor** is a user account that is allowed to see one or more teams.

The pieces

Piece	Where	What it is
Operators	All settings → People & access → **Operators**	The people who answer calls, each with one or more extensions
Teams	**Teams**	A named group of operators (by extension) and the hunt groups it is responsible for
User accounts	**User accounts**	Who can sign in, with a role and, for supervisors, a team
Roles	**Roles & permissions**	What each role may see and do



Step 1. Choose the operators

1. Open **Operators** and select **Add operators**.
2. Search by extension or name, or open **Suggested** (extensions that answered your call-centre lines in the last seven days).

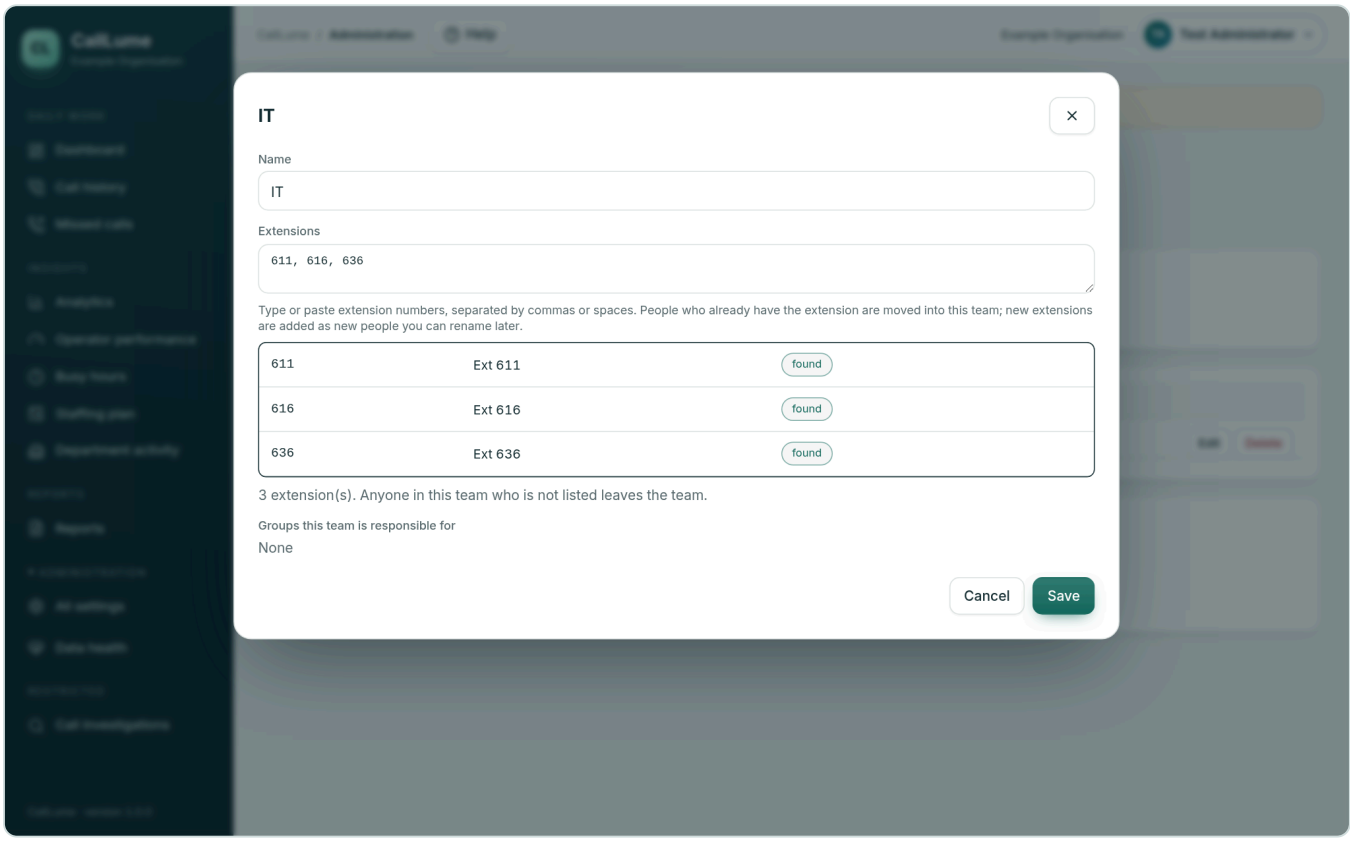
3. Tick the extensions, check the names, and confirm.

Step 2. Create a team by extension

1. Open **Teams**, type a name under **New team** and select **Create**.
2. Select **Edit** on the new team.
3. In **Extensions**, type or paste the extensions: for example `611, 616, 627`. Separate them with commas or spaces.
4. The list below shows each extension, who it is and whether it will **move from** another team. Extensions that CallLume does not know yet become new people that you can rename later.
5. Optionally tick the **hunt groups** this team is responsible for. A supervisor also sees **all missed calls** of those groups.
6. **Save**.

> **Note** The list in the box is the complete team. Anyone who is in the team but not in the list leaves it.

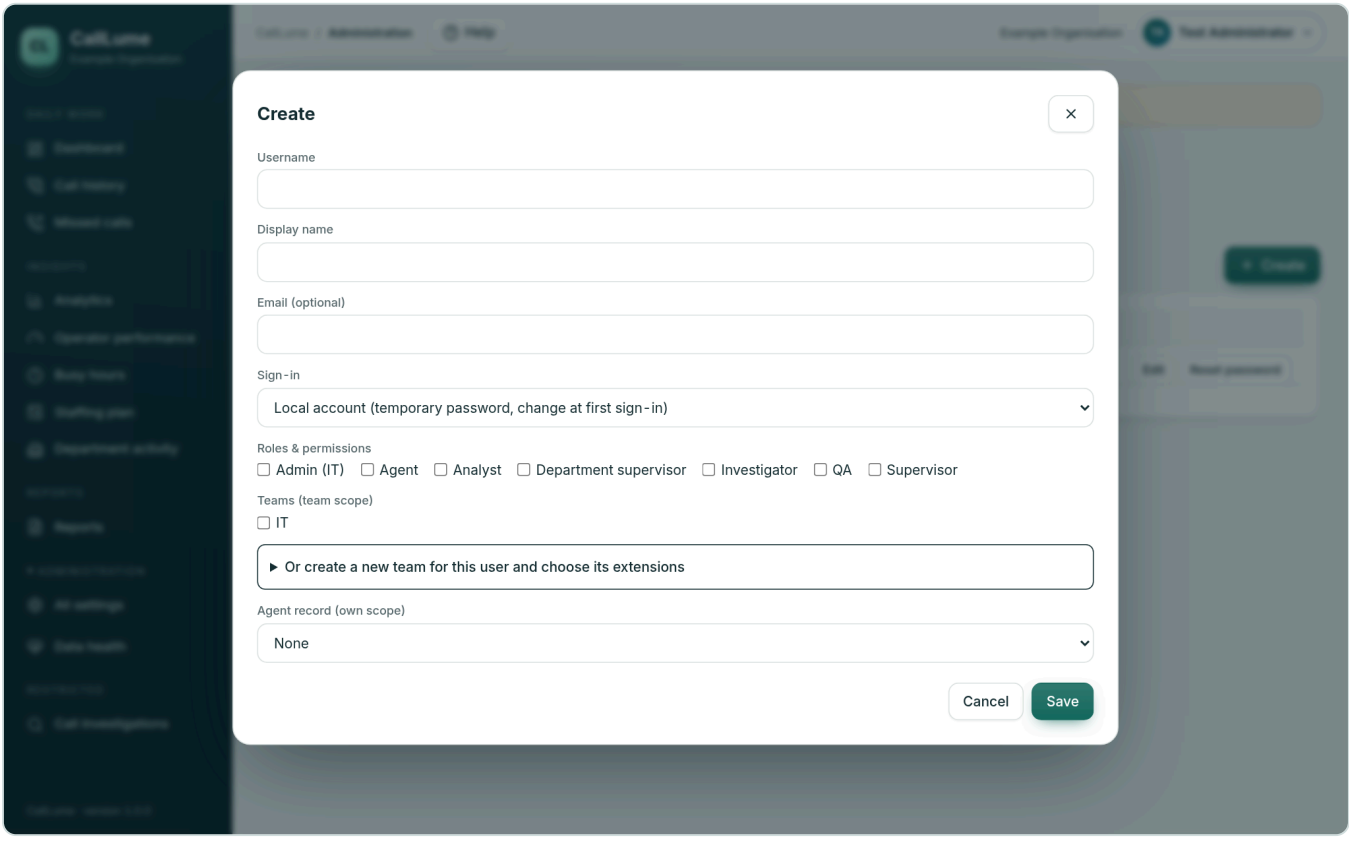
You can also move several operators at once. In **Operators**, tick their rows and use **Set team** at the top.



Step 3. Create the supervisor

1. Open **User accounts** and select **Create**.
2. Type the username, name and email, choose **Local account**, and tick the role **Supervisor**.
3. Tick the team. To create the team now, open **Or create a new team for this user** and give a name and the extensions.
4. **Save**. A temporary password is shown **once**. Give it to the supervisor; they must change it at the first sign-in.

The supervisor then sees only the calls of those extensions (calls they answered or made) and the missed calls of the team's hunt groups. Selecting more extensions in **Set up my view** can only narrow this, never widen it.



A supervisor for several teams

Tick several teams on the user. The supervisor sees them together.

Roles

Role	Sees	Typical person
Admin (IT)	Everything, including settings	IT administrator
Supervisor	The calls of their teams, missed calls, reports	Team leader
Department supervisor	The activity of their department's extensions (see Department views)	IT, Insurance and other internal departments
QA	Recordings, scorecards, call data	Quality reviewer
Analyst	Dashboards and reports (read only)	Management
Agent	Own calls and call-backs	Operator
Investigator	Only Call investigations	Authorised person

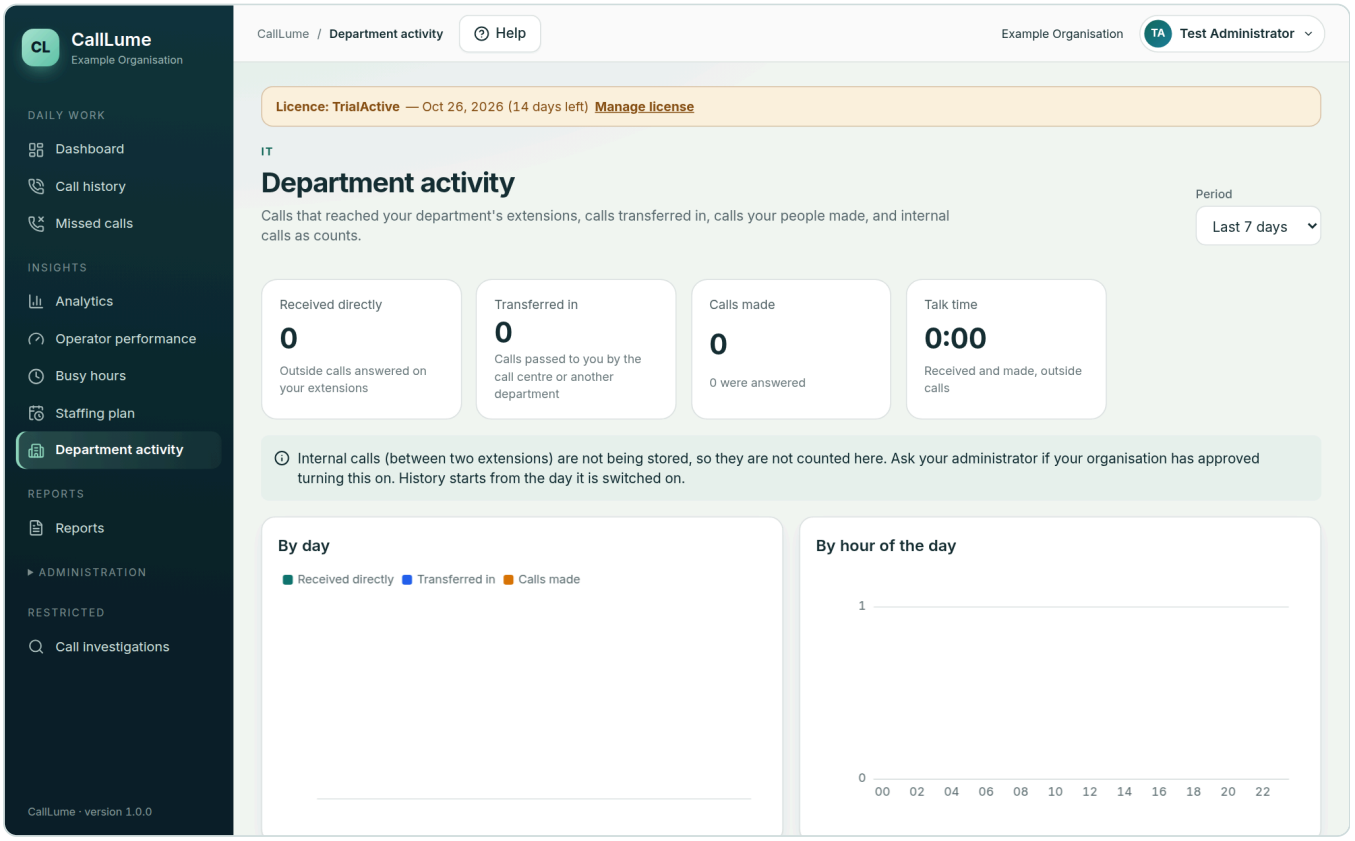
Create your own roles from **Roles & permissions** by choosing permissions and a scope (everything, the team, or own calls only).

Leavers and moves

- When a person leaves, open their record in **Operators** → **Extension history** and untick **Active** or end their extension on the last day. Old calls keep the old name.
- When an extension passes to someone else, end the first person's extension on the last day and start the new person's from the next day.
- Disable user accounts of leavers in **User accounts**. Accounts that are not used for a set number of days can be switched off automatically (see Security and sign-in).

17. Department views (IT, Insurance and others)

Department activity is for internal departments such as IT or Insurance that are not call-centre operators but still receive transferred calls and make calls. It answers: *how many calls came to us, how many were passed to us, how many did we make, and how many internal calls did we receive and make?*



What you see

Card or table	Meaning
Received directly	Outside calls answered on your department's extensions
Transferred in	Outside calls that were passed to your extensions, by the call centre or by another department. A call is counted once.
Calls made	Outside calls your people dialled, and how many were answered
Talk time	Total talk time of those calls
Internal calls received / made	Calls between extensions inside the organisation, as counts only
By day and **By hour**	The trend and the busiest hours
Each extension	The same numbers for every extension in the department
Where transferred calls were first answered	Whether the call centre or another team or department answered the call first, never a person

> **Note** Internal calls show only how many. They never show who the other person was or what was said. Internal calls are counted only if your administrator has switched on internal call storage after the privacy approval; history starts from that day.

How the data is processed, and the form you sign

The first time you open **Department activity** you are asked to read and sign a form. It lists, in plain words, **what data is processed** (call records from the phone system: extension, time, direction, duration, answered or not, transfers; internal calls as counts only; never audio or content; no caller numbers on this page), **why** (managing your department's workload), **who sees it** (you for your department, administrators, and the audit log), **how long it is kept** (your organisation's retention settings), and that **your organisation is responsible** for the lawful basis and for answering data-protection questions. By signing you agree to use the figures only for management, keep per-extension figures confidential, follow HR and privacy rules before using them about an individual, and tell your team that their calls are counted this way. Type your full name, tick the box and select **Sign and continue**. Your signature, time and sign-in are recorded, and administrators can see who has signed on the **Teams** page.

Choosing the period

Use **Period** at the top: today, last 7 days, this month or last 30 days. If you supervise more than one department, choose it from **Department**.

For administrators: setting up a department

1. Open **All settings** → **People & access** → **Teams**.
2. Type the name (for example *IT*), choose **Department (IT, Insurance...)** and select **Create**.
3. Select **Edit** and type or paste the department's extensions, for example `301, 302, 305`. Save.
4. Open **User accounts** → **Create**. Give the person the role **Department supervisor** and tick the department.
5. If you also want internal call counts, turn on **Internal calls** in **Optional features** after your privacy owner approves.

The department supervisor sees only their own department. They cannot see call-centre data, other departments or other settings.

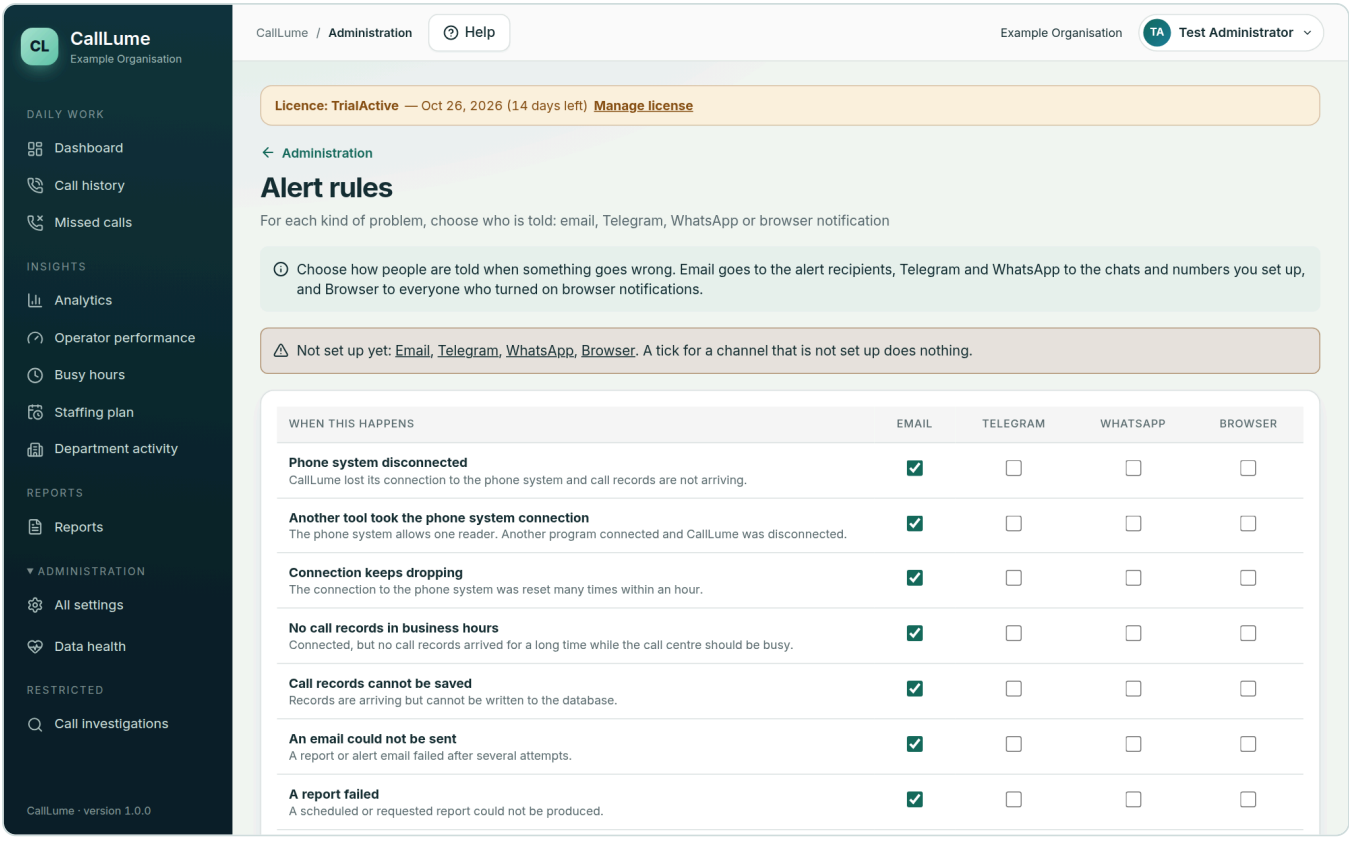
The list of who has signed the form is at the bottom of the **Teams** page.

18. Alerts and notifications

CallLume raises an **alert** when something needs attention: the phone system stopped sending records, a backup failed, the licence is about to expire, missed calls are piling up, and so on.

Alert rules

Open **All settings → Alerts & notifications → Who is told, and how**. For each kind of problem choose which channels are used: email, Telegram, WhatsApp and browser notification. A rule can be switched off.



Channels

Channel	Set up in	Notes
Email	**Email setup**	Needs your mail server. Reports use it too.
Telegram	**Telegram**	Create a bot with BotFather, paste its token and the chat id, then send a test.
WhatsApp	**WhatsApp**	Uses the official WhatsApp Business service; you need your business account details and approved sender.
Browser notifications	**Browser notifications**	People select **Allow** in their browser; messages arrive even when CallLume is closed.

Secrets such as tokens are stored encrypted and shown masked.

Recipients and timing

Alert recipients and timing sets who receives alert emails, how often a still-open problem repeats, and after how many quiet minutes silence counts as a problem.

Delivery log

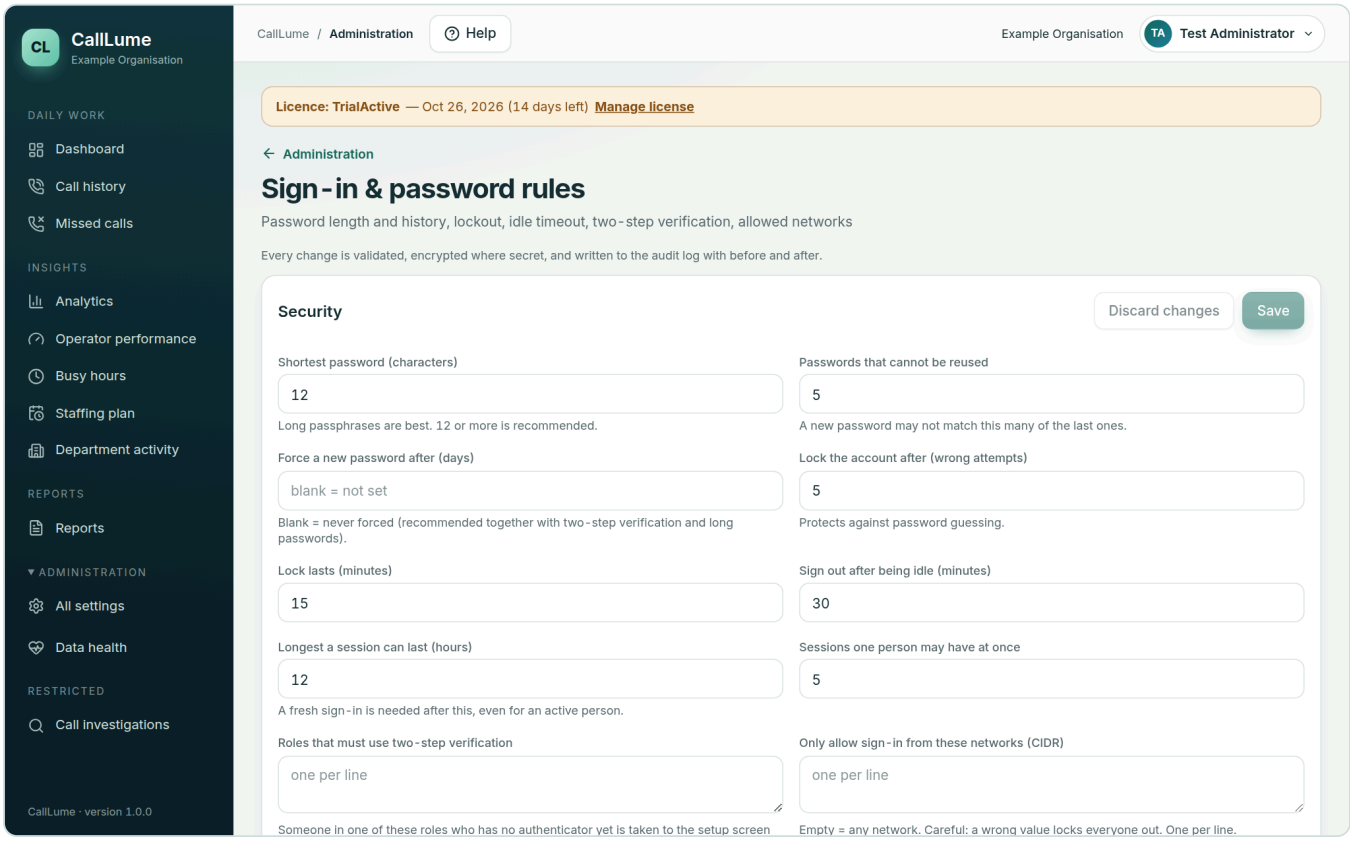
Delivery log lists every Telegram, WhatsApp and browser message and whether it arrived, so you can see why somebody did not receive one.

Missed-call emails and report emails

These are set up per schedule in **Reports** → **Scheduled**.

19. Security and sign-in

Open **All settings** → **Sign-in & password rules** to change these. Changes apply to the next sign-in.



Defaults

Setting	Default
Minimum password length	12 characters
Passwords remembered (cannot reuse)	5
Forced password change	Off (long passphrases do not need yearly changes)
Lock the account after failed attempts	5 attempts, locked for 15 minutes
Idle sign-out	10 minutes (new installations)
Wrong two-step codes before going back to sign-in	3
Longest session	12 hours
Sessions per person	5
Two-step verification (authenticator app)	Required for Admin
Switch off unused accounts	Off. Choose a number of days to turn it on. The last active administrator is never switched off.

Setting	Default
Terms and Conditions tick box at sign-in	On

Two-step verification

Add more roles to **Two-step verification required for** to make supervisors or others use it too. A person who loses their phone is reset by an administrator in **User accounts** → **Reset MFA**.

Automatic sign-out when idle

A person is signed out after **Sign out after being idle (minutes)** without real activity (mouse, keyboard, touch or scrolling). The default for a new installation is **10 minutes**; the allowed range is 5 to 480. A message appears 60 seconds before the end ("You will be signed out in 60 s because of inactivity") with the button **Stay signed in**. When the time is up the person is signed out in every open browser tab and lands on the sign-in page with "You were signed out because of inactivity."

Screens that refresh by themselves (Overview, the live queue, the session check) do **not** count as activity, so an unattended screen cannot keep a session open. A wallboard that signs in with a **wallboard token** is not affected: it keeps its own lifetime (**Wallboard screen sign-in lasts**). A wallboard opened by signing in as a person is signed out like any other person; use a wallboard token for a screen on a wall.

Existing installations keep the value they stored. The new default of 10 applies to new installations and to installations that never saved this page. If your installation was set up before this change it may still say 30: open **All settings** → **Sign-in & password rules**, set **Sign out after being idle (minutes)** and save. A new value applies to sessions started after the save.

Wrong two-step codes

After **Wrong MFA codes before returning to sign-in** wrong codes (default 3; 1 to 10), counting authenticator and backup codes together, the person is sent back to the sign-in screen with "Too many wrong codes. Please sign in again." and must enter the password again. This does not give unlimited guesses: every wrong code also counts towards **Lock the account after failed attempts**, across rounds, so a few rounds lock the account (and the lock ends the other pending sign-ins too). Every wrong code and every exhausted round is in the audit log (`mfa.verify` with result failure, and `mfa.attempts_exceeded`), without the codes themselves.

Allowed networks

Enter network ranges (for example `10.0.0.0/8`) to allow sign-in only from inside your network. Leave empty to allow any address. Be careful not to lock yourself out.

Directory sign-in

Staff can sign in with their Windows/AD account over LDAPS: see **All other settings** → **Directory**. Map directory groups to roles.

Sessions

Signed-in sessions lists everyone signed in and lets you end any session at once.

Hide menu items

All settings → Menu items hides pages your team does not need. This only tidies the menu. Permissions still decide what a person can open.

Audit log

Audit log is a permanent record of who did what and when (sign-ins, setting changes, exports, reveals of numbers). It cannot be edited. **Compliance evidence** collects proof of your controls for an auditor.

HTTPS certificate

The installer creates a self-signed certificate. Replace it with your own in **HTTPS certificate** so browsers stop warning.

20. Backups and keeping data

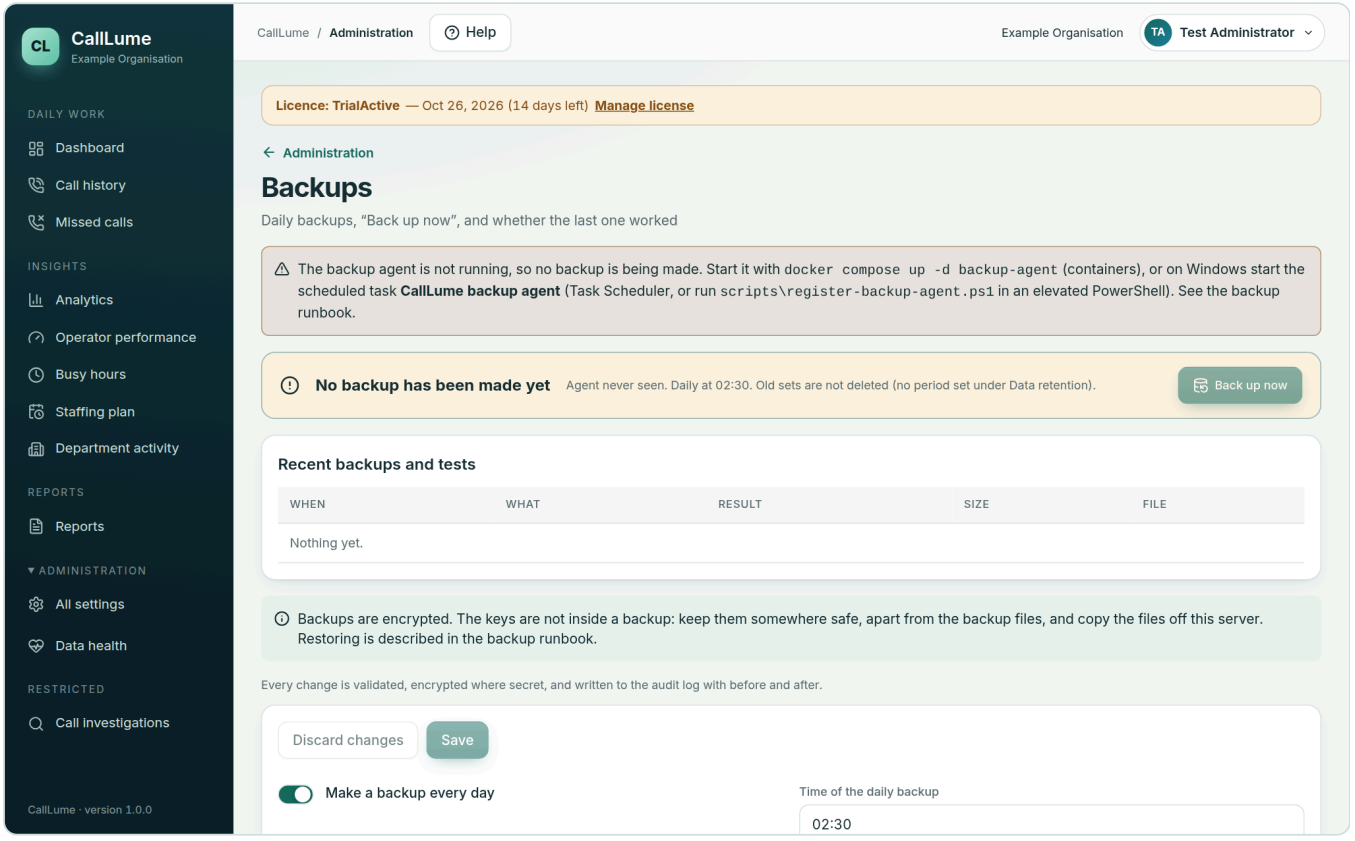
Backups

Open **All settings → Backups**.

- A backup runs **every day** at the time you set (02:30 by default). Turn it off only if another tool backs up the database.
- **Back up now** starts a backup straight away; the page shows its result.
- After each backup CallLume restores it into a scratch database and checks it (**restore test**). The page shows whether the last test passed.
- The backups are made by the **backup agent**. On Windows it is the scheduled task **CallLume backup agent**, created by the installer and started at boot. If the page says the agent is not running, start that task in Task Scheduler, or run `scripts\register-backup-agent.ps1` from an elevated PowerShell.
- Each backup is encrypted. It contains the database and the pending call records. It does **not** contain the key files.

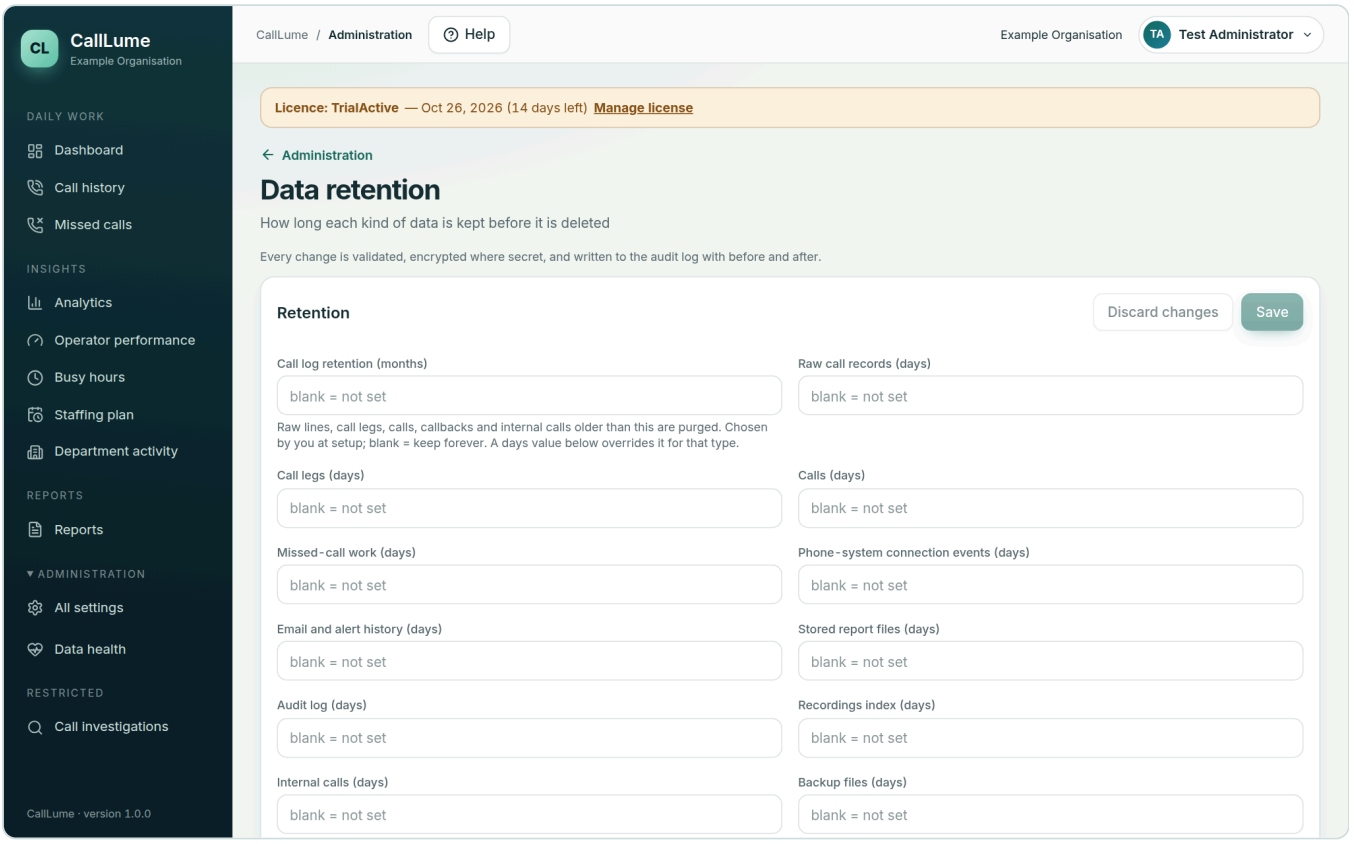
> **Warning** Copy the key files (the `secrets` folder in the data folder) to safe storage. Without the keys a backup cannot be read.

Copy backup files off the server regularly (to a file server or cloud storage), so one disk failure cannot lose both the data and its backup.



Restoring

A restore replaces the database with the contents of one backup. It is done by an administrator from the command line on the server, with the same CallLume version and the original key files. If you need a restore, contact NurIQ support or follow the backup runbook supplied with your installation; do not delete the existing database first.



Retention: how long data is kept

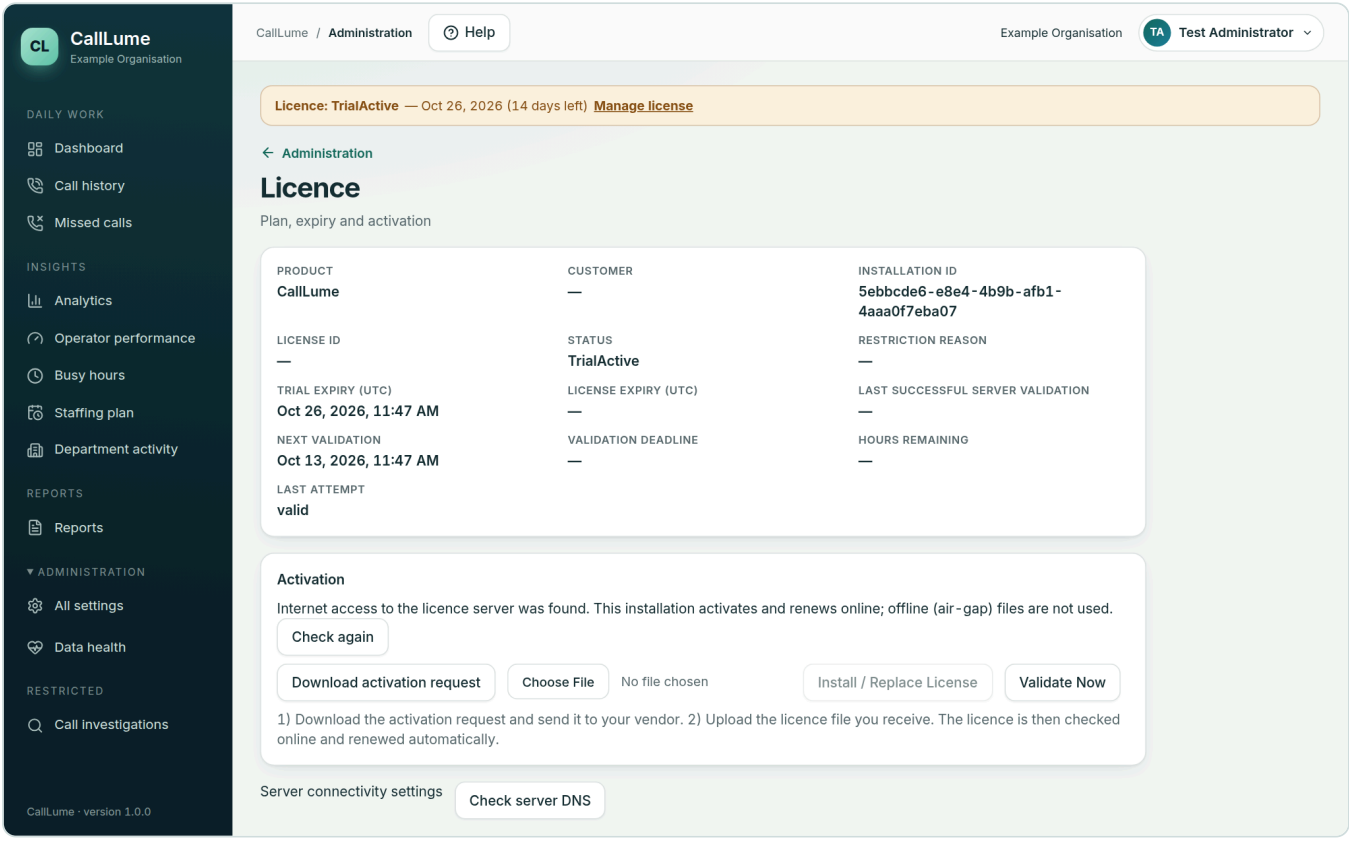
Open **All settings** → **Data retention**. For each kind of data (call records, audit log, alert logs, email logs, backups and so on) choose a number of days or **Keep**. Nothing is chosen for you; the decision and who made it are recorded. Expired data is deleted automatically each night.

> **Note** Choose retention with your data-protection owner. Shorter periods reduce risk; longer ones keep history for reports and trends.

21. Licence, upgrades and support

Licence

Open **All settings → Licence**. It shows your installation ID, the plan, the expiry date and the state. A banner warns you in the last 7, 3 and 1 days of the 14-day trial.



Activate online

If the server can reach the licence service, it activates and renews by itself.

Activate offline (no internet)

1. Select **Download request** and save the `.iqreq` file.
2. Send it to NurIQ (say that the site has no internet).
3. Upload the licence file you get back with **Install licence**.

An offline licence works until its fixed date and then needs a new file.

If the licence runs out

Collection, dashboards, reports and exports stop until it is renewed. Your data is kept. Administration, terms, audit and backups stay available so you can fix it.

Upgrading

Run the new MSI on the same server. It keeps your data and settings. Take a manual **Back up now** first. After the upgrade sign in and check **System health**.

- The new MSI replaces the old version in place. It keeps your data, port, data folder, users, backups, trial or licence dates and the keys.
- A silent upgrade needs the terms on the command line, the same as a silent install: `msiexec /i CallLume-<version>-x64.msi /qn ACCEPT_TERMS=calllume-1`. If it is missing, the upgrade stops after a few seconds with the message "You must explicitly accept CallLume terms", and the installed version keeps running unchanged.
- Allow about three minutes for an upgrade.
- Running the same MSI again repairs the installation without changing your data. Uninstalling keeps your data unless you add `REMOVE_DATA=1`.

Moving settings between installations

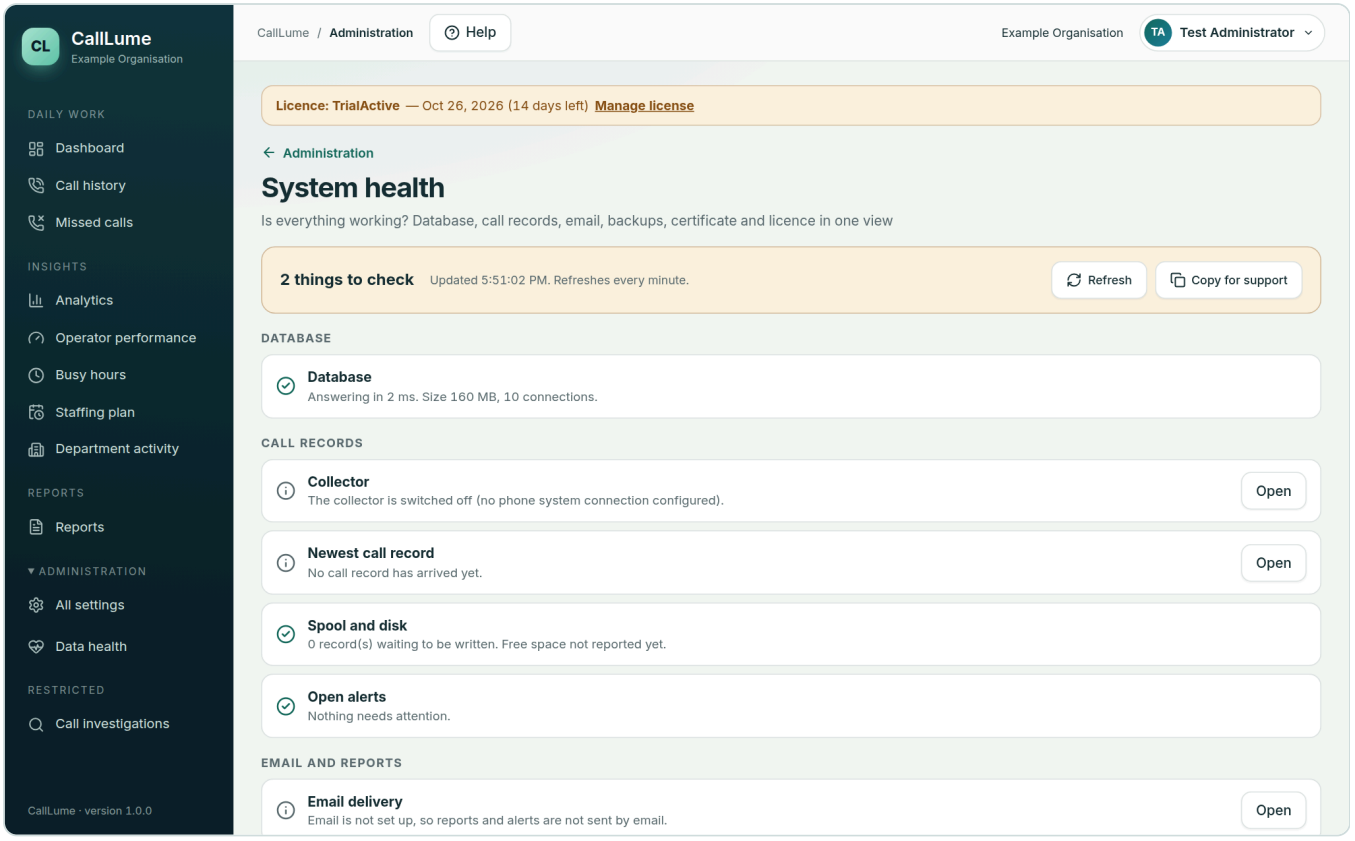
Back up & move settings exports your settings to a file you can load into another installation after a review. It does not move call data.

Getting help

Contact NurIQ Technologies. Have ready your installation ID (on the Licence page), the product version (bottom of the left menu) and what **System health** shows.

22. Troubleshooting

Start with **All settings** → **System health**. It checks the database, the phone-system feed, email, backups, the certificate and the licence in one list and tells you which one needs attention.



Problem	Likely reason	What to do
No new calls appear	The phone system is not connected, or another tool took the connection	Open **Phone system connection**. Check host, port 8085 and **Enabled**. Stop any other call-log tool (the PBX allows one reader; the newest wins).
Numbers are lower than the old system	Records are missing during a gap	Open **Data health** and look for gaps. Import the old log file for that period.
A supervisor sees nothing	They have no team, or the team has no extensions	Open **Teams**, check the extensions and that the user ticks the team.
A supervisor sees too much	They have the Admin or Analyst role	Check **User accounts** roles.
"You were signed out because of inactivity"	No mouse, keyboard or touch activity for the idle time (default 10 minutes), or the computer slept	Sign in again. An administrator can change the time in **Sign-in & password rules** (existing installations keep their stored value, often 30). Screens that only refresh by themselves do not count as activity.
"Too many wrong codes. Please sign in again."	The wrong two-step code was entered the allowed number of times (default 3)	Sign in again and enter the current code from the authenticator, or a backup code. Several rounds in a row lock the account (see below).

Problem	Likely reason	What to do
Cannot sign in, locked	Too many wrong passwords	Open **User accounts** and select **Unlock** or **Reset password**.
No emails	Email not set up or the mail server rejects it	Open **Email setup** and send a test. Check the **Delivery log**.
The setup page rejects the token	It expired (24 hours)	Restart the **CallCentreApi** service and use the new token.
Browser warns about the certificate	Self-signed certificate	Import your own in **HTTPS certificate**.
Everything looks empty after install	Retention, hours or groups not set	Follow the **Setup checklist**.

Services on Windows

The main services are **CallCentreApi**, the collector and the database. Restart them from the Windows **Services** window. Logs are in `C:\ProgramData\CallCentreOps\logs`.