

# Quick Reference Guide: Exporting Processed Data

## INTRODUCTION

The **Time and Billing Export** screen makes it possible to search through your database of edited call records, and export only those records you want.

## LAYOUT OF THE TIME AND BILLING EXPORT SCREEN

At the top of the screen are two text boxes. These are for:

- Retrieving or saving a Configuration Name
- Specifying an Export Type

### Configuration Name

In the **Configuration Name** text box, assign an export's selection criteria configuration to a file name, or retrieve an existing configuration file.

**Note:** You cannot export unless you specify a Configuration Name and an Export Type.

### Export Types

Click the down-arrow to select an export format, click **Configure**, and a dialog box for each format type will appear where you can configure the export file.

## BASIC SEARCH CRITERIA SCREEN

This screen lets you define search criteria to export records of calls made on specified days, and during a designated time frame by using the **Date** tab and to schedule the export of those records by using the **Schedule** tab

Additionally, by clicking the **Include "Local" call types** check box, Local calls will be included in your search criteria.

### The Date Tab

Click the **Date** tab to begin defining search criteria for the export

#### SPECIFYING THE DATE RANGE

By selecting **All Available Dates**, you are able to export all call records for all dates. If you select **Current Month**, **Last Month**, or **Last x number of days**, Start and End dates appear. These are only for display.

If you click **Specific date range**, a calendar appears where you can select the exact Start and End dates. To go through the calendar, either:

- Click an arrow to move monthly, or the scroll bar to move annually.

To use the calendar to enter the Start and End dates in their text boxes:

1. Click **Specific date range**, click the **Start** calendar button, click a Start date, and click **OK**.
2. Next, click the **End** calendar button, select an End date in the calendar, and then click **OK**.
3. Click **OK** to go back to the **Date** tab screen to set the time of day.

#### SPECIFYING THE TIME RANGE

- When you click **Entire Day** in the **Time of Day** section, you can export edited call records for a 24-hour period during the chosen date range.

Or by clicking **Other**, you can export edited call records for calls made during specific times. Type in the **Start time on first day:** and **End time on last day:** text boxes.

## The Schedule Tab

The **Schedule** tab is used to set a schedule for running the export. Be sure to click the **Run export at scheduled time** check box.

### SCHEDULING THE EXPORT BY MONTH

There are two methods for scheduling monthly. One method lets you specify the exact date of the month the export will occur:

**Date Option Button:** Select this option if you want the export to begin on a specific date of the month.

**Date Text Box:** In this text box, enter the day of the month the export will occur.

The other method lets you specify a first, second, third, or fourth day of the week each month the export will occur:

**Select Day Option Button:** Select this option if you want the export to occur on a specific first, second, third, or fourth day of the week each month.

**Week of the Month:** Lists the choices of which week of the month you want the export to occur. You must also choose on which day of the week you want the export to occur.

**Day of the Month:** Lists the choices of the day of the week that you want the export to occur. You must also choose on which week of the month you want the export to occur.

### SCHEDULING THE EXPORT BY WEEK

If you wish to export regularly every week, follow these steps:

- Click **Weekly**, and a list box will appear. Select the day of the week you would like data to be exported

### SCHEDULING THE EXPORT BY DAY

If you wish to export data on a specific day or days, follow these steps:

- Click **Daily**, and check boxes will appear for each day of the week. Click the desired day or days for data to be exported.

### SCHEDULING THE EXPORT BY TIME INTERVALS

If you wish to export data regularly every so many hours, follow these steps:

- Click **Periodically**, and a list box will appear containing periods of time in hours. Choose the time frame for data to be exported.

After you have set the month, week, day, or hour, the next step is to enter the time of day that you want the export to run.

### SETTING THE TIME OF EXPORT

- To designate what time you want your data exported, type the time in the **Time of Export** text box. Specify AM or PM.

**Note:** You cannot specify a time of export if you selected **Periodically**.

After all your search criteria have been set, click **Export Now** to begin exporting records to your time and billing system.

## ADVANCED SEARCH CRITERIA SCREEN

The **Advanced Search Criteria** screen appears when you click the **Advanced Criteria** button found on the **Basic Search Criteria** screen. It is important to note that all search criteria you define are not exclusive, but rather, cumulative. This means that all the search criteria you set work together to narrow your export to include only the desired records.

### The Date Tab

The **Date** tab is divided into two sections. One section is used to specify a range of dates and times that calls were made to be included in the export, and the other section contains check boxes to specify if you would like previously exported calls included in the export.

#### SPECIFYING THE DATE RANGE

If you select **Current Month**, **Last Month**, or **Last x number of days**, Start and End dates appear. These are only for display and cannot be changed.

If you click **Specific date range**, a calendar appears where you can select the exact Start and End dates.

To go through the calendar, either:

- Click an arrow to move monthly, or the scroll bar to move annually.

To use the calendar to enter the start and end dates in their text boxes:

1. Click the **Specific date range** option button.
2. Click the **Start** calendar button, click a start date, and click **OK**.
3. Next, click the **End** calendar button, select an end date in the calendar, and then click **OK**.

#### INCLUDE PREVIOUSLY EXPORTED CALLS

This section of the **Date** tab screen includes the following check boxes:

**Export Calls that haven't been previously exported:** Select to include call records that haven't been exported.

**Export Calls that have been previously exported:** Select to include call records that have been previously exported.

**Previous Export Date:** Click this check box, and a list box will appear containing dates of previous exports.

### The Time Tab

When you click **Entire Day** in the **Time of Day** section, you can:

- Export edited call records for an entire 24-hour period during the selected date range.

Or by clicking on the **Other** option button:

- Specify certain hours for the export by typing in the **Start time on first day:** and **End time on last day:** text boxes.

### The Dialed Tab

The **Dialed** tab contains check boxes for including call records with valid, invalid, or missing Account and Matter codes. In the middle section are text boxes to enter Account and Matter codes and a **Search** button that invokes a **Search for Account/Matter Codes** dialog box. At the bottom are text boxes to specify a telephone number, minimum and maximum call costs and duration, an extension or range of extensions, and a list box to select a data source.

#### INCLUDE VALID/INVALID ACCOUNT AND MATTER CODE CHECK BOXES

**Include calls with Active/Valid Account/Matter Codes:** This box is checked as the default setting, and specifies that call records with valid Account and Matter codes will be exported.

**Include calls with Inactive/Invalid Account/Matter Codes:** Click this check box if your time and billing system can handle invalid Account and Matter codes.

**Include calls with no Account/Matter Codes:** Click this check box to export call records that can handle records without Account or Matter codes.

### SEARCHING FOR ACCOUNT AND MATTER CODES

- Type the codes in the **Account Code** and **Matter Code** text boxes, or
- Look up Account and Matter codes by clicking the **Search** button.

At this dialog box, search for Account codes using any one of three criteria:

- **By Account Group** – A major division within the Account Database.
- **By Account Name** – The Account Description that is part of the Account Group.
- **By Account Code** – The Account code that the Account Name is identified with.

### Searching for an Account Code

To search for an Account Code, follow these steps:

1. Enter the Account Name, Group, or code directly in their text boxes, or
2. Enter the first few characters of the Account Name, Group, or Code.
3. After you typed in your search criteria, click **Search**. In the dialog box, a list of Account codes appears.

If you want to use only the selected Account Code, click **Accept Account Code Only** at the bottom of the screen. When you do this, you return to the **Dialed** tab where the selected Account code is now in the **Account Code** text box. Click **OK** to confirm the account code selection is correct.

### Searching for Matter Codes Using the Associated Account Code

After an Account Code has been retrieved, follow these steps to search for its associated Matter Code.

**Note:** make sure no characters are in the **Matter code prefix** text box.

1. Highlight an Account Code in the **Search for Account/Matter Codes** dialog box, and click **Find Matter Codes**.
2. The Matter Code(s) associated with the highlighted Account Code will appear in a list in the Search for Account/Matter Codes screen.
3. Highlight the desired Matter code, and click **Accept Account and Matter Code**. You will return to the **Dialed** tab where the Account and/or Matter Codes now fill their text boxes.

### Searching for Matter Codes Using the Matter code prefix text box

Another way to search for Matter Codes is to type the code (or its first few characters) into the **Matter code prefix** text box.

1. If you know the Matter Code, enter it in the **Matter code** text box, or
2. If you only know the first few characters, enter that information.
3. After you have typed in your search criteria, click **Find Matter Codes**.

After retrieving the codes, you have the option to:

- Accept the Account code, or both Account and Matter Codes.

After clicking on the desired button, you will return to the **Dialed** tab where the Account and/or Matter Codes now fill their text boxes.

### CALL DETAILS TEXT BOXES

**Dialed Number:** If you wish to export records for all calls made to a specific phone number, type the number in this text box. The number entered should include all dialed digits (e.g., 1+NPA+NXX+NNNN)

**Minimum Cost:** Use this box when you want your selection criteria to include all calls that more than the billed cost entered in this text box.

**Maximum Cost:** This box is used when you want your search criteria to include all calls that don't exceed the cost entered in this text box.

**Minimum Duration:** Enter a time in minutes in this text box to include a minimum call duration in your search criteria.

**Maximum Duration:** To include a maximum call length in your search criteria, enter a time in minutes in this text box.

### SPECIFYING AN EXTENSION OR RANGE OF EXTENSIONS

If you wish to specify one extension, several extensions, or a range of extensions, perform one of the following:

- To specify only one extension, type it in the **Extension(s)** text box.
- To include several extensions, type each extension separated by a comma in the **Extension(s)** text box. For example, 123, 129, 133, 150
- To indicate a range of extensions, type the first and last extensions of the range separated by a hyphen in the **Extension(s)** text box. For example, 430-480
- To combine several extensions or a range of extensions in the **Extension(s)** text box: 1054, 1453, 1821, 1964-1969.

**Note:** If you include any retrieved extensions as part of your selection criteria, do not make any selections in the **Directory** tab.

### SPECIFYING THE DATA SOURCES

In the bottom of the **Dialed** tab are list boxes that are used to include the type of data source in your search criteria.

**Data Source:** This list box contains the data sources in your organization you can select. Choose a data source to select edited call records for calls made from that data source.

**Originating Data Source:** In a networked PBX system, select the data source from which call records originated that you want to include in your edited call data export.

**Originating Data Source Group:** In a networked PBX system, select the data source group that you want to include in your edited call data export.

**Note:** If the number of data sources exceeds the maximum number defined at the **Misc. System Options 1** screen during installation, then a **Find Word(s)** text box and **Word Search** button will appear for each data source list box. There, perform a search for each data source, and the results will appear in each data source list box.

### Performing a Data Source Search

Enter your search string in the **Find word(s)** text box. You don't have to enter an entire word, just a fragment. After entering a search string, Click the **Word Search** button, and the search results will include all values containing your search string and will appear in the corresponding list box.

The data sources you selected are now another qualifier in your selection criteria.

## The Directory Tab

Selecting the **Directory** tab displays a screen that lets you limit the export of call records from any level in your organization (**except** an individual extension). You may also search the entire directory by typing a search string in the text box at the bottom of the screen.

The number of levels displayed depends on your security privileges.



### SELECTING AN ORGANIZATION LEVEL

Selecting an organization level is very similar to selecting an individual, except that once a level is selected; call records for all entities below the selected level will be included in the search criteria.

1. Expand the tree structure until the organization level is displayed, and click the level's representative symbol.
2. All call(s) made within the selected organization level and below will be included in the search criteria.

## PERFORMING A SEARCH

Search the directory by typing a search string in the **Find** text box. To perform a search, follow these steps:

1. Type the search string in the **Find** text box. If you are not sure of a spelling, you may type only the first few characters.
2. Click  to start searching, or to find the next occurrence of your string.
3. Click  to find the next occurrence of your string.

## The Call Types Tab

The **Call Types** tab allows you to select which type(s) of calls you would like exported. Call types include Long Distance, International, Local, Inbound, Info/Assist, Internal, and four User Defined settings.

Click any number of these check boxes to select the types of call you want to export. For example, if you want to select both incoming and local calls to export to your billing system, click the check boxes beside those options.

## The Schedule Tab

This tab is used to set a schedule for running the export. Be sure to click the **Run export at scheduled time** check box.

### SCHEDULING THE EXPORT BY MONTH

There are two methods for scheduling monthly. One method lets you specify the exact date of the month the export will occur:



The screenshot shows the 'Export Schedule' dialog box. The 'Monthly' radio button is selected. Under the 'Monthly' section, the 'Date' radio button is selected. A text box next to 'Date' contains the value '01'. To the right, there is a dropdown menu set to 'First' and another dropdown menu set to 'Monday', followed by the text 'of the month.'

**Date Option Button:** Select this option if you want the export to begin on a specific date of the month.

**Date Text Box:** In this text box, enter the day of the month the export will occur.

The other method lets you specify a first, second, third, or fourth day of the week each month the export will occur:



The screenshot shows the 'Export Schedule' dialog box. The 'Monthly' radio button is selected. Under the 'Monthly' section, the 'First' radio button is selected. To the right, there is a dropdown menu set to 'First' and another dropdown menu set to 'Monday', followed by the text 'of the month.'

**Select Day Option Button:** Select this option if you want the export to occur on a specific first, second, third, or fourth day of the week each month.

**Week of the Month:** Lists the choices of which week of the month you want the export to occur. You must also choose on which day of the week you want the export to occur.

**Day of the Month:** Lists the choices of the day of the week that you want the export to occur. You must also choose on which week of the month you want the export to occur.

### SCHEDULING THE EXPORT BY WEEK

If you wish to export regularly every week:

- Click **Weekly**, and select the day of the week from the list box.

### SCHEDULING THE EXPORT BY DAY

If you wish to export data on a specific day or days:

- Click **Daily**, check boxes will appear for each day of the week, and click the desired day or days.

**SCHEDULING THE EXPORT BY TIME INTERVALS**

If you wish to export data every so many hours:

- Click **Periodically**, and choose the time frame for data to be exported.

After you have set the month, week or day, the next step is to enter the time of day that you want the export to run.

**SETTING THE TIME OF EXPORT**

Type the time in the **Time of Export** text box. Specify AM or PM.

<b>Note:</b> You cannot specify a Time of Export if you selected <b>Periodically</b> .
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After all search criteria have been set, click **Export Now** to begin the export.



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