Quick Reference Guide: Summarized Data Export

The Summarized Data Export function is used to search through your database of call records, and by specifying search criteria, export only those records you want in a summarized export format. The summarized data can then be imported into an accounting system or spreadsheet.

With this function, you can —

- Define search criteria to retrieve only relevant call records to include in your report
- Set a schedule for exporting edited call records
- Save all your search criteria settings to a configuration file name
- Export your summarized data file in a delimited or fixed length format
- Import a saved report and export the data

It is important to note that the search criteria you specify at each of the tabs work together to narrow down your export.

To access the ***Summarized Data Export*** dialog box —

- At the ***Control Center***, click **File → Export Summarized Data**

SPECIFYING THE CONFIGURATION NAME

You must specify a Configuration Name in the **Configuration Name** box. A configuration name is the name of a file that contains the export selection criteria from all five Summarized Data Export tabs for an export (including an export type). You can select an existing configuration name from the list box, or, for a new export, type a new name in the **Configuration Name** box and complete the export selection criteria on the five tabs. Click the **Save** button to save the configuration name and your export selection criteria.

REQUIREMENTS FOR SAVING A CONFIGURATION NAME

- You must select at least one field from the ***Group By*** tab.
- If you select the **Run export at scheduled time** check box, you must select one of the following: **Monthly**, **Weekly**, **Daily**, or **Periodically**.

You will not be able to export unless a configuration name is specified.

GROUP BY TAB

The ***Group By*** tab lets you set up how you want the summarized data to be grouped. For example, if you want data grouped by each data source, select the **Data Source Name** check box.

> **Note:** If you checked the **Include Fixed Costs Total** check box, a different set of fields will be available.
>
> **Note:** You must select at least one option from the ***Group By*** tab in order to save a configuration.
>
> **Note:** If you purchased the optional Facilities Management module, total inventory charges will be contained in the summarization level.

BASIC TAB

The ***Basic*** tab allows you to define your export selection by date and time, as well as specify an export type.

Specifying the export type

You must specify a format type from the **Export Type** list box.

CONFIGURING THE EXPORT

Select an export type from the list box, and click **Configure**. Follow the steps below for your type of export configuration.

Delimited Export File

1. In the **Separators** section, select a character to be a field separator in the export file:
   - Select the **Comma** or **Tab** option button.
   - If you are using a separator other than a comma or tab, select the **Other** option button, and type the separator character into the box.
2. In the **Date Format** text box, type in the format you wish the date to appear. Use M for Month, D for day, and Y for year with each separated by a slash. For example, if you want the date to appear in this month/day/year format (for example, 08/16/1998), enter mm/dd/yyyy in the **Date Format** text box.
3. Select the **Include headers in first row?** check box if you want column headings as the first row of data in the export file.
4. In the **Delimiters** section, select a delimiter to use around each field:
   - Select either the **Double Quotes** or **Single Quotes** option button.
   - If you do not want to use a delimiter, select the **None** option button.
   - If you want to use a delimiter only around text fields, select the **Delimit text fields only?** check box. When this box is selected, a delimiter also surrounds date fields but not any numeric fields.
5. Click the **Include headers in first row?** check box if you want column headings as the first row of data in the export file.

To lay out specifications for columns of data in the delimited export file—

6. Double click and type a number in the appropriate cell in the **Order** column to specify the placement of that column in the export file. If you don't, then that column will be omitted from the export.
7. Finally, click **OK** to save the settings, or click **Cancel** to abandon any changes and close the ***Delimited*** dialog box.

Excel File

In order to create an Excel file, Excel must be installed on the computer doing the export. If you select Excel format, an ***Excel Export Options*** dialog box will appear after you specify a Configuration Name, and click the **Configure** button.

1. If you want the field names to be included as headers in the first row, check the **Include headers in first row?** box.
2. In the **Date Format** text box, type in the format you wish the date to appear. Use M for Month, D for day, and Y for year with each separated by a slash. For example, if you want the date to appear in this month/day/year format (for example, 08/16/1998), enter mm/dd/yyyy in the **Date Format** text box.

To arrange the columns of data in the export file, follow these steps:

3. Double click and type a number in the desired cell in the **Order** column to specify the placement of that column in the export file. If you don’t specify a number, then that column will be omitted from the export.
4. Finally, click **OK** to save the settings, or click **Cancel** to abandon any changes and close the ***Delimited*** dialog box.

Fixed Length Export File

If you select a fixed length format, a ***Fixed Length*** dialog box will appear after you specify a configuration name, and click the **Configure** button.

1. If you want numbers to be padded with leading zeros, leave the **Pad Numbers with zeros?** check box selected.
2. In the **Date Format** text box, type in the format you wish the date to appear. Use M for Month, D for day, and Y for year with each separated by a slash. For example, if you want the date to appear in this month/day/year format (for example, 08/16/1998), enter mm/dd/yyyy in the **Date Format** text box.

To arrange the columns of data in the export file—

3. Double click and type a number in the desired cell in the **Order** column to specify the placement of that column in the export file. If you don't specify a number, then that column will be omitted from the export.
4. Type a number in the appropriate cell in the **Width** column to specify how many characters a column should contain.
5. Specify if data will be left or right justified in the **Justified** column.
6. Finally, click **OK** to save the settings, or click **Cancel** to abandon any changes and close the ***Delimited*** dialog box.

Specifying call records by date and time

DATE RANGE

Using option buttons, you can specify that call records for calls made during a range of dates are included in the export file.

- If you select either **Current Month** or **Previous Month**, data from the selected date range will be included in the summarized data export.
- If you click the **Specific date range** option button, **From** and **To** text boxes and accompanying calendar buttons appear where you can select the exact Start and End dates:

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

1. Click the **Specific date range** option button.
2. Click the calendar button next to the **From** text box. Select a date, and then click the **OK** button.
3. Click the calendar button next to the **To** text box. Select a date in the calendar, and then click the **OK** button.

Alternatively, you can type the **From** and **To** dates directly in their text boxes as MM-DD-YY.

- If you select the **Relative** option button, a **Last** text box and an accompanying list box appear. Perform the following:

1. In the text box, enter a number that will specify how far back in a certain time period specified in the adjoining list that call records will be included in your export.
2. From the list box, select the time period that will include call record data for your export. You can select weeks, days, months, or hours.

TIME RANGE

You can select call records for calls made for an entire day, or during certain hours of a day. The times selected are for the start time on the first day and the end time on the last day during the days chosen in the **Date Range** section.

Continuous

With the **Continuous** option button, you can export call records for calls made during an uninterrupted time period. That is, if your date range is Monday the 24th through Friday the 28th with a start time of 8:00 AM and an end time 5:00 PM, your export will include call records for calls made from 8:00 AM Monday the 24th all the way through 5:00 PM Friday the 28th. Type a time in each text box, using military (24-hour) time, or use AM/PM.

Interval

With the **Interval** button you can specify a daily start time on the first day of the date range and a daily end time on the last day of the date range. Enter these times in **Daily start time** and **Daily end time** text boxes. For example, if your date range is Monday the 24th through Friday the 28th and you select the Interval option with a start time of 8:00 AM and an end time of 5:00 PM. Your export will include call records for calls made from 8:00 AM through 5:00 PM, Monday through Friday. Type a time in each text box, using military (24-hour) time, or use AM/PM.

After Hours

After Hours lets you export records for calls made during a two day-period. When this option is selected, **Start time** and **End time** text boxes appear. Type a time in each text box, using military (24-hour) time, or use AM /PM.

OUTPUT TAB

At the ***Output*** tab, you can select how you want the export delivered. In the top half of the screen, you specify a file name and location for the export as well as a delivery method (by email or report portal).

In the bottom half of the screen, when you click the **Merge** check box, you can use the structure defined in the Directory database to create a list of recipients for an export.

FILTERS TAB

With the ***Filters*** tab, you can define your export selection to include only the fields you want. The ***Filters*** tab has a **Filter Grid** that's used to include only those records that match specific search criteria in the report. When a row is double clicked, a dialog box appears that lets you define an operator and search criteria specific to the field name in that row.

- The left column of the grid displays the field names available. If the **Networked PBX** option was selected during installation, the **Data Source Group Name** and **Originating Data Source Name** fields will also be available.
- The middle column displays the operator used to filter search criteria.
- The right column displays the search criteria specified in its search dialog box for the field name.

When you double click on a row in the **Filter Grid**, a ***Select Field Name*** dialog box appears. A list of operators that are available in the ***Select Field Name*** dialog box follows:

Includes: Specifies to search for just the value or values entered for the field name selected.

Doesn't Include: Searches for all values except those entered for the field name selected.

=>: Sets the low point and searches for all values equal to or greater than the value entered.

<=: Sets the high point and searches for all values equal to or less than the value entered.

Like: This filter is used for alphanumeric queries and acts as a wildcard to search for all values beginning with the search string.

Defining Search Criteria

When you double click on a row in the **Filter Grid**, a ***Select "field name"*** dialog box appears that enables you to specify the search criteria for that field name. While there are a great number of these Select field name dialog boxes, they all generally fall into the following types:

- Generic Select Field Name Dialog Box with a Look Up Button
- Generic Select Field Name Dialog Box without a Look Up Button
- Select a Type of Code Dialog Box
- Other

> **Note:** When selecting a Trunk Member, the Trunk Group is displayed in the ***Select Trunk Member*** dialog box only as a reference. To select a Trunk Group, you must choose that row in the **Filter Grid**.

Generic Select Field Name Dialog Box with a Look Up Button

This dialog box uses a table containing values for the selected field name.

To use this type of ***Select "field name"*** dialog box, follow these steps:

1. From the list box, select an operator.
2. In the text box, enter the value or values. If entering multiple values, use a semi-colon to separate each, and a hyphen to indicate a range. For example, 7117;7119;7121-7131.
3. Alternatively, click the **Look Up** button to open a ***Look Up For*** dialog box that displays a table of values specific to the field name chosen.
4. At the ***Look Up For*** dialog box, click each desired value. To select a series of consecutive values, hold down the **Shift** key while selecting the first and last values in the series. To select a series of non-consecutive values, hold down the **Ctrl** key and select each value. Click **OK** to close the ***Look Up For*** dialog box.
5. Click **OK** to save the selection(s), and the values will appear in the right hand column of the **Filter Grid** with the operator in the middle column.

Generic Select Field Name Dialog Box without a Look Up Button

The ***Select "field name"*** dialog box uses a **Data Source** list box. To use this type of dialog box, follow these steps:

1. From the list box, select an operator.
2. Select a data source from the list box.
3. A ***Select from List*** dialog box will appear displaying a table of values specific to the field name chosen.
4. At the ***Select from List*** dialog box, click each desired value. To select a series of consecutive values, hold down the **Shift** key while selecting the first and last values in the series. To select a series of non-consecutive values, hold down the **Ctrl** key and select each value. Click **OK**.
5. Alternatively, in the text box, enter the value or values. If entering multiple values, use a semi-colon to separate each, and a hyphen to indicate a range. For example, 7117;7119;7121-7131.
6. Click **OK** to save the selection(s).

Select a Type of Code Dialog Box

This ***Select "field name"*** dialog box appears for searching account codes, matter codes, DNIS codes, or authorization codes. While the dialog box for each code differs somewhat, the idea is basically the same for each:

- You can search for a specific code or codes, or
- You can search for codes that fall within certain categories

Searching for a specific code or codes

1. Select the **Query specific code** option button, and from the list box, select an operator.
2. In the text box, enter the code or codes. If entering multiple codes, use a semi-colon to separate each, and a hyphen to indicate a range. For example, 7117;7119;7121-7131.
3. Alternatively, click the **Look Up** button.
4. The **Look Up** button will open a ***Look Up For*** dialog box that displays a table of codes specific to the field name chosen.
5. At the ***Look Up For*** dialog box click each desired code. To select a series of consecutive codes, hold down the **Shift** key while selecting the first and last codes in the series. To select a series of non-consecutive codes, hold down the **Ctrl** key and select each code. Click **OK** to close the ***Look Up For*** dialog box.

Searching for codes that fall within certain categories

1. Select the **Or query by** option button.
2. From the list of option buttons, select the one desired for the search.

With either method, click **OK** to save the selection(s), and the codes will appear in the right hand column of the Filter Grid with the operator appearing in the middle column.

OTHER

The Other type of ***Select "field name"*** dialog box is either:

- A list of check boxes of which you can select as many as required (for example, select call types)
- A list of option buttons of which you can select only one (for example, operator-assisted calls)

SCHEDULE TAB

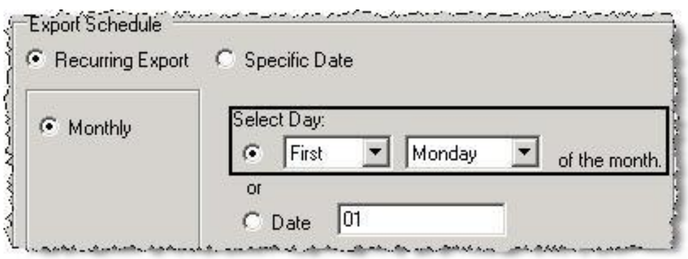
The ***Schedule*** tab sets up a schedule for automatically running the export. After clicking the **Run export at scheduled time** check box, controls appear that enable you to schedule your export monthly, weekly, daily, periodically, and with a specific date, and time.

At the ***Schedule*** tab, you can create two types of export schedules:

- A Specific Date and Time export (Be aware that a Specific Date and Time export will run **only once** on the date and time specified.)
- A Recurring export

Scheduling Monthly

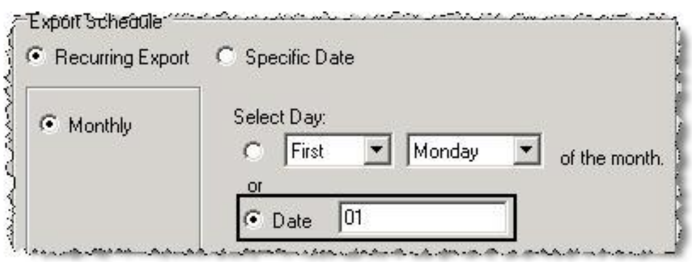
If you click the **Monthly** option button, you have two choices. One method lets you specify the exact date of the month the export will occur:



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 Weekly

If you click the **Weekly** option button:

- Select the day of the week you want the export to run from the list box.

Scheduling Daily

If you click the **Daily** option button:

- Select the day or days you want to export data.

Scheduling Periodically

If you click the **Periodically** option button:

- Choose the time interval for data to be exported.

After you have set the month, week, or day to run your export, type the time you want the export to run in the **Time of Export** box. Be sure to specify AM or PM. Next, in the **First Run Date** text box, enter the date you want the schedule to begin running.

After setting the search criteria, click **Export Now** to begin exporting.

EDITING AN EXPORT

To edit an existing export configuration, follow these steps:

1. At the ***Summarized Data Export*** dialog box, choose the export you want to edit from the **Configuration name** list box.
2. Make the necessary changes, and click the **Save** button to save the edits.

DELETING AN EXPORT

To delete an existing export configuration, follow these steps:

1. At the ***Summarized Data Export*** dialog box, choose the export you want to delete from the **Configuration name** list box.
2. Click the **Delete** button.

IMPORTING A REPORT

The fields used to group the report are the same used as the group by fields found in the ***Group By*** tab. The fields exported are the group by fields and the columns that were on the report. Also imported are the date and time ranges used and any filters chosen in the report.

To import a report, follow these steps:

1. Click on **Import** button.
2. The ***Import Report Settings*** dialog box appears. It lists all of the shared reports to which you have access.
3. Click on the name of the report to be imported.
4. Click **OK**.

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