Quick Reference Guide: Call Exploration

Infortel Select Call Exploration is an easy way to look at call records to find:

- Patterns of telephone abuse or misuse
- Usage trends in your telephone system
- Call record details from a single organization level down to an individual user

After selecting **Call Exploration** from the **Reports** menu at the Infortel Select ***Control Center***, the ***Call Exploration*** main screen appears.

RUNNING CALL EXPLORATION

Setting Search Criteria

The ***Call Exploration*** main screen is used for defining the search criteria for your report. You may search your call records using a variety of criteria with your query becoming more specific depending on the number of criteria specified.

At the top of the screen is an area that lets you search date and time ranges for call data to be included in the report. The lower portion of the screen contains an area where you can search by field names and select filters used to narrow the field name search. Clicking a **Look Up** button for a field name will open a dialog box that displays a list of values for the field name selected. At this dialog box, you can specify the values to be included in your search.

Submit: After setting all of your search criteria, click this button to generate the report.

Sort Organizations by Code: Select this option if you want the report sorted by the organization code.

Sort Organizations by Name: Select this option if you want the report sorted by the organization name.

From Date: In these text boxes, enter the beginning date in the range of call records that are to be included in the report.

From Date Calendar Button: Click this button to open the interactive calendar. On the calendar, click the date to specify the beginning date in the range of call records that are to be included in the report.

To Date: In these text boxes, enter the ending date in the range of call records that are to be included in the report.

To Date Calendar Button: Click this button to open the interactive calendar. On the calendar, click the date to specify the last date in the range of call records that are to be included in the report.

From Time: In these text boxes, specify the starting time of the data to include. The specified starting time will be as of the first day specified in the **Date Selection** area. Enter the time as non-military time.

> **Note:** You must be careful to specify AM or PM.

To Time: In these text boxes, specify the ending time of the data to include. The specified ending time will be as of the last day specified in the **Date Selection** area. Enter the time as non-military time.

> **Note:** You must be careful to specify AM or PM.

Continuous: This option will query for call record data starting with the From time on the From date to the To time on the To date.

Interval: This option will query for call records data during the specified period of time for the days specified in the **Date Selection** area.

For example, if you want to query for call record data only from normal business hours, enter 8:00 AM in the **From** text boxes and 5:00 PM in the **To** text boxes.

Field Name: This column displays the field names that are available for searching. In the columns to the left, you may select operators and specify filters for each field name that will let you narrow your search. The more operators and filters you specify, the more specific your search will be.

Includes: This list contains operators that let you determine whether to include or exclude the value or values entered in the **Filter** text box in your output for the particular field name selected.

You may also specify a low limit to retrieve values higher than it, or you may set a high point to retrieve values lower than it for the particular name selected. Refer below for a list of operators:

AVAILABLE OPERATORS

> **Note:** the operators available depend on the filter (field name) chosen.

- **Includes** - Specifies to search for just the value or values specified for the field name selected. This is the default.
- **Doesn't Include** - Specifies to search for a value or values except those specified for the field name selected. This is not available with the Cost or Duration field names.
- **=>** - This operator sets the low point and searches for all values equal to or greater than the value specified in the text box. Multiple entries are not allowed with this operator.
- **<=** - This operator sets the high point and searches for all values equal to or less than the value specified in the text box. Multiple entries are not allowed with this operator.
- **Like -** This filter is used for alphanumeric queries and acts as a wildcard to search for all values beginning with the search string specified. This is not available with the Cost or Duration field names.

Filter: In these text boxes, enter the appropriate value or values for the corresponding field name that you want to include or exclude from your output. To include multiple values in your report, use a semicolon to separate each value and a hyphen to indicate a range of values. For example, 7117; 7119; 7121-7130.

As an alternative, you may search for a value or values by clicking the adjacent **Look Up** button, if available.

Look Up: Click this button to open a ***Look Up Field Name*** screen that displays a list of values for the field name selected. Refer below for more information on the ***Look Up Field Name*** screen.

> **Note:** When you click the **Look Up** button to include a Call Type, a ***Look Up Call Type*** screen appears. See below for more information on this screen.

LOOK UP FIELD NAME SCREEN

After clicking the **Look Up** button a screen appears that lets you search for a value or values relevant to the field name selected.

Values List Box

At the left-hand side of the screen is a list box containing two or more columns of data. The first column displays the first 10 values for the field name selected, and the other column(s) displays information associated with the field name. To include these values, follow these steps:

1. Select the check box next to each value you want included in the search criteria for your report.
2. Click the **Add** button.
3. The selected values will appear in the list on the right-hand side of the screen.

Below the **Values List** box is a set of buttons used for scrolling through the list.

Selection List Box

After clicking the **Add** button, your selections will appear in the list on the right-hand side of the screen.

- To remove a selection, highlight the value and click the **Remove** button.
- To remove more than one selection, hold down the **Ctrl** key while selecting each item and click the **Remove** button.
- To remove all selections, click the **Clear** button.
- Clicking **OK** will add the selections to the ***Select "field name"*** dialog box.

Searching for Values

At the top of the screen is a **Find** text box and a button (or buttons) that let you narrow your search for values. To use the **Find** text box, follow these steps:

1. Type the search string in the **Find** text box. The search string can appear in any of the columns appearing in the **Values** list box. You may use the ***** as a wildcard.
2. Click the button corresponding to the column you are searching.
3. The first 10 matches will appear in the **Values** list box.
4. Select the desired values and click the **Add** button to add them to the **Selection** list box.

LOOK UP CALL TYPE

When this button is clicked, a dialog box with a list of check boxes appears.

1. Select as many of the check boxes as needed to add the necessary Call Types to your search criteria.
2. Click **OK** to add the selected call types to your search criteria.
   - Click **Cancel** to close the dialog box without saving the selections.
   - Click **Clear** to remove all check marks.

> **Note:** The specifications entered at this screen are cumulative rather than exclusive. This means that each criterion specified becomes part of a single search string.

Drilling Down Through Search Results

After setting the search criteria and clicking the **Submit** button, a ***Call Exploration Results*** screen will appear. This screen is the first in a series of search results screens. When you click an organization level name, you will be taken to a screen containing call record information for the level or levels within the selected level. At these screens you can print or e-mail the displayed results.

> **Note:** When drilling down through the search results, a user will be able to see only the levels that they have permission to view. For example, if a user has access privileges to just the Accounting department, all links to higher levels would be disabled.

In the left-hand side of the results screens, when you place your cursor over a level that can be explored, the font will become bold and highlighted. When you click on that level, you will be taken to a screen that will display information about the levels within that level. You can continue this process until you reach the call details for a user.

Go Back One Level: Click this button to move up one level and display the search results for that level in the organization tree.

Print: Click this button to send the report to a printer.

> **Note:** Only the portion of the report currently displayed on your screen is printed. The output does not include any information about the previous or explored levels.

Send as E-mail: Click this button if you want to send the report as e-mail. When you do, a dialog box appears where you can specify the recipient, subject, and message for the e-mailed report. See the Sending a Call Exploration Report as E-mail section below for more information about e-mailing a report.

> **Note:** The report e-mailed is only the portion of the report currently displayed on your screen and does not include any information about the previous or explored levels.

Return to Selection Criteria: Click this button to return to the selection criteria screen. There, you can change the existing settings, or create a new search.

Level Column: When you place your cursor over a level that can be explored, the font will become bold and highlighted. Click on the level to be taken to a screen that will display information about the levels within that level. You can continue this process until you reach the call details for a user.

Call Type: This column displays the call types that are either:

- The only call types the system tracks (if no call types were defined in the search criteria)
- The call types that were defined in your search criteria

When you have drilled down to the user level, you can click on a call type to drill down to see the call details on just that call type for the user.

Count: This column displays the number of calls for the organization level broken down by call type. The total number of calls for this level is also displayed.

Cost: This column displays the billed cost of calls for the organization level broken down by call type. The total billed cost for all calls in this level is also displayed.

Duration: This column displays the duration of calls for the organization level broken down by call type. The duration total of calls for this level is also displayed.

Avg. Cost: This column displays the average billed cost of calls for the organization level broken down by call type. The total average billed cost for all calls in this level is also displayed.

Avg. Duration: This column displays the average duration of calls for the organization level broken down by call type. The total average duration for all calls for this level is also displayed.

Viewing Call Details for Users

If you want to explore call information at a more detailed level, you may view call details for individual users at the ***User Level*** screen. Here, you are able to examine call details for individual calls, filter your results even further, and sort your results. At the ***User Level*** screen, you can print or e-mail the displayed results. At the ***User Level*** screen, you are able to:

- Examine call details for individual calls
- Filter your results even further
- Sort your results

In the left-hand side of the ***User Level*** screen, when you place your cursor over one of the levels that can be explored, the font will become bold and highlighted.

Click on a level to be taken to a screen that will display information about the selected level.

In addition, in the left-hand side of the ***User Level*** screen, when you place your cursor on a user name, the font will become bold and highlighted.

Click on the name to "unfilter" the results.

EXAMINING CALL DETAILS

To examine call details for individual calls, click the icon, and a call detail screen for that call will appear.

> **Note:** The call detail icon displays only for those with Administrator status.

FILTERING THE RESULTS

By selecting elements in the cells of the grid, you are able to filter your results even further. For example, if you want to display just Local calls in the grid, place your cursor over LCL, and the font will become bold and highlighted.

Click the call type, and call record data for just that user and call type will display. To return to the ***User*** screen, click on the user name listed above the grid.

SORTING THE RESULTS

You can sort the results by clicking on each column heading.

Go Back One Level: Click this button to move up one level and display the search results for that level in the organization tree.

Print: Click this button to send the report to a printer.

> **Note:** Only the portion of the report currently displayed on your screen is printed. The output does not include any information about the previous or explored levels.

Send as E-mail: Click this button if you want to send the report as e-mail. When you do, a dialog box appears where you can specify the recipient, subject, and message for the e-mailed report.

> **Note:** The report e-mailed is only the portion of the report currently displayed on your screen and does not include any information about the previous or explored levels.

Return to Selection Criteria: Click this button to return to the selection criteria screen. There, you can change the existing settings, or create a new search.

: Click this icon to examine call details for individual calls, and a call detail screen for that call will appear.

Call Date and Time: This column displays the date and time the user placed a call. Click on the column heading to sort the records by call date and time. When you place your cursor over a date and time, the font will become bold and highlighted.

Click on a date and time to display call record data for just that date. To return to the User screen, click on the user name above.

Duration: This column displays the duration of calls for the user. Click on the column heading to sort the records by duration.

Cost: This column displays the costs of calls for the user. Click on the column heading to sort the records by cost.

Type: This column displays the call types the user placed that are either:

- The only call types the system tracks (if no call types were defined in the search criteria)
- The call types that were defined in your search criteria

Click on the column heading to sort the records by call type. When you place your cursor over one of the call types, the font will become bold and highlighted.

Click on a call type to display call record data for just that call type. To return to the User screen, click on the user name above.

Phone Number: This column displays the phone numbers the user called. Click on the column heading to sort the records by call type. When you place your cursor over one of the phone numbers, the font will become bold and highlighted.

Click on a phone number to display call record data for just that phone number. To return to the User screen, click on the user name above.

Phone Number Lookup: When you click on this icon, a screen outside of Infortel Select will open (AnyWho: Internet Directory Assistance). There, you can perform a search on the selected phone number to see who was called.

> **Note:** This feature is only available for U.S. phone numbers.

Location: This column displays the locations of the calls the user placed. Click on the column heading to sort the records by location. When you place your cursor over one of the locations, the font will become bold and highlighted.

Click on a location to display call record data for just that location. To return to the User screen, click on the user name above.

Ext: This column displays the extensions from where the user placed a call. Click on the column heading to sort the records by extension. When you place your cursor over one of the extensions, the font will become bold and highlighted.

Click on a location to display call record data for just that extension. To return to the User screen, click on the user name above.

Auth: This column will display an asterisk if an authorization code was used by the user.

Account: This column displays the client's names for the account code (Matter codes only appear if you have purchased the PSP option. Click on the column heading to sort the records by client name.

> **Note:** Account and Matter are the default names the system uses for the primary and secondary account codes. When you install the system, you specify your own names for these codes, such as Customer/Project, Client/Case, or others. The names you select appear in place of "Account" and "Matter."

SENDING A CALL EXPLORATION REPORT AS E-MAIL

Click the **Send as E-mail** button if you want to send the report as e-mail. When you do, a dialog box appears where you can specify the recipient, subject, and message for the report. After entering an address (required), and an optional subject and message, click the **OK** button to send the report.

> **Note:** The report e-mailed is only the portion of the report currently displayed on your screen and does not include any information about the previous or explored levels.

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