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 list boxes. These are for:

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

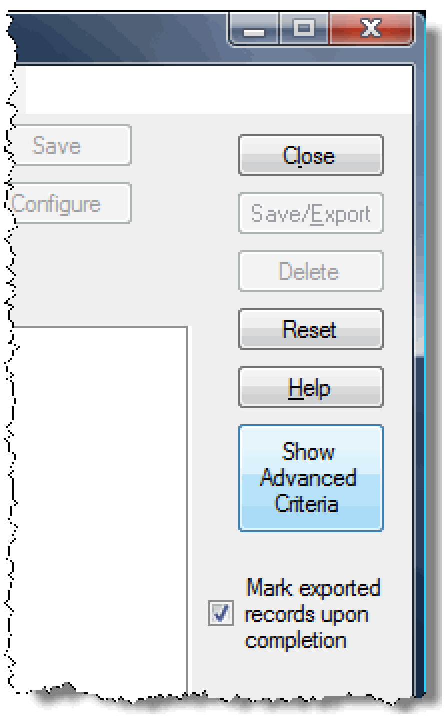
Configuration Name: This list box contains saved data export configurations that you can use. To create a new configuration, type a configuration name in the text box, complete the other information on the screen, select an export type (and configure it by clicking the Configure button), and save the configuration.

Export Type: This list box contains the types of data formats that the system can use to export. `

Save: Click this button to save an export configuration with the name you type in the Configuration Name list box.

Configure: Click this button to open a dialog box based on the Export Type you select from the adjacent list box. The dialog box enables you to specify configuration parameters.

On the right-hand side of this screen, you will find a set of buttons and a check box.



Close: Click this button to close this dialog box without saving any changes you made.

Save/Export: Click this button to immediately export edited call record data to the file you specified.

Delete: Click this button to delete the selected saved export configuration file from the system.

Reset: Click this button to change all the settings on the screen back to their original (default) settings.

Help: Click this button to open the on-line Help file.

Show Advanced Criteria: Click this button to change the screen from the two-tabbed ***Basic Criteria*** screen to the five-tabbed ***Advanced Criteria*** screen.

> **Note:** This button appears when you are working with the ***Basic Criteria*** screen.

Show Basic Criteria: Click this button to change the screen from the five-tabbed ***Advanced Criteria*** screen to the two-tabbed ***Basic Criteria*** screen.

> **Note:** This button appears when you are working with the ***Advanced Criteria*** screen.

Mark Exported Records Upon Completion: Click this check box to specify that exported records are marked (or "flagged") to show they have already been exported. This can help prevent exporting the same record twice. If you check this box, edited call record data you export will be marked as "already exported."

ACCESSING THE TIME AND BILLING EXPORT FUNCTION

To access the ***Time and Billing Export*** dialog box, follow these steps:

- At the ***Control Center***, point to **Administration → Export Processed Data**

Note: You must specify a Configuration Name in the **Configuration Name** box and a format type in the **Export Type** list box.

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 and Time*** 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 and Time Tab

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

SPECIFYING THE DATE RANGE

- Click the **All Available Dates** option button to specify call records for all dates that have call records will be included in the export.
- Click the **Current Month** option button to specify call records for the current month that have call records will be included in the export.
- Click the **Last Month** option button to specify call records for the previous month that have call records will be included in the export.
- If you select **Last Number of Days**, your export will include call records for the specified previous number of days. When selected, the adjoining text box becomes active.
- Click the **Specific Date Range** option button to specify exact dates in the date range.

  When selected, **Start** and **End** text boxes appear. Click the calendar buttons to specify the start and end dates in the range, or enter the dates in the **Start** and **End** text boxes.

SPECIFYING THE TIME RANGE

In the **Time Range** section, you can specify call records for calls made for an entire day, or during certain hours of a day. The times selected are during the day(s) chosen in the **Date Range** section. Time settings pertain to data selected for inclusion in the export, not when the export will run.

- Click the **Entire Day** option button to select edited call record data for the entire 24-hour period for each of the dates you already selected in the **Date Range** section.

  For example, if your date range is Monday the 24th through Friday the 28th and you select the **Entire Day** option, your export will include call records for calls made from just after midnight Sunday the 23rd through midnight Friday the 28th.
- Click the **Specify Time Range** option button to select edited call record data with unique starting and ending times for the first and last dates you selected in the Date Range section. When selected, **Start Time on First Day** and **End Time on Last Day** text boxes become active.

  The date you enter in the **Start Time on First Day** text box specifies selecting edited call data records for calls made after this time on the previously selected starting date.

  The date you enter in the **End Time on Last Day** text box specifies selecting edited call data records for calls made up until this time on the previously selected ending date.

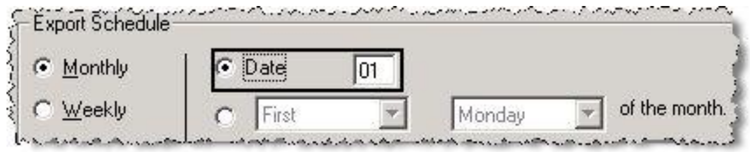
  For example, your date range is Monday the 24th through Friday the 28th and you select the Other option with a start time of 8:00 AM and an end time of 5:00 PM. Your export will include call records for calls made from 8:00 AM Monday through 5:00 PM Friday. So, a call at 7:00 AM Monday or 9:00 PM Friday will not be included in your export. However, a call made at 10:00 PM Tuesday or 6:00 AM Thursday will be included in your export.

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 **Save/Export** to begin exporting records to your time and billing system.

ADVANCED SEARCH CRITERIA SCREEN

The ***Advanced Search Criteria*** screen appears when you click the **Show 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.

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SPECIFYING THE DATE RANGE

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- Click the **Last Month** option button to specify call records for the previous month that have call records will be included in the export.
- If you select **Last Number of Days**, your export will include call records for the specified previous number of days. When selected, the adjoining text box becomes active.
- Click the **Specific Date Range** option button to specify exact dates in the date range.

  When selected, **Start** and **End** text boxes appear. Click the calendar buttons to specify the start and end dates in the range, or enter the dates in the **Start** and **End** text boxes.

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: When you click this check box, a list box will display containing dates of previous exports. This list box fills with dates as you perform exports.

SPECIFYING THE TIME RANGE

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- Click the **Entire Day** option button to select edited call record data for the entire 24-hour period for each of the dates you already selected in the **Date Range** section.

  For example, if your date range is Monday the 24th through Friday the 28th and you select the **Entire Day** option, your export will include call records for calls made from just after midnight Sunday the 23rd through midnight Friday the 28th.
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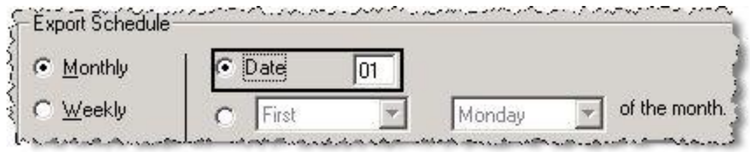

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Select Day Option Button: Select this option if you want the export to occur on a specific first, second, third, or fourth day of the week each month.

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.

> **Note:** You cannot specify a Time of Export if you selected **Periodically**.

After all search criteria have been set, click **Save/Export** to begin the export.

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.

CHECK BOXES

Include Calls With Active/Valid Account/Matter Codes: Click this check box to specify that call records with active or valid account and matter codes will be exported.

Include Calls With Inactive/Valid Account/Matter Codes: Click this check box to specify that call records with inactive or invalid account and matter codes will be exported.

Include Calls With No Account/Matter Codes: Click this check box to specify that call records without account and matter codes will be exported.

Include Only Calls With Billable Account Codes: Click this check box to specify that call records with billable account codes will be included in your export.

Include Only Calls With Billable Matter Codes: Click this check box to specify that call records with billable matter codes will be included in your export.

Include Only Matched Tandem Calls: Click this check box to specify that regular calls not subject to matching and the combined calls created by the matching will be included in your export.

> **Note:** This text box appears only if the Matching Arena option was installed on the product key.

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.

TRUNK INFORMATION

From each list box noted below, select the operator to be used in the search. The operators include:

- **Includes -** Specifies to search for just the value or values entered in the text box.
- **>= -** This filter sets the low point and searches for all values equal to or greater than the value entered in the text box.
- **<= -** This filter sets the high point and searches for all values equal to or less than the value entered in the text box.
- **Doesn’t Include -** Specifies to search for all value or values except those entered in the text box for the field name selected.
- **Like -** This filter is used for alphanumeric queries and acts as a wildcard to search for all values beginning with the search string entered in the text box.

Note: The Like operator only appears for the Facility and Secondary Facility text boxes.

Trunk Group: In this section specify search criteria that will include a trunk group in the export. Click the adjoining list box to use an operator in your search.

Secondary Trunk Group: In this section specify search criteria that will include a secondary trunk group in the export. Click the adjoining list box to use an operator in your search.

Facility: In this section specify search criteria that will include a trunk facility in the export. Click the adjoining list box to use an operator in your search.

Secondary Facility: In this section specify search criteria that will include a secondary trunk facility in the export. Click the adjoining list box to use an operator in your search.

...(Lookup Screen): Click this button to open a ***Look Up*** screen that lets you search for facilities and secondary facilities to be added to search criteria for the export.

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.

LIMIT CALL RECORD EXPORTING BY OWNER

In this section, you can search for an individual or individuals and export their call records.

Look Up Owner: Click this button to open a look up screen where you can search for individuals to be added to the search criteria for the export.

Remove: Select a name and click this button to remove it from the list. To remove more than one name at a time, hold down the CTRL key as you select each name.

Clear All: Click this button to remove all names from the list.

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.

Long Distance: Specifies whether to include long distance calls in your selection of edited call records to export. If you check this box, long distance calls will be included in your export.

International: Specifies whether to include international calls in your selection of edited call records to export. If you check this box, international calls will be included in your export.

Local: Specifies whether to include local calls in your selection of edited call records to export. If you check this box, local calls will be included in your export.

Inbound: Specifies whether to include inbound calls in your selection of edited call records to export. If you check this box, inbound calls will be included in your export.

Info/Assist: Specifies whether to include information or operator assisted calls in your selection of edited call records to export. If you check this box, information or operator assisted calls will be included in your export.

Internal: Specifies whether to include calls made internally in your selection of edited call records to export. If you check this box, internally made calls will be included in your export.

User Defined 1: Specifies whether to include calls that conform to a custom call type in the selection of edited call records to export. If you check this box, this type of call will be included in your export.

User Defined 2: Specifies whether to include calls that conform to a custom call type in the selection of edited call records to export. If you check this box, this type of call will be included in your export.

User Defined 3: Specifies whether to include calls that conform to a custom call type in the selection of edited call records to export. If you check this box, this type of call will be included in your export.

User Defined 4: Specifies whether to include calls that conform to a custom call type in the selection of edited call records to export. If you check this box, this type of call will be included in your export.

The Cost Codes Tab

At the ***Cost Codes*** tab, you can specify a cost code for call cost and/or billable time records to be exported.

Export: This list box contains the following options:

- Call Costs (default)
- Billable Time (appears only when Enhanced PSP is activated)
- Call Costs and Billable Time (appears only when Enhanced PSP is activated)

CALL COST RECORDS SECTION

> **Note:** The **Call Cost Records** section is active only when Call Costs or Call Costs and Billable Time are selected from the **Cost Codes** list box.

Cost Code: In this text box, enter the cost code for call cost records you want included in the export. This is an alpha-numeric field with a maximum of 25 characters.

BILLABLE TIME RECORDS SECTION

> **Note:** The Billable Time Records section is active only when Billable Time or Call Costs and Billable Time are selected from the **Cost Codes** list box.

Cost Code: In this text box, enter the cost code for billable time records you want included in the export. This is an alpha-numeric field with a maximum of 25 characters.

Export Actual Time: Click this option button if you want the actual duration of calls exported to the duration field.

Export Billable Time: Click this option button if you want the billable time for calls exported to the duration field.

> **Note:** Billable time is the time of a call used for calculating the billable amount rounded up to the nearest X minutes.

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