Quick Reference Guide: Reports

The Infortel report designer lets you create an extensive number of different reports that you can print, export, or e-mail to those you wish to preview them. You can create user-defined summary reports, graphical reports, and save reports in PDF, HTML, and RTF formats. Reports are supported only for these formats.

> **Notes:**
>
> If you generate a PDF file and it contains over 2000 pages of text, the output will be broken up into smaller files. For example, if a report is 2200 pages, there will be one file containing 2000 pages, and one file containing 200 pages.
>
> If you generate a graphical report PDF file and it is over 500 pages, the output will be broken up into smaller files.
>
> Reports have been optimized for laser printer use. The print margins for reports in Landscape format are ½" right and left. Print margins for reports cannot be adjusted. Printers that require larger page margins, such as some Ink Jet printers, may not print the full report.

CREATING A REPORT

There are two main components to every report:

- Report Templates (system defined)/Summary Styles (user defined) – The way the data is formatted
- Named Report Settings – The search criteria

To create a report, follow these steps:

1. At the ***Control Center***, click **Reports → Call Accounting Reports**.
2. At the ***Select Report*** screen that appears, select a report template. This can be a system template, a summary style, or a saved report.
3. Next, a ***Reports Parameters*** screen will appear where you can enter your search criteria for data to be included in the report (date, time, filters, saved report options, output, etc.)
4. Click the **Run Now** button to send the report to the output destination specified at the ***Advanced*** tab. If you click **Preview**, the report will display on your screen. If neither of these were chosen, the report will appear on your screen.

Report Templates/Summary Styles

A custom made template is referred to as a "summary style," and consists of the following:

- The summary style components:
  - Name of the summary style
  - The type of data to be included in the report
  - The report title
  - The summary fields to be included in the report
- The column layout components:
  - Where the columns are placed
  - Which columns are included in the report
  - The names of the column headers for the selected fields

> **Note:** Only those with Administrator level privileges may define summary styles.

CREATING SUMMARY STYLES

At the ***Summary Styles*** dialog box you can create, edit, or delete summary styles.

To access the ***Summary Styles*** dialog box, follow these steps:

1. At the **Control Center**, select the **Reports** menu.
2. From the **Reports** menu, select the **Summary Styles** menu item.
3. The ***Summary Styles*** dialog box will appear.
4. At the ***Summary Styles*** dialog box perform the following:
   - If you are creating a new summary style, click the **Create** button, and the ***Summary Styles Information*** screen will appear.
   - If you are editing an existing summary style, select the summary style name, and click the **Edit** button.
   - If you are deleting a summary style, select the summary style name, and click the **Delete** button.

Use the ***Summary Styles Information*** screen to define the type of data to include in the report, give the report a title, specify which summary fields to include in the report, and assign a name to the summary style and column layout configuration.

1. In the **Summary Style Name** text box, type the name of the new summary style.
2. In the **Reporting Type** list box, select the type of data that will form the basis of the report.
3. In the **Description** text box, type the description of the new summary style.
4. Select an option button to specify if the report will be generated in a portrait or landscape format.

> **Note:** If you choose portrait, you can print up to seven columns. If you choose landscape, you can print up to nine columns.

5. Click the **Clear Fields** button to clear all entries from this screen.
6. Type in or select from the **Column Layout** list the name of the new column layout. This name will appear in the **Name** text box in the ***Define Column Layouts*** dialog box.

DEFINING COLUMN LAYOUTS

At the ***Define Column Layouts*** dialog box, you can define the placement of columns, determine which columns are included in the report, and provide a column header for the selected fields.

Column Layout Design Name

In the **Name** text box, type in the name of the new column layout. This name will appear in the **Column Layout** list box in the ***Summary Style Information*** dialog box.

Summary Fields

To determine the placement of each field in the report, follow these steps:

1. After selecting a field from the **Summary Fields** list box, click on a column number, and click the **Add** button.
   - These steps will place the selected fields into the text boxes at the bottom of the screen, and also determine their placement in the report.
2. In the **Column Header** text box, you may keep the name displayed, or enter another one.
3. From the **Summary Type** list box, indicate if the columns display as an average or a sum.
4. Repeat for each column to be in the report.
5. Select **Include Other Charges** if you wish to include a charges column in a report.

> **Note:** This check box only appears if the User or Organizational reporting types are chosen at the ***Summary Style Information*** dialog box.

EDITING SUMMARY STYLES

To edit a previously created summary style, follow these steps:

1. At the ***Control Center***, select the **Reports** menu.
2. From the **Reports** menu, select the **Summary Styles** menu item.
3. The ***Summary Styles*** dialog box will appear.
4. Select the name of the summary style to be edited, and click the **Edit** button.
5. The ***Summary Style Information*** dialog box for the selected summary style will appear.
6. Make the desired changes and click the **OK** button to save them.

DELETING SUMMARY STYLES

To delete a summary style, follow these steps:

1. At the **Control Center**, select the **Reports** menu.
2. From the **Reports** menu, select the **Summary Styles** menu item.
3. The ***Summary Styles*** dialog box will appear.
4. Select the name of the summary style to be deleted, and click the **Delete** button.

Named Report Settings

The second component of a report is defined by you, and contains all search criteria, as well as scheduling, and routing information. This data is saved to a file and is referred to as a "named report setting." You must create a named report setting for both report templates and summary styles.

> **Note:** It is very important to save the named report setting. If it is not saved, all report specifications will be lost after the report is run.

All report parameters comprising Named Report Settings are set at the ***Basic*** and ***Advanced*** tabs on the ***Reports Parameters*** screen.

> **Note:** Reports have been optimized for laser printer use. The print margins for reports in Landscape format are ½" right and left. Print margins for reports cannot be adjusted. Printers that require larger page margins, such as some Ink Jet printers, may not print the full report.

To access the ***Report Parameters*** screen, follow these steps:

1. At the ***Control Center***, point to the **Reports** menu and select **Call Accounting Reports**.
2. The ***Select Reports*** screen will appear. There, select the desired category and open the folder to the desired sub-category.
3. Select the template or summary style in the sub-category, right click and select **Create Named Setting** from the pop-up menu.
4. The ***Save Report Parameters*** dialog box will appear. Enter a name for this report (This name will appear in the tree in the ***Select Reports*** screen.), and an optional description.
5. Click **Save** to proceed, and you will return to the ***Select Reports*** screen. Here, the new report name will be listed.
6. Select the new report and then click the **Continue** button.

CREATING NAMED REPORT SETTINGS – BASIC TAB

The ***Basic*** tab is the main screen for defining search parameters and scheduling specifications for your graphical and text reports.

Date Range

Date settings pertain to data selected for inclusion in the report, not when the report will run. Also, setting a date is required before a time range is specified. If you wish to exclude call record data from Saturdays and Sundays in the report, select the **Exclude Weekends** check box.

- Setting a Specific Date – A specific date specifies that the report will contain call records that include a specific date, fall within a range of dates, or that occur before or after a specified date.
- Setting a Relative Date – A relative date specifies that the report will contain call records that occurred within a certain time frame. This time frame will shift depending on the date the report is generated.

Time Range

All of the time text boxes allow for either 24-hour (military) time or non-military time.

Time settings pertain to data selected for inclusion in the report, not when the report will run. Once a date range has been specified, the **Time Range** section becomes active. This section contains a list box with options for querying by time.

- Continuous – This will query for call record data during the entire 24-hour period for the number of days specified in the Date Range section.
- Interval – This option will query for call record data during the specified period of time for the days specified in the Date Range section. **Start** and **End Time** text boxes will appear.
- Other Range – This option will query for call record data starting from the time specified on the first date in the date range to the ending time specified on the last date in the date range. **Start time** on first day and **End time** on last day text boxes will appear.
- After Hours – This option will query not only to include calls made during the specified period of time for the days specified in the Date Range section, but to include calls made after hours.

> **Note:** After Hours is only available when the **Between** option is selected when you are setting a specific date, or if you are setting a relative date range.

Filter Grid

This grid is used to include only those records that match specific search criteria in the report.

The left column of the grid displays the field names available for the type of report chosen from the ***Select Reports*** screen.

The middle column displays the operator chosen to filter search criteria for each field name.

The right column displays the search criteria specified in its search dialog box for the field name.

Operator	Explanation
Includes	Specifies to search for just the value or values entered in the text box for the field name selected.
Doesn't Include	Specifies to search for all value or values except those entered in the text box for the field name selected.
=>	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.
Like	This filter is used for alphanumeric queries and acts as a wildcard to search for all values beginning with the search string entered.

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. Depending on the field name chosen, this dialog box and the controls used to request information will vary. 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

This type of dialog box uses a table containing values appropriate to the selected field name. After clicking a **Look Up** button, a ***Select Field*** screen appears where you can search for a field for your report. Please see below for more information on the ***Select Field*** screen.

Generic Select Field Name Dialog Box Without a Look Up Button

This type of dialog box is similar to the dialog box described above, but does not contain a **Look Up** button.

Select a Type of Code Dialog Box

This type of 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

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 type)
- A list of option buttons of which you can select only one (for example, operator-assisted calls)

> **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**.

Select Field Screen

Field and Description List Box

At the left-hand side of the screen is a list box containing each value in the field you are searching on. For example, if you are searching on account codes, each code will be listed in this box.

Selection List Box

After clicking the **Add** button, your selections will appear in the list on the right-hand side of the screen. Click the **OK** button to add the selections to your search criteria.

Searching for Values

At the top of the screen is a **Find** text box and a button that lets you narrow your search for values.

Creating Named Report Settings – Advanced Tab

The ***Advanced*** tab contains items that are either report specific (i.e., the item is available based on the summary style or report template selected at the Select Reports screen), or less frequently used.

Report Layout

Summarize on This Level and Above: This list box contains a list of grouping levels. When you select a level, the report will summarize on that level and all levels above. The levels you choose collapse into a single summation line. While this is generally available with Summary reports, this list box is also used in some Detail reports to control grouping.

Page Break: This list box also contains a list of grouping levels. When you select a level, you specify on which grouping level to force a page break.

Sort Fields: This list box displays all of the fields in the report that can be sorted. Select the field on which you want to sort the report, and the direction you want it sorted.

> **Note:** Sorting is available only with Detail reports.

Add Headers and Comments: Click this button to open a ***Report Headers and Comments*** dialog box appears. See below for more information on the ***Report Headers and Comments*** dialog box.

Report Headers and Comments

After clicking the **Add Report Headers and Comments** button a ***Report Headers and Comments*** dialog box appears.

> **Note:** The information entered at this dialog box will override any other title, subtitle, or comment entered when defining a Summary Style.

Enter the title, optional subtitle and optional comments in their text boxes.

Destination Buttons

The four destination buttons give you the ability to route your report to a printer, send it via e-mail to a recipient or, using e-mail merge (available only with the Organization Reports category) a group of recipients. Finally, you can export the report to a file in a variety of formats.

Printers: The Printers option gives you the ability to send the report to the specified printer or printers. In order to select printers, they must be installed and recognized by your operating system.

E-mail: When you click this button, an ***E-mail Messaging*** dialog box appears. Here you can specify the recipient(s) of the report, as well as create a message or save a previously created message that will accompany the report.

E-mail Merge: E-mail merge is used to e-mail a report only to those persons who need to see that type of report. Rather than specifying each individual recipient, you use the structure defined in the Directory database to create a list of recipients for a report. For example, you can have each person (who has an e-mail address) in a department that is in a division level named Accounts Payable receive a report.

> **Note:** The **E-mail Merge** button is available only when creating an Organizational report.

Export: When you click this button, the ***Configure File Export*** dialog box appears. This dialog box lets you export the report in a different format to a specified file path. The available formats are:

- PDF (default)
- RTF
- HTML

REPORT OPTIONS

In the **Report Options** section of the ***Advanced*** tab, the options that appear will not be the same from one report type to another. Only those options that apply to the selected report will appear in this section.

MULTIPLE LANGUAGES

Call Accounting Reports can now support multiple languages. This is an option that can be turned on or off. The features described below only appear if the Multiple Languages option is turned on.

When creating a report, if a language is selected from the **Override Language** list box on the ***Advanced*** tab, the report will be generated and delivered in that language. This will occur regardless of the language specified in a recipient’s record in the Directory database.

If the “Default” setting is selected from the **Override Language** list box, *and* a report will be delivered using Email or Email Merge, Call Accounting Reports will translate the report according to the language selected from the **Language** list box on the ***General/Objects*** tab in the Directory database for that person.

If Call Accounting Reports detects that a recipient has the “Default” setting selected in the Directory database (Using a recipient's email address, Call Accounting Reports “cross references” the Directory database to determine the specified language.), it will send the report in the language specified in the next highest organizational level for that recipient. If the language is anything other than the “Default” setting, the report will be sent in the specified language.

If Call Accounting Reports detects that the “Default” setting is selected at the next highest organizational level in the Directory database, it will send the report in the language specified in the at that level. If no language is specified at any organizational level, the report will be sent in English.

Note: At this time, the only supported language is Dutch. Other languages will be supported in future releases.

EDITING A NAMED REPORT SETTING

You can always edit a named report setting by double clicking on its symbol in the ***Select Reports*** screen, making the changes at the ***Report Parameters*** screen and clicking the **Save** button.

DELETING A NAMED REPORT SETTING

To delete a named report setting, select it in the ***Select Reports*** screen, right click and select **Delete Named Settings** from the pop-up menu.

SCHEDULING A REPORT

The report scheduling process starts at the ***Basic*** tab of the ***Report Parameters*** screen. Clicking the **Schedule this Report** button first opens a ***Schedule for "report name"*** dialog box. This dialog box displays the names of previously created report schedules. When you click the **New** or **Edit** button at the ***Schedule for "report name"*** dialog box, a ***Scheduling*** screen opens where you name and create or edit the report schedule.

At the ***Scheduling*** screen, you can specify when a report is generated, the computer that will run the report, and, depending on how you want the report routed, when it will:

- Reach its destination via e-mail
- Be printed
- Be exported as a file

These routing options are specified at the ***Advanced*** tab on the ***Report Parameters*** screen. After defining the schedule, you can save the schedule parameters to its own file. These parameters are then added to Auto Reports.

Creating a New Schedule

You can create two types of report generation schedules:

- A Specific Date and Time Report
- A Regularly Scheduled Report

Note: To have a report generate automatically on schedule, you **must** click the **Active?** check box.

SCHEDULING A SPECIFIC DATE AND TIME REPORT

Note: When this option is selected, the report will run **once** on the date and time specified. After the report has been generated, the schedule will not create another report.

To schedule a report to run at a specific date and time, follow these steps:

1. Select the **Specific Date and Time** option button.
2. Select or type in the name of the computer that will run the report in the **Computer to Run Report** combo box.
3. To have the report generate automatically, be sure the **Active?** check box is selected.
4. In the **Run This Report on** text box, you can either enter the date, or use the pop-up calendar. On the calendar, click the date to specify the date to run the report. Click **OK**, and the date the report will be generated will appear in the text box.
5. In the adjoining text box, enter the time you want the report to be generated. You may enter the time as military time (24-hour) or non-military time. When entering a non-military time, you must be careful to specify AM or PM or the time will be converted to military time. For example, if you enter 8:00 without AM or PM, that time will be assumed to be 8:00 AM.
6. To save this schedule click the **Save** button, and you will return to the ***Scheduling for "report name"*** dialog box. There, you will see the new schedule listed.

SCHEDULING A REGULARLY SCHEDULED REPORT

Note: Whichever scheduling option is chosen, you **must** specify a Start Report date and time.

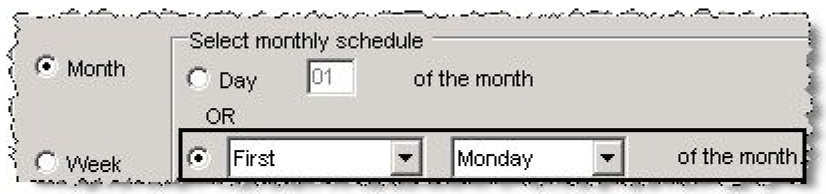
- To save this schedule click the **Save** button, and you will return to the ***Scheduling for "report name"*** dialog box. There, you will see the new schedule listed.

Scheduling by Month: Selecting the **Monthly** option button gives you two choices. One method lets you specify the exact date of the month the report will be generated:

Date Option Button: Select this option if you want the report to generate on a specific date of the month.

Date Text Box: In this text box, enter the day of the month report will be generated.

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



Select Day Option Button: Select this option if you want the report to generate 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 report to be generated. You must also choose on which day of the week you want the report to be generate.

Day of the Month: Lists the choices of the day of the week that you want the report to be generate. You must also choose on which week of the month you want the report to be generate.

Scheduling by Week: Select the **Weekly** option button to generate a report on a specified day of the week.

Scheduling by Day: Select the **Day** option button to generate a report on a specified day or days of the week.

Scheduling by Hours: Select the **Hours** option button to have a report run automatically every number of specified hours.

Editing a Schedule

It is possible to change any of the parameters of a previously created schedule. To do this, follow these steps:

1. At the ***Select Reports*** screen, double click the desired Report Setting, and the ***Reports Parameters*** screen will appear.
2. Click the **Schedule this Report** button, and the ***Scheduling For*** dialog box will appear.
3. Select the desired schedule name, and click the **Edit** button.
4. At the ***Scheduling*** dialog box, make the necessary changes and click the **Save** button.
5. Click **Close** at the ***Scheduling For*** dialog box.

Deleting a Schedule

To delete a previously created schedule, follow these steps:

1. At the ***Select Reports*** screen, double click the desired Report Setting, and the ***Reports Parameters*** screen will appear.
2. Click the **Schedule this Report** button, and the ***Scheduling For*** dialog box will appear.
3. Select the desired schedule name, and click the **Delete** button.
4. A dialog box will ask you to confirm the delete, and click **Yes**.
5. Click **Close** at the ***Scheduling For*** screen.

SAVING A REPORT

When you click the **Save Settings** button at the ***Report Parameters*** screen, a ***Save Report Parameters*** dialog box will display.

Administrators

- Can create either personal or shared settings
- Shared settings are available to anyone with proper access privileges

Non-administrators

- Can only create personal settings
- The **Share this report to all users** check box is not available
- The **Add to Report Batch** list box is not available

VIEWING REPORTS

If you wish to preview a report as you are composing it, click the **Preview** button at the ***Report Parameter*** screen. The report will display on your screen.

At the top of the screen is the **File** menu. The **File** menu contains items that let you:

- Print the report
- Select a printer to print the report
- Export the report to a file
- Close the ***Print Preview*** screen

In the upper left corner of this screen is a panel of buttons that let you page through the report in either direction, or to advance to the last page or back to the first page, depending upon where in the body of the report you have stopped.

Between the directional paging buttons is a page number display. Here, the current page number and total number of pages in the report are displayed. Other controls let you print the report to your default printer and increase the magnification of the report.

If you wish to view a previously created report, access the ***Select Reports*** screen, open the appropriate category folder, and select the Named Report Setting for the report. When the ***Report Parameter*** screen appears, click the **Preview** button.

GRAPHICAL REPORTS

Graphical reports let you view data in a graphical format rather than the text format of tabular reports. There are three types of graphical reports: Date Dependent, Overview, and Contribution.

Graphical reports are available only for Organizational and Trunk Summary Reports.

Date Dependent Graphical Reports

These reports display usage information over a period of time specified in the Date Range section of the Report Parameters screen. Organizational Call Type Summary, Trunk Utilization, and Call Traffic (Trunk) reports are all Date Dependent Graphical Reports.

Overview Graphical Reports

These reports are based on Organization, and give an overview of activity based on averages. These averages consist of time divided by the day of the week.

Contribution Graphical Reports

These reports show what percentage each call type (inbound, long distance, local, and all other call types) was for a given interval.

Follow these steps to begin defining a graphical report:

1. At the ***Control Center***, point to the **Reports** menu and select **Call Accounting Reports**.
2. A ***Select Reports*** screen will appear.
3. There, double-click on the type of graphical report you want to generate (Trunk Summary or Organizational Summary).
4. Double-click on the  icon and the ***Report Parameters*** screen will appear.

The steps for defining the parameters and generating a graphical report are the same as for generating a text report; the only difference being selecting a unit of time from the **Graph Measured by** list box found in the ***Basic*** tab of the ***Report Parameters*** screen.

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