Quick Reference Guide: Reports on Demand

Reports on Demand is a quick and easy way for users to generate reports over the Internet, and is accessed from the **Reports** menu at the Infortel Select ***Control Center***.

SELECTING A REPORT

To access Reports on Demand, select it from the **Reports** menu at the Infortel Select ***Control Center***. Once selected, the ***Report Tree*** screen will appear.

> **Note:** You must select a system-defined or saved report template to proceed with the report process.

To use this screen, click the plus sign (+) next to each symbol to reveal the types of reports or templates contained in that symbol.

> **Note:** The saved reports that are displayed are those that belong to the current user, or are shared reports. Shared reports are available to anybody that has the proper security level to access reports.

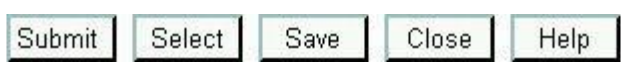
OK: After selecting the desired report, click this button and you will be taken to the report screen containing the tabs relevant to the report selected.

Cancel: Closes the ***Report Tree*** screen.

Delete: Deletes a report created by the current user.

SETTING SEARCH CRITERIA

After selecting a report from the Report Tree, a tabbed screen referred to as the ***Reports*** screen will appear. The ***Reports*** screen contains several tabs that allow you to create reports as specific or as general as needed. **It is important to remember** that the specifications entered at each tabbed screen are cumulative rather than exclusive. This means that each criterion that is specified at each tab becomes part of a single search string. At the top of this screen, you will find a set of buttons.



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

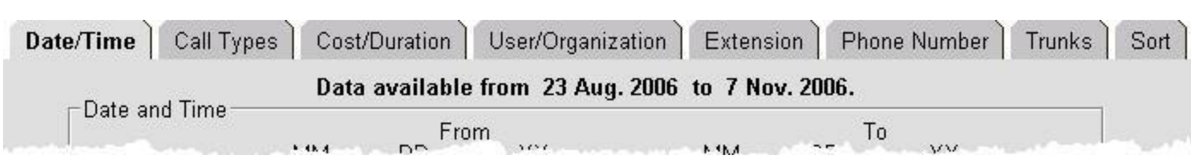
Select: Click this button to display the Report Tree screen. There, you can choose from the list of available reports.

Save: Click this button to save the current set of search criteria.

Close: Click this button to exit from Reports on Demand and return to the ***Control Center***.

Help: Opens the on-line help system.

Below the buttons is a set of tabs:



Date/Time Tab

At the ***Date/Time*** tab, specify the date and time of data selected for inclusion in the report, not when the report will run. For example, if you enter 08 31 2002 in the From section and 09 19 2002 in the To section, call records for that time period will be included in the report.

From Date: In these text boxes, enter the beginning date in the range of call records that are to be included in the report. You may also click the calendar button to open the interactive calendar.

To Date: In these text boxes, enter the ending date in the range of call records that are to be included in the report. You may also click the calendar button to open the interactive calendar.

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.

Data Sources: Select the data source(s) you want to include in the report from the list. To add a data source to the list, click the **Add Data Source** button, and a ***Choose Data Sources*** dialog box will appear where you can search for and select data sources to be included in the report.

> **Note:** If none of the data sources are selected, then call record data from all data sources will be included in the report.

Add Data Source: Click this button to open a ***Choose Data Sources*** dialog box where you can search for and select data sources to be included in the report.

Remove Data Source: After selecting a data source in the **Data Sources** list box, click this button to remove it from the list of data sources to be included in the report. You may use the *CTRL* key to select more than one data source, or the *SHIFT* key to select a range of data sources.

Clear: Click this button to remove all of the data sources from the **Data Sources** list box.

Show report parameters on first page: If you select this option, a cover page containing all the criteria used to generate the report will be included in the report.

Use Local Currency: If your system uses multiple currencies, click this check box to display only the local currency in the report. If you do not click this check box, the common currency will appear in the report.

Call Types Tab

The ***Call Types*** tab lets you select the types of calls you want to include in the report. Since all call types are chosen by default, you can exclude a call type from your report criteria by de-selecting it.

The call types defined during the installation process will display on this screen.

CALL TYPES

Since all the check boxes are selected by default, de-select the check box next to the call type you want excluded from your report. Of course, you may keep all call types selected.

Note: At least one call type must remain selected.

ACCOUNT CODES

Searching for a specific code or codes –

1. Select the **Query by specific code** option button.
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.

Tip: You may also use wildcards to search for account codes. Please see below.

1. Select the **Or Query by** option button.
2. From the list of option buttons, select the one that is necessary for your search.

Note: The **Calls without valid account codes** option button also includes calls with no account codes.

Cost/Duration Tab

At the ***Cost/Duration*** tab, you are able to specify a minimum and/or maximum billed cost for calls, a minimum and/or maximum duration of calls made, or all costs and durations.

BILLED COST

Minimum Billed Cost: Enter the minimum billed cost for a call in order to include that call record in your report. Type the dollar and cents, including the decimal, in the text box. If you enter just a minimum, calls must cost at least as much as that minimum and there is no limit to the maximum cost.

Maximum Billed Cost: Enter the maximum billed cost for a call in order to include that call record in your report. Type the dollar and cents, including the decimal, in the text box. If you enter just a maximum, calls costing $0.00 and up to the specified maximum will be included in the report.

Note: If you enter a minimum billed cost **and** maximum billed cost, then calls costing between those two amounts will be included in your report.

All Costs: By default, this check box is selected if you do not want to restrict the search criteria for your report by a minimum and/or maximum billed cost. If you enter a minimum or maximum cost, this check box will automatically clear.

DURATION

Minimum Duration: Enter a minimum call duration in order to include that call record in your report. Enter the hours, minutes and seconds in the text boxes as HH:MM:SS. If you enter just a minimum, calls must last at least as much as that minimum and there is no limit to the maximum duration.

Maximum Duration: Enter a maximum call duration in order to include that call record in your report. Enter the hours, minutes and seconds in the text boxes as HH:MM:SS. If you enter just a maximum, calls lasting 00 00 00 and up to the specified maximum will be included in your report.

Note: If you enter a minimum duration **and** maximum duration, then calls lasting between those two times will be included in your report.

All Durations: By default, this check box is selected if you do not want to restrict the search criteria for your report by a minimum and/or maximum call duration. If you enter a minimum or maximum duration, this check box will automatically clear.

Extension Tab

The ***Extension*** tab displays for the following report types:

- Extension Detail
- Extension Summary
- Call Detail Record Search

Note: You must specify at least one extension for an extension report.

Extension: Enter the extensions you want to include in the report in this text box. To include multiple extensions in your report, use a semicolon to separate each extension and a hyphen to indicate a range of values. For example, 201; 350; 374-378.

Tip: You may also use wildcards to search for extensions. Please see the **Wildcard Usage** section below.

Phone Number Tab

At the ***Phone Number*** tab, you are able to specify which phone numbers you want to include in the report. The Phone Number tab only displays for the following report:

- Call Detail Record Search

Note: You must specify at least one phone number for a phone number report.

Dialed Digits: Enter the phone number or phone numbers you want to be included in your report in this text box. To include a multiple dialed digits in your report, use a semicolon to separate each set of dialed digits and a hyphen to indicate a range of values. For example, 15551212; 18005551234; 18005552345-18005552350.

Tip: You may also use wildcards to search for dialed digits. Please see the **Wildcard Usage** section below.

Sort Tab

The ***Sort*** tab lets you specify how and in which direction you want your report sorted. This tab displays only for the following detail reports:

- Extension Detail
- Trunk Detail
- Account Code Detail
- Call Detail Record Search
- Organizational Detail

Sort By: Select one field to specify how you want to sort the report. The options available will depend on the report selected from the Report Tree screen.

Sort Order: Select an option to specify in which direction you want to sort the report. The report will be sorted according to the field selected.

Trunks Tab

Depending on the type of report selected from the Report Tree, one of the two following ***Trunks*** tabs will be in use.

TRUNKS TAB - TRUNKS DETAIL REPORT

This version of the ***Trunks*** tab differs from the Trunks Summary report in that it does not include a list box that lets you choose the level that you want to summarize the report on. This type of report is available when you select either of the following from the ***Report Tree*** screen.

- Trunks Detail
- Call Detail Record Search

Facility: In this text box, select a facility or facilities that you want included in the report. The list of facilities displayed depends on the facilities that are within the data source(s) chosen at the Date/Time tab. When you choose a facility, the trunk groups within that facility will display in the Trunk Group text box. If you choose no facilities, then all facilities will be included in the report.

Trunk Group: In this text box, select a trunk group or groups that you want included in the report. Only the trunk groups that are part of the chosen facility or facilities will be displayed. If no trunk groups are selected, then all trunk groups that belong to the selected facility or facilities will be included in the report.

Trunk Member: Enter the trunk members you want to include in the report in this text box. To include multiple trunk members in your report, use a semicolon to separate each trunk member and a hyphen to indicate a range of values. For example, 201; 350; 374-378.

> **Tip:** You may also use wildcards to search for trunk members. Please see the **Wildcard Usage** section below.

Page Break: From this list box, select the level that will force a page break. The choices for forcing a page break are: Data Source, Facility, Trunk Group, and Trunk Member. You also have the option of not forcing a page break at all.

TRUNKS TAB - TRUNKS SUMMARY REPORT

This version of the ***Trunks*** tab differs from the Trunks Detail and Call Detail Record Search reports in that it includes a list box that lets you choose the level that you want to summarize the report on. This type of report is available when you select the following from the ***Report Tree*** screen.

Choose the Summarization Level: From this list box, select the level you want summarized in one line. For example, if you select Facility Name, then a summary of each facility's record would appear in a single line.

Page Break: From this list box, select the level that will force a page break. The choices for forcing a page break are: Data Source, Facility, Trunk Group, and Trunk Member. You also have the option of not forcing a page break at all.

Facility: In this text box, select a facility or facilities that you want included in the report. The list of facilities displayed depends on the facilities that are within the data source(s) chosen at the ***Date/Time*** tab. When you choose a facility, the trunk groups within that facility will display in the **Trunk Group** text box. If you choose no facilities, then all facilities will be included in the report.

Trunk Group: In this text box, select a trunk group or groups that you want included in the report. Only the trunk groups that are part of the chosen facility or facilities will be displayed. If no trunk groups are selected, then all trunk groups that belong to the selected facility or facilities will be included in the report.

Trunk Member: Enter the trunk members you want to include in the report in this text box. To include multiple trunk members in your report, use a semicolon to separate each trunk member and a hyphen to indicate a range of values. For example, 201; 350; 374-378.

> **Tip:** You may also use wildcards to search for extensions. Please see the **Wildcard Usage** section below.

Page Break: From this list box, select the level that will force a page break. The choices for forcing a page break are: Data Source, Facility, Trunk Group, and Trunk Member. You also have the option of not forcing a page break at all.

User/Organization Tab

Depending on the type of report selected from the Report Tree, one of the four following ***User/Organization*** tabs will be in use.

USER/ORGANIZATION TAB - CALL DETAIL SEARCH REPORT

This version of the ***User/Organization*** tab is available when you select the Call Detail Search report type from the Report Tree. To select it, click on the Detail Reports folder and then the Other folder in the ***Report Tree*** screen.

The bottom of this tab contains check boxes that let you choose which organizational level to include in the report. After selecting an organizational level, the level below becomes active letting you choose one or more entities within the selected level.

For example, after selecting a company, the divisions within that company become available. Continue this process until you include as many levels in the report as you need.

> **Tip:** If you select an **All "Organization Level"** check box without any of the entities, all entities within that organization level will be included in your report.
>
> **Tip:** If you select the **All User** check box, all users within the selected organization levels above will be included in your report.

Organization Level/User List Boxes

In these list boxes, select an entity within an organization level or a user that you want included in the report. When you choose an entity, the entities within the chosen entity will display in the list box below the selected one. If you wish to include more than one entity, follow these steps:

- For consecutively listed entities:

1. Select the first entity in the list.
2. While holding the **Shift** key, select the last entity in the list.

- For non-sequentially listed entities, select each entity from the list while holding the **Ctrl** key.

> **Note:** if you select more than one entity from a list box, none of the lower entities will be available.

USER/ORGANIZATION TAB - FREQUENTLY DIALED NUMBER REPORT

This version of the ***User/Organization*** tab is available when you select the Frequently Dialed report type from the ***Report Tree*** screen.

To select it, click on the Analytical Reports folder and then the Ranking Reports folder in the ***Report Tree*** screen.

Choose the Summarization Level: From this list box, select the organizational level you want summarized in one line. For example, if you select User, then a summary of each user's record would appear in a single line.

Page Break: From this list box, select the organizational level that will force a page break. The choices for forcing a page break are the organizational levels you defined when the software was installed. You also have the option of not forcing a page break at all.

Show Top Numbers: Enter the amount of most frequently dialed numbers for the chosen summarization level you want included in the report. The default is 10.

The bottom of this tab contains check boxes that let you choose which organizational level to include in the report. After selecting an organizational level, the level below becomes active letting you choose one or more entities within the selected level.

For example, after selecting a company, the divisions within that company become available. Continue this process until you include as many levels in the report as you need.

> **Tip:** If you select an All "Organization Level" check box without any of the entities, all entities within that organization level will be included in your report.
>
> **Tip:** If you select the **All User** check box, all users within the selected organization levels above will be included in your report.

Organization Level/User List Boxes

In these list boxes, select an entity within an organization level or a user that you want included in the report. When you choose an entity, the entities within the chosen entity will display in the list box below the selected one. If you wish to include more than one entity, follow these steps:

- For consecutively listed entities:

1. Select the first entity in the list.
2. While holding the **Shift** key, select the last entity in the list.

- For non-sequentially listed entities, select each entity from the list while holding the **Ctrl** key.

> **Note:** if you select more than one entity from a list box, none of the lower entities will be available.

USER/ORGANIZATION TAB - ORGANIZATIONAL DETAIL REPORT

This version of the ***User/Organization*** tab is available when you select the Organizational Detail report type from the Report Tree. To select it, click on the Organizational Reports folder and then the Detail folder in the ***Report Tree*** screen.

Page Break: From this list box, select the organizational level that will force a page break. The choices for forcing a page break are the organizational levels you defined when the software was installed. You also have the option of not forcing a page break at all.

The bottom of this tab contains check boxes that let you choose which organizational level to include in the report. After selecting an organizational level, the level below becomes active letting you choose one or more entities within the selected level.

For example, after selecting a company, the divisions within that company become available. Continue this process until you include as many levels in the report as you need.

> **Tip:** If you select an All "Organization Level" check box without any of the entities, all entities within that organization level will be included in your report.
>
> **Tip:** If you select the **All User** check box, all users within the selected organization levels above will be included in your report.

Organization Level/User List Boxes

In these list boxes, select an entity within an organization level or a user that you want included in the report. When you choose an entity, the entities within the chosen entity will display in the list box below the selected one. If you wish to include more than one entity, follow these steps:

- For consecutively listed entities:

1. Select the first entity in the list.
2. While holding the **Shift** key, select the last entity in the list.

- For non-sequentially listed entities, select each entity from the list while holding the **Ctrl** key.

> **Note:** if you select more than one entity from a list box, none of the lower entities will be available.

USER/ORGANIZATION TAB - ORGANIZATIONAL SUMMARY REPORT

This version of the ***User/Organization*** tab is available when you select the Organizational Summary report type from the Report Tree. To select it, click on the Organizational Reports folder and then the Summary folder in the ***Report Tree*** screen.

Choose the Summarization Level: From this list box, select the organizational level you want summarized in one line. For example, if you select User, then a summary of each user's record would appear in a single line.

Page Break: From this list box, select the organizational level that will force a page break. The choices for forcing a page break are the organizational levels you defined when the software was installed. You also have the option of not forcing a page break at all.

The bottom of this tab contains check boxes that let you choose which organizational level to include in the report. After selecting an organizational level, the level below becomes active letting you choose one or more entities within the selected level.

For example, after selecting a company, the divisions within that company become available. Continue this process until you include as many levels in the report as you need.

> **Tip:** If you select an All "Organization Level" check box without any of the entities, all entities within that organization level will be included in your report.
>
> **Tip:** If you select the **All User** check box, all users within the selected organization levels above will be included in your report.

Organization Level/User List Boxes

In these list boxes, select an entity within an organization level or a user that you want included in the report. When you choose an entity, the entities within the chosen entity will display in the list box below the selected one. If you wish to include more than one entity, follow these steps:

- For consecutively listed entities:

1. Select the first entity in the list.
2. While holding the **Shift** key, select the last entity in the list.

- For non-sequentially listed entities, select each entity from the list while holding the **Ctrl** key.

> **Note:** if you select more than one entity from a list box, none of the lower entities will be available.

GENERATING A REPORT

After setting all the necessary criteria at the tabbed screens for your report, click the **Submit** button to generate the report. When **Submit** is clicked, a ***Report Format*** dialog box will appear where you can specify the format of the generated report. The default setting is HTML.

Show Report in Browser as HTML: Select this option to have the report display in your browser.

Show Report in Browser as PDF: Select this option to have the report display with Acrobat Reader.

Send Report as E-mail: Select this option if you want to send the report as e-mail. When this option is chosen, a list box appears where you can specify the format of the e-mailed report:

- Rich Text Format (RTF)
- Acrobat (PDF)
- HTML

In addition, text boxes display that let you specify:

- The E-mail address
- A subject
- A message to be sent with the report

> **Tip:** If you want to display the search parameters used to generate the report, select the **Show report parameters on first page** check box on the Date/Time tab.

SAVING A REPORT

When you click the Save button, a Save Report Parameters dialog box will display.

Report Name: Specify a name (maximum of 50 characters) for the current set of search criteria. This name will appear in the tree in the Report Tree screen.

Description: Enter an optional description for the report.

Share this report to all users: Select this check box if you want to share the current settings with users that have sufficient access privileges to the reports function.

> **Note:** The saved reports that are displayed in the ***Report Tree*** screen are those that belong to the current user, or are shared reports. Shared reports are available to anybody that has the proper security level to access reports.

WILDCARD USAGE

Some report searches allow for the use of an asterisk (*****) and question mark (**?**) as wildcards. Each wildcard has a different function.

> **Note:** you may use a percent sign (%) in place of an asterisk.

***** – An asterisk (or percent sign) placed at the end of a partial value acts as a truncation symbol.

Example: To search for all dialed digits that begin with "1800", enter "1800*" in the text box. All dialed digits beginning with that fragment will be retrieved and included in the report.

? – The question mark is used in one position in the dialed digits, and acts as a placeholder for a single character. It is a length specific wildcard and there must be a ? for every character it replaces.

Example: To search for all "1800555####" account codes, enter "1800555????" in the text box. All dialed digits beginning with "1800555" and containing a total of eleven characters will be retrieved and included in the report.

ISI Telemanagement Solutions, Inc.

1051 Perimeter Drive
Suite 200
Schaumburg, IL 60173
Phone: (847)995-0002
Fax: (847)995-0003
www.isi-info.com