Quick Reference Guide: Call Accounting Reports - Web

The Infortel Select Call Accounting Reports 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 reports using either pre-defined templates or user-defined templates. In addition, you can create graphical reports.

> **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.

SELECTING A REPORT

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

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

The ***Report Tree*** screen is in two sections – **Available Reports** and **Favorites**.

- The **Available Reports** section displays a list of folders similar to Windows Explorer. Each folder represents a category of reports and contains sub-categories. Within the sub-categories are system-defined report templates as well as saved reports.
- The **Favorites** section contains a list of reports that are added by you so they can be accessed quickly and easily.

By clicking one of the option buttons, the ***Report Tree*** screen can display all reports, only reports in the **Available Reports** section, or only reports in the **Favorites** section.

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

DEFINING THE REPORT

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 (the default tab for all reports is the ***Basic*** tab). **It is important to remember** that all of the search specifications entered at the ***Basic*** tab are cumulative rather than exclusive. This means that all of the criteria that is specified in the date and time range sections and the filter grid at the ***Basic*** tab become part of a single search string. At the top of this screen, is a set of buttons.

Preview Button: Click this button to display the report to your screen. The displayed report uses all the settings and search criteria specified at each tab. The report may be displayed as PDF or HTML depending on the Display Format option selected at the ***Basic*** tab.

> **Note:** Only those with Report Administrator privileges will see this button. If someone logs in with a Report User access level, the button will not display.

Run Now: Click this button to **immediately** initiate the report generation process. The report that is generated uses all the settings and search criteria specified at each tab. The report will:

- Display as PDF or HTML (depending on the Format option selected at the ***Basic*** tab)
- Be sent to the email recipient(s).
- Be exported to the specified file location.

> **Note:** Only those with General Report Admin or General Report User access privileges will have access to this button. **Close Button:** Click this button to close the tabbed screen, and return to the ***Report Selection*** screen.

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

> **Note:** You must specify at least a date range to save a report.

Help: Opens the on-line help system.

Below the buttons is a set of tabs. Each of the tabs helps you define the contents and format of the report, who receives the report, and when the report is generated.

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
- 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.

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.

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

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

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.

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.

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*** 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.

Export Tab

The ***Export*** tab lets you export and save your report to a file.

Folder Path: The **Folder Path** list box contains valid file locations that the current user has access to. This is for the following reasons:

- Browser security prevents the server from automatically writing a file to the local computer
- If the file is to scheduled to be exported at a later time, the server will not have access to the local computer

Select a valid file location from the list. The location is relative to the computer that actually runs the report.

File name: In the **File Name** text box, enter the file name of the report **without** specifying an extension. When you select a file export format, this will determine the extension added. The default file name is the saved name of the report. Slashes and periods are illegal characters.

Add date time stamp?: When you select this check box, the date and time will be appended to the file name as: FILENAMEYYMMDDHHMMSS (the file name, year, month, date, hour, minute, second).

File Export Format: In this list box, select how you want the report formatted for the export. Infortel Select Reports are supported only for the formats listed, and the selected format determines the extension of the file name specified in the **File name** text box. The available formats are:

- PDF (default)
- RTF
- HTML

Clear All: Clicking this button removes all entries from the ***Export*** tab.

E-mail Tab

At the E-mail tab, you can:

- E-mail a report
- Select recipients' names and e-mail addresses from those stored in the Directory database
- Attach a saved or newly created message to the e-mailed report
- Specify a format for the e-mailed report

E-mail addresses: In this text box, type the e-mail address of the recipient of the report. If there are multiple recipients, separate each address with a semi-colon.

Subject: In this text box, type the topic of the report. There is a maximum of 75 characters.

Message: In this text box, type a message that will be attached to the report. There is a maximum of 255 characters. To include a message that's already created, select a message from the **E-mail stored messages name** list box.

File name: In this text box, enter the file name of the report without specifying an extension. When you select a file export format, this will determine the extension added. The default file name is the saved name of the report. Slashes and periods are illegal characters.

E-mail Address Lookup: Click this button to open a ***Select Address to Include*** screen that lets you look up and choose e-mail addresses from your Directory database. See below for more information on the ***Select Address to Include*** screen.

Clear All: Clicking this button removes all entries from the ***E-mail*** tab.

E-mail stored messages name: From this list box, select a previously created message to be attached to the report from the list.

Create: Click this button to open a ***Stored Message*** dialog box where you can add a message that will be stored with a unique file name.

Delete: After selecting a message from the **Stored Messages** list box, click this button to delete the selected message.

Edit: Click this button to open a ***Stored Message*** dialog box where you can edit a previously created message.

File Export Format: In the **File Export Format** list box, select how you want the report formatted for the export. Infortel Select Reports are supported only for the formats listed, and the selected format determines the extension of the file name specified in the **File name** text box. The available formats are:

- PDF (default)
- RTF
- HTML

Date time stamp: When you select this check box, the date and time will be appended to the file name as: FILENAMEYYMMDDHHMMSS (the specified file name, year, month, date, hour, minute, second).

SELECT ADDRESS TO INCLUDE SCREEN

After clicking **the E-mail Address Look Up** button, a screen appears that lets you search for an e-mail address or addresses stored in your Directory database.

Name and Address List Box

At the left-hand side of the screen is a list box containing two columns of data. The first column displays the first 10 names from your Directory database (listed alphabetically), and the other column displays each person's e-mail address. To include an address, follow these steps:

1. Select the check box next to each name that you want to receive the report.
2. Click the **Add** button.
3. The selected names will appear in the list on the right-hand side of the screen.

Below the **Name and Address** 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 Names

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

4. Type the search string in the **Find** text box. The search string can appear in either of the columns appearing in the **Name and Address** list box. You may use the ***** as a wildcard.
5. Click the button corresponding to the column you are searching.
6. The first 10 matches will appear in the **Name and Address** list box.
7. Select the desired names and click the **Add** button to add them to the **Selection** list box.

STORED MESSAGE DIALOG BOX

To create a saved message, follow these steps:

1. Click the **Create** button and the ***Stored Message*** dialog box will appear.
2. In the **Message Name** text box, enter a unique file name (up to 50 characters) for the stored message.
3. In the **Message** text box, type the message (up to 255 characters) that will be attached to the report.
4. Click the **Save** button, and the message name will appear in the list box in the **E-mail Stored Message** list box.

- Once saved, the message can be edited or deleted by selecting its name from the list box and clicking the **Delete** or **Edit** button.

E-mail Merge Tab

E-mail merge is used to e-mail a report only to those persons you want to see that 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.

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

Since e-mail merge works with the Directory database, when adding people to the database, it is necessary to specify their e-mail addresses if they are to receive a report. When adding people to the Directory database, **do not** select the **Exclude from auto-mail reports** check box.

In addition, e-mail merge works with the **Security Settings** button on the ***General*** tab. When this button is clicked, you can define the people the user receives information about.

At the top of the ***Select E-mail Merge Parameters*** dialog box are three list boxes used to specify the recipients of the report. The first list box contains a list of organizational levels that were set up when the Directory database was created. Depending on the level the chosen from the first list, the second list box will display only the levels above the first selection. The third list box will then contain the names of each organization level selected in the second box. 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.

In the **Message** section, you can attach a message to the e-mailed report. These messages serve as cover letters to the report and can be written on the fly, or saved and re-used for subsequent mailings. Only those with Administrator level access can add, edit, or delete stored e-mail messages.

> **Note:** When using the ***E-mail Merge*** tab, any organization filters set at the ***Basic*** tab (i.e., organization names, organization codes, and owner names) will be ignored.

Schedule Tab – Generating a Report

After setting all the necessary search criteria at the ***Basic*** tab, the formatting information at the ***Advanced*** tab, and the exporting and e-mail destinations, select the ***Schedule*** tab to specify when the report will be created, and the computer that will run the report. You can have a report generate on a regular basis, or schedule a report to run once at a specific date and time.

> **Note:** you must specify a valid start date at the ***Basic*** tab before you can schedule a report.

CREATING A NEW SCHEDULE

You can create two types of report generation schedules:

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

Each of these lets you determine when you want a report to be created with the major difference between the two being that a Specific Date and Time Report will run **only once** on the date and time specified. After the report has been generated, the Specific Date and Time Report schedule will not create another report.

Scheduling a Specific Date and Time Report

If 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. This option is the default selection when the **New Schedule** button is clicked.

> **Note:** When you a schedule a report to be generated at a specific date and time, it will run only once.

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

1. At the ***Schedule*** tab, click the **New Schedule** button.
2. At the ***Schedule*** screen, select the **Specific Date and Time** option button.
3. Select the computer that will run the report from the **Computer to Run Report** list box.

   > **Note:** The default message at the top of this screen is, "Schedule times are always in the local time of the server performing the scheduled request.". If you select a computer from the **Computer to Run Report** list box that is in another time zone, the message that appears is, "The local time on the report server is X hours behind/ahead of your time." where "X" represents the number of hours between the Greenwich Mean Time (GMT) of the report server and the GMT of the client PC.

4. To have the report generate automatically, be sure the **Active?** check box is selected.
5. In the **Run this Report on** text box, either enter the date, or use the pop-up calendar.
6. 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.
7. To have the report generate automatically, be sure the **Active?** check box is selected.
8. To save this schedule click the **OK** button, and you will return to the ***Schedule*** tab.

> **Note:** When you a schedule a report to be generated at a specific date and time, it will run only once.

Scheduling a Regularly Scheduled Report

When the **Regularly Scheduled Report** option is chosen, you can schedule a report to be generated on a regular basis. When setting up a regularly scheduled report, you **must** specify when the report is generated the first time by indicating the day and time you want the report schedule to actually begin running.

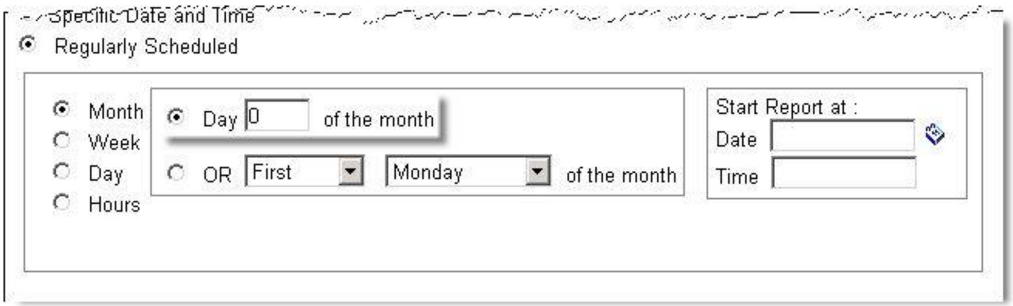
To schedule a regularly scheduled report, follow these steps:

1. Select the **Regularly Scheduled** option button.
2. Select or type in the name of the computer that will run the report in the **Computer to Run Report** list box.

   > **Note:** The default message at the top of this screen is, "Schedule times are always in the local time of the server performing the scheduled request.". If you select a computer from the **Computer to Run Report** list box that is in another time zone, the message that appears is, "The local time on the report server is X hours behind/ahead of your time." where "X" represents the number of hours between the Greenwich Mean Time (GMT) of the report server and the GMT of the client PC.

3. To have the report generate automatically, be sure the **Active?** check box is selected.

Scheduling by Month: There are two methods for scheduling monthly. One method lets you specify the exact date of the month the report will run:

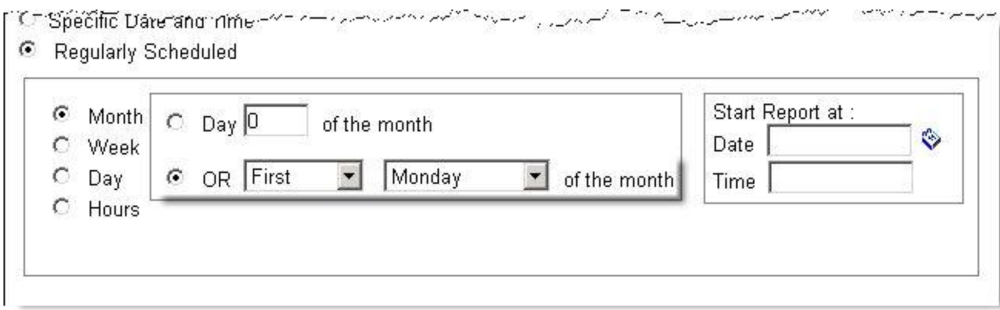


Date Option Button: Select this option if you want the report to run on a specific date of the month.

Date Text Box: In this text box, enter the day of the month you want the report to run.

> **Note:** If you choose a day that does not occur every month (for example, the 31st of the month), the report will run on the last day of the month.

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



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

Week of the Month: Select whether the report runs on the first, second, third, fourth, or last specific day of the week of the month. You must also choose on which day of the week you want the report to run.

Day of the week list box: Select which day of the week the report will run.

> **Note:** When you define a regularly scheduled report, you **must** specify a Start Report date and time.

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 ***Schedule*** tab, select the **ID** option button next to the schedule you want to edit.
2. Click the **Edit Schedule** button, and the selected schedule will appear.
3. Make the necessary changes, and click the **OK** button.
4. You will return to the ***Schedule*** tab with the revised schedule displayed.

Deleting a Schedule

To delete a previously created schedule, follow these steps:

1. At the ***Schedule*** tab, select the option button next to the schedule you want to be deleted.
2. Click the **Delete** button, and a dialog box will appear asking you to confirm the delete.

SAVING A REPORT

When you click the **Save Settings** button on the tabbed 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

> **Note:** The saved reports that display 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.

REPORT LISTINGS

In order to keep track of the saved settings that have been created for all reports, the **Saved Report Listing** button lets you display and print these settings.

After the **Listing button** is clicked, a ***Select Report Settings*** dialog box appears where you can choose which type of listing to display, and the format to display them in. Depending on the user's security level, not all report settings may be displayed in the listing.

Report Administrator Access Level

For those with Report Administrator level privileges, the following will apply:

- The **Personal** option will display all personal saved report settings for all users.
- The **Published** option will display all system defined report settings for all users.
- The **All** option will display both Personal and Published report settings for all users.

Report User Access Level

For a non-administrator, the following will apply:

- The **Personal** option will display all personal saved report settings for the current user.
- The **Published** option will display all system defined report settings for all users.
- The **All** option will display the personal saved report settings for the current user as well as all system defined report settings. The current user will not see other users' saved report settings.

ISI Telemanagement Solutions, Inc.

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