Reports

How do I run a report?

If you want customized versions of the **Detail**, **Summary**, **Frequently Dialed Number**, and **Trunk Analysis** reports rather than the standard ones provided, you must create a custom report definition. See How do I define a report? for more information.

To run a standard report or a custom report that's already been defined, choose **Report Functions** from the **System Menu**.

Detail Reports

Detail reports provide comprehensive information on every call made. The type of information provided depends on the type of Detail report chosen:

- **Extension, Authorization, Account Code Detail Reports** – list extensions, authorization codes and/or account codes, including date, time, duration, and cost of calls, the number dialed, the facility used for the call, and the location of the calling destination. This type of report may be run on a range of dates or types of calls.
- **Organizational Detail Reports** – list calling activity for portions of the organization at any organizational level, showing date, time duration, cost, number dialed, facility used, and location of the calling destination for each call. They also provide information about the types of calls made by each portion of the organization, including totals, averages, and percentages. This type of report may be run on a range of dates or types of calls.
- **User Detail Reports** – show the date, time, duration, facility used, cost, number dialed, and location for each call made by each user. (A user is a person with an extension, authorization code, or both.) This type of report may be run on a range of users (alphabetical), dates, or types of calls. An optional summary page is available.
- **Trunk Detail Reports** – if available in your configuration, display the date, time, duration, extension used, cost, number dialed, and destination location for each call made using a particular trunk or facility. This type of report may be run on a range of trunks or facilities, dates, or types of calls.

1. Select the type of detail report to be run and press ENTER. The available definitions for the report will be displayed.
2. Select the definition you wish and press ENTER. The parameters that make up that definition will display, and you may alter them for this run of the report.
3. Press F10 to run the report.

Summary Reports

Summary reports provide summarized data on all calls made. The type of information presented is determined by the type of Summary Report chosen:

Extension, Authorization, Account Code reports list extensions, authorization codes and/or account codes as determined by the summary style selected.

- **Organizational Summary Reports** – list the calling activity for portions of the organization at any organizational level. The data shown is determined by the summary style selected. This type of report also shows subtotals for each portion of the organization selected.
- **User Summary Reports** – show selected summary information for a selected range of users. This type of report may be run for a range of users, dates, or types of calls.
- **Trunk Summary Reports** – display various summary data for selected trunks. This type of report may be run for a range of trunks, facilities, or types of calls.
- **Frequently Dialed Number by Organization Reports** – show summary information for extensions sorted by organization. For each extension, the report shows a summary of calls sorted in frequency order. For each dialed number, the report shows the city, state, frequency, total and average duration and cost, and type of call. There are also totals for each extension and organization.

1. Select the type of summary report to be run and press ENTER. The available definitions for the report will be displayed.
2. Select the definition you wish and press ENTER. The parameters that make up that definition will display, and you may alter them for this run of the report.
3. Press F10 to run the report.

Frequently Dialed Number Reports

Frequently Dialed Number reports are commonly used to identify numbers that are being abused. The report will show up to 99 of the most frequently dialed numbers within a selected date/time range, and may be run on a range of area codes, listing the location, frequency, and total cost. Local calls may be excluded. The detail version displays calls grouped by digits dialed, showing the extension, date, time, duration, and cost of the call as well as the facility, trunk, and call type.

1. Select **Frequently Dialed Number Reports** from the **Report Functions Menu** and press ENTER. The available definitions for the report will be displayed.
2. Select the definition you wish and press ENTER. The parameters which make up that definition will display, and you may alter them for this run of the report.
3. Press F10 to run the report.

Number Search Reports

Number Search reports are used to track the activity of calls made to a particular number. The users who make these calls may then be identified. Number Search reports may be run by extensions, authorization codes, or account codes. Question marks may be entered in the last four digits of a number if you wish to search on area code and exchange. International calls may be found using the area code 011.

1. Select **Number Search Report** from the **Report Functions Menu** and press ENTER. The available settings for the report will be displayed. You may modify any of the default settings before running the report.
2. Press F10 to run the report.

Area Code/Exchange Reports

Area Code/Exchange reports are used to analyze calling patterns by their locations. For calls such as 800 numbers that are identifiable by area code, they can provide the number of particular types of calls made. This report can provide the total number of calls made to each exchange for a range of area codes, as well as the location of the exchange, the total duration and cost of calls to that exchange, and the average cost per minute. A summary of calls by state may also be included.

1. Select **Area Code/Exchange Report** from the **Report Functions Menu** and press ENTER. The available definitions for the report will be displayed. You may modify any of the default settings before running the report.
2. Press F10 to run the report.

Trunk Analysis Reports

Trunk Analysis reports are used to examine traffic patterns on trunks and facilities (groups of trunks). These reports may be run on ranges of trunks or facilities, or for a specified time period of each day examined.

1. Select **Trunk Analysis Reports** from the **Report Functions Menu** and press ENTER. The available definitions for the report will be displayed. You may modify any of the default settings before running the report.
2. Press F10 to run the report.

HOW DO I DEFINE A REPORT?

Report definitions are customized, named report functions that are created prior to report operation. To define a report, choose **Report Functions** from the **System Menu**, then select **Define Reports** and choose the type of report you are defining.

Defining Detail Reports

Detail reports provide comprehensive information on every call made. There are four types of detail reports:

Defining Extension, Authorization, Account Code Detail Reports

After selecting the type of detail report you wish to define, a list of existing definitions will be displayed. To create a new definition, select **Create**, and a new screen of choices will appear.

On this screen:

1. Enter a name for this definition in the Report Set Name field.
2. Set output to printer, screen, or both using the Screen and Printer Output fields.
3. Enter a Diskfile Name if the report will be saved to your hard disk.
4. Specify whether or not the report will have a Summary Page.
5. Select an ascending (+) or descending (-) sort option in the Sort By field.
6. Choose Billed or Base Cost from the list in the Cost Type field.
7. Select Date Format from the list of choices and set Start/End Date and Time.
8. Set Date Format to User Defined if you wish to enter a range of dates.
9. Set the Minimum Cost and Minimum Duration of calls.
10. Select the Billing Class(es) that will appear on the report (if available).
11. Choose whether the report will be run by Extension, Auth Code, and/or Client (Account).
12. Set a range of extensions, auth codes, and/or clients (accounts).
13. Select the items to include in the report with the Y, N, or O (Only) options.
14. Press F10 to save your definition.

Organizational Detail Reports

After selecting the type of detail report you wish to define, a list of existing definitions will be displayed. To create a new definition, select **Create**, and a new screen of choices will appear.

On this screen:

1. Enter a name for this definition in the Report Set Name field.
2. Set output to printer, screen, or both using the Screen and Printer Output fields.
3. Enter a Diskfile Name if the report will be saved to your hard disk.
4. Specify whether or not the report will have a Summary Page.
5. Select an ascending (+) or descending (-) sort option in the Sort By field.
6. Choose Billed or Base Cost from the list in the Cost Type field.
7. Select Date Format from the list of choices and set Start/End Date and Time.
8. Set Date Format to User Defined if you wish to enter a range of dates.
9. Set the Minimum Cost and Minimum Duration of calls.
10. Select the Billing Class(es) that will appear on the report (if available).
11. Choose the organizational level the report will set Ranges on.
12. Set page breaks from the list of choices.

13. Set the Low and High range values.
14. Select the items to include in the report with the Y, N, or O (Only) options.
15. Press F10 to save your definition.

User Detail Reports

After selecting the type of detail report you wish to define, a list of existing definitions will be displayed. To create a new definition, select **Create**, and a new screen of choices will appear.

On this screen:

1. Enter a name for this definition in the Report Set Name field.
2. Set output to printer, screen, or both using the Screen and Printer Output fields.
3. Enter a Diskfile Name if the report will be saved to your hard disk.
4. Specify whether or not the report will have a Summary Page.
5. Select an ascending (+) or descending (-) sort option in the Sort By field.
6. Choose Billed or Base Cost from the list in the Cost Type field.
7. Select Date Format from the list of choices and set Start/End Date and Time.
8. Set Date Format to User Defined if you wish to enter a range of dates.
9. Set the Minimum Cost and Minimum Duration of calls.
10. Select the Billing Class(es) that will appear on the report (if available).
11. Set the Low and High User Names.
12. Select the items to include in the report with the Y, N, or O (Only) options.
13. Press F10 to save your definition.

Trunk Detail Reports

After selecting the type of detail report you wish to define, a list of existing definitions will be displayed. To create a new definition, select **Create**, and a new screen of choices will appear.

On this screen:

1. Enter a name for this definition in the Report Set Name field.
2. Set output to printer, screen, or both using the Screen and Printer Output fields.
3. Enter a Diskfile Name if the report will be saved to your hard disk.
4. Specify whether or not the report will have a Summary Page.
5. Select an ascending (+) or descending (-) sort option in the Sort By field.
6. Choose Billed or Base Cost from the list in the Cost Type field.
7. Select Date Format from the list of choices and set Start/End Date and Time.
8. Set Date Format to User Defined if you wish to enter a range of dates.
9. Set the Minimum Cost and Minimum Duration of calls.
10. Select the Billing Class(es) that will appear on the report (if available).
11. Select the Facility to be examined.

12. Set the Low and High Trunk Number Range.
13. Select the items to include in the report with the Y, N, or O (Only) options.
14. Press F10 to save your definition.

Defining Summary Reports

Summary reports provide summarized data on all calls made. There are five types of summary reports:

Extension, Authorization, Account Code Summary Reports

After selecting the type of summary report you wish to define, a list of existing definitions will display. To create a new definition, select **Create**, and a new screen of choices will appear.

On this screen:

1. Enter a name for this definition in the Report Set Name field.
2. Set output to printer, screen, or both using the Screen and Printer Output fields.
3. Enter a Diskfile Name if the report will be saved to your hard disk.
4. Select a Summary Style from the list of choices.
5. Determine whether or not Fixed Costs defined for users will appear on the report.
6. Choose Billed or Base Cost in the Cost Type field.
7. Set the Date Format and the Start/End Date and Time.
8. Set Date Format to User Defined if you wish to enter your own range of dates.
9. Set the Minimum Cost and Maximum Cost of calls.
10. Set the Minimum Duration and Maximum Duration of calls.
11. Select the Billing Class(es) that will appear on the report (if available).
12. Choose whether the report will be run by Extension, Auth Code, and/or Client (Account).
13. Set a range of extensions, auth codes, and/or clients (accounts).
14. Select the items to include in the report with the Y, N, or O (Only) options.
15. Press F10 to save your definition.

Organizational Summary Reports

After selecting the type of summary report you wish to define, a list of existing definitions will display. To create a new definition, select **Create**, and a new screen of choices will appear.

On this screen:

1. Enter a name for this definition in the Report Set Name field.
2. Set output to printer, screen, or both using the Screen and Printer Output fields.
3. Enter a Diskfile Name if the report will be saved to your hard disk.
4. Select a Summary Style from the list of choices.

5. Determine whether or not Fixed Costs defined for users will appear on the report.
6. Choose Billed or Base Cost in the Cost Type field.
7. Set the Date Format and the Start/End Date and Time.
8. Set Date Format to User Defined if you wish to enter your own range of dates.
9. Set the Minimum Cost and Maximum Cost of calls.
10. Set the Minimum Duration and Maximum Duration of calls.
11. Select the Billing Class(es) that will appear on the report (if available).
12. Choose the organizational level the report will set Ranges on.
13. Set page breaks from the list of choices.
14. Set the Low and High range values.
15. Select the items to include in the report with the Y, N, or O (Only) options.
16. Press F10 to save your definition.

User Summary Reports

After selecting the type of summary report you wish to define, a list of existing definitions will display. To create a new definition, select **Create**, and a new screen of choices will appear.

On this screen:

1. Enter a name for this definition in the Report Set Name field.
2. Set output to printer, screen, or both using the Screen and Printer Output fields.
3. Enter a Diskfile Name if the report will be saved to your hard disk.
4. Select a Summary Style from the list of choices.
5. Determine whether or not Fixed Costs defined for users will appear on the report.
6. Choose Billed or Base Cost in the Cost Type field.
7. Set the Date Format and the Start/End Date and Time.
8. Set Date Format to User Defined if you wish to enter your own range of dates.
9. Set the Minimum Cost and Maximum Cost of calls.
10. Set the Minimum Duration and Maximum Duration of calls.
11. Select the Billing Class(es) that will appear on the report (if available).
12. Set the Low and High User Names.
13. Select the items to include in the report with the Y, N, or O (Only) options.
14. Press F10 to save your definition.

Trunk Summary Reports

After selecting the type of summary report you wish to define, a list of existing definitions will display. To create a new definition, select **Create**, and a new screen of choices will appear.

On this screen:

1. Enter a name for this definition in the Report Set Name field.

2. Set output to printer, screen, or both using the Screen and Printer Output fields.
3. Enter a Diskfile Name if the report will be saved to your hard disk.
4. Select a Summary Style from the list of choices.
5. Determine whether or not Fixed Costs defined for users will appear on the report.
6. Choose Billed or Base Cost in the Cost Type field.
7. Set the Date Format and the Start/End Date and Time.
8. Set Date Format to User Defined if you wish to enter your own range of dates.
9. Set the Minimum Cost and Maximum Cost of calls.
10. Set the Minimum Duration and Maximum Duration of calls.
11. Select the Billing Class(es) that will appear on the report (if available).
12. Select the Facility to be examined.
13. Set the Low and High Trunk Number Range.
14. Select the items to include in the report with the Y, N, or O (Only) options.
15. Press F10 to save your definition.

Frequently Dialed Number Summary Reports

After selecting the type of summary report you wish to define, a list of existing definitions will display. To create a new definition, select **Create**, and a new screen of choices will appear.

On this screen:

1. Enter a name for this definition in Report Name.
2. Set output to printer, screen or both using the Screen and Printer Output fields.
3. Enter a Diskfile Name if the report will be saved to your hard disk.
4. Set the Date Format and Start/End Date and Time. (Set Date Format to User Defined if you wish to enter your own range of dates.)
5. Set the Minimum Cost and Minimum Duration of calls.
6. Select the Billing Class(es) that will appear on the report (if available).
7. Select the organizational level the report will set Ranges On.
8. Set Page Breaks from the list of valid choices.
9. Set the Low and High range values.
10. Select the items to include in the report with the Y, N, or O (Only) options and press F10 to save your definition.

Defining Frequently Dialed Number Reports

Frequently Dialed Number reports are commonly used to identify numbers that are being abused. When you choose **Define Frequently Dialed Number Reports** from the **Define Reports Menu**, a list of existing definitions will be displayed. To create a new definition, select **Create** and a new screen of choices will appear.

On this screen:

1. Enter a name for this definition in the Report Name field.
2. Set output to printer, screen, or both using the Screen and Printer Output fields.
3. Enter a Diskfile Name if the report will be saved to your hard disk.
4. Select the Call Direction(s) to be reported from the list of valid choices.
5. Determine whether or not Fixed Costs defined for users will appear on the report.
6. Set the Date Format and the Start/End Date and Time. Set Date Format to User Defined if you wish to enter your own range of dates.
7. Set the First and Last Area Code for the range to be reported. Including area code 011 gives your Frequently Dialed Number report international capabilities.
8. Determine how many numbers to list.
9. Determine whether or not to include local calls.
10. Determine whether or not Detail for each Phone Number will be listed.
11. Press F10 to save your definition.

Defining Trunk Analysis Reports

Trunk Analysis reports are used to examine traffic patterns on trunks and facilities (groups of trunks). When you choose **Define Trunk Analysis Reports** from the **Define Reports Menu**, a list of existing definitions will be displayed. To create a new definition, select **Create** and a new screen of choices will appear.

On this screen:

1. Enter a name for this definition in the Report Name field.
2. Set output to printer, screen, or both using the Screen and Printer Output fields.
3. Enter a Diskfile Name if the report will be saved to your hard disk.
4. Select a Report Style from the list of valid choices. *For descriptions of the styles available, see the Summary Styles section of Chapter 6 of the User's Guide.*
5. Determine whether this will be a Report by Facility, or just list system totals.
6. Set Page Breaks from the list of valid choices.
7. Set the Start/End Date and Time.
8. Determine whether or not to Skip Weekends.
9. Set Low and High Facility and Trunk Ranges from the list of valid choices.
10. Press F10 to save your definition.

HOW DO I SCHEDULE A REPORT TO RUN ON A REGULAR BASIS?

The Task Scheduler may be used to schedule the following reports:

- Base Detail (Extension, Auth Code, Account Code)
- Base Summary (Extension, Auth Code, Account Code)
- Organizational Detail

- Organizational Summary
- User Detail
- User Summary
- Frequently Dialed Number
- Trunk Detail
- Trunk Analysis
- Base ACCESS
- Summary ACCESS
- Organizational Frequently Dialed Number

When you select **Task Scheduler** under **Utility Functions** on the **System Menu**, and answer **Y** to the "Are You Sure?" prompt, the Task Editor screen is displayed. Select **Add** to create a task. When the Task Command field is highlighted, press F2 and the Build Command Line screen is displayed.

1. In the Task Command field, press F2 for a list of tasks available and select **REPORT**.
2. Press F2 and select **OSPLUS** from the list in Parameter 1.
3. In Parameter 2, press F2 for a list of the types of reports available for scheduling. Make your choice from the list, then press ENTER.
4. In Parameter 3, press F2 and the letters A through Z will appear. Select the letter that corresponds to the existing definition of the report (found under the **Define Reports Menu**) and press ENTER.

When the main Task Editor screen displays:

1. Enter a Start Date and Time for the report to run.
2. Select the task's Priority from the list of valid choices.
3. From the list of choices, select a Reschedule Date/Time for the report to run periodically.

   -or-

1. If more than one task is scheduled, select the Day(s) of the Week on which this report should run again.
2. Cancel Time is the time after which OS Plus shouldn't attempt to run the report.
3. Cancel Type tells whether Cancel Time is an actual time (A) or the relative number of hours and minutes after the report's scheduled start time (R).

Once the last parameter is entered, the task is saved and scheduled.

- For more information on scheduling reports, see the Schedule Reports section of Chapter 5 of the User's Guide.

Why are charges on my reports different than phone company charges?

This is often due to a skim time being in effect for the facility used. Skim time is the amount of time subtracted from the call duration to compensate for dialing and connect times. To modify skim time:

1. Select **System Definitions** from the **System Menu**.
2. Choose **Define Facilities/Trunks** and **Facilities**.
3. Use the ARROW keys to select the facility from the list.
4. Select **Edit** and **Storage**.

   - For more information on skim time, see the Facilities and Trunks section of Chapter 4 of the User's Guide.

Why do unanswered calls appear on my reports?

This often occurs when the minimum call duration parameter is set for too short a period of time. Thirty seconds is the system's default entry.

1. Check the minimum call duration parameter by selecting Define Facilities and Trunks under **System Definitions** on the **System Menu**.
2. Select **Facilities** and highlight the facility in question.
3. When you select **Edit** and **Storage**, the minimum call duration will be displayed.

   - For more information on minimum call duration, see the Facilities and Trunks section of Chapter 4 of the User's Guide.

Why does the incorrect time of day appear on my reports?

Your PBX may be sending an inaccurate time to the OS Plus system. Check the time sent by the PBX via the **Show Unprocessed Call Records** command under **Utility Functions** on the **System Menu**. Adjust your PBX as necessary.

- For more information on the Show Unprocessed Call Records command, see Chapter 5 of the User's Guide.

Why do calls below minimum cost/duration or above maximum cost/duration appear on my reports?

Check the **Min Cost/Duration AND Option** on Page Three of the **System Parameters** (from **System Definitions** on the **System Menu**). This is a Y/N field which determines whether cost AND duration (Y) or cost OR duration (N) must be above the minimum for a call to appear on a report.

If the report in question is a summary report, you may also wish to check **Min Cost/Duration for each Call** on the same screen. This option determines whether each call or only summary totals are subject to the minimum requirements.

- For more information on minimum cost and duration options, see the System Parameters section of Chapter 4 of the User's Guide.

WHY DO USERS WHO HAVEN'T MADE ANY CALLS APPEAR ON MY REPORTS?

If inactive users appear on your reports, enter N in the **Report Inactive Users** option on Page Three of the **System Parameters** (under **System Definitions** from the **System Menu**).

- For more information on inactivity options, see the System Parameters section of Chapter 4 of the User's Guide.

WHY DO EXTREMELY LONG DURATION CALLS APPEAR ON MY REPORTS?

This is often caused by a PBX or Central Office trunk that has failed to release properly. Some PBXs will alter the duration of calls if the date/time is reset while calls are in process.

- Check **Show Unprocessed Call Records** under **Utility Functions** on the **System Menu** to see what is happening to the data from the PBX. Corrective action should be taken with the PBX vendor or phone company.

WHY DON'T INFORMATION (411) AND EMERGENCY (911) CALLS APPEAR ON MY REPORTS?

Calls for directory and emergency assistance are often briefer than 30 seconds. Try setting a lower minimum call duration in the report definition and/or the facility parameters.

- For more information on report definition, see How do I define a report? or see Chapter 6 of the User's Guide.
- For more information on facility parameters, see How do I add trunks and facilities? or see the Facilities and Trunks section of Chapter 4 of the User's Guide.