Expense Management

User Guide

NEC NEC Corporation

Liability Disclaimer

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Introduction

Chapter Topics
- *Overview - Main Features*
- *Getting Started*
- *Application Grid Help*
- *The Enhanced Grid*

The Application assists organizations in becoming more productive by giving them the right tools to effectively manage their IT operations and services, in terms of efficiency and cost validation.

The Application provides integrated pro-active and policy based solutions for organizations, ranging from internal IT operations through to complete IT service management, including customer care and billing.

The system's modular architecture allows the application to be expanded by adding new modules in accordance with customer's requests, special projects or market trends.

A policy-planning module implements and monitors real time performance and usage according to policies and criteria that are defined by the organization to maintain budget control, usage performance and system health.

When organizations supply their resources and services to internal and external users, they must be able to manage customers, services and billing. The Application offers the tools to register and organize customers, and assign the relevant services and resources to them.

The system consists of individual modules that offer a comprehensive range of functionality, including;

- Tools to list and organize personnel into required organizational units.
- The ability to organize IT resources and administrate their costs using structured cost plans.
- The ability to track the usage, utilization and costs of IT resources, and to generate powerful reports on a regular basis.
- Budget allocation to specific personnel or entities, with tracking capabilities that issue alerts when limits are reached.
- Identify extraordinary resource usage or call activity and alert the relevant person of its occurrence.
- The ability to track and manage customer's accounts and their billing

Overview - Main Features

User-Centric Application

Expense Management is a user-centric system (i.e. many devices are allocated to each user) that is adaptable to different organizational structures.)

Each user can be assigned a number of diverse devices and services. Users are organized in different organizational structures.

The main physical entities are the enterprise personnel and the enterprise devices, (for example, telephony, PCs, cellular) and services.

The focus of the application is its users, which refers to both employees and customers. A user may be associated with several devices of various types, for example, the physical phone extension in his office, his cellular device or the calling card he uses when traveling. Users may also be connected to various services, for example, video rental or an Internet service.

Both personnel and resources are divided into organizational groups. Groups may be defined by the organizational hierarchy, such as organizational units (OUs) or according to organizational frameworks such as mailing lists and cost centers.

Flexible Report Capabilities using the Crystal Designer

Reports are a central feature that let you gather and analyze information regarding the resources and services in different focuses and perspectives. The Application Report subsystem is comprised of groups of reports that operate in a similar manner, but differ in their specific requirements. Various reports are designed to give the enterprise various perspectives of their telephony usage.

The implementation of the reports modules is based on a commercial report generator called Crystal Reports for .NET. This product provides a report layout designer tool (integrated with VS7), a framework for developing the report's logic and a runtime module that is installed on the server.

Automatic distribution of the reports enabled by the Windows Scheduler, allows efficient report distribution. The system is enhanced with the capability to create a report for many entities or personnel and distribute them to all report owners.

A Proactive System for Controlling the Budget and Usage of Resources

The Activity Analysis module contains the tools for monitoring the activity of the system. It allows an enterprise to define and control the budgets of their personnel and organizational entities. The usage and the thresholds of the usage of the telephony resources, as well as the parameters for the proactive alerts of the system can also be defined.

Enhanced Costing Mechanism

The enhanced Costing Modules enables the flexible definition of costing plans for the different services and personnel. Taking into account the variability of services and costing plans, the Costing Modules enables a user-friendly structure and mechanism to build the costing plans for the various services, as well as importing them from a pre-defined file.

Flexible Tree Structure

The system's organization of enterprise entities such as personnel, facilities and resources is based on a flexible tree structure.

Each of the organization's structures, regardless of its content is structured as a tree that consists of unlimited levels and offers adaptable navigation and tree modification capabilities.

Multi Site

The system is able to handle a large number of sites comprised of a variety of different types of PBXs and data sources from various vendors.

A Site refers to the scope of the enterprise in which the application is installed. A site may be comprised of several heterogeneous data sources. A Data Source (DS) is the origin of a telephony call's digital data that is collected and processed by the Application, for example, PBXs, IP Switches, Calling Cards and Cellular Phones usage information. The data is collected using a variety of protocols such as RS 232 and TCP/IP communication, FTP and shared folders files access, as well as interfacing with dedicated databases and applications. The collected data is stored in a central database and is available to authorized users of the site.

Modular Structure

The Application is built and structured as an open modular platform. It can be integrated in different combinations to fulfill different application needs.

The modular and adaptable structure allows the Application to conform to the needs of the customer with simple modifications and adaptations to complete development of additional modules to accommodate the growing needs of the telecommunications market.

Scalability

The system can be installed on a standalone computer (Windows 2000/XP) using SQL Express or be implemented in a fully based network environment (Windows Server 2000/2003) using SQL 2005.

The solution is implemented as a server application that runs the call management business logic and a suite of Web applications that interact with the users via Web browsers installed on users' desktops.

Scalability is achieved via flexible modular architecture. With the appropriate hardware and software setup the application is suitable for both small installations, where the application runs on a stand-alone computer, and big network environments common in large enterprises with thousands of users and a virtually unlimited number of calls.

Collection Capabilities

Collection can be performed from different sources via various protocols.

The data is collected via a variety of protocols such as RS 232 and TCP/IP communication, FTP and shared folders files access as well as interfacing with dedicated databases and applications.

The protocol for interfacing with the data sources can be both textual and binary protocols. Collection can be carried out in parallel from different and heterogeneous data sources, depending only on the physical resources used.

Integrations and Open Interface

Transfer of data to and from the system through a single point of entry, ensures easy integration with existing and future organizational systems.

When the solution is installed in an environment of PBXs that has an existing management suite, it can synchronize its data with the managed application.

The Application supports importing data, including the import of extensions or other organizational related data, and Active Directory (using LDAP).

Data export and communication with external systems are also supported.

Maintenance and Administration

Centralized management of the Application provides a single point for executing, monitoring and logging of various system activities. System maintenance is easy and supported by user-friendly, generic tools.

Monitoring tools, job scheduling and proactive alerts reduce the required number of administrative personnel and administrative costs. Usage of the self-maintenance capabilities of the SQL server reduces maintenance requirements. System technologies enable load balancing and protect against data loss in cases of power or hardware failure.

Security and Authentication

The security mechanism, based on Microsoft Security guidelines and infrastructure for Web applications, enables registered users to gain access via the corporate intranet or Internet.

The system includes flexible security mechanisms that are optimized for the organizational environment.

NEC developed the NEC Centralized Authentication Service (CAS) to perform login authentication for CAS-enabled applications. When a user attempts to access a CAS-enabled application in a new browser session, the application relies on NEC CAS to check the credentials of the user.

The NEC CAS can use the following Authentication Sources:

• Internal Database Authentication Setup - (default)
• Windows Authentication Setup
• LDAP Authentication Setup

REFERENCE

See Chapter 4 - Miscellaneous Procedures of the NEC CAS Installation Guide for instructions on how to change Authentication Sources.

Detailed descriptions for each Authentication Source are also available in the NEC CAS Online Help.

The application supports Internet security protocols such as SSL.

The Application manages user access privileges according to roles. The application includes a set of predefined roles, for example, Regular user, Manager, Administrator.

Each user in the application has a name and password mechanism to insure password integrity and locks after 3 unsuccessful attempts.

Technology

The Application is based on Microsoft .Net Framework and provides architectural improvements over previous versions.

The architecture is comprised of a server application and a suite of web applications that interact with users via web browsers installed on the users' desktops.

The system is designed to run on the enterprise intranet and provide services to enterprise personnel and customers.

Web User Interface

A Web application interface, developed in a .NET environment using advanced languages and tools (C#, ASP, .NET), provides data access for users.

Users and administrators of all levels can access the system from any location using their browser over the intranet or Internet. All application functionality, for example, Reporting, Tools and Table Views can be accessed via the Web application.

SQL Database

The implementation of the database is based on the Microsoft SQL Server 2005. Since some installations run on Windows 2000 or XP Professional desktop edition with SQL Express, the management of the database is implemented via the SQL interfaces and is not dependent on the SQL Enterprise Manager suite.

The implementation of the scheduler takes advantage of the built-in scheduling facilities of SQL Server 2005. The SQL job scheduler is capable of performing recurring tasks as well as pre-scheduled and one-time tasks. The job scheduler is also capable of identifying CPU idle states and initiating the run of low priority tasks when system resources are free.

MSMQ

Using MSMQ as the middleware between the pipeline processes allows for flexible data formats. MSMQ also permits transactional protection of the data by including the queues of each segment in a DTC transaction. This type of protection also applies to database operations and protects against data loss in case of power or hardware failures.

Programming Tools

The comprehensive Visual C#NET 2003 programming language is used to create XML Web services, while the component-oriented C# development language is used to program Microsoft .NET connected applications for the Web.

Infragistics tools are used for developing the interface layer of the application. Infragistics provides all the components for building professional interfaces for Microsoft Web solutions.

Getting Started

Getting Started - Introduction

The application enables users to configure and manage the organizational telephony and the personnel using it.

In addition it includes pre-defined reports that can be modified according to the specific setup and needs of the organization.

The system consists of individual modules that offer a comprehensive range of functionality, including;

- Tools to list and organize personnel into required organizational units.
- The ability to organize IT resources and administer their costs using structured cost plans.
- The ability to track the usage, utilization and costs of IT resources, and generate powerful reports on a regular basis.
- Budget allocation to specific personnel or entities, with tracking capabilities that issue alerts when limits are reached.
- Identify extraordinary resource usage or call activity and alert the relevant person of its occurrence.

Each module is accessed through a tab in the application main window

Application Windows

The application windows change to cater for the needs of the different modules, entities and functions of the application. However, most of the application windows retain the same basic structure as well as a similar look and feel.

Application Heading

This part of the window remains the same throughout the application and does not change with the different modules. It contains:

- The **Application Header** (top of the window) contains the application name and logo, login information and the **about**, **Help**, **Logout** and **Change Password** tools.
- The **Module selection** tabs area (located below the Application Header) enables you to select and access the different modules of the application.

Module-Depended Area

This part of the window changes from module to module. However, it retains a similar basic structure:

- The **Sub module selection area** (lower left hand side) enables you to select a sub module or an entity or a category within the module. Not all modules have it.
- The **Tree area** or **Option list area** (upper part of left hand side) contains either a tree structure or a list.
- The **Work area** occupies the rest of the window (right hand side).

Navigating in the Application

To access most function of the application you have to:

1. Select the Module from the **Module Selection tabs**.
2. If required, select **Sub Module** or **Category** from the **sub module selection area** (lower left hand side).
3. Select a leaf or an option from the **tree area** (upper part of the right hand side).

Logging in to the System

In order to use the Application you need to be defined as a system user. System users can access different system functions according to the role assigned to them..

NOTE

Check with your System Administrator if you are an authorized user and your access permissions. You should also be given a password.

To log in to the system:

Step 1   Enter the Application URL into the browser address textbox. The Login is displayed in the browser window.

Step 2   Type your User Name and Password and click **LOGIN**. The Application Main Window appears.

Searching for Records

The application includes a built-in search option that enables filtering records according to a search condition in a single field.

NOTE   *This option is available in many system windows.*

The filtering options are given in Table 1-1.

Table 1-1 *Searching for Records Field Descriptions*

Field Type	Search Condition	Filtered Records
Alpha Numeric	All Words	According to a logical AND search.
	Any Words	According to a logical OR search
	Like…	Start with …
	Equal to…	The same as …
	Not Equal to…	Different from …
	Not Like…	Do not start with …
Numeric	=	Equal to …
	<	Larger than …
	>	Smaller than …
	≤	Larger than or equal to …
	≥	Smaller than or equal to …

In addition to the built-in search option, users familiar with SQL can set up their own SQL queries. This enables customizable filtering of several fields and includes using additional search operators.

To search for a specific record:

1. Click the Search icon. The Search window is displayed.
2. To search for records using the built-in search option, select Condition.

NOTE   *You can enter a customized SQL Query by selecting SQL Query and typing the query in the SQL Query.*

3. In the Condition, in the **Search For** text box, type the term you are looking for.
4. Select the relevant field name from the **In Column** drop-down list.
5. Select the relevant condition from the **Operator** drop-down list.
6. Click **OK**. The view displays the records suiting your condition.

NOTE   *You can abort the search at any time using the Abort Search icon. This aborts the search and displays all the records.*

Application Grid Help

Table 1-2 *Supported Keystrokes.*

Keystroke	Purposes
Up arrow	Moves selection to previous row.
Down arrow	Moves selection to next row.
Left arrow	Moves selection to previous cell when used in record row.
Right arrow	Moves selection to next cell when used in a record row.
Home	Moves selection to first row in a table when Row is selected (default). Moves selection to first cell when Cell is selected.
End	Moves selection to last row in a table when Row is selected (default). Moves selection to last cell when Cell is selected.
Page up	Scroll up one page from current selection.
Page down	Scroll down one page from current selection.
+ (Keypad)	Expands child table's rows in a Hierarchical Grid.
- (Keypad)	Collapses child table's rows in a Hierarchical Grid.
Tab	When in Edit mode, Tab key will switch input control to next editable cell.
Shift+Tab	When in Edit mode, switch input control to previous editable cell.
Ctrl+Home	Moves selected row to first visible row in the table.
Ctrl+End	Moves selected row to last visible row in table.
Ctrl+T	Switch focus to Filter Row area.
Ctrl+D	Switch focus to grid's body area from Filter Row area.
Enter	• Activate edit mode and display input control for currently selected cell when used in edit navigation mode. • Accepts current cell changes when used in input control.
Enter/Shift+Enter	Apply Add Row operation if used in New Row area and Apply Update operation for grid's row.
Esc	• Rejects and reverts changes back to original value when used in input control. • Cancels row changes and exit edit mode when used in edit navigation mode.

Table 1-3 *Supported Mouse Events.*

Events	Purposes
Left click	Selects item.
Wheel up	Scroll up rows view.
Wheel down	Scroll down rows view.
Right click	Displays context menu for valid grid's elements.

Table 1-4 *List of Symbols or Icons Used in MA4000 Expense Management Grid*

Icons	Purposes
	Displays grid client help.
	Requests more data records.
	Refresh the Grid's data.
	Sorts the data descending based on the column you currently click on.
	Sorts the data ascending based on the column you currently click on.
	Show a list of filter type that is used to filter data rows.
	Indicates the current selected object's row.
	Cancel row changes and exit edit mode.
	Update row changes and exit edit mode.
	Copy row or table's data to clipboard.
	Delete row.
	Indicates that current row is in edit mode (cells have been changed).
	Activate edit mode.
	Display Export popup.
	Indicates the New Row for table.

The Enhanced Grid

Enhanced Grid - Introduction

Many features and dialog boxes within the application use the enhanced grid format to display a selection of data records of a certain type of entity. The records are displayed in a table structure, where each row represent one record, and each column displays the content of one data field.

All enhanced grids in the application share a similar structure, and most of them offer common options and operations. In Addition, each specific feature or dialog box grid may have additional specific options and operations.

All grids contain the following parts:

* **Action** toolbar - contains tools for saving and using Favorite filter settings and usually contains grid specific tools and options.
* **Column headings** bar - each column represents one data field
* **Filters bar** - (may be shown or hidden) - contains the current filter settings
* **Data rows**- each row represents one record.
* **Status bar** - shows grid status, paging information and tools and the Export and Help tools.

Basic Operations

Paging

If the number of currently selected records exceeds the number of data lines in the grid, the records are spread among more "pages". Look for the paging status and paging tools in the Status bar.

Figure 1-1 *Paging Status and Tools*

22 Record(s)   ✗ Unfiltered   Page 2 of 3 ─────⬇─────── ✦
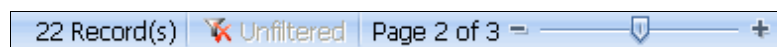
Paging status information includes:

* Number of currently selected records.

NOTE

If the number of currently selected records, that is, the number of records that satisfy the currently set filters, exceeds 200, only the first 200 records are shown in the grid, and the status line reflects this situation.

* An indication whether the records are Filtered or Unfiltered.
* Currently shown page number
* Number of pages for the current selection

Use the paging tools as follows:

- To move to the next page, click the plus sign.
- To move to the previous page, click the minus sign.
- To move to a specific page, press and hold the slider and slide it until you see the desired page number.

Sorting

You can sort the records by one of the columns.

An arrow in the column heading indicates that the records are sorted by that column. For example `Last Name ▲` indicates that the data is sorted by ascending order of field Last Name. An arrow pointing up or down indicates ascending or descending order correspondingly.

To sort the records:

- Right click in the column heading and select the required sort order from the drop-down menu.
- Or click in a column heading to sort by that column.
- **To reverse the sort order**, click in the column heading again.

For each component You can sort by one column only at a time.

Refreshing

To manually refresh the view:

- In the Status bar, click **Refresh** ↔.

Filtering Records

Use filtering to display only the required data records. You can apply filters to more than one column at a time. When multiple filters are applied, the logical relation between the filtering condition is AND, that is, only records that meet all of the conditions will be included in the selection.

To set and activate filters:

Step 1   If the filters bar is not shown, right click in any of the columns heading and select **Filter bar**, or click **Filters** `▼ Filters` in the Action toolbar.

Step 2   In a column to which you wish to apply a filter, click the filter icon and select from the drop-down menu the appropriate relation for the ▼ filter.

Step 3   Click in the filter cell (not on the icon), a value entering text box opens `⌈_____▼`, enter the appropriate value.

Step 4   To activate all currently set filters now, press **Enter**. Or wait until all filters are set and then activate all set filters at once in Step 6.

Step 5   Repeat Step 2 to Step 4 for each column to which you wish to apply a filter.

Step 6   To activate all set filters, click any of the filter icons in the filters bar and select **Apply All Filters**.

The new selection is displayed. The paging information and tools in the status bar reflects the results of applying the filters.

Figure 1-2 *Paging Status and Tools After Filtering*

21 Record(s) | ▼ Filtered | Page 1 of 3 − ▽━━━━━━━ +
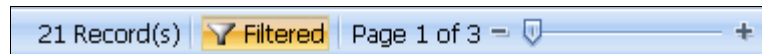
To clear a filter:

Step 1   If the filters bar is hidden, right click in any of the columns heading and select **Filter bar**.

Step 2   Click the filter icon ▼ of the filter you wish to clear and select C**lear This Filter.**

To clear all filters:

Step 1   If the filters bar is hidden, right click in any of the columns heading and select **Filter bar**.

Step 2   Click the filter icon ▼ of the filter you wish to clear and select **Clear All Filters**.

The new unfiltered selection is displayed. The paging information in the status bar indicates now that the current selection is not filtered.

Figure 1-3 *Paging Status and Tools Without Filtering*

22 Record(s) | ✗ Unfiltered | Page 2 of 3 − ━━━━▽━━ +
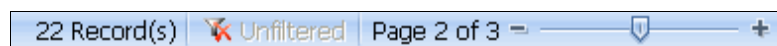
Saving and Using Filters Settings

The Favorites feature enables you to save the current filter settings in the Favorite filters list.

To save filters settings as favorite:

Step 1   Set and activate a filters setting.

Step 2   In the Actions toolbar, click **Add to Favorites** .

Step 3   In the **Save As** dialog box, type a name for this favorite filters setting.

Step 4   If you wish to make it your default filters setting, check the **Set as Default** check box.

Step 5   Click **Save**.

         The new setting is added to your favorites list.

To use a favorite filter setting:

Step 1   In the Actions toolbar, open the **Select Favorite...**
         Select Favorite... ▾ drop-down list.

Step 2   Select the desired filters setting.

Step 3   The selected setting is applied.

To Organize your favorites list:

Step 1   In the Actions toolbar, click **Organize Favorites** .

Step 2   In the **Organize Favorites** dialog box:

         —To delete a favorite, click in the favorite row to select it, then click **delete** .

         —To edit a favorite, click in the favorite row to select it, then click **Edit** .

         —To change the default favorite, check or uncheck the default check box. There can be only one default favorite.

Step 3   Close the Organize Favorites dialog box.

Exporting Data

You can export the data from the grid selection into various file formats on your local work station.

To be able to open and handle these files on your computer, the appropriate file types must be recognized and the appropriate programs to open these files must be installed.

The available file types are:

- **HTML** - Contains the data in a print ready format that can be opened for display by any browser program, e.g., Microsoft Internet Explorer, and can be edited by any HTML editing program, such as RoboHelp.
- **PDF** - Closed picture files that can be read by Adobe Acrobat Reader, but can not be opened for editing.
- **XML** - Data files containing both the data and the data description. Suitable to be imported to certain programs.
- **EXCEL** - Excel files are spreadsheet files that can be opened and edited by Microsoft Excel.
- **TIFF** - Graphics file that can be opened and edited by most graphics programs, e.g. Microsoft Paint.
- **RTF** - Contains the data in a print ready format. These are word processing files that can be opened and edited by most word processing programs, e.g. Microsoft Word
- **TEXT** - Comma separated text files. i.e. the file contains the data, but no data description. Can be opened and edited by any text editor, such as Notepad. These files can be used to import the data into customized programs.

To export data to a file- all formats:

Step 1   Set the filters so that the grid selection contains the data records you wish to export in the desired order.

Step 2   Click at the right hand side of the status bar.

Step 3   From the drop-down list, select the desired file type.

Step 4   From the drop-down list, select the desired page layout: **Portrait** or **Landscape**.

Step 5   In the drop-down list, click **Export Now**.

The exported file is created and displayed on your screen.

Step 6   Save the file.

To export data to an Excel file:

Step 1   In the grid from which you wish to export data, set the filters and the sort order so that the grid will contain the data you wish to export in the desired order.

Step 2   In the Actions toolbar, Click the **option** menu [Options] and select **Export** from the drop-down menu.

The exported file is created and displayed on your screen.

Step 3   Save the file.

2

Managing Organization Utilities

Chapter Topics
- *Managing Organization Utilities - Introduction*
- *Organizational Utilities - Main Window*
- *Managing Organization Personnel*
- *Managing Telephony Resources*
- *Managing Account Codes*

Managing Organization Utilities - Introduction

This section covers the management of organizational utilities, which includes management of personnel, telephony and resources. All three of these components are accessed from the Organizational Utilities Main window, which uses a tree structure to display the selected entity according to defined groups. Other similar aspects of the interface are used to display and define the various entities and are explained in the following paragraphs.

Organizational Utilities - Main Window

The Organizational Utilities main window is displayed when you click the Org. Utilities module tab.

The Organizational Utilities main window provides a single management point for organizational utilities, organizational personnel and organizational telephony.

The Sub-Module Selection Pane

The **Organizational Entities Sub-module Selection** pane, in the lower left hand side of the screen, displays the organizational entity types that you can manage:

- **Personnel**: Manage the organizational personnel telephony usage

- **Facilities**: Manage the organizational telephony Facilities

- **Costing**: Manage all costing related items including; cost plans, rates, discounts, service providers, categories and routes.

• **Account Codes**: Manage the Account Codes.

When you select one of the entity types the **Tree Area** displays the relevant entity tree.

The Tree Area

The **Tree Area**, in the upper left hand side of the screen, displays the tree of the managed entity that you select in the Organizational Entities List.

When you select **Personnel**, the tree displays the organizational personnel arranged according to selected groups.

When you select **Facilities**, the tree displays the organizational data sources grouped according to physical sites.

When you select **Costing**, the tree displays all cost related items such as cost plans.

When you select **Account Codes**, the **definition** option is selected automatically.

Work Area

The Work area is composed of two panes.

• The left pane - **Entities list pane** - displays a list of entities belonging to the entity selected in the Tree. for example: persons belonging to an organizational unit or sub-unit, or facilities belonging to a data source.

• The right pane - **Entity Information pane** - displays information on the entity currently selected in the left pane. If you do not select an entity in the left pane, the right pane displays information for the entity selected in the Tree Area.

You can hide the right pane by clicking the **Close Details** icon.

You can use the Search tool to search for entities in the list in the left pane.

You can also add or delete entities.

Managing Organization Personnel

Managing Organizational Personnel- Introduction

The Application allows for allocation of the organizational personnel to organizational groups. There are various types of organizational groups: those that are defined according to organizational hierarchy, referred to as organizational units (OUs) and those that are defined according to context, referred to as cost centers.

Grouping is flexible: a person can belong to more than one organizational group. For example, a person can belong to an organizational unit and a cost center, such as a special project.

Personnel information can be imported from external databases or you can add persons and their data on an individual basis. The application uses various standard means of importing and exporting data which means the data can easily be synchronized with different management and HR applications, and there is a single point of entry. However, any information can also be entered using the application's user interface. Telecommunication devices in an organization are assigned to individuals or to organizational groups. These assignments enable reporting on calls of individuals and organizational groups.

NOTE

To increase the flexibility of the application, administrators have the option of adding their own information fields to the various dialog screens. These customized information fields are defined in the database and the can therefore also be included in reports and data exports.

The Organizational Utilities Window - Personnel View

In the Personnel view the Organizational Utilities window displays the organizational grouping units according to the selected grouping type (administrative, cost center, mailing list) and the individuals belonging to each unit.

Using the Personnel View you can add or remove organizational groups as well as individuals. You can also assign resources to individual users.

Unit Tool Bar –Used to add a new managed entity belonging to the type selected in the organizational entities sub-modules. Also enables deleting an entity or finding an entity in the tree

Organizational Unit Tree - Displays the organizational units according to the selected grouping type.

Entity Pane - Displays a list of entities belonging to the entity selected in the tree.

Person Tool Bar - This toolbar is displayed when a person is selected in the Entity pane and is used to edit a person's properties.

Entity Information Pane - Displays information about entities selected in the Entity Pane. If no entity is selected, this pane displays information for the entity selected in the tree.

IMPORTANT

You need to scroll to view all the tabs.

Adding Organizational Groups

The organizational section for personnel can be grouped into different organizational entities:

• Administrative: Organizational personnel grouped according to organizational structure
• Cost Centers: Organizational personnel grouped according to organizational projects.

Each of these entities can have sub units. You can add groups of each type as well as sub-units and assign them to organizational personnel. You can also add new persons to the group/sub-unit (see Adding Organizational Personnel). You can then generate different reports as well as proactive alerts for members of specified groups or sub-units.

To add organizational entities or sub-units

Step 1   Select the Org. Utilities module and from the Organization Entities Sub-module, choose Personnel.

The Organizational Utilities window displays the Personnel view. (For a description of the Organizational Utilities window see Organizational Utilities Main Window - Personnel).

Step 2   From the **View by** drop-down list in tree toolbar select the type of grouping to which you want to add the organizational entity.

Step 3   From the Organizational Tree, select the organizational group to which you want to add the entity.

Step 4   In the tree toolbar, click **New OU**. The **Organizational Unit Details** window appears.

The **Details** tab displays the fields necessary for the new organizational entity.

Step 5   In the **Details** tab type the information for the organizational entity in the corresponding text boxes.

Step 6   In the **Org Unit** Type text box, select the relevant type from the drop-down menu options.

Step 7   In the **Parent Entity** text box, you can change the selected parent entity by clicking the **Re-Assign** button and selecting a different entity.

Step 8   Once the required information has been entered click **Update**.

Step 9   The window closes and the new entity is displayed under the selected organizational grouping.

Adding Organizational Personnel

You can add people to the organization. When adding a person you choose the organizational entity (administrative, account or cost center) to which this person is assigned. You can enter additional information for the person and assign them VIP status, which prevents their calls from being listed in the system reports.

You can then register the person as a system user and grant access permissions by assigning a specific user role (see System Users).

To add a person to the organizational personnel

Step 1   Select the **Org. Utilities** module and from the **Organization Entities Sub-module** choose **Personnel**.

The Organizational Utilities window displays the Personnel view (for a description of the Organizational Utilities window see Organizational Utilities Main Window – Personnel View).

Step 2   From the **View by** drop-down list in the tree toolbar select the grouping by which you want the organizational personnel to be displayed.

Step 3   From the Organizational Tree select the organizational group to which you want to add the person.

The **Entity** pane displays the persons belonging to this group.

Step 4   In the Entity toolbar click **New** 📑.

The **Personnel Details Editor** window appears.

Step 5   In the **Details** tab type the name and personal information of the new person in the corresponding text boxes.

Step 6   You can select **VIP** to assign the person VIP status.

NOTE

Individuals assigned the VIP status will not have their incoming and outgoing calls listed in the detail reports.

Step 7   If you want to register the person as a system user, click the User tab and define the person as a system user (see System Users).

Step 8   If you want to add the new person as a member to an existing organizational group, click the Organization tab and select the group to which you want to add the person.

Step 9   Click **Update**.

The new person is added to the organization group you selected.

Quick Personnel Assignment

When clicking the Person Assignment icon (🧑) the Quick Personnel Assignment screen appears. This screen allows you to search for a specific person, reassign the person to an organization unit and assign or unassign a device.

Quick Device Assignment

When clicking the Device Assignment icon (📲) the Quick Device Assignment screen appears.

This screen allows search of a device and assign it to a user.

The override owner will overwrite the previous owner's assignment.

> **NOTE**
>
> *Both options are not disabled for users entered through an external management system. Therefore users that operate in this environment should be informed that the only correct method of assigning person/devices is through exchange.*

Personnel Information Details

Personal details of members of the organization are displayed in the five tabs in right pane of the Entity information pane. Personal details information can be imported directly from the organizational information system.

A user with the proper authorization can edit most of this information.

The various tabs enable accessing and viewing different information:

• **Details** tab: Updating user personal information and VIP status allocation, including the assigned devices.

— **Resources** tab: Assigning resources to organizational members.

• **Contact Info** tab**:** Managing the person's contact information (phone numbers, addresses, and location). This information is imported from the organizational databases**.**

• **Organization** tab: Adding the user to various organizational groups.

• **User** tab: Registering a person as a system user and editing user login information or access permissions.

To edit personal information

Step 1   In the Work Area of the Personnel view click the **Edit** 📝 button.

The Edit Personnel Details window appears.

Step 2   Use the tabs in the window to edit any personal details.

> **NOTE**
>
> *Contact information is imported from organizational sources and cannot be edited.*

Step 3   Click **Update** to update the information.

Assigning Resources to the Organizational Personnel

Individuals and organizational groups in an organization can be assigned telecommunication resources. The system reports on call information according to these assignments.

You can assign more than one resource to a person or a group. You can also change the resources assignment date retroactively. When you change the assignment retroactively all the calls to and from the resources that are stored in the database are now credited to the assigned person/organizational group.

You can assign resources to individual or groups using the Organizational Utilities window in the Personnel view.

You can also name a user as an owner of a resource (see Assigning an Owner to a resource).

NOTE

Assigning Resources to Individual Organizational Members

You can assign communication resources to individual members of the organization.

To assign resources to individuals

Step 1   Select the Org. Utilities module and from the Organization Entities Sub-module choose Personnel.

       The Organizational Utilities window displays the Personnel view. (For a description of the Organizational Utilities window see Organizational Utilities Main Window – Personnel View).

Step 2   From the Organizational Tree in the left pane select the organizational group or sub-unit to which the individual belongs (i.e. descendants).

       The **Entity** pane displays all the individual members of the group.

Step 3   Select the person to whom you want to assign the resource/s.

Step 4   In the **Entity Information** toolbar click the **Edit** button.

       The **Personnel Details Editor** window appears.

Step 5   Select the **Resources** tab and click the **Device Management** button.

       The Device Assignment Edit window appears

Step 6   From the **Available Devices** list in the left pane select a resource you want to add and click **Add**.

Step 7   Continue to add resources from the list as needed.

Step 8   When you finish adding the resources of this data source, you can select additional data sources from the tree and continue to assign resources belonging to other data sources as needed.

NOTE   *If you assign a currently assigned resource to a new owner, it will automatically be unassigned from the original owner.*

Step 9   You can change the assignment retroactively by selecting **Change assignment periods** and selecting a **Start/End** date and time.

Step 10   Click **OK**.

A message informing you that the database was updated successfully appears.

NOTE   *If you have changed the assignment of a resource you will first receive a notification.*

Step 11   Click **OK** to confirm.

The resources you selected are now assigned to the individual person.

NOTE   *If you selected to change the assignment retroactively the call information in the database is updated accordingly.*

Assigning Resources to Organizational Groups

You can assign resources to the various organizational groups.

To assign resources to an organizational group or sub-unit

Step 1   Select the Org. Utilities module and from the Organization Entities Sub-module choose Personnel.

The Organizational Utilities window displays the Personnel. (For a description of the Organizational Utilities window see Organizational Utilities Main Window – Personnel View).

Step 2   From **View by** drop-down list in the tree toolbar select the type of grouping to which you want to add the organizational entity.

Step 3   From the Organizational Tree select the organizational group to which you want to assign the device/s.

Step 4   In the Entity Information pane click **Edit** 📝.

The Organizational Unit Details window appears.

Step 5   Activate the **Resources** tab and click the **Device Management** button.

The **Device Assignment Edit Dialog** window appears.

Step 6   From the list in the right pane select a device you want to add and click **Add**.

Step 7   Continue to add resources from the list as needed.

Step 8   When you finish adding the resources of this data source, you can select additional data sources from the tree and continue to assign resources belonging to other data sources as needed.

Step 9   When you finish adding the resources of this data source you can change the assignment retroactively by selecting **Change assignment periods** and selecting a **Start/End** date and time.

Step 10   Click **OK**.

A message informing you that the database was updated successfully appears.

NOTE   *If you have changed the assignment of a device you will first receive a notification.*

Step 11   Click **OK** to confirm.

The resources you selected are now assigned to the organizational group.

NOTE   *If you selected to change the assignment retroactively the call information in the database is updated accordingly.*

Adding Personnel Manual Charges

A one-time charge can be assigned to a person per month. The assigned date for the manual charge is the first of the month.

To add manual charges

Step 1   Select the **Org. Utilities** module and from the Organization Entities Sub-module choose **Personnel**.

The Organizational Utilities window displays the Personnel view. (For a description of the Organizational Utilities window see Organizational Utilities Main Window – Personnel View).

Step 2   From the Organizational Tree in the left pane select the organizational group or sub-unit to which the individual belongs (i.e. descendants).

The **Entity** pane displays all the individual members of the group.

Step 3   Select the person to whom you want to add the manual charge.

Step 4   In the **Entity Information** toolbar click the 📝 **Edit** button.

The **Personnel Details Editor** window appears.

Step 5   Select the **Manual Charges** tab.

Step 6   Select the applicable month and year from the **Manual Charges for:** drop-down menu.

Step 7   To add a new manual charge click the **Add** button.

Step 8   Select the device name from the drop-down menu or start to enter the device number and the Automatic Completion mechanism will open the menu with the available numbers.

Step 9   Enter a brief description of the charge, and the amount.

Step 10   Click **Update**. The Applied-by field is automatically completed.

To remove a manual charge:

Step 1   Select the relevant charge row.

Step 2   Click the **Remove** button.

System Users

To allow organizational personnel access to the system you need to define them as system users. Access permissions to the system are categorized into user roles and the highest viewable hierarchical unit. Each user role includes permissions to perform tasks according to the tasks requirements. The highest viewable hierarchical unit identifies the specific organizational units whose information the user is permitted to access. When you add an individual to the organization, you can authorize them to access the system by defining them as a user of a specific role and allocating accessible organizational units.

System administrators are authorized to change access rights; can add new users to the system; change a user's password or password requirements; change a user's access permissions; block a user's account etc.

System users are authorized to perform different tasks according to the access permissions allocated to them.

User access permissions are defined by:

- User role: Defines the tasks the user is authorized to perform.
- Highest viewable hierarchical unit: Defines the highest hierarchical organizational unit the user is authorized to view (for example R&D department or Transportation unit).

All users can view their own call information. Performing other system tasks is restricted according to the role the user is allocated. Restricted tasks are for example:

• Viewing information for other organizational personnel
• Scheduling reports
• Scheduling maintenance jobs
• Changing user access rights

The system has three **built in roles**:

• **User**: Restricted to viewing their personal report.
• **Manager**: Authorized to view information for subordinate personnel within the organization and to schedule reports.
• **Administrator**: Authorized to perform all system tasks.

NOTE | *Built in roles cannot be modified or deleted.*

New roles can easily be defined and added by authorized users.

When adding a new user you need to allocate a role to the user and define the highest viewable hierarchical unit the user is permitted to access. This defines the user's access permissions.

You can define the user as a VIP user. VIP user call details are not listed in the system reports.

The system supports different user in the same organization using different languages. The list of defined languages appears in the Language drop-down list. The language is set for each user separately.

To add a new user:

Step 1   Select the Org. Utilities module and from the Organization Entities Sub-module choose **Personnel**.

Step 2   The Organizational Utilities window displays the Personnel view. (For a description of the Organizational Utilities window see Organizational Utilities Main Window – Personnel View).

Step 3   From the Organizational Tree in the left pane select the organizational group or sub-unit to which the person you want to define as a system user belongs.

Step 4   The **Entity** pane displays all the individual members of the group.

The Personal Details Editor window appears.

Step 5   Activate the **User** tab.

Step 6   Select **Register as system user**.

Step 7   In the **User Name** text box type the user name of the new user.

Step 8   In the **Password** text box type a password and then retype it in the Retype Password text box.

Step 9 If you want the user to change the password select **User must change password**.

Step 10 In the **Language** drop-down list select the relevant language for this user.

Step 11 If you want to block this user's account select the **Block account** check box.

Step 12 If you want to set a password expiration date, select the **Enable password expiration** check box and then select either a specific date or duration.

Step 13 In the Role section, click the Update button to add users. (See details below)

Step 14 In the Highest Viewable Hierarchical Unit section, click the Add button to add a unit. (See details below)

If no unit is selected, the user will only be able to see his/her own data.

NOTE

Step 15 In the **Role** section, click the **Update** button to add users.

Step 16 In the **Highest Viewable Hierarchical Unit** section, click the **Add** button to add a unit.

Step 17 Click **Update**.

The person is now defined as a system user.

To change a user password and/or role:

Step 1 Select the Org. Utilities module and from the Organization Entities Sub-module choose Personnel.

The Organizational Utilities window displays the Personnel view. (For a description of the Organizational Utilities window see Organizational Utilities Main Window - Personnel View).

Step 2 From the Organizational Tree in the left pane select the organizational group or sub-unit to which the person whose information you want to edit belongs.

The Entity pane displays all the individual members of the group.

Step 3 From the list in the Entity pane select the person.

Step 4 In the Entity Information toolbar click **Edit** .

The Personal Details Editor window appears.

Step 5 Activate the **User** tab.

Step 6 You can now do any of the following:

Step 7	In the **Password** text box type a password and then retype it in the Retype Password text box.
Step 8	Check the **My Portal** check box to allow using the My Portal module, and select the components to be viewed by the user.
Step 9	In the **Role** text box, click the **Update** button. The Roles window appears.
Step 10	In the upper pane select the role you want to assign to the user and click Add. The role appears in the lower pane.
Step 11	Click **OK**. The window closes and the role appears in the Roles area.
Step 12	Click **Update**. The new user information is updated in the database tables.

To change the highest viewable hierarchy unit

Step 1	Select the **Org. Utilities** module and from the Organization Entities List choose **Personnel**. The Organizational Utilities window displays the Personnel view.
Step 2	From the Organizational Tree in the left pane select the organizational group or sub-unit to which the person whose information you want to edit belongs.
Step 3	The Entity pane displays all the individual members of the group.
Step 4	From the list in the Entity pane select the person.
Step 5	In the Entity Information toolbar click **Edit**. The Personal Details Editor window appears.
Step 6	Activate the **User** tab.
Step 7	In the **Highest Viewable Hierarchy Unit** section, click the **Add** button. The Highest Viewable Hierarchy Unit window appears.
Step 8	In the **Available Organization Units** section, select the unit you want to assign to the user and click **Add**. The unit appears in the Selected pane.
Step 9	Click **OK**.
Step 10	The window closes and the unit appears in the Highest Viewable Hierarchy Unit area.
Step 11	Click **Update**. The new user information is updated in the database tables.

Managing Telephony Resources

Managing Telephony Resources

An organization can consist of one or more physical sites. Each physical site contains one or more data sources. Data sources collect call information directly (PBXs) or by importing files. The PBXs transfer calls from and to the external environment (service providers, tie lines) through trunks and from and to organizational entities (individuals, organizational units) through physical and virtual resources (devices).

A site can include both physical devices – extensions or cellular phones and virtual devices such as calling cards and PINs.

The Application is able to handle a large number of sites comprised of a variety of different types of PBXs and data sources from various vendors.

Using the Application you can:

- Define sites
- Add data sources to existing sites
- Add trunks to data sources and assign them to Service Providers
- Add devices to data sources and assign them to organizational units or individual owners

Managing Sites

A Site refers to the geographic location of the enterprise in which the application is installed. A site may be comprised of several heterogeneous data sources. A Data Source (DS) is the origin of a telephony call's digital data that is collected and processed by the Application, for example, PBXs, IP Switches, Calling Cards and Cellular Phones usage information. The data is collected using a variety of protocols such as RS 232 and TCP/IP communication, FTP and shared folders files access, as well as interfacing with dedicated databases and applications. The collected data is stored in a central database and is available to authorized users of the site.

Adding a New Site

When adding a new site to an organization you need to add the data sources of the new site, define data collectors and define the costing methods and parameters.

To add a new site

Step 1   Select the Org. Utilities module and from the Organization Entities Sub-module choose **Facilities**.

The Organizational Utilities window displays the Facilities view. (For a description of the Organizational Utilities window, see Organizational Utilities Main Window).

Step 2   In the Tree Area, from the sites hierarchical tree select the root and click **New** ⬛ icon on the tree toolbar. From the drop-down list select **Sites**.

The **Edit Site** window appears.

Step 3   In the **Name** textbox, type a name for the new site.

Step 4   In the **GMT Offset** text box enter the time zone offset in hours.

Step 5   Select the relevant status and Business Hours XML file for business hours definitions.

Step 6   In the **Guiding Principles** text box use the arrow buttons to set the order of priority.

Step 7   Click **Update**.

The new site is added to the tree.

Step 8   Select the new site and again click **New** ⬛ in the tree toolbar and from the drop-down menu select **Data Source**.

The **Edit Data Source** window appears.

Step 9   In the **Data Source** tab type the relevant information for a data source in the new site.

Step 10   Select the status of the data source:

Step 11   **Active** / **Inactive** and click **Update**.

The data source is added under the new site in the hierarchical tree.

Step 12   Repeat Step 4 thru Step 5 to add all the data sources in the site.

Configure data collectors for all the new data sources (see Adding a Data Collector).

Editing / Deleting Sites and Data Sources

Using the Organizational Utilities main window in Facilities view you can change the parameters of sites and data sources. You can also delete sites and delete data sources from sites.

To delete site/data source

Step 1   Select the Org. Utilities module and from the Organization Entities Sub-module, choose Facilities.

The Organizational Utilities window displays the Resource view. (For a description of the Organizational Utilities window, see Organizational Utilities Main Window).

Step 2   From the hierarchical tree in the left pane of the Resource view select the site / data source you want to delete.

Step 3   Click **Delete** on the Tree Area toolbar.

A confirmation message appears warning the user that deleting the site will delete the ports and calls associated to the site, the site will be deleted after confirmation.

Only and administrator has the permission to delete a site.

Step 4   Click **OK** to confirm.

The site / data source is deleted and removed from the tree.

To edit site/data source parameters

Step 1   Select the Org. Utilities module and from the Organization Entities Sub-module choose **Facilities**.

The Organizational Utilities window displays the Facilities view. (For a description of the Organizational Utilities window, see Organizational Utilities Main Window).

Step 2   From the hierarchical tree in the Tree Area select the site / data source you want to edit.

Step 3   Click **Edit** on the Entity Information pane toolbar.

The Resource Edit window appears.

Step 4   Change the parameters you want to edit and click **Update**.

The information is updated.

Managing Trunks

The Application supports the configuration of two types of trunks:

- Regular trunks connecting a data source through service providers.
- Tie Line trunks connecting two data sources directly.

To enable creating reports relating calls on regular trunks to service providers, you need to assign each trunk to a service provider from a list of service providers defined in the system.

Only an authorized user can add new service providers to the system.

NOTE

When adding tie line trunks you need to specify the data sources that are connected through the Tie Line trunk.

Managing trunks is done in the Facilities view.

To display information for a specific trunk

Step 1   Select the Org. Utilities module and from the Organization Entities Sub-module choose Facilities.

The Organizational Utilities window displays the Facilities view. (For a description of the Organizational Utilities window, see Organizational Utilities Main Window).

Step 2   From the hierarchical tree in the Tree, select the data source of the specific trunk.

The **Entity** pane displays a list of all Facilities associated with this data source.

Step 3   Select the required trunk.

The **Details** tab in the Entity Information pane displays information for the trunk.

Adding Trunks

The Trunks view displays all trunks associated with a site or data source. You can add trunks to a data source. After adding the trunk you can assign it to a service provider so that the system can create reports assigning the calls through the trunk to a specific service provider.

To add a trunk

Step 1   Select the Org. Utilities module and from the Organization Entities Sub-module choose **Facilities**.

The Organizational Utilities window displays the Facilities view. (For a description of the Organizational Utilities window, see Organizational Utilities Main Window).

Step 2   From the hierarchical tree in the Tree Area select the data source where you want to add a trunk.

The **Entity** pane displays a list of all resources associated with this data source.

Step 3   Click **New** [icon] on the **Organizational Entity** toolbar and select **Trunk** from the drop-down list.

The Edit Trunk window appears.

Step 4   In the **Edit Trunk** type a name for the new trunk in the **Name** text box.

Step 5   Enter any additional comments in the **Comments** text box.

Step 6   From the **Type** drop-down list select the type of the trunk: **Regular** or **Tie Line**.

Step 7   From the **Status** drop-down list select the trunk status.

Step 8   From the **Function** drop-down list select the relevant function i.e. the usage, for the selected device type.

Step 9   From the **Class of Service** drop-down list select the class of service that is allowed.

Step 10   From the **Data source** drop-down list select the data source that is connected to the trunk.

Step 11   Click **Update**.

The window closes and the trunk is added to the list of resources Entity pane of the required data source.

Editing Trunk Settings

You can edit the setting of a trunk belonging to a data source.

To edit trunk settings

Step 1   Select the Org. Utilities module and from the Organization Entities Sub-module choose Facilities.

The Organizational Utilities window displays the Facilities view. (For a description of the Organizational Utilities window, see Organizational Utilities Main Window).

Step 2   From the hierarchical tree in the Tree Area select the data source of the specific trunk.

The **Entity** pane displays a list of all resources associated with this data source.

Step 3   Select the trunk you want to edit and click the [icon] **Edit** button on the **Entity Information** toolbar.

The **Edit Trunk** window appears.

Step 4   Update any information you need to edit.

Step 5   You can click Re-assign to re-assign the trunk.

The Device Assignment Edit Dialog window appears.

Step 6   Re-assign trunks according to your needs by selecting the person or organizational unit from the left pane of the work area and clicking **Add**.

Step 7   If you want to change the assignment period select **Change assignment period**.

The right pane of the Work Area displays the assignment period.

Step 8   Use the **Start** and **End** text boxes to change assignment retroactively.

Step 9   When you finish click **OK**.

The window closes.

Step 10   Click **Update**.

The information is updated in the Details tab of the Entity Information pane.

Deleting Trunks

You can delete a trunk belonging to a data source.

To delete a trunk

Step 1   Select the Org. Utilities module and from the Organization Entities Sub-module choose Facilities.

The Organizational Utilities window displays the Facilities view. (For a description of the Organizational Utilities window, see Organizational Utilities Main Window).

Step 2   From the hierarchical tree in the Tree Area select the data source of the specific trunk.

The **Entity** pane displays a list of all resources associated with this data source.

Step 3   Select the trunk you want to delete and click the ☒ **Delete** button on the **Organizational Entity** toolbar.

A confirmation message appears.

Step 4   Click **OK**.

The trunk is deleted from the Entity pane.

Managing Resources

In each geographical site call information is collected by the data sources defined in the site. Each data source is associated with one or more communication resources.

NOTE
Each data source is associated with one type of communication resource.

The Application supports communication resources such as:

- Telephone extensions
- Calling cards
- Cellular phones
- PIN numbers

Telecommunication resources in an organization can be assigned to individuals or to organizational groups. The database stores call information according to these assignments.

You can assign more than one resource to a person or a group, and you can change the resource assignment retroactively. If you change the assignment retroactively all the calls to and from the facility in the database are now credited to the new person/organizational group.

Managing the resources is done in the Organizational Utilities main window in the Facilities view.

NOTE
You can also assign resources to individuals or organizational units directly using the Personnel view.

To display a specific resource

Step 1   Select the Org. Utilities module and from the Organization Entities Sub-module choose Facilities.

The Organizational Utilities window displays the Facilities view. (For a description of the Organizational Utilities window, see Organizational Utilities Main Window).

Step 2   From the hierarchical tree in the Tree Area select the data source for the specific resource.

The **Entity** pane displays a list of all resources associated with this data source.

Step 3   Select the required resource.

The **Details** tab in the **Entity Information** pane displays its detail and the person or organizational group to whom the resource is assigned (You can view a history of resource assignment in the **Properties** tab).

Adding Resources to Data Sources

The Entity pane of the Organizational Utilities window in the Facilities view lists all resources (trunks and other devices) associated with a data source. You can add resources to a data source. After adding the resource you should assign it to an individual or an organizational group.

NOTE

If you do not assign the facility it will not appear in the system reports.

To add a resource

Step 1   Select the Org. Utilities module and from the Organization Entities List choose Facilities.

The Organizational Utilities window displays the Facilities view. (For a description of the Organizational Utilities window, see Organizational Utilities Main Window).

Step 2   From the hierarchical tree in the Tree Area select the data source for the specific facility.

The **Entity** pane displays a list of all devices associated with this data source.

Step 3   Click **New** on the Organizational Entity toolbar.

Step 4   From the **Select a New Resource Type** drop-down list select **Group**.

The **Edit Resources Group** window appears.

Step 5   In the **Name** text-box type a name for the new resource.

Step 6   Enter any additional information according to your needs and click **Update**.

The window closes and the new facility is added to the list in the Entity pane. The system automatically allocates an ID number to the new resource group.

Assigning an Owner to a Resource

You can assign a new owner to a resource at any time. You can also assign the resource retroactively in which case the calls stored in the database will be credited in the system reports to the new owner from the date of the changed assignment.

To assign a resource to an individual or organizational group

NOTE

You can also assign Facilities by selecting a person or organizational group and assigning them Facilities (see Assigning Facilities to Organizational Personnel).

Step 1   Select the Org. Utilities module and from the Organization Entities Sub-module choose Facilities.

The Organizational Utilities window displays the Facilities view. (For a description of the Organizational Utilities window, see Organizational Utilities Main Window).

Step 2   From the hierarchical tree in the Tree Area select the data source of the specific facility.

The Entity pane displays a list of all resources associated with this data source.

Step 3   Select the facility you want to assign and click **Edit** 📝 on the Entity Information toolbar.

The **Edit Device** window appears.

Step 4   In the **Assign To** text box type the name of the new owner or click **Re-Assign** to select the new owner using the **Select Owner** window (see Selecting Personnel). If you want to assign the device retroactively you can determine the assignment time period by checking Change assignment periods and entering the date and time for starting and ending the assignment see Date Selection.

Step 5   Click **OK**.

The **Edit Device** window re-appears with the person you selected in the **Assign To**

Step 6   Click **Update**.

The change is saved to the database.

Adding a Device Range

It is possible to add a range of devices manually to the application using the Add Device Range feature in the Facilities menu. The length of the device range is limited to 4 characters.

To add a device range

Step 1   Select the Org. Utilities module and from the Organization Entities List choose Facilities.

The Organizational Utilities window displays the Facilities view. (For a description of the Organizational Utilities window, see Organizational Utilities Main Window).

Step 2   From the hierarchical tree in the Tree Area select the data source for the specific facility.

The **Entity** pane displays a list of all devices associated with this data source.

Step 3   Click the **Add Device Range** button on the toolbar.

Step 4   From the **Device Type** drop-down list select either **Extension** or **Range**.

Step 5   Enter a **From** and **To** range.

Step 6   Click **OK**.

Deleting Resources

You can delete a resource associated with a data source.

To delete a resource

Step 1   Select the Org. Utilities module and from the Organization Entities Sub-module choose Facilities.

The Organizational Utilities window displays the facility view. (For a description of the Organizational Utilities window, see Organizational Utilities Main Window).

Step 2   From the hierarchical tree in the Tree Area select the data source of the specific resource.

The **Entity** pane displays a list of all resources associated with this data source.

Step 3   Select the resource you want to assign and click **Delete** ✖ on the **Organizational Entity** toolbar.

A confirmation message appears.

Step 4   Click **OK**.

The resource is deleted from the Entity pane.

Managing Account Codes

Account Codes Grid

The Account Codes grid enables viewing and updating Client Codes and Matter Codes, which together make up the Account Codes and to Import or Export Account Codes.

To open the Account Codes grid:

Step 1   Select the **Org Utilities** Module.

Step 2   From the **Sub Modules** pane, select **Account Codes**.

The Account Codes Grid Opens.

When the grid first opens, it shows only Client Codes rows, and the Matter Codes rows are hidden. To expand the Matter Codes of a Client, click the plus sign ⊞ to the left of the Client row. To collapse the Matter Codes, click the minus icon ⊟ to the left of the Client Code row.

The grid is similar to the application's Enhanced Grid. For common grid operations, such as filtering, paging, sorting and exporting the records.

Creating and Editing Account Codes

To Create or edit an Account Code:

Step 1   From the Account Codes grid, open the Account Codes dialog box:

— If the Account Code is for a new Client, click the **Add Account Code** 🗋 in the Actions toolbar.

— If the Account is for an existing Client, click in a row to select the Client Code, and click **Edit Account Codes** 🖉 in the Action toolbar.

Step 2   To view existing Client Codes and select a Client to add the Account Code to:

— In the **Search** text box `Search...` ▼, type the beginning of the required Client Code and press Enter.

— From the drop-down list, click to select a Client.

Step 3   To view previous updates to the selected Client Code, click **History** 🔄.

Step 4   In the Client pane (upper part) of the New/Edit Account Code dialog box, complete the following fields:

Option	Description
Client Code	A unique number identifying the Clint.
Client name	The name of the Client.
Valid from	Start date and time for this Client. Default is the current date and time.
Valid To	End date and time for this Client. Default is end of year 9999.
Price Plan	Select the Price Plan to apply to the Client.
Customer Name	You can use the customer name to group Clients, or to enter a formal name.
First Name	First name of the Customer.
Last Name	Last name of the Customer.
Salutation	How to address this person.
Auto Add	
Phone	Phone number of the Customer.
Fax	Fax number of the Customer.
E-mail	E-mail of the Customer.

Step 5   In the Matter pane (lower part) of the New/Edit Account Code dialog box:

—To create a new Matter Code:
   a. Click in the uppermost row or click the new icon 📄,

   b. Type Matter Code and Name.

   c. Press **Enter**.

—To delete an existing Matter Code, click in the row to select it, and click delete ✕.

NOTE

You cannot edit a Matter Code. To change a Matter Code, delete it and then create a new one.

Step 6   To save and return to the grid, click Save 💾. To save and continue to create another Account Code, click Save and New 🗐 Save & New.
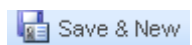
Importing and Exporting

You can Export Account Codes from one application and import them to another application.

To Export Account Codes:

Step 1   In the Account Codes grid, set the filters to select the Account Codes you wish to Export.

Step 2   In the Action toolbar, click **Export** ⬛ Export .

Step 3   In the **Export** dialog box, enter a **File Path** or click Browse [...] to select a file path from the application files tree.

Step 4   Enter a File Name. The extension must be .txt.

Step 5   Click **Export** [Export] .

To Import Account Codes:

Step 1   In the Action toolbar of the Account Codes grid, click **Import** ⬛ Import .

Step 2   In the Import dialog box, complete the following fields:

Option	Description
Local	A unique number identifying the Clint.
Local File	Enter the local file you wish to Import, or click Browse to select the Import file.
Upload	The name of the Client.
Upload File	Enter the upload file you wish to Import, or click Browse to select the Import file.
Include Headers	Check if the file includes Headers.
Run Costing Refresh	Check if you wish to run Costing Refresh.

Step 3   Click **Import** [Import] .

3

Reports

Chapter Topics

Reports - Introduction

Reports are a central feature of the application. The **Reports** feature enables you to gather and analyze information regarding the resources and services with different points of focus and perspectives.

The various reports are designed to give the enterprise different perspectives of the telephony usage.

The reports are accessed through the Reports main window.

To generate a report you have to configure it first. That is, to customize it to your organization's needs, and to set its distribution method.

After Configuring a report you can either:

- Run it immediately as a **Preview** on your Screen, or
- Run it immediately according to its defined **Distribution**.

Or you may save the configured report as a User defined Report and then:

- Run it manually later, or
- Schedule it to run at once or periodically, or
- Further define its output and Distribution options.

Reports Main Window

The Reports main window is displayed when you select the Reports Module.

Use the Reports main window to configure and generate reports.

Reports Tree Area

The left hand pane of the window contains the Reports Tree. All the application reports are displayed in a tree structure. You can expand or collapse branches and leaves in the tree structure to select the desired report.

Reports Work Area

The right hand pane of the window is the Reports Work Area. The Work Area contains the tabs where you configure the reports.

The buttons on the work area toolbar (top right) enable you to do the following:

• Save the report as a User Defined Report. See Saving a configured Report.

• Run the report

• Preview the report. See Viewing On-Screen Reports.

Configuring a Report

Configuring a Report - Introduction

Use the report configuration tabs in the reports work area to configure the report.

Each tab enables you to set a specific set of parameters needed for generating the report.

Since different reports require different parameters and options, not all reports include all the tabs. Each report has its own tabs containing only the parameters and options relevant to that report.

The **Details** tab summarizes the report settings.

To configure a report

Step 1   In the application main window, click **Reports.**

Step 2   Expand the report groups to open the desired report, and click the report name.

The Reports configuration tabs opens in the work area with the **Scope** tab on top.

Step 3   In the **Scope** tab, define the report scope.

Step 4   Click the **Display Options** tab and select the desired display options.

Step 5   Click the **Filters** tab and set the required filters.

Step 6   If required, click the **Common Filter** tab and define common filter fields.

Step 7   If required, click the **Distribution** tab and define the distribution for the report.

Step 8   Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it.

NOTE   *You can click the Preview* *button at any time to view the report on-screen on your workstation.*

NOTE   *Not all tabs are available for all reports.*

User Defined Reports

When you save a configured report, it becomes a **User Defined Report**.

User Defined Reports appear in the Reports Tree as a separate group. The number next to this group indicates the number of User Defined Reports defined in the application.

The following options can be applied only to User Defined Reports:

• Report Scheduling.
• The Output Parameters section in the Report Distribution tab.
• Access through My Portal.

To create a new User-Defined Report:

Step 1   Select a report from the Reports Tree.

Step 2   Configure the report to your requirements.

Step 3   Click the **Save As** button.

Step 4   In the **Name** text box, enter a name for the user-defined report. This is how the report will appears in the Reports Tree under **User Defined Reports**.

Step 5   In the **Description** text box type a description for the user-defined report.

Step 6   Click **OK**.

The new User Defined Report is added to the Reports Tree and can be accessed by selecting it.

To view and edit User-Defined Report:

Step 1   Select a report from the User Defined Branch of the Reports Tree

Step 2   Edit the configuration and then:

—You can save it with the same name (this will override the previous configuration, or

—You can save it with a new name (and keep the previous configuration too).

Scope

Use the **Scope** tab to select the data you wish to include in the report:

• Select the report entities, that is, organizational entities you wish to include in the report. These can be individual persons, whole organizational units, specific devices etc.

• For Organization Unit report types only, click the Organization Levels button and set summaries and page breaks levels.

• Select Period and Time Frame for the report. Only calls from that period and time frame are included in the report.

• Select a specific Dialed Number or Dialed Number Prefix.

Selecting the Report Entities

From the **Entity Type** drop-down list, select the entity type by which you wish to select the records to be included in the report.

The available options depend on the report type.

NOTE

The following table contains the full list of scope definition options. For each report, only the applicable options for that report are available.

Section	Option	Description
Entity Type	Person(s)	To select individual persons directly. When you select persons you also select the devices assigned to these persons.
	Unit(s)	To select Organizational Units. The **Hierarchy** drop-down list is activated to let you select the hierarchy from which you wish to select the organizational unit. When you select organizational units you also select the persons assigned to these units and the devices assigned either to the unit or to the persons assigned to the unit.
	Device(s)	To select devices directly.
	Extension(s)	To select extensions.
	Service Provider(s)	To select service providers.
	Account Code(s)	To select Account Codes
Hierarchy	Administrative	To select the units from the Administrative hierarchy.
	Cost Centers	To select the units from the cost centers hierarchy.
	Mailing Lists	To select the units from the mailing lists hierarchy.
Hierarchy Selection	Select Hierarchy	Select to generate the report for one selected hierarchy only.
	All Hierarchies	Select to generate the report for all Hierarchies. (Unassigned Personnel only)
For All	Checked	To include all the entities. The **Select...** button is unavailable.
	Unchecked	To select specific entities. The **Select...** button is available
Select...	Button	Click to open a selection window to select Organizational Units, Persons, Devices/Extensions, Service Providers or Account Codes.
	Text box	Type an entity name or comma separated list of entity names.

Selecting Organizational Levels

If the report type is one of the Organization Structure reports, you can also define for which organizational levels you wish to have summaries and page breaks.

Click the **Organization Levels** button to open the levels dialog box:

- Check the Level check box for summaries.
- Check the Page Breaks check box to have a new page for each unit of that level.

Click the **Organization Levels** button again to close the dialog box.

Selecting the Report Period

Select the period for the report. You can choose to report on all the calls for the selected period or include only calls made during business or non-business hours or within a specific hour range.

The following table contains the full list of period selecting options. For each report, only the applicable options for that report are available.

Section	Option	Description
Report Period	Pre-defined (for example: Yesterday, Last year, Last month etc.)	To select a predefined period option, for example, *Yesterday*. Click on the **Pre-defined Periods** button to select the required option.
	Last	To run a report on the last selected number of days. Enter the required number of days in the Last field. You can also report on the last two months. You can choose to report on all hours within the period or only on Business / Non-business hours.
	From / To	To define the date and time period to be included in the report.
Time Frame	Time	To select a predefined time range from the drop-down list (All day, Business hours, Non-business hours).
	From / To	To select a daily range of hours to be included in the report. Enter the start and end times in the relevant fields.

Selecting a Dialed Number

Use the **Dialed Number** field to define the dialed number for which you wish to select call records.

You can enter a full number or a prefix of any length followed by a wild card symbol (*) to define a certain geographic area or a certain service provider.

This field allows you to enter multiple strings separated by a comma, e.g. 054*, 052*.

Display Options

Use the **Display Options** tab to set the following report settings:

The following table contains the full list of display options. For each report, only the applicable display options for that report are available.

NOTE

Section	Option	Description
Include Categories	Check box for each category	Check the required call categories
Unmasking	Check to Unmask Numbers and Data in the report.	Enables you to override number masking. If checked, the Unmask Ability dialog box opens. Enter the two passwords and click **OK**.
Response Time Groups (in Seconds)	Define the 4 response time groups.	For the first 3 groups, type a minimum and a maximum number of seconds. For the last group type a minimum only.
Configuration	Dialed Number Mask	Enables aggregating according to part of the phone number. Type the number of digits you wish to aggregate by.
Report Size	Max. Number of rows per device	Lets you limit the number of rows for each device and avoid long reports.
Calculate By	By Amount	Calculate the number of incoming calls.
	By Percentage	Calculate the percentage of incoming calls.
Answered In		Define which calls to include based on the number of seconds it took to answer the call.
Resource Type	Device	Includes devices.
	Trunk	Includes trunks.
Fixed Charges	Include Fixed Charges	Check to include fixed charges in the report.
	Fixed Costs in One Line	Select to display a summary of fixed costs in one line.
	Detailed Fixed Costs	Select to display details of fixed costs.
Calculate Utilization	By cost	Calculate by the cost of the calls.
	By Price	Calculate by the price of the calls.
	By Percentage	Calculate by percentage of calls
	By Duration	Calculate by the duration of the calls.
	By Erlang (for Trunk reports)	Calculate the traffic volume in Erlang (for Trunk reports only).

Section	Option	Description
Taxes	Include Taxes	Check this check box to include taxes in the report.
	Taxes in One Line	Select this option to display a summary of taxes in one line.
	Detailed Taxes	Select this option to display details of taxes.
Show Results As	Table	Check to display the report as a table.
	Graph	Check to display the report as a graph.
Costing Type	Select one of the following: • Cost and Price • Only Cost • Only Price	**Cost** is what the organization is charged for the calls. **Price** is what the organization charges for the calls.
Sort By	The drop-down list contains all applicable sort fields for that report.	Select the field by which you wish to sort the report data.
	Sorting order: Ascending/Descending	Select to sort the data in ascending or descending order.
Top Usage	Ranking	Number of devices to appear in the report.
Page Setup	Page Size	Choose the paper size. Default Paper Size / A4 / A3
	Page Orientation	Choose the orientation. Landscape / Portrait

Filters

Use the Filters tab to limit the calls included in the report.

The following table contains the full list of filtering options. For each report, only the applicable options for that report are available.

Section	Option	Description
Device Type	Extension	Include calls associated with selected extensions.
	PIN Code	Include calls associated with selected PIN codes.
	Cellular	Include calls associated with selected cellular phones.
	Calling Card	Include calls associated with selected calling cards.
	Pager	Include calls associated with selected pagers.
	Trunk	Include trunk calls.
	Trunk Group	Include trunk group calls.
	Generic Asset	Include calls associated with selected other devices.
Call Direction	Incoming	Include incoming calls.
	Outgoing	Include outgoing calls.
	Internal	Include internal calls.
	T2T Incoming	Include incoming trunk to trunk calls.
	T2T Outgoing	Include outgoing trunk to trunk calls.
	Conference Incoming	Include incoming conference calls.
	Conference outgoing	Include outgoing conference calls.
	Other	Include other calls such as conference calls or trunk-to-trunk calls.
Call Type	Business	Include business calls.
	Personal	Include personal calls.
Call Categories	Select...	Click **Select...** , select a category and click Add. When finished selecting, click OK.
Duration	Min / Max [00:00] (Min:Sec)	Select to filter calls according to minimum / maximum length of calls.

Section	Option	Description
Cost	Min / Max	Select to filter calls according to minimum / maximum cost of calls.
No. of Calls	Min / Max	Select to filter calls according to minimum / maximum number of calls.
Total Threshold	Number Of Calls Greater than	Check the check box and type the minimum number of calls.
	Duration Total Greater than	Check the check box and type the minimum total duration time.
	Cost/Price Total Greater than	Check the check box, select Cost or Price from the drop-down list and type the minimum total Cost or Price.

Common Filter

Use the **Common Filter** tab to farther limit the call records included in the report according to additional non-standard fields. These fields are defined in a configuration file that maps additional CDR data fields onto the database.

The following options are available for filtering the calls:

Section	Option	Description
Conditions	Logical Operator	Select either **AND** or **OR** from the drop-down list. This field determines whether the filter is performed on one field or multiple fields.
	Field To Filter By	Select the field by which you want to filter the calls. These fields include options from a file that selects the search criteria. They may include: • Data Source • Site • Device Function • Device Class of Service • Device Status or other values based on the information sent to the database from the phone system and the customer requirements.
	Comparison Operator	Select the required operator from the drop-down list. The Comparison Operator field defines the operations performed on the selected fields in the **Field to Filter By** field, such as: • Equals (=) • Does not equal (<>) • Greater than (>) • Less than (<) • Greater than or equal to (>=) • Less than or equal to (<=) • Between • Like This field creates an equation that performs the filter operation.
	Value(s)	Provides the value that the equation employs to sort the data, like *Number of Calls per Month Greater Than **400***.

To set a condition:

Step 1   Select a **Logical Operator** option.

Step 2   Select one **Field** by which to filter the calls.

Step 3   Select a **Comparison operator**.

Step 4   Enter the required **Value(s)**.

Step 5 Click **New** 📄. The condition is displayed in the text box.

Step 6 To add additional conditions, repeat the above steps.

To delete a condition:

Step 1 Click on the relevant condition in the text box, to select it.

Step 2 Click the **Delete** ✖ button. A system message appears.

Step 3 Click **OK** to confirm deletion.

Distribution

Use the **Distribution** tab to set the delivery method for the report.

You can view the report online on your local workstation.

You can also schedule a report job that can be performed once at any day or time or scheduled to run as a recurring job.

The report can then be dispatched according to your choice: to a printer, to a saved file or by e-mail to selected recipients.

NOTE

You cannot set the Output parameters on a System report. You must define a customized report and save it to the system. The Output fields will be enabled for the user defined reports.

The availability of the delivery options depends on the specific usage of the report and the authorization level of the user.

Some of the system reports have two options available for report outputs:

• **Single**: A single report is generated for all entities or persons in the report scope.
• **Multiple**: Individual reports are generated for each entity or person in the report scope.

The following table lists the available options for configuring the delivery method of reports.

Section	Option		Description
Output	Output Type	Single	Create one report for all scope personnel/ entities.
		Multiple	Create individual reports for each person/entity included in the scope.
		File Type	This field selects the output file type from the drop-down window in which the report will be displayed. The file type options are the following formats: • MS Word (Doc) • MS Excel (XLS) • MS Excel Data Only (XLS) • Portable Document • Rich Text (RTF)
	Printer		Lets you print the report on any one of the predefined system printers. You can select the **Print** option by selecting the **Printer** check box. You can click on the **Printers** button to select a printer from the list of defined printers.
	File Path	Browse	Lets you save the report to file.
		File Name	Enter the report's **File Name**. The **File Type** is determined and automatically inserted by the selection in the **File Type** field above.
		Name Structure	Sets the **Report Name** structure to include just the report name, or to include the name with the date. When reports are run periodically, the date with the name can distinguish the reports from one another.
Email	E-mail report to All entities selected in the scope		Lets you send the report to the persons in the report scope or the owners of the **Scope** entities.

Section	Option	Description
E-mail to Other Recipients		Lets you e-mail the report to selected persons or entities. The Recipients button is enabled by clicking on the check box. Clicking on the Recipients button opens the Recipients Selection window. Here is where you select new recipients. The recipients are displayed on the Distribution tab next to the Email to recipients check box.
E-mail Recipient		Lets you e-mail the report to someone who is not on the organization's personnel list.
E-mail Body Message		Enter e-mail message text that accompanies the attached report in the e-mail.
Scheduled Jobs		After you select an output option, this field enables you to define when the Job will run. The **New Job** button or the **Edit Job** button enables you to schedule the job frequency.

To view the report on your local workstation

Step 1   You do not need to choose a distribution method.

Step 2   Click the **Preview** 📖 button.

The report is generated and displayed on-screen on your workstation.

To define the report distribution

Step 1   Select the **Output** format (**Single** or **Multiple**)

Step 2   Select the **File Type** for the report (**Doc**, **XLS**, **PDF**, **RTF**)

Step 3   Select the report output method (**Printer**, **File**, **e-mail** or just preview the report)

To preview the reports

- Click the **Preview Report** button, or view the report in the **Report Scheduler** or under the **Scheduled Jobs** option.

The **Preview** button is located in the **Scheduled Jobs** window in this tab.

The **Report Scheduler** shows the job list of the **User Defined Reports**. It is located under the **Reports** menu in the **Reports Scheduler** option.

The **Scheduled Jobs** window shows all scheduled jobs. It is located under the **Maintenance** menu **Task Manager** option.

To send the report to a printer

When the application is installed, it reads the available printers in the Windows setup file. When new printers are installed in the Windows setup, the application detects them as well.

Step 1   In the **Output** section, select the **Printer** check box to select the **Print** option, and click **Printers.**
The **Printers Window** appears.

Step 2   Select a printer for printing the report.

To generate the report as a file

All files are sent to an Output folder in the application. You can create subfolders for specific files or application users. The Browse button enables you to direct the export of reports to the individual subfolder.

Step 1   In the **Output** section, select **File Path** and click **Browse** to select the folder under the **Output** files folder as the destination of the report files.

Step 2   In the **File Name** field, enter the **File Name** that defines the file output for the report. The extension is automatically entered once you select the **File Type** option above.

Step 3   Select a **Name Structure** for the file output. You can add a date in one of three formats to identify recurring reports from one another. If you define the report name without adding a date to the structure, each new report will override the previous report.

To select an E-mail recipient for the report

Step 1   Select an e-mail option to send the report to an e-mail recipient.

Step 2   Select **E-mail report to all entities selected in the scope** to send the report to all relevant parties who are listed in the report

Step 3   Select **E-mail to other recipients** to send the report to a restricted list of the organization's personnel. The **Recipients button** is activated with this check box, and enables you to select the targets for the e-mail by using the Recipient Selection window.

Step 4   Select **E-mail Recipient** to select an e-mail recipient who is not in the organization list. You can select more than one recipient by separating each e-mail address by a comma.

Step 5   From the **Organizational Structure** tree select the organizational unit to whom the person or unit belongs and from the bottom pane select the person or unit.

Step 6   Click **Add**.

The person or organizational unit is added to the list in the lower pane.

Step 7   When you finish selecting the report recipients click **OK**.

The window closes.

NOTE

You can choose to email the report for each member of a selected organizational unit separately, or email the report to the organizational unit address.

To schedule a report to be generated according to a pre-set schedule

Step 1   From the **Reports** Tree select the user-defined report you want to schedule.

Step 2   Activate the **Distribution** tab.

Step 3   Click the **Schedule New** 📝 button.

The **Job Scheduler - Web Page** Dialog appears.

Step 4   In the **Job Name** textbox type a name for the scheduled job.

Step 5   In the **Description** textbox you can type a description.

Step 6   Schedule the job according to your needs or select the time to run a one-time job (make sure the time you select is in the future).

The scheduling options are listed in the following table.

Section	Field	Options	Description
Job Name			Name for the scheduled job
Description			Textbox for Job description
Job Type		One time	A single generation of the report at a specified date and time.
		Recurring	Repeated generation of the report on specified days at specified time/s.
		Limit Duration to	Limits the time of the report run.
One Time Job	Run Job At:	(Date)	The date of the onetime scheduled report
		(Time)	The time of day of the onetime scheduled report

Section	Field	Options	Description
RecurringJob	Scheduled Days	Daily	The report will be generated daily at the specified time/s.
		Weekly	The report will be generated weekly at the specified day/s and time/s.
		Monthly	The report will be generated every month at the specified day/s and time/s
	For daily generation of reports	Every ¨ day(s)	Frequency for daily generation of reports: According to the number entered, the report is generated every second, third, etc. day at the specified time/s.
	For weekly generation of reports	Every ¨ week(s)	Frequency for weekly generation of the reports: The report is generated on the specified week of the month on the selected day of every month (or second, third, etc. month).
		Select the days of the week.	For weekly generation of reports: The report will be generated on the selected days of the week (according to the selected frequency).
	For monthly generation of reports	Day ¨ of every ¨ month(s)	Frequency for the monthly generation of reports. The report is generated on the specified day of every specified month. For example, on day one of every second month.
		The (1st, 2nd, 3rd,4th ,last) day of the week specified, of every ¨ month.	Frequency for monthly generation of reports: The report is generated on the specified week of the month on the selected day of every month (or second, third, etc. month).
	Scheduled Time in Day	Once at	The report is generated once a day at the specified hour.

Section	Field	Options	Description
		Every ¨	Frequency of report generation according to selected frequency units (hours/minutes).
		Hour(s)/ Minute(s)	Report generation frequency units.
		From / To	Time period for repeated generation of reports.

Step 7 Click **OK.**

The window closes and a message confirming the job was created successfully appears.

Step 8 Click **OK**.

The window closes and the report will run according to the schedule.

NOTE

If you scheduled the report to run in the future you can run it immediately by clicking the RUN JOB ⊡ *button.*

Saving a Configured Report

After configuring a report you can save the Configured report as a User Defined Report.

To create a user-defined report:

Step 1 Select a report from the Reports Tree.

Step 2 Configure the report according to your requirements.

Step 3 Click the **Save As** ⊞ button.

The **Save As** window appears

Step 4 In the **Name** text box type a name for the user-defined report.

This name will appear in the Reports Tree under **User Defined Reports**.

Step 5 In the **Description** text box type a description of the user-defined report.

This description will appear in the tool tip of the user-defined report in the Reports tree.

Step 6 Click **OK**.

The new User Defined Report is created and can be accessed by selecting it from the Reports Tree.

Viewing On-Screen Reports

After the system generates the on-screen report it is displayed directly in your browser window.

You can use the toolbar buttons to navigate the content of the report online, save the report as a PDF file (viewable with Adobe Acrobat Reader) and export the results to a local file.
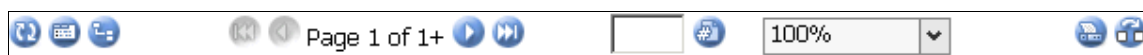
The following table lists the icons of the on-screen toolbar and their functions.

Icon	Name	Function
	Navigate to configuration wizard	Return to the main window
	Show report group tree	Displays the tree of the report entities. Click the plus sign to expand the tree. You can now access the relevant report information of any entity by selecting the entity in the tree.
	First page	Go to the beginning of the report.
	Previous page	Go to the previous page.
	Next page	Go to the next page.
	Last page	Go to the last page of the report.
	Go To page	Go to the page specified in the text box.
100%	Zoom	Zoom in or out of the report.
	Export	Export the report to a file of selected format. The following formats are supported: Crystal Reports (RPT), Acrobat Format (PDF), MS Word, MS Excel (including data only), and Rich Text Format (RTF). Follow the online instructions to export the report.
	Print as PDF document	Save the report as a PDF file.

Selecting Scope Entities

Selecting Organizational Units

The Organization Units Selection window enables you to search for organizational units and to select the units you wish to include in the report.

To display the Organization Units Selection window

Step   Select **Unit(s)** in the **Entity Type** field on the **Scope** tab, then uncheck the **For All** check box and click the **Select...** button.

To initiate a search in the Units Selection window

Step 1   Fill in the following variables:

Organization Units Selection

🔍 [   ] Search By: [All] ▼ [Administrative ▼] Search Under: [   ] [i] [Search]

—In the first **Search** text box, enter any unit as a parameter for the search. This parameter search uses an auto-complete mechanism, so if, for example, you enter "**sal**" in the search field, the search will display results for those parameters beginning with the letters "**sal**". This might mean that all units that begin with the parameter "**sales**" in the **Entity Name** or **Path**, for example, will be displayed in the **Selection** pane. The **Entity Names** (units) will be displayed in the **Selection** pane with the correct path. All the entities contained in the listed path result will be listed accorded to the other search criteria.

—In the **Search By** text box (the second search text box), select **Entity Name**, **Path** or **ALL** as search criteria.

The third search text box defines the organizational unit parameters of the search. This can be grouped into the following organizational entities:

Administrative: Organizational units grouped according to the organizational structure

Cost Centers: Organizational units grouped according to organizational projects.

Mailing Lists: Select the organizational parameters of the unit search.

—In the **Search Under** text box (the fourth search text box), select whatever address you know that can further limit the search for the units desired.

This search uses an auto-complete mechanism for any combination of the string in the search results. If, for example, you want to identify entity names in projects or product management groups, enter "pro" in the **Search Under** text box. This will generate results that might include units listed under product management, products or projects. It

would not be possible to generate this list using just the first search text box.

—Click the **More Info** button ![i] to provide more information about the path address. The search results will be sorted according to the following categories:

Type

Path

Name

If the search results display more than one unit with the same name, for example, this information could be used to determine which of the units listed is the one intended to include in the report.

—Click the **Search** button.
The search results are displayed in the **Selection** pane.

To add a unit to the scope of the report

Step 1   Select any of the units listed in the **Available Units** list in middle **Selection** pane by clicking on the desired row. Use Windows conventions, such as the use of the **Shift** key to select a range of search results, or use of the **Control** key to select several individual units listed in the search results.

Step 2   Click the **Add** button to move the selected units from the **Available Units** list in the **Selection** pane to the **Selected** pane on the bottom of the **Selection** window. You can use the **Add All** button to move all the contents of the **Available Units** list to the **Selected** pane.

Step 3   From the **Available Units** list, select the unit you want to add and click **Add**. The unit is added to the **Selected** list in the bottom pane and is included in the report.

To remove a unit from the scope of the report

Step   Select the unit you want to remove from the scope of the report in the **Selected** list in the bottom pane and click **Remove.** The unit is removed from the list and will not be included in the report.

Selecting Personnel

The Personnel Selection window enables you to search for people in the organization and select the persons to be included in the report.

To display the Personnel Selection window

Step   Select **Person(s)** in the **Entity Type** field on the **Scope** tab, then uncheck the **For All** check box and click the **Select...** button.

To initiate a search in the Personnel Selection dialog box

Step 1   Fill in the following variables:

—In the first **Search** text box, enter any member of the unit (entity name) or any grouping from where you want the personnel to be selected. This parameter search uses an auto-complete mechanism, so if, for example, you enter **"pro"** in the search field, the search will display results for those parameters beginning with the letters **"pro"**. This might mean, for example, that all entity names from the units of **products**, **product development** and from **projects** will be displayed. The entity names will be displayed in the **Selection** pane with the correct organizational unit. All the entities contained in the listed path result will be listed accorded to the other search criteria.

—In the **Search By** text box (the second search text box), select **Entity Name**, **Path** or **ALL** as search criteria.

The third search text box defines the organizational personnel parameters of the search. This can be grouped into the following organizational entities:

Administrative: Organizational personnel grouped according to the organizational structure

Cost Centers: Organizational personnel grouped according to organizational projects.

Mailing Lists: Select the organizational parameters of the personnel search.

—In the **Search Under** text box, select whatever address you know that can further limit the search for the personnel desired.
This search uses an auto-complete mechanism for any combination of the string in the search results. If, for example, you want to identify entity names in Sales groups, enter **Sales** in the **Search Under** text box. This will generate results that might include personnel in Sales or in Sales and Marketing units. It would not be possible to generate this list using just the first search text box.

—Click the **More Info** button 🛈 to provide more information about the path address. The search results will be sorted according to the following categories:

Type	Path
Name	Address
Email	Phone No.
Contact Person	Fax No.

If the search results display more than one person with the same name, for example, this information could be used to determine which of the people listed is the one intended to include in the report.

Step 2   Click the **Search** button. The search results are displayed in the **Selection** pane.

To add a person to the scope of the report

Step 1   Select any of the personnel listed in the middle **Selection** pane by clicking on the desired row.

Use Windows conventions, such as the use of the **Shift** key to select a range of search results, or use of the **Control** key to select several individual personnel listed in the search results.

Step 2   Click the **Add** button to move the selected personnel from the **Selection** pane to the **Selected** pane on the bottom of the **Selection** window.

Step 3   You can use the **Add All** button to move all the contents of the **Selection** pane to the **Selected** pane.

Step 4   From the **Available Personnel** list select the person you want to add and click **Add**.

The person is added to the **Selected** list in the right pane and is included in the report.

To remove a person from the scope of the report

Step   From the **Selected** list in the bottom pane, select the item you want to remove from the scope of the report, and click **Remove**. The unit is removed from the list and will not be included in the report.

Selecting Devices/Extensions

The **Device Selection** window enables you to search for devices in the organization and select the devices to be included in the report.

NOTE   *Extension is a type of Device.*

To display the Device Selection window

Step   Select **Device(s)** in the **Entity Type** field on the **Scope** tab, then uncheck the **For All** check box and click the **Select...** button.

To initiate a search in the Device Selection window

Step 1   Fill in the following variables:

—In the first **Search** text box, enter any **Device Type** or **Owner Name** as a parameter for the search. This parameter search uses an auto-complete mechanism, so if, for example, you enter "**2**" in the search field, the search will display results for those devices beginning with the model number "**2**". This might mean that all devices that begin with the number "**2**, **20** or **2000**" in the **Device Name**, will be displayed in the **Selection** pane.

The results of the search for devices displays the Device Names, Device Types and Owners in the **Selection** pane.

—In the **Search By** text box (the second search text box), select **Device Name**, **Device Type**, **Owner** or **All** as search criteria.

The third search text box in the **Device Selection** search toolbar, is the **Search Under** text box. It is used to identify the PBX used with the search. This search uses an auto-complete mechanism for any combination of the string in the search results.

—Click the **More Info** button [i] to provide more information about the **Data Source Type**. The search results will display the **Type**, **Path** and **Device Names** of the devices connected to the listed PBX.

NOTE   *The Information button cannot provide additional information about cellular phones that are assigned to the units.*

Step 2   Click the **Search** button. The search results are displayed in the **Available Units** list in the middle **Selection** pane.

To add a device search result to the scope of the report

Step 1 Select any of the individual search results listed in the **Available Units** list by clicking on the desired row. Use Windows conventions, such as the use of the **Shift** key to select a range of search results, or use of the **Control** key to select several individual results listed in the search results.

Step 2 Click the **Add** button to move the selected items from the **Available Units** list to the **Selected** pane on the bottom of the **Selection** window. You can use the **Add All** button to move all the contents of the **Available Units** list to the **Selected** pane.

To remove a Device Name, Type or Owner from the scope of the report

Step From the **Selected** list in the bottom pane, select the item you want to remove from the scope of the report, and click **Remove**. The unit is removed from the list and will not be included in the report.

Selecting Service Providers
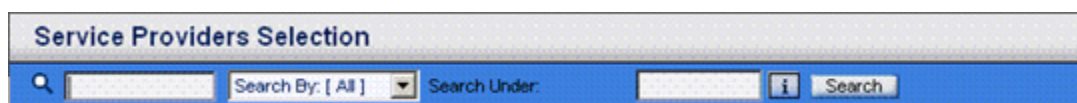
The Service Provider Selection window enables you to search for service providers and select the service providers to be included in the report.

To display the Service Provider Selection window

Step Select **Service Provider(s)** in the **Entity Type** field on the **Scope** tab, then uncheck the **For All** check box and click the **Select...** button.

To initiate a search in the Service Providers Selection window

Step 1 Fill in the following variables::

— In the first **Search** text box, enter any **Service Provider** as a parameter for the search. This parameter search uses an auto-complete mechanism, so if, for example, you enter "**D**" in the search field, the search will display results for those Service Providers beginning with the letter "**D**" in the **Selection** pane.

— In the **Search By** text box (the second search text box), select **Service Provider Name** as search criteria.

NOTE

The third search text box in the Service Provider Selection search toolbar, is the Search Under text box. This search box is not relevant for this search, and it should be left blank.

Step 2 Click the **Search** button. The search results are displayed in the **Available Units** list in the middle **Selection** pane.

To add a Service Provider search result to the scope of the report

Step 1   Select any of the individual search results listed in the **Available Units** list by clicking on the desired row. Use Windows conventions, such as the use of the **Shift** key to select a range of search results, or use of the **Control** key to select several individual results listed in the search results.

Step 2   Click the **Add** button to move the selected items from the **Available Units** list to the **Selected** pane on the bottom of the **Selection** window. You can use the **Add All** button to move all the contents of the **Available Units** list to the **Selected** pane.

To remove a Service Provider from the scope of the report

Step   From the **Selected** list in the bottom pane, select the item you want to remove from the scope of the report, and click **Remove**. The service provider listed is removed from the list and will not be included in the report.

Selecting Account Codes

The **Account Codes Selection** dialog box enables you to search for Account Codes and select the Account Codes to be included in the report.

To display the Account Codes Selection Dialog Box

Step   Select **Account Codes** in the **Entity Type** field on the **Scope** tab, then uncheck the **For All** check box and click the **Select...** button.

To initiate a search in the Extension Selection window

Step 1   Fill in the following variables:

—In the first **Search** text box, enter any **Client Code** or **Client Name** as a parameter for the search. This parameter search uses an auto-complete mechanism, so if, for example, you enter "**2**" in the search field, the search will display results for those Client Codes or Client Names beginning with the model number "**2**". This might mean that all Account Codes that begin with the number "**2**" in the **Account Name**, will be displayed in the **Selection** pane.

The results of the search for Client Code or Client Name displays the Client Code or Client Name in the **Selection** pane.

—In the **Search By** text box (the second search text box), select **Client Code, Client Name** or **All** as search criteria.

Step 2   Click the **Search** button. The search results are displayed in the **Available Units** list in the middle **Selection** pane.

To add an Account Code search result to the scope of the report

Step 1   Select any of the individual search results listed in the **Search Result** list by clicking on the desired row. Use Windows conventions, such as the use of the **Shift** key to select a range of search results, or use of the **Control** key to select several individual results listed in the search results.

Step 2   Click the **Add** button to move the selected items from the **Search Result** list to the **Selected** pane on the bottom of the **Selection** window. You can use the **Add All** button to move all the contents of the **Search Result** list to the **Selected** pane.

To remove an Account Code from the scope of the report

Step   From the **Selected** list in the bottom pane, select the item you want to remove from the scope of the report, and click **Remove**. The unit is removed from the list and will not be included in the report.

Report Types

Account Codes

Account Codes Report

Account Codes reports provide calls details or summaries by Account Codes, and a list of undefined Account Codes.

Select any of the following report types:

- **Account Codes Details** – Lists a detailed list of calls (one line per call) for each Account Code.
- **Account Codes Summaries**– Gives a one-line summary of calls for each Account Code.
- **Account Codes Undefined** – Lists Account Codes that were added automatically to the Data Base because they existed in CDRs or other import files, but are not defined in the application.

To configure an Individual Calls report

Step 1   In the application main window, click **Reports.**

Step 2   In the Reports Tree, expand **Account Codes** > **Account Codes Report**s and select the required report type.

The Reports configuration tabs opens in the work area with the Scope tab on top.

Step 3   In the **Scope** tab, define the report scope.

Step 4   Click the **Display Options** tab and select the desire display options.

Step 5 If required, click the **Distribution** tab and define the distribution for the report.

Step 6 Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it

NOTE
You can click the Preview 🔲 *button at any time to view the report on-screen on your workstation.*

Administration

Call Volume By Day

Call Volume by Day report provides for each PBX the number of calls in the last 14 days. The report can be generated as a table or as a graph.

The report type is **Call Volume by Day**.

To configure the Call Volume by Day report

Step 1 In the application main window, click **Reports.**

Step 2 In the Reports Tree, expand **Administration** > **Call Volume by Day** and select the required report type.

The Reports configuration tabs opens in the work area with the **Display Options** tab on top.

Step 3 In the **Display Options** tab and select the desired display options.

Step 4 If required, click the **Distribution** tab and define the distribution for the report.

Step 5 Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it

NOTE
You can click the Preview 🔲 *button at any time to view the report on-screen on your workstation.*

Cost Center Directory

Cost Center Directory report lists the personnel in the enterprise with their devices and Cost Center allocation.

The report type is **Cost Center Directory**.

To configure the Cost Center Directory report

Step 1   In the application main window, click **Reports.**

Step 2   In the Reports Tree, expand **Administration** > **Cost Center Directory** and select the required report type.

The Reports configuration tabs opens in the work area with the **Display Options** tab on top.

Step 3   in the **Display Options** tab and select the desired display options.

Step 4   If required, click the **Distribution** tab and define the distribution for the report.

Step 5   Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it.

NOTE

You can click the Preview 🖼 *button at any time to view the report on-screen on your workstation.*

Device History Reports

Device History report displays the assignment history of selected devices or Extensions. For each selected device the report lists current and previous assignments, including the start and end date of assignments, number of calls, their total duration and cost.

The report type is **Extension/Device History.**

To configure The Device History report

Step 1   In the application main window, click **Reports.**

Step 2   In the Reports Tree, expand **Administration** > **Device History Reports** and select the required report type.

The Reports configuration tabs opens in the work area with the Scope tab on top.

Step 3   In the **Scope** tab, define the report scope.

Step 4   Click the **Display Options** tab and select the desired display options.

Step 5   If required, click the **Distribution** tab and define the distribution for the report.

Step 6   Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it.

NOTE   *You can click the Preview button at any time to view the report on-screen on your workstation.*

Organization Directory

Organization Directory reports List the Personnel in the organization.

Select any of the following report types:

- **Organization Directory All Extensions/Devices** - Lists a person's by their organizational units with all the devices assigned to each Person.
- **Organization Directory** - Lists persons by their organizational units with their Device names.
- **Organization Phone Book**- List the Persons with their organizational unit and device Name.

To configure an Organization Directory report

Step 1   In the application main window, click **Reports.**

Step 2   In the Reports Tree, expand **Administration** > **Organization Directory** and select the required report type.

The Reports configuration tabs opens in the work area with the **Scope** tab on top.

Step 3   In the **Scope** tab, define the report scope.

Step 4   Click the **Display Options** tab and select the desired display options.

Step 5   If required, click the **Distribution** tab and define the distribution for the report.

Step 6   Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it.

NOTE   *You can click the Preview button at any time to view the report on-screen on your workstation.*

Resources With No Calls

Resources With No Calls report Lists all the resources without any calls for a certain period.

The report type is **Extensions/Devices without Calls.**

To configure the Resources Without Calls report

Step 1   In the application main window, click **Reports.**

Step 2   In the Reports Tree, expand **Administration** > **Resources With No Calls** and select the required report type.

The Reports configuration tabs opens in the work area with the **Scope** tab on top.

Step 3   In the **Scope** tab, define the report scope.

Step 4   Click the **Display Options** tab and select the desired display options.

Step 5   Click the **Filters** tab and set the required filters.

Step 6   If required, click the **Distribution** tab and define the distribution for the report.

Step 7   Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it.

NOTE

You can click the Preview 📖 *button at any time to view the report on-screen on your workstation.*

Unassigned Devices

Unassigned Devices report lists devices that are not assigned to any person or organizational unit.

The report type is **Unassigned Extensions/Devices**.

To configure the Unassigned Devices report

Step 1   In the application main window, click **Reports.**

Step 2   In the Reports Tree, expand **Administration** > **Unassigned Devices** and select the required report type.

The Reports configuration tabs opens in the work area with the Scope tab on top.

Step 3   In the **Scope** tab, define the report scope.

Step 4   Click the **Display Options** tab and select the desired display options.

Step 5   Click the **Filters** tab and set the required filters.

Step 6   If required, click the **Distribution** tab and define the distribution for the report.

Step 7   Click the **Details** tab to view your configuration.

Step 8   The report is configured now. You can run it and/or save it.

NOTE
You can click the Preview 🔲 button at any time to view the report on-screen on your workstation.

Unassigned Personnel

Unassigned Personnel report lists Persons who are currently not assigned to any organization unit. The report type is Unassigned Personnel.

To configure the Unassigned Personnel report

Step 1   In the application main window, click **Reports.**

Step 2   In the Reports Tree, expand **Administration** > **Unassigned Personnel** and select the required report type.

The Reports configuration tabs opens in the work area with the **Scope** tab on top.

Step 3   In the **Scope** tab, define the report scope.

Step 4   Click the **Display Options** tab and select the desired display options.

Step 5   If required, click the **Distribution** tab and define the distribution for the report.

Step 6   Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it.

NOTE
You can click the Preview 🔲 button at any time to view the report on-screen on your workstation.

Detail and Summary

Business and Personal Combined

Business and Personal Combined reports provide, for each device, either a one-line summary or a detailed list of the personal or business calls for that device (one line per call).

You can request a detailed list of personal calls and a one-line summary of business calls, or vice versa, that is, a detailed list of business calls and a one-line summary of personal calls.

Select any of the following report types:

- **By Extension/Device** – Lists the Devices by Organizational Structure. All the devices assigned to an Organizational Unit, whether directly or through a person, are listed under the Organizational Unit.
- **By Organization Unit** – Lists the Devices by Persons within the Organizational Unit. Devices assigned directly to the Organizational Unit are listed under the Organizational Unit.
- **By Personnel** – Lists the Devices by alphabetical Order of Persons.
- **By Personnel with Page Break** – Lists the Devices by alphabetical Order of Persons with a new page for each person.

NOTE

This report is available only if there is an indication whether the call is a business or personal call.

NOTE

Some system setups prohibit users from seeing other user's personal calls information.

The report includes selected individuals or organizational units. You can break down report information by devices (such as phone extensions, calling cards, PIN codes) or by the individuals associated with the calls.

The report can be generated for various scope entities such as organizational units, or selected individuals. When generating the report for organizational units the report includes devices assigned not to individuals but to the organizational unit.

The report details for each scope entity the calls associated with the assigned devices, including time and date of the call, call type and direction (incoming/outgoing) and details of the source/destination number. It includes the call duration and cost. It also gives for each device total length and cost of calls for business and personal calls.

The report enables users to view details of their device usage and allows mangers of organizational units to view device usage information according to different categories, including unassigned devices.

To configure a Business and Personal Combined report

Step 1   In the application main window, click **Reports.**

Step 2   In the Reports Tree, expand **Detail and Summary** > **Business and Personal Combined** and select the required report type.

The Reports configuration tabs opens in the work area with the **Scope** tab on top.

Step 3   In the **Scope** tab, define the report scope.

Step 4   Click the **Display Options** tab and select the desired display options.

Step 5   Click the **Filters** tab and set the required filters.

Step 6   If required, click the **Common Filter** tab and define common filter fields.

Step 7   If required, click the **Distribution** tab and define the distribution for the report.

Step 8   Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it.

NOTE   *You can click the Preview* 📇 *button at any time to view the report on-screen on your workstation.*

Calls Details

Calls Details reports provide, for each device, a detailed list of its calls (one line per call).

Select any of the following report types:

- **By Extension/Device** – Lists the Devices by Organizational Structure. All the devices assigned to an Organizational Unit, whether directly or through a person, are listed under the Organizational Unit.
- **By Organization Unit** – Lists the Devices by Persons within the Organizational Unit. Devices assigned directly to the Organizational Unit are listed under the Organizational Unit.
- **By Organization Unit with Pulses** – Lists the Devices by Persons within the Organizational Unit. Devices assigned directly to the Organizational Unit are listed under the Organizational Unit. The lines contain an additional column for Number of Pulses.
- **By Personnel** – Lists the Devices by alphabetical Order of Persons.
- **By Personnel with Page Break** – Lists the Devices by alphabetical Order of Persons with a new page for each person.

To configure a Calls Detailed report

Step 1   In the application main window, click **Reports.**

Step 2   In the Reports Tree, expand **Detail and Summary** > **Calls Detailed** and select the required report type.

The reports configuration tabs opens in the work area with the **Scope** tab on top.

Step 3   In the **Scope** tab, define the report scope.

Step 4   Click the **Display Options** tab and select the desired display options.

Step 5   Click the **Filters** tab and set the required filters.

Step 6   If required, click the **Common Filter** tab and define common filter fields.

Step 7   If required, click the **Distribution** tab and define the distribution for the report.

Step 8   Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it.

NOTE

You can click the Preview ⬚ button at any time to view the report on-screen on your workstation.

Calls Summaries

Calls Summaries reports provide, for each device, a one-line summary of its calls.

Select any of the following report types:

- **By Extension/Device** – Lists the Devices by Organizational Structure. All the devices assigned to an Organizational Unit, whether directly or through a person, are listed under the Organizational Unit.
- **By Organization Unit** – Lists the Devices by Persons within the Organizational Unit. Devices assigned directly to the Organizational Unit are listed under the Organizational Unit.
- **By Organization Unit - one line per person** – provides for each Organizational Unit a one-line summary of its calls.
- **By Organization Unit with Pulses** – Lists the Devices by Persons within the Organizational Unit. Devices assigned directly to the Organizational Unit are listed under the Organizational Unit. The lines contain an additional column for Number of Pulses.
- **By Personnel** – Lists the Devices by alphabetical Order of Persons.

To configure a Calls Summary report

Step 1 In the application main window, click **Reports.**

Step 2 In the Reports Tree, expand **Detail and Summary** > **Calls Summaries** and select the required report type.

The Reports configuration tabs opens in the work area with the Scope tab on top.

Step 3 In the **Scope** tab, define the report scope.

Step 4 Click the **Display Options** tab and select the desired display options.

Step 5 Click the **Filters** tab and set the required filters.

Step 6 If required, click the **Common Filter** tab and define common filter fields.

Step 7 If required, click the **Distribution** tab and define the distribution for the report.

Step 8 Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it.

> **NOTE** *You can click the Preview button at any time to view the report on-screen on your workstation.*

Personnel Calls

Personnel Calls reports provide, for each person, a detailed list of his or her calls (one line per call). This report is designed especially for E-mail distribution, where each recipient receives his or her calls only.

In a preview of this report you can view only those calls you are allowed to view according to your permissions. If you are a regular user, you most probably can view only your own calls, but you can generate the report and send it to other users via email.

Select any of the following report types:

• **By Organization Unit** – Lists the Devices by Persons within the Organizational Structure. Devices assigned directly to the Organizational Unit are listed under the Organizational Unit.

• **By Personnel** – Lists the Devices by alphabetical Order of Persons.

To configure a Personnel Calls report

Step 1 In the application main window, click **Reports.**

Step 2 In the Reports Tree, expand **Detail and Summary** > **Personnel Calls** and select the required report type.

The Reports configuration tabs opens in the work area with the Scope tab on top.

Step 3 In the **Scope** tab, define the report scope.

Step 4 Click the **Display Options** tab and select the desired display options.

Step 5   Click the **Filters** tab and set the required filters.

Step 6   If required, click the **Distribution** tab and define the distribution for the report.

Step 7   Click the **Details** tab to view your configuration.

   The report is configured now. You can run it and/or save it.

> **NOTE**   *You can click the Preview ▤ button at any time to view the report on-screen on your workstation.*

Organization Units Summary

Organization Units Summary reports provide call summaries for each Organizational Unit.

Select any of the following report types:

- **One Line Summary** – provides a one-line calls summary for each Organizational Unit.
- **One Summary Line per Device Type** – provides a one-line calls summary for each Device Type Within the Organizational Unit.

To configure an Organization Units Calls Summaries report

Step 1   In the application main window, click **Reports.**

Step 2   In the Reports Tree, expand **Detail and Summary** > **Organization Units Summary** and select the required report type.

   The Reports configuration tabs opens in the work area with the Scope tab on top.

Step 3   In the **Scope** tab, define the report scope.

Step 4   Click the **Display Options** tab and select the desired display options.

Step 5   Click the **Filters** tab and set the required filters.

Step 6   If required, click the **Common Filter** tab and define common filter fields.

Step 7   If required, click the **Distribution** tab and define the distribution for the report.

Step 8   Click the **Details** tab to view your configuration.

   The report is configured now. You can run it and/or save it.

> **NOTE**   *You can click the Preview ▤ button at any time to view the report on-screen on your workstation.*

Summary and Detail by Category

Summary and Details by Category reports provide, for each category of calls within the device, either a one-line summary or a detailed list of all the calls for that category and device. You can select which categories will be summarized and which categories will be detailed.

Select any of the following report types:

• **By Extension/Device** – Lists the Devices by Organizational Structure. All the devices assigned to an Organizational Unit, whether directly or through a person, are listed under the Organizational Unit.

• **By Organization Unit** – Lists the Devices by Persons within the Organizational Structure. Devices assigned directly to the Organizational Unit are listed under the Organizational Unit.

• **By Personnel** – Lists the Devices by alphabetical Order of Persons.

• **By Personnel with Page Break** – Lists the Devices by alphabetical Order of Persons with a new page for each person.

• **Summary per Category** – Lists for each person a one-line summary for each calls Category.

To configure a Summary and Details by Category report

Step 1   In the application main window, click **Reports.**

Step 2   In the Reports Tree, expand **Detail and Summary** > **Summary and Detail by Category** and select the required report type.

The Reports configuration tabs opens in the work area with the Scope tab on top.

Step 3   In the **Scope** tab, define the report scope.

Step 4   Click the **Display Options** tab and select the desired display options.

Step 5   Click the **Filters** tab and set the required filters.

Step 6   If required, click the **Common Filter** tab and define common filter fields.

Step 7   If required, click the **Distribution** tab and define the distribution for the report.

Step 8   Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it.

NOTE

You can click the Preview 🖿 *button at any time to view the report on-screen on your workstation.*

Serviceability

Budget Balance Report

Budget Balance Reports provide for each person the current balance of his or her calls budget.

The report type is **By Personnel**.

To configure a Budget Balance report

Step 1 In the application main window, click **Reports.**

Step 2 In the Reports Tree, expand **Serviceability** > **Budget Balance Report** and select the required report type.

   The Reports configuration tabs opens in the work area with the Scope tab on top.

Step 3 In the **Scope** tab, define the report scope.

Step 4 Click the **Display Options** tab and select the desired display options.

Step 5 If required, click the **Distribution** tab and define the distribution for the report.

Step 6 Click the **Details** tab to view your configuration.

   The report is configured now. You can run it and/or save it.

NOTE

You can click the Preview button at any time to view the report on-screen on your workstation.

Calls Response

Calls Response reports provide analysis of call status and response time of incoming calls to selected organization units.

The call response times of are analyzed according to four Response Time groups defined by the user and presented on an hourly basis.

The report lists, for each hour within the report period, the total number of incoming calls and the total number of answered calls, calls that encountered a busy signal and calls which were lost. It also gives the average duration and average response time in seconds for each hour as well as the number and percentage of calls in each of the four Response Time groups.

IMPORTANT

This report can be produced only for PBXs that provide the status of incoming calls and the Ring Time field as part of the CDR. In some cases response time may be included in the output of the PBX as the number of rings it took to answer the calls, in this case the number of rings is converted to time in seconds.

Select any of the following report types:

- **By Organization Unit** – Lists the Devices by Persons within Organization Units. Devices assigned directly to the Organization Units are listed under the Organization Unit.

To configure a Calls Response report

Step 1 In the application main window, click **Reports.**

Step 2 In the Reports Tree, expand **Serviceability** > **Calls Response** and select the required report type.

The Reports configuration tabs opens in the work area with the Scope tab on top.

Step 3 In the **Scope** tab, define the report scope.

Step 4 Click the **Display Options** tab and select the desired display options.

Step 5 If required, click the **Common Filter** tab and define common filter fields.

Step 6 If required, click the **Distribution** tab and define the distribution for the report.

Step 7 Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it

You can click the Preview 🖼 *button at any time to view the report on-screen on your workstation.*

NOTE

Cradle to Grave

Cradle to Grave report enables you to view calls that were forwarded from extension to extension or from trunk to trunk more than a certain number of times.

The report type is **By Extensions**.

To configure a Cradle to Grave report

Step 1 In the application main window, click **Reports.**

Step 2 In the Reports Tree, expand **Serviceability** > **Cradle to Grave** and select the required report type.

The Reports configuration tabs opens in the work area with the Scope tab on top.

Step 3 In the **Scope** tab, define the report scope.

Step 4 Click the **Display Options** tab and select the desired display options.

Step 5 If required, click the **Distribution** tab and define the distribution for the report.

Step 6   Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it.

> *You can click the Preview* 🖼 *button at any time to view the report on-screen on your workstation.*
>
> **NOTE**

Incoming Calls Status

Incoming Calls Status reports provide summaries of incoming calls according to call status. The number of calls and the calls total durations are reported for each call status.

> *In order to run/view this report General Fields 18 and 19 must be defined as follows:*
>
> • General Field 18 (position 86 length 6) - Called Party GenField18 => BCalledParty
>
> • General Field 19 (position 115 length 2) - Suppl. serv. GenField19 => BService
>
> **NOTE**

Select any of the following report types:

- **Per Person by Organization Structure** – Lists the Devices by Persons within the Organization Unit. Devices assigned directly to the Organization Unit are listed under the Organization Unit.
- **By Personnel** – Lists the Devices by alphabetical Order of Persons.

To configure an Incoming Calls Status report

Step 1   In the application main window, click **Reports.**

Step 2   In the Reports Tree, expand **Serviceability** > **Incoming Calls Status** and select the required report type.

The Reports configuration tabs opens in the work area with the Scope tab on top.

Step 3   In the **Scope** tab, define the report scope.

Step 4   Click the **Display Options** tab and select the desired display options.

Step 5   Click the **Filters** tab and set the required filters.

Step 6   If required, click the **Common Filter** tab and define common filter fields.

Step 7   If required, click the **Distribution** tab and define the distribution for the report.

Step 8   Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it.

> *You can click the Preview* 🖼 *button at any time to view the report on-screen on your workstation.*
>
> **NOTE**

Incoming Calls Details

Incoming Calls Details reports provide detailed list of incoming calls according to call status. The number of calls and the calls total durations are reported for each call.

NOTE

In order to run/view this report General Fields 18 and 19 must be defined as follows:

• General Field 18 (position 86 length 6) - Called Party GenField18 => BCalledParty

• General Field 19 (position 115 length 2) - Suppl. serv. GenField19 => BService

Select any of the following report types:

• **By Organization Unit** – Lists the Devices by Persons within the Organizational Structure. Devices assigned directly to the Organizational Unit are listed under the Organizational Unit.

• **By Personnel** - Lists the Devices by alphabetical Order of Persons.

To configure an Incoming Calls Details report

Step 1   In the application main window, click **Reports.**

Step 2   In the Reports Tree, expand **Serviceability** > **Incoming Calls Details** and select the required report type.

The Reports configuration tabs opens in the work area with the Scope tab on top.

Step 3   In the **Scope** tab, define the report scope.

Step 4   Click the **Display Options** tab and select the desired display options.

Step 5   Click the **Filters** tab and set the required filters.

Step 6   If required, click the **Common Filter** tab and define common filter fields.

Step 7   If required, click the **Distribution** tab and define the distribution for the report.

Step 8   Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it.

NOTE

You can click the Preview 🖼 *button at any time to view the report on-screen on your workstation.*

Operators Incoming Calls Summary Status

Operators Incoming Calls Summary Status reports provide summaries of incoming calls according to call status. The number of calls and the calls total duration are reported for each call status.

NOTE

In order to run/view this report General Fields 18 and 19 must be defined as follows:

- General Field 18 (position 86 length 6) - Called Party GenField18 => BCalledParty
- General Field 19 (position 115 length 2) - Suppl. serv. GenField19 => BService

Select any of the following report types:

- **By Organization Unit** – Lists the Devices by Persons within the Organizational Structure. Devices assigned directly to the Organizational Unit are listed under the Organizational Unit.
- **By Personnel** – Lists the Devices by alphabetical Order of Persons.

To configure an Operator Incoming Calls Summaries report

Step 1   In the application main window, click **Reports.**

Step 2   In the Reports Tree, expand **Serviceability** > **Operators Incoming Calls Summary** and select the required report type.

The Reports configuration tabs opens in the work area with the Scope tab on top.

Step 3   In the **Scope** tab, define the report scope.

Step 4   Click the **Display Options** tab and select the desired display options.

Step 5   Click the **Filters** tab and set the required filters.

Step 6   If required, click the **Common Filter** tab and define common filter fields.

Step 7   If required, click the **Distribution** tab and define the distribution for the report.

Step 8   Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it.

NOTE

You can click the Preview 📖 *button at any time to view the report on-screen on your workstation.*

Top Usage

Dialed Number Distribution

Dialed Number Distribution reports provide for each person his or her outgoing calls aggregated by the dialed numbers (or prefixes of dialed numbers).

For each dialed number (or dialed number prefix) the number of calls, calls duration and cost is provided.

NOTE   *Internal numbers are not included in this report.*

Select any of the following report types:

- **By Organization Unit** – Lists persons according to Organizational Structure.
- **By Personnel** – Lists the persons by alphabetical order.

To configure a Dialed Number Distribution report

Step 1   In the application main window, click **Reports.**

Step 2   In the Reports Tree, expand **Top Usage** > **Dialed Numbers Distribution** and select the required report type.

   The Report configuration tabs opens in the work area with the Scope tab on top.

Step 3   In the **Scope** tab, define the report scope.

Step 4   Click the **Display Options** tab and select the desired display options.

Step 5   Click the **Filters** tab and set the required filters.

Step 6   If required, click the **Common Filter** tab and define common filter fields.

Step 7   If required, click the **Distribution** tab and define the distribution for the report.

Step 8   Click the **Details** tab to view your configuration.

   The report is configured now. You can run it and/or save it.

NOTE   *You can click the Preview* 🖳 *button at any time to view the report on-screen on your workstation.*

Hit Parade by Devices

Hit Parade by Devices reports rank the devices with the highest telephony usage according to:

- Largest number of calls
- Longest total call duration
- Highest cost of calls

The devices included in the report can be devices assigned to a variety of scope entities of the enterprise personnel. You can include in the scope organizational units. When ranking devices of organizational units, the ranking includes devices assigned to the organization Units but not to individual users.

The report lists, for each device ranked the total number of calls, the total duration of calls and the total monetary value of calls.

Select any of the following report types:

- **Directly assigned Devices**– Lists under each organizational Unit only the personnel directly assigned to the unit.
- **All Devices** – Lists under each organizational Unit all personnel assigned to that unit or to any of its sub units.

To configure a Hit Parade by Devices report

Step 1   In the application main window, click **Reports.**

Step 2   In the Reports Tree, expand **Top Usage** > **Hit Parade by Devices** and select the required report type.

The Reports configuration tabs opens in the work area with the Scope tab on top.

Step 3   In the **Scope** tab, define the report scope.

Step 4   Click the **Display Options** tab and select the desired display options.

Step 5   Click the **Filters** tab and set the required filters.

Step 6   If required, click the **Common Filter** tab and define common filter fields.

Step 7   If required, click the **Distribution** tab and define the distribution for the report.

Step 8   Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it.

NOTE

You can click the Preview 📷 *button at any time to view the report on-screen on your workstation.*

Hit Parade by Dialed Numbers

Hit Parade by Dialed Numbers reports rank the most frequently dialed numbers according to:

• Largest number of calls

• Longest total call duration

• Highest cost of calls

For each dialed number ranked, the reports include the location as well as the total number of calls, the total duration of calls and the total monetary value of calls.

Select any of the following report types:

• **Directly Assigned Personnel Calls** – Lists under each organization Unit only the personnel directly assigned to the unit.

• **Directly Assigned Personnel Calls With Pulses** – Lists under each organization Unit only the personnel directly assigned to the unit. Contains an additional column for Number of Pulses.

• **Calls for All Personnel** – Lists under each organization Unit all personnel assigned to that unit or to any of its sub units.

To configure a Hit Parade by Dialed Numbers report

Step 1   In the application main window, click **Reports.**

Step 2   In the Reports Tree, expand **Top Usage** > **Hit Parade by Dialed Numbers**, and select the required report type.

Step 3   The Reports configuration tabs opens in the work area with the Scope tab on top.

Step 4   In the **Scope** tab, define the report scope.

Step 5   Click the **Display Options** tab and select the desired display options.

Step 6   Click the **Filters** tab and set the required filters.

Step 7   If required, click the **Common Filter** tab and define common filter fields.

Step 8   If required, click the **Distribution** tab and define the distribution for the report.

Step 9   Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it.

You can click the Preview 🖼 *button at any time to view the report on-screen on your workstation.*

NOTE

Hit Parade by Personnel

Hit Parade by Personnel reports rank the individuals with the highest phone usage according to:

Step 1 Largest number of calls

Step 2 Longest total call duration

Step 3 Highest cost of calls

For each individual ranked, the report displays the total number of calls, the total duration of calls and the total monetary value of calls.

Select any of the following report types:

• **Directly assigned Personnel**– Lists under each organizational Unit only the personnel directly assigned to the unit.

• **All Personnel** – Lists under each organizational Unit all personnel assigned to that unit or to any of its sub units.

To configure a Hit Parade by Personnel report

Step 1 In the application main window, click **Reports.**

Step 2 In the Reports Tree, expand **Top Usage** > **Hit Parade by Personnel** select the required report type.

The Reports configuration tabs opens in the work area with the Scope tab on top.

Step 3 In the **Scope** tab, define the report scope.

Step 4 Click the **Display Options** tab and select the desired display options.

Step 5 Click the **Filters** tab and set the required filters.

Step 6 If required, click the **Common Filter** tab and define common filter fields.

Step 7 If required, click the **Distribution** tab and define the distribution for the report.

Step 8 Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it.

> *You can click the **Preview** button at any time to view the report on-screen on your workstation.*

NOTE

Utilization

Daily Utilization

Daily Utilization Reports list the telephony utilization of each entity (according to the selected report type) for each hour of each day for a one-week period. Telephony utilization is given as total number of calls and total of one of the following:

- Call cost
- Call price
- Call duration
- Percentage of usage
- Arlene (for trunk reports)

Select any of the following report types:

- **By Extension/Device**– Lists the daily utilization for each Device by Device Type order.
- **By Organization Unit** – Lists the daily utilization for each Person according to Organization structure.
- **By Personnel** – Lists the daily utilization for each Person by alphabetical order.
- **By Service Provider** – Lists the daily utilization for each Service Provider.
- **By Trunk** - Lists the daily utilization for each Trunk.

T**o configure a Daily Utilization Report:**

Step 1 In the application main window, click **Reports.**

Step 2 In the Reports Tree, expand **Utilization** > **Daily Utilization** and select the required report type.

The Reports configuration tabs opens in the work area with the Scope tab on top.

Step 3 In the **Scope** tab, define the report scope.

Step 4 Click the **Display Options** tab and select the desired display options.

Step 5 Click the **Filters** tab and set the required filters.

Step 6 If required, click the **Common Filter** tab and define common filter fields.

Step 7 If required, click the **Distribution** tab and define the distribution for the report.

Step 8 Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it.

NOTE

You can click the Preview [icon] button at any time to view the report on-screen on your workstation.

Device Details

The Device Calls Details reports provide for each device a detailed list of its call.

Select any of the following report types:

- **By Extension/Device**– List the Devices by Device Type order.
- **By Extension/Device with page breaks** – List the Devices by Device Type order with page break.
- **By Extension/Device with Pulses** – List the Devices by Device Type order. The lines contain an additional column for Number of Pulses.
- **By Trunk** - Lists the daily utilization for each Trunk.

To configure a Daily Utilization Report:

Step 1   In the application main window, click **Reports.**

Step 2   In the Reports Tree, expand **Utilization** > **Device Details** and select the required report type.

           The Reports configuration tabs opens in the work area with the Scope tab on top.

Step 3   In the **Scope** tab, define the report scope.

Step 4   Click the **Display Options** tab and select the desired display options.

Step 5   Click the **Filters** tab and set the required filters.

Step 6   If required, click the **Common Filter** tab and define common filter fields.

Step 7   If required, click the **Distribution** tab and define the distribution for the report.

Step 8   Click the **Details** tab to view your configuration.

           The report is configured now. You can run it and/or save it.

NOTE   *You can click the Preview* button *at any time to view the report on-screen on your workstation.*

Device Summary

The Device Calls Summary reports provide for each device a one-line summary of its telephony utilization. Telephony utilization is given as total number of the filtered calls, total duration of the filtered calls and total cost or price of the filtered calls.

Select any of the following report types:

- **By Extension/Device**– List the Devices by Device Type order.
- **By Extension/Device with Pulses**– List the Devices by Device Type order. The lines contain an additional column for Number of Pulses.
- **By Originating Extensions** – Calls made using Pin Codes are listed in this report not under the Pin Code Devices, but under the Extensions from which the call was actually made.
- **By Trunk** - Lists the daily utilization for each Trunk.

T**o configure a Daily Utilization Report:**

Step 1   In the application main window, click **Reports.**

Step 2   In the Reports Tree, expand **Utilization** > **Device Summary** and select the required report type.

The Reports configuration tabs opens in the work area with the Scope tab on top.

Step 3   In the **Scope** tab, define the report scope.

Step 4   Click the **Display Options** tab and select the desired display options.

Step 5   Click the **Filters** tab and set the required filters.

Step 6   If required, click the **Common Filter** tab and define common filter fields.

Step 7   If required, click the **Distribution** tab and define the distribution for the report.

Step 8   Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it.

NOTE

You can click the Preview 📇 *button at any time to view the report on-screen on your workstation.*

Monthly Calls Summary

Monthly Calls Summary reports list the telephony utilization of each entity (according to the selected report type) for each month. Telephony utilization is given as total number of the filtered calls, total duration of the filtered calls and total cost or price of the filtered calls.

Select any of the following report types:

- **BY Extension/Device**– Lists the daily utilization for each Device by Device Type order.
- **By Organization Unit** – Lists the daily utilization for each Person according to Organization structure.
- **By Personnel** – Lists the daily utilization for each Person by alphabetical order.
- **By Service Provider** – Lists the daily utilization for each Service Provider.
- **By Trunk** - Lists the daily utilization for each Trunk.

To **configure a Daily Utilization Report:**

Step 1   In the application main window, click **Reports.**

Step 2   In the Reports Tree, expand **Utilization** > **Monthly Calls Summary** and select the required report type.

The Reports configuration tabs opens in the work area with the Scope tab on top.

Step 3   In the **Scope** tab, define the report scope.

Step 4   Click the **Display Options** tab and select the desired display options.

Step 5   Click the **Filters** tab and set the required filters.

Step 6   If required, click the **Common Filter** tab and define common filter fields.

Step 7   If required, click the **Distribution** tab and define the distribution for the report.

Step 8   Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it.

NOTE

You can click the Preview 📖 *button at any time to view the report on-screen on your workstation.*

Weekly Utilization

Weekly Utilization Reports list the telephony utilization of each entity (according to the selected report type) for a four week period giving utilization information for every day of each week. Telephony utilization is given as total number of calls and total of one of the following:

- Call cost
- Call price
- Call duration
- Percentage of usage
- Erlang (for trunk reports)

Select any of the following report types:

- **By Extension/Device**– Lists the daily utilization for each Device by Device Type order.
- **By Organization Unit** – Lists the daily utilization for each Person according to Organization structure.
- **By Personnel** – Lists the daily utilization for each Person by alphabetical order.
- **By Service Provider** – Lists the daily utilization for each Service Provider.
- **By Trunk** - Lists the daily utilization for each Trunk.

To configure a Daily Utilization Report:

Step 1   In the application main window, click **Reports.**

Step 2   In the Reports Tree, expand **Utilization** > **Weekly Utilization** and select the required report type.

The Reports configuration tabs opens in the work area with the Scope tab on top.

Step 3   In the **Scope** tab, define the report scope.

Step 4   Click the **Display Options** tab and select the desired display options.

Step 5   Click the **Filters** tab and set the required filters.

Step 6   If required, click the **Common Filter** tab and define common filter fields.

Step 7   If required, click the **Distribution** tab and define the distribution for the report.

Step 8   Click the **Details** tab to view your configuration.

The report is configured now. You can run it and/or save it.

NOTE   *You can click the Preview* 📠 *button at any time to view the report on-screen on your workstation.*

4

Billing

Chapter Topics

Billing - Introduction

Pricing refers to the process of calculating the price of a call and other charges that will be billed to employees or customers of the organization. To define pricing in the system one needs to define the price plans and associate them to the appropriate services supplied to employees or users.

The Application Billing module enables the flexible definition of pricing plans for the different services. Price Plans is located under the Billing tab.

The Price Plan functionality is organized in a tree structure, similar to the other modules in the application. The following trees can be selected from the drop-down menu:

Price Plans – Definition of price plans for each service

Price Rates – Definition of different rates you can use in the price plans

Price Discounts – Definition of the discounts and markups to be used in the price plans

Categories – Definition of locations grouping.

Billing - Main Window

The Billing main window is displayed when you click the Billing module tab.

Use the Billing main window to configure price plans, discounts, rates and categories.

The Billing List

The Billing List, in the lower left pane, displays the various activity types that you can access and configure:

- **Price Plans**: Configure price plans and related entities such as price discounts, rate and categories.

The Billing Tree

The Billing Tree displays the tree of the activity that you select in the Billing list.

The work area is composed of two panes.

- The left pane displays a list of items belonging to the item selected in the Billing tree (for example: Categories).
- The right pane displays information for items selected in the left pane.

You can hide the right pane by clicking the Close Details ⊠ icon.

You can use the Search tool to search for entities in the list in the left pane. You can also add or delete entities.

Price Plans

Pricing refers to the process of calculating the price of a call and other charges that will be billed to employees or customers of the organization. To define pricing in the system one needs to define the price plans and associate them to the appropriate services supplied to employees or users.

The Application Billing module enables the flexible definition of pricing plans for the different services. Price Plans is located under the Billing tab.

> *If you do not assign a Price Plan, the price of a call will equal zero.*

NOTE

Similarly to a cost plan each price plan can be a combination of a few pricing rule types:

- **One Time Price** – A fixed price that is allocated once. You can define the amount and payment, and define the target scope for this cost.
- **Recurring Price** – A fixed price that is of a recurring nature, which can be defined and scheduled, to be calculated at any period and frequency.
- **Usage Price** – A price which is defined for the usage of the service, for example by the number of calls, the duration of each call or the destination of the call.

A Price Plan defines how the price of a call is calculated. Price plans are assigned to Price Plan groups. You must therefore first create a Price Plan group before a price plan can be created. Once you have created a price plan you can create rules for the price plan.

To create a new price plan group

Step 1   From the lower right pane of the **Billing** Main window select **Price Plans**.

Step 2   In the tree pane, select **Price Plans** from the drop-down menu.

Step 3   Click the **New** button and select Price Plan Group from the drop-down list. The Edit Price Plan Group dialog box opens.

Step 4   Enter a name and description for the group and then click **Update**. The new price plan group is displayed in the tree pane.

To create a new price plan

Step 1   From the lower right pane of the **Billing** Main window select **Price Plans**.

Step 2   In the tree pane, select **Price Plans** from the drop-down menu.

Step 3   Click the **New** ![icon] button and select Price Plan from the drop-down list. The Edit Price Plan dialog box opens.

Step 4   Complete the following fields:

Section	Option	Description
General	Price Plan ID	Generated automatically once the price plan is created.
	Name	Enter a name for the price plan.
	Description	Enter a short description of the price plan.
	Main Category	Select the main category.
	Use Price from Data Source	If selected the price is taken from the PBX.
	Override Zero Pricing	If the price taken from the PBX amounts to zero, it will be ignored and the price will instead be calculated.
	Calculate by Rules	When using 2 Price Plan Rules with Time of Day condition - This setting determines whether to Only use the first rule based on the time of day of the call (at call start time) or to switch to the second rule during the call if the time of day of the rule condition changes (throughout call duration).
Resources	Devices for Cost/Price Plan	Note that this action can only be performed in the **Edit Cost Plan** task.
Conditions	Call Type	Select the call type, either Business or Personnel.
	Device Type	Select the device type.
	Call Direction	Select the check box of the applicable call direction to be selected.
	Call Category	Click the **Select** button to select a call category.
	Call Duration	Click to select the minimum and/or maximum time for call duration. When a check box is selected, complete the time value in numbers for the corresponding field.
	Cost	Click to select the minimum and/or maximum cost for the call. When a check box is selected, complete the cost value in numbers for the corresponding field.
	Dialed Numbers	Type the specific dialed numbers to be included and click ![icon] to enter the number. To delete an error, or delete an already existing number, highlight the number and click ![icon].

Step 5   Click the **Update** button. The new price plan is saved and displayed in the work area.

To edit an existing Price plan

Step 1   Click on the **Billing** module.

Step 2   From the lower right pane of the **Billing** Main window select **Price Plans**.

Step 3   In the tree pane, select **Price Plans** from the drop-down menu.

Step 4   Select the relevant Price plan and then click the **Edit** button. The Edit Price Plan Provider dialog box opens.

Step 5   Make the required changes and then click the **Update** button to save.

To create a price plan rule

Step 1   Click on the **Billing** module.

Step 2   From the lower right pane of the **Billing** Main window select **Price Plans**.

Step 3   In the tree pane, select **Price Plans** from the drop-down menu.

Step 4   Select the relevant Price plan and then click the **New** button in the work area. The Edit Price Plan Rule dialog box opens.

To create a fixed price rule

Complete the following fields:

Section	Option	Parameter	Description
General	Rule Type	Fixed Cost	Select the Fixed Cost radio button.
	Name		Enter a name for the cost plan.
	Description		Enter a short description of the cost plan.
Charge Timing	Cost		Enter the amount to be charged.
	Price	Date	Select the date on which the one time fee is charged.
		Time	Select the time on which the one time fee is charged.
	Recurring	Charge Every	Lets you define a recurring charge every specified number of times per hour, day, week or month. Enter the required number and then select the relevant option from the drop-down menu.
		Weekly	Define a recurring charge per specified days of each week. Select a check box(es) next to the relevant day(s) of the week.
		Monthly	Define a recurring charge per specified days of the month. Select the check box(es) next to the relevant day(s) of the month.
	Scheduled Time	Once At	Charging is scheduled to occur once at the specified time. Enter the required time.
		Every	Charging is scheduled to occur at a number of specified times every hour, day, week or month. Enter the required number and then select the relevant option from the drop-down menu.
		From To	Charging is scheduled to occur during a specified time frame. Enter the beginning (From) and end (To) times.

To create a usage based rule

Usage price rules can be either related to an existing cost rule or independent of any cost rule. If the price rule is related to a cost rule then the definition is based on certain cost related settings. If the price rule is independent of any cost rule it is defined in a similar way to the usage cost rule.

Section	Option	Parameter	Description
General	Rule Type	By Usage	Select the By Usage radio button.
	Name		Enter a name for the price rule.
	Description		Enter a short description of the price rule.
Rules	Cost Related Settings		Lets you to define settings related to the existing cost.
		Use Cost	Use Cost as a base in order to calculate Price.
		Value	Either a value or percentage.
		Calculation Type	Select by percentage of value.
		Limit to Minimum	Limit the price to a specified minimum fixed value or percentage of the cost.
		Limitation Type	Select by percentage of value.
		Limit to Maximum	Limit the price to a specified maximum fixed value or percentage of the cost.
	Independent Settings		Lets you to define independent price settings.
		Rule Components	Lets you create rules.
		Rates & Discounts	Lest you define rate and discounts.
	Calculate by Rules		Long calls that extend over different periods (e.g. before and after midnight), will have different Rates applied to different parts of the call.
			In such cases, if the "throughout call duration" is selected, the price is calculated separately for each rate. (e.g. 10 minutes at pre-midnight rate and 10 at after-midnight rate). If "at call start time" is selected, then the entire call will be priced only according to the rate found at the beginning of the call (e.g. the whole call will be priced by the pre-midnight rate).
	Apply Minimum Digits Check		When this option is selected, check if the Dialed Number Length of the call is equal or greater than the minimum digits value for that Main Category. If it is less than that value, the call will not be priced.

Section	Option	Parameter	Description
Conditions	Call Type		Select the call type, either Business or Personnel.
	Time		Select an existing business hours time table template, or click 'New' to add a new template or 'Edit' to edit an existing template (note that this will change the original template
	Device Type		Select the device type.
	Call Direction		Select the check box of the applicable call direction to be selected.
	Call Category		Click the **Select** button to select a call category.
	Call Duration		Click to select the minimum and/or maximum time for call duration. When a check box is selected, complete the time value in numbers for the corresponding field.
	Cost		Click to select the minimum and/or maximum cost for the call. When a check box is selected, complete the cost value in numbers for the corresponding field.
	Dialed Numbers		Type the specific dialed numbers to be included and click ⊞ to enter the number. To delete an error, or delete an already existing number, highlight the number and click ✕.
Taxes			Select the taxes to assign to the pricing rule.

Step   Click the **Update** button. The new service provider is saved and displayed in the work area.

To edit an existing price plan rule

Step 1   Click on the **Billing** module.

Step 2   From the lower right pane of the **Billing** Main window select **Price Plans**.

Step 3   In the tree pane, select **Price Plans** from the drop-down menu.

Step 4   Select the relevant Price plan. The pricing rules attached to the selected price plan are displayed in the work area.

Step 5   In the work area, click the required price plan rule and then click the **Edit** 📝 button. The Edit Price Plan Rule dialog box opens.

Step 6   Make the required changes and then click the **Update** button to save.

Price Discount

Price plans are made up of two central components, rates and Price Discounts. Price Discounts refer to reductions to the original price.

Creating a New Price Discount

To create a new price discount group

Step 1   From the lower right pane of the **Billing** Main window select **Price Plans**.

Step 2   In the tree pane, select **Price Discounts** from the drop-down menu.

Step 3   Click the **New** button and select **Price Discount Group** from the drop-down list. The Edit Price Discount Group dialog box opens.

Step 4   Enter a name and description for the group and then click **Update**. The new price discount group is displayed in the tree pane.

To create a price new discount

Step 1   Click on the **Billing** module.

Step 2   From the lower right pane of the **Billing** Main window select **Price Plans**.

Step 3   In the tree pane, select **Price Discounts** from the drop-down menu. A list of existing Price Discounts is displayed in the work area.

Step 4   In the work area, click the **New Discount** button. The New Discount dialog box opens.

Step 5 Complete the following fields:

Option	Description
Option	Description
Name	Discount name.
Description	Short description of the discount.
Category	Select the relevant category from the drop-down menu. For example, Normal. Each category has a set of pre-defined discount days.
Class	Select Percentage to define a proportional amount, Fixed to define a fixed amount or Rate to select a Price Plans rate.
Discount On	Define whether the discount is calculated according to the duration or cost (fee) of the call.
Percent	Lets you define the percentage if the Percentage class is selected.
Rates	Lets you select a Price Plans rate if the Rate class is selected.
Value	Lets you enter the value of the discount if the Fixed class is selected.
Start Date	If the Normal category is selected the date and time ranges for which the discount is valid can be defined. Select the relevant radio button to define the starting day.
End Date	Select the relevant radio button to define the starting ending day.
Start Time	Enter the start time.
End Time	Enter the end time.

Step 6 Click the **Update** button. The new discount is saved and displayed in the work area.

Editing an Existing Discount

To edit an existing discount

Step 1 Click on the **Billing** module.

Step 2 From the lower right pane of the **Billing** Main window select **Price Plans**.

Step 3 In the tree pane, select **Price Discounts** from the drop-down menu. A list of existing Price Discounts is displayed in the work area.

Step 4 In the work area, click the required discount to select and then click the **Edit** 📝 button. The Edit Discount dialog box opens.

Step 5 Make the required changes and then click the **Update** button to save.

Price Rates

Price plans are made up of two central components, discounts and Price Rates. Price Rates define how much specific usage is priced per defined unit, for example, calls to New York are priced at $0.50 per minute. When different segments of a call have different prices, then Price Rate segments can also be included in a Price Rate definition

To create a new price rate group

Step 1   From the lower right pane of the **Billing** Main window select **Price Plans**.

Step 2   In the tree pane, select **Price Rates** from the drop-down menu.

Step 3   Click the **New** button and select **Price Rates Group** from the drop-down list. The Edit Price Rates Group dialog box opens.

Step 4   Enter a name and description for the group and then click **Update**. The new price rates group is displayed in the tree pane.

To create a new Price Rate

Step 1   Click on the **Billing** module.

Step 2   From the lower right pane of the **Billing** Main window select **Price Plans**.

Step 3   In the tree pane, select **Price Rates** from the drop-down menu.

Step 4   A list of existing Price Rates is displayed in the work area.

Step 5   In the work area, click the **New Price Rate** button. The New Price Rate dialog box opens.

Step 6   Complete the following fields:

Section	Option	Description
	Name	Name of the Price Rate.
	Description	A short description of the Price Rate.
	Field	Select whether the Price Rate will be defined according to duration or units.
	Grace Period	The amount of initial call time that a user is not charged few. E.g. the first 30 seconds.
	Fixed Cost	A fixed amount that is charged for placing the call.
		The minimum amount that is always charged.

Step 7   Click the **Update** button to save.

To add a Price Rate segment

Step 1   Click on the **Billing** module.

Step 2   From the lower right pane of the **Billing** Main window select **Price Plans**.

Step 3   In the tree pane, select **Price Rates** from the drop-down menu.

Step 4   A list of existing Price Rates is displayed in the work area.

Step 5   In the work area, click the required Price Rate to select and then click the **Edit** 🖹 button. The Edit Price Rate dialog box opens.

Step 6   In the Price Rate Segments section, click the **New Price Rate Segment** 🖹 button. The New Price Rate Segment dialog box opens.

Step 7   Complete the following fields:

Option	Description
Length	Enter duration of the segment.
Meter Unit	Enter the duration of a metered unit.
Price Per Meter Unit	Enter the price per metered unit.
Rounding	Define how to round numbers, either up or down, by selecting the relevant option from the drop-down menu.

Step 8   Click the **Update** button to save. The Price Rate segment details are displayed. To edit the Price Rate segment select it from the Price Rate Segment list and then click the **Edit Price Rate Segment** button.

To edit an existing Price Rate

Step 1   Click on the **Billing** module.

Step 2   From the lower right pane of the **Billing** Main window select **Price Plans**.

Step 3   In the tree pane, select **Price Rates** from the drop-down menu. A list of existing Price Rates is displayed in the work area.

Step 4   In the work area, click the required Price Rate to select and then click the **Edit** 🖹 button. The Edit Price Rate dialog box opens.

Step 5   Make the required changes and then click the **Update** button to save.

Price Categories

Price categories refer to defined locations. Categories are used in the definition of price plan rules. Price categories must be assigned to price category groups. Therefore a price category group must be created before price categories can be created.

To create a price category group

Step 1   From the lower right pane of the **Billing** Main window select **Price Plans**.

Step 2   In the tree pane, select **Categories** from the drop-down menu.

Step 3   Click the **New** button and select **Categories Container** from the drop-down list.

Step 4   Select either **Group** or **Main Category**.

Step 5   Enter a name and description for the group and then click **Update**. The new Categories group is displayed in the tree pane.

> **NOTE**
>
> *You can now add Main category groups to the category "container" that you have just created, by following the same procedure.*

To create a new category

Step 1   Click on the **Billing** module.

Step 2   From the lower right pane of the **Billing** Main window select **Price Plans**.

Step 3   In the tree pane, select **Categories** from the drop-down menu. A list of existing Categories is displayed in the work area.

Step 4   In the work area, click the **New** button. The New Category dialog box opens.

Step 5   Complete the following fields:

Option	Description
Short Name	Short name of the category
Default Prefix	Select to use the default prefix.
Prefix	Enter the prefix.
Name	Enter the full name.
Minimal Digits	Define the minimum number of digits.
Label	Select a label from the drop-down list.

Step 6   Click the **Update** button to save.

You can also select an existing main category and then click the New button to define the parameters above.

NOTE

To edit an existing category

Step 1   Click on the **Billing** module.

Step 2   From the lower right pane of the **Billing** Main window select **Price Plans**.

Step 3   In the tree pane, select **Categories** from the drop-down menu. A list of existing Categories is displayed in the work area.

Step 4   In the work area, click the required category to select it and then click the **Edit** button. The Edit category dialog box opens.

Step 5   Make the required changes and then click the **Update** button to save.

5

Rating

Chapter Topics • *Rating - Introduction*
• *Costing - Introduction*
• *Rating Administration - Introduction*

Rating - Introduction

The **Rating** module enables your organization to simulate the calculations done by the various service providers in their billing systems. It must reflect the different agreements your organization has with its service providers and telephone carriers.

The **Rating** module is divided into two sub-modules:

• The **Costing** sub-module contains costing definitions, that is, how to calculate the cost of each call.

In recent years, telephone tariffs became much simpler than they used to be. In many cases, the sophisticated but heavy and complicated Costing sub-module previously needed, became superfluous. Consequently, a new **Costing** sub-module was developed. It is easier to define and maintain, and when appropriate, can replace the previous cumbersome **Costing** module.

• The **Administration** sub-module contains various administration functions related to the **Rating** module.

Costing - Introduction

In the **Costing** sub-module, you define the rates to be used for calculating the cost of each call. The rates must reflect the agreements your organization has with the various service providers and telephone carriers.

Costing entities are organized in a two-level tree structure displayed on the left hand side of the application window. The top level of the tree contains tables and folders of tables. When you select a table from the tree, its content is displayed on the right hand side of the window. The following folders or tables can be selected from the tree:

• **National Rates** - A folder of National Rates tables. Each table contains a list of rates with their Rate Codes.

- **National Locations** - A folder of National Locations tables. Each table assigns Rate Codes to national prefixes.
- **International** tables - A folder of International tables. Each table assigns rates to international prefixes.
- **Routes** - A table of Routes. Each Route specifies which tables, from each of the three above mentioned folders, will be used for calculating the cost of the call. Routes are selected according to the call details from the Call Detail Record (CDR).
- **City Locations** - A single table that may be used if a higher resolution of locations is desired.

Two additional table-level parameters are important for the New Costing:

- The **Increments** parameter defines the smallest unit of time for cost calculation. Its value is defined as a property of both National and International rates tables. The rates are always defined as price per minute, but the increments may be much shorter. The cost of a call depends not only on the rate per minute and the duration of the call, but also on the increments value. Consider, for example, a call with a duration of 13 seconds and a rate of 60 cents per minute. If the increments value is 6, its cost will be 18 cents (3 increments X 6 cents per increment), while if the increments value is 10, the cost will be 20 cents (2 increments X 10 cents per increment).
- The **International Access Code** is a property of International tables. It is used to determine whether a call is international or national.

For a full description of how rates are determined, see *Calculating the Cost of a Call*.

Calculating the Cost of a Call

This section contains the procedures and steps necessary to calculate the cost of a call.

- *Step 1 - Selecting a Route*
- *Step 2 - National or International*
- *Step 3 - Determining Rate and Increments*
- *Step 4 - Calculating the Cost*

Step 1 - Selecting a Route

The first stage for all calls is to select the appropriate route.

To select the appropriate route, call details are matched against route definitions. The route selected will determine which tables will be used to determine the rate in the subsequent stages. All routes are matched by their Data Source field. Additionally, each route can have one more method of matching calls, as described in Table 5-1.

Table 5-1 *Matching Method*

Matching Method	Description
By Device	The device field is matched against ranges of devices defined in the route.
From Call Detail Record (CDR)	Routing by a value retrieved from the CDR.
By Trunk	The trunk field in the CDR is matched against ranges of trunks defined in the route.
By Prefix	The prefix of the dialed number is compared to ranges of prefixes defined in the route.
By Trunk Group	The trunk group field is compared to ranges of trunk groups defined in the route.
By Data Source	The Destination Data Source determines the route.
Default Service	This route applies to all calls for which no other match was found. That is, a route with this matching method constitutes the default route for the Data Source.

Once a route record is selected, it is used to determine which tables, of the three folders in the tree structure, should be used for the subsequent steps of calculating the cost of the call. Table 5-2 provides a list of the tables and a brief description of their use.

Table 5-2 *Tables*

Table	Use For
Location table	Determines the Rate Code from prefixes.
Special Location table	May or may not be available in your organization. If available, it points to a partial Location table. This table will be searched first for a matching prefix. If no match is found, the matching continues to the standard Location table.
Rate table	Determines national increments and rates according to the Rate Code.
International table	Determines international increments and rates according the international prefixes.

Step 2 - National or International

To determine whether the call is international or national, the dialed number is compared to the International Access Code defined in the selected International table.

Step 3 - Determining Rate and Increments

National Calls

For national calls, the rate is determined as follows:

- Determine the appropriate Rate Code. The dialed number is compared to prefixes in the two Location tables defined for the selected route until a matching location is found. The Rate Code is

retrieved from the matching location record. The following rules apply to the comparison process.

— If a Special Location table is defined for the route, this table is searched first.

— If no Special Location table is defined, or if no match was found in the Special Location table, then the Location table is searched.

— In each table, the longer prefixes are compared first.

— Once a match is found, the search is terminated.

— If no matching rate code is found, the call will be assigned a zero cost, and its Call Category will be **Not Rated**.

• Once the Rate Code is determined, the rate to be used is the rate assigned to that code in the National Rates table defined for that route.

— The **Increments** parameter is taken from the National Rates table defined for the route.

— If the rate code does not exist in the National Rates table, the call will be assigned a zero cost, and its Call Category will be **Not Rated**.

International Calls

For international calls, the rate is determined in one step. The dialed number is compared to the prefixes in the International table defined for that route. The rate is retrieved directly form the matched record. The Increments parameter is taken from the same table.

Step 4 - Calculating the Cost

Once the rate and increments are determined, the cost of the call is calculated.

• For simple rates:

— **Number of increments** is calculated by dividing the duration of the call by the increments and rounding up any remainder.

— **Price per increment** is calculated by dividing the price per minute by 60, without truncation, and then multiplying it by the increments value.

— **Cost of the call** is the number of increments multiplied by the price per increment.

• For advanced rates, the calculation depends on the Advanced Rate definition.

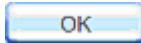### Managing the Costing Tree

The top level of the rating tree includes two top-level tables and three folders.

• **Folders** contain tables and can be expanded and collapsed.

• T**ables within folders** can be created, deleted, copied to another name (save as), or renamed.

- **Top-level tables** (those not in folders) cannot be added, deleted, expanded, or collapsed.
- **Selecting a table** (whether top-level or within a folder) displays its content as an advanced grid on the right hand side of the window.
- **National Location** tables can be imported.
- **International Location** tables can be imported and exported.

Creating a New Table in a Folder

Follow the steps below to create a new table within a folder.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Costing** sub-module.

Step 3   Click **New** 🗒 on the **Action** toolbar above the tree pane. A **New Table Name** dialog box displays.

Step 4   Enter a name for the table and click **OK** [OK] . The new table displays on the right hand side of the window.
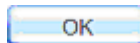
> *New National Rates and International tables are not created empty. Instead, each new table is created as a copy of the corresponding default table. New National Location tables are created empty.*

NOTE

Deleting a Table

Follow the steps below to delete a table.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Costing** sub-module.

Step 3   Expand the appropriate folder and select the table you wish to delete.

Step 4   Click **Delete** ✕ on the application main window toolbar above the tree pane.

Step 5   In the **Delete Confirmation** dialog box, click **OK** [OK] .

Renaming a Table

Follow the steps below to rename a table.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Costing** sub-module.

Step 3   Expand the appropriate folder and select the table you wish to rename.

Step 4   Click **Rename** [Rename] on the **Action** toolbar above the tree pane. A **Rename** dialog box displays.

Step 5   Enter a name and click **OK** | OK | .

Copying a Table to Another Name (Save As)
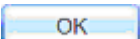
Perform the steps below to copy a table to another name.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Costing** sub-module.

Step 3   Expand the appropriate folder and select the table you wish to rename.
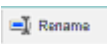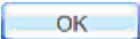
Step 4   Click **Save As** 🗐 on the **Action** toolbar above the tree pane. A **Rename** dialog box displays.

Step 5   Enter a name and click **OK** | OK | .

Step 6   Click **Update** to save the new cost plan.

Setting Increments

Increments define the smallest unit of time (in seconds) for cost calculation.

The rates are always defined per one minute. However, even with the same rate and duration, the cost of a call may be different depending on the increments value used. Consider, for example, a call with a duration of 13 seconds and a rate of 60 cents per minute. If the increments value is 6, its cost will be 18 cents (3 increments X 6 cents per increment), while if the increments value is 10, the cost will be 20 cents (2 increments X 10 cents per increment).

Defining Increments for a National Rates Table

Follow the steps below to define increments for a National Rates table.
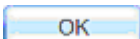
Step 1   Click **Rating** at the application main window.

Step 2   Select the **Costing** sub-module.

Step 3   Expand the National Rates folder.

Step 4   Right-click the National Rates table for which you want to define increments.

Step 5   Select **Increments** from the popup menu.

Step 6   Enter the required increments value in the **Properties** dialog box and click **OK** | OK | .

Defining Increments for an International Table

Follow the steps below to define increments for an International table.
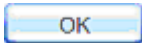
Step 1	Click **Rating** at the application main window.
Step 2	Select the **Costing** sub-module.
Step 3	Expand the International folder.
Step 4	Right-click the International table for which you want to define increments.
Step 5	Select **Properties** from the popup menu.
Step 6	Enter the required International Access Code and Increments value in the **Properties** dialog box and click **OK** [OK] .

Setting an International Access Code

The International Access Code is used to determine whether a call is National or International.

Defining an International Access Code

Perform the steps below to define an International Access Code.

Step 1	Click **Rating** at the application main window.
Step 2	Select the **Costing** sub-module.
Step 3	Expand the International folder.
Step 4	Right-click the International table for which you want to define the access code.
Step 5	Select **Properties** from the popup menu.
Step 6	Enter the required International Access Code in the **Properties** dialog box and click **OK** [OK] .

Managing Routes

Routes are used to link calls to specific Costing tables. Call details are compared to route definitions to select a matching route. The route selected determines which Costing tables will apply for calculating the cost of that call.

The list of existing routes is displayed as an Enhanced Grid. To use the Enhanced Grid capabilities, see *Enhanced Grid - Introduction*.

Creating a New Route

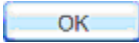Follow the steps below to create a new route.

Step 1	Click **Rating** at the application main window.
Step 2	Select the **Costing** sub-module.

Step 3   Select the Routes table. A grid of existing routes appears on the right hand side of the window.

Step 4   Click **New** 🌼 on the **Action** toolbar.

Step 5   Complete the fields in the **New Route** dialog box. Refer to Table 5-3.

Table 5-3 *New Route Field Descriptions*

Section	Option	Parameter and Description	
General	Route	Enter a name for the route.	
	Data Source	Select a data source from the drop down list or click **Search** 🔍 to open the **Data Source Selection** dialog box and search for the appropriate Data Source.	
National	Location Table	Select the appropriate **Location** table from the drop down list.	
	Special Location Table	You can define a partial table that will be searched before the regular Location table. If no match is found in the Special Location table, than the Location table is searched.	
	Rate Table	Select the appropriate **National Rates** table from the drop down list.	
International	International Table	Select the appropriate **International** table from the drop down list.	
Cost Setting	Use Cost from PBX	Check this check box if you wish to use the cost from the PBX. If selected, all subsequent cost setting check boxes are grayed out. Default is unchecked.	
	Set Cost for all calls as zero	Check this check box if you wish to set the cost of all calls to zero. If selected, all subsequent cost setting check boxes are grayed out. Default is unchecked.	
	Set Cost for Incoming calls as zero	Check this check box if you wish to set the cost of incoming calls to zero. Default is checked.	
	Set Cost for Internal calls as zero	Check this check box if you wish to set the cost of internal calls to zero. Default is checked.	
Identification	Method and Values for comparison	Select from the drop down list the desired method for matching calls to this route. The method selected determines the expected values that can be entered in the subsequent field	
		By Device	Calls are matched by comparing device numbers. For comparison, enter a comma separated list of device numbers or device number ranges.
		From CDR	Cost is taken from the CDR.

Section	Option	Parameter and Description	
		By Trunk	Calls are matched by comparing trunk numbers. For comparison, enter a comma separated list of trunk numbers or trunk number ranges.
		By Prefix	Calls are matched by comparing prefixes of dialed numbers. For comparison, enter a comma separated list of prefixes.
		Default Service	No farther matching beyond the Data Source is done, hence, this route applies to all calls for which no other matching route was found. This route constitutes the default route for that Data Source. Only one Default Service route can be defined per Data Source.
		By Trunk Group	Calls are matched by comparing trunk group numbers. For comparison, enter a comma separated list of trunk groups or trunk group ranges.
		By Data Source	The Destination Data Source determines the route.
	Call Types		Check or uncheck these check boxes to indicate which call types will be matched to the route.
Other Options	Strip		Before comparing the dialed number to the prefixes in the National and International location tables, remove certain digits from the dialed number.
		Position	Starting position of digits to be removed.
		Length	Number of digits to remove.
	Append	Position	Starting position for appending text.
		Text	Text to append.

Step 6   Click **Save** 💾 to save the new route or **Save & New** [Save & New] if you wish to continue creating new tables.

Deleting an Existing Route

Perform the steps below to delete an existing route.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Costing** sub-module.

Step 3   Select the Routes table. A grid of existing routes appears in the routes grid on the left hand side of the window.

Step 4   Click in the row of the route you wish to delete.

Step 5   Click **Delete** ✕ on the **Routes** toolbar.

Editing an Existing Route

Perform the procedure below to edit an existing route.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Costing** sub-module.

Step 3   Select the Routes table. A grid of existing routes appears in the routes grid on the left hand pane of the window.

Step 4   Click in the row of the route you wish to edit, and then click the **Pencil** icon 🖉 .

Step 5   Do one of the following:

—Click **Save** 💾 to save the edited route.

—Click **Save & New** 🖫 Save & New if you wish to save the edited route and continue to create new routes.

—If you wish to undo the changes, click **Undo** ↩ , and then click **Yes** Yes to confirm the undo.

Managing National Rates

National Rates records contain Rate Name and Code, and a rate, which can be either a simple price-per-minute rate or an advanced rate.

The list of existing rates is displayed as an Enhanced Grid. To use the Enhanced Grid capabilities, see *Enhanced Grid - Introduction*.

Creating a New Rate

Follow the steps below to create a new rate.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Costing** sub-module.

Step 3   Expand the National Rates folder and select the desired Rate table. The content of that table appears in the grid on the right hand side of the window.

> **NOTE**   *If you need to create a new table, see Managing the Rating Tree .*

Step 4   Click in the top row or click **New**   .on the **Action** toolbar.

Step 5   In the top row, complete the fields listed in Table 5-4.

Table 5-4 *New Rate Fields*

Field Name	Description
Rate Name	Enter a name for the new rate. The name must be unique.
Rate Code	Enter a code for the new rate. The code must be unique.
Price per Minute	Enter the price per minute.
Advanced Rate	Display only field. The **Advanced Rate** icon indicates an advanced code.

Step 6   Press **Enter** to save the new rate.

Step 7   If you wish to make this rate an Advanced Rate, click in the new rate's row to select it, and then click Advanced Rate on the **Action** toolbar. The **Advanced Rate** dialog box opens. For more information on Advanced Rate fields, see Advanced Rates.

Deleting an Existing Rate

To delete an existing rate, follow the steps below.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Costing** sub-module.

Step 3   Expand the National Rates folder and select the desired National Rates table. The content of that table appears in the grid on the right hand side of the window.

Step 4   Click in the row of the rate you wish to delete.

Step 5   Click **Delete** on the **Action** toolbar.

Editing an Existing Rate

To edit an existing rate, follow the steps below.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Costing** sub-module.

Step 3   Expand the National Rates folder and select the desired National Rates table. The content of that table appears in the grid on the right hand side of the window.

Step 4   Click in the row of the rate you wish to edit and then click the **Pencil** icon.

Step 5   In the row, modify the fields you wish to modify, then press **Enter**.

Step 6   If this is an Advanced Rate and you wish to edit the Advanced Rate fields, click in the rate row to select it, and then click Advanced Rate

on the **Action** toolbar. The **Advanced Rate** dialog box opens. For information on advanced rate fields, see *Advanced Rates*.

Managing National Locations

National Locations records contain a prefix defining the location and fields describing the location.

The list of locations in the table is displayed as an Enhanced Grid. To use the Enhanced Grid capabilities, see *Enhanced Grid - Introduction*.

Creating a New National Location

Follow the steps below to create a new National Location.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Costing** sub-module.

Step 3   Expand the National Location folder and select the desired National Locations table. The content of that table appears in the grid on the right hand side of the window.

> **NOTE**   *If you need to create a new table, see Managing the Rating Tree.*

Step 4   Click in the top row or click **New** .on the **Action** toolbar.

Step 5   In the top row, complete the fields listed in Table 5-5.

Table 5-5 New National Locations Fields

Field Name	Description
Prefix	Enter the prefix defining the location.
Call Category	Select the appropriate call category from the drop down list. The available Call Categories are defined in Call Categories.
Rate Code	Enter the desired Rate Code.
Minimum Digits	Enter the minimal number of digits for the location.

Field Name	Description
Location	Enter a name for the location.

Step 6   Press **Enter** to save the new National Location.

Deleting an Existing National Location

Perform the following steps to delete an existing National Location.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Costing** sub-module.

Step 3   Expand the National Locations folder and select the desired National Locations table. The content of that table appears in the grid on the right hand side of the window.

Step 4   Click in the row of the National Location you wish to delete.

Step 5   Click **Delete** ✕ on the **Action** toolbar.

Editing an Existing National Location

Perform the following steps to edit an existing National Location.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Costing** sub-module.

Step 3   Expand the National Locations folder and select the desired National Locations table. The content of that table appears in the grid on the right hand side of the window.

Step 4   Click in the row of the National Location you wish to edit and then click the **Pencil** ✏ icon.

Step 5   In the row, modify the fields you wish to modify, then press **Enter**.

Managing International Tables

International tables records contain a prefix defining the International location and fields describing the location.

The list of locations in the table is displayed as an Enhanced Grid. To use the Enhanced Grid capabilities, see *Enhanced Grid - Introduction*.

Creating a new International Record

Follow the steps below to create a new International Record.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Costing** sub-module.

Step 3   Expand the International folder and select the desired International table. The content of that table appears in the grid on the right hand side of the window.

If you need to create a new table, see Managing the Rating Tree.

Step 4   Click in the top row or click **New**   .on the **Action** toolbar.

Step 5   In the top row, complete the fields listed in Table 5-6.

Table 5-6   *International Record Fields*

Field Name	Description
Prefix	Enter the prefix defining the location.
Minimum Digits	Enter the minimal number of digits for the location.
Location	Enter a name for the location.
Price per Minute	For a simple rate, enter the price per minute.
Advanced Rate	Display only field. The **Advanced Rate** icon indicates an advanced rate.

Step 6   Press Enter to save the new rate.

Step 7   If you wish to make this rate an advanced rate, click in the new rate's row to select it and then click Advanced Rate   in the **Action** toolbar. The **Advanced Rate** dialog box opens. For more information on advanced rate fields, see *Advanced Rates*.

Deleting an Existing International Record

Perform the following steps to delete an existing International Record.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Costing** sub-module.

Step 3   Expand the National Locations folder and select the desired International Records table. The content of that table appears in the grid on the right hand side of the window.

Step 4   Click in the row of the **International Record** you wish to delete.

Step 5   Click **Delete**   on the **Action** toolbar.

Editing an Existing International Record

Perform the following steps to edit an existing International Record.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Costing** sub-module.

Step 3   Expand the National Locations folder and select the desired International Records table. The content of that table appears in the grid on the right hand side of the window.

Step 4   Click in the row of the **International Record** you wish to edit and then click the **Pencil** icon.

Step 5   In the row, modify the fields you wish to modify, then press **Enter**.

Advanced Rates

Simple rates define the cost of a call as a fixed price per one minute. For example, calls to New York cost $0.50 per minute. Advanced Rates should be used whenever you need a more complex definition in order to accurately calculate the cost of a call. Advanced rates might apply when different segments of the call have different units or different prices, when different days of the week or hours of the day have different rates, or when you need to define a grace period, etc.

Both National and International rates can be defined as Advanced Rates.

Defining or Editing an Advanced Rate

Use the procedure below to define or edit advanced rates.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Costing** sub-module.

Step 3   Expand the National Rates or International folder and select the desired table. The content of that table appears in the grid on the right hand side of the window. Records containing advanced rates are marked by the **Advanced Rate** icon in the **Advanced Rate** column.

Step 4   Click in the row of the that contains the rate you wish to define or edit.

Step 5   Click **Advanced Rate** on the **Action** toolbar. The **Advanced Rate** dialog box displays.

Step 6   Complete the fields detailed in Table 5-7.

Table 5-7 *Advanced Rate Fields*

Tab	Section/Option	Option	Description
General	Name		Name of the rate
	Description		A short description of the rate
	Field		Select whether the rate will be defined according to duration or units.
	Grace Period		The amount of initial call time that a user is not charged for. For example, the first 30 seconds.
	Fixed Cost		A fixed amount that is charged for placing the call.

Tab	Section/Option	Option	Description
	Add fixed cost when duration is shorter than grace period.		Select if the fixed cost should be applied when calls are shorter than the defined grace period.
	Minimum Cost		The minimum amount that is always charged.
	Rate Segment		In the **Rate Segment** grid **Action** toolbar, click ⬚ to add a new segment; or click in a segment row to select it and then click ✏ to edit the selected segment or ✕ to delete it.
		Length	Enter the duration of the segment.
		Meter Unit	Enter a duration of a metered unit.
		Price per Meter Unit	Enter the price per metered unit.
		Rounding	Define how to round numbers, either up or down, by selecting the relevant option from the drop down menu.
			Click **Update** to save the new or edited **Rate Segment**.
Conditions	Time		Click **New** ⬚ to create a new Working Hours definition or click **Edit** ✏ to edit the previously defined Working Hours definition. When finished, click **Update** to save the new or modified definition. This definition applies only to this advanced rate and cannot be used for other rates.
	Call Direction		Check the applicable call direction to be selected.
	Call Duration		Click to select the minimum and/or maximum time for a call duration. When a check box is selected, complete the time value in numbers for the corresponding field.
	Dialed Numbers		Type the specific dialed numbers to be included and click ⬚ to enter the number. To delete an error, or delete an already existing number, highlight the number and click ✕ .

Step 7   Click **Update** to save the new or edited Advanced Rate.

City Locations

City locations give you a better resolution of the destination in the report. For example, let's say that the prefix for Texas in the United States is 972. However, to have a better resolution you could allocate

specific cities within Texas with unique prefixes, for example, Dallas as 9721, Plano as 9722 etc. So, even though the costing is the same for the whole of Texas, the report will display the actual name of the relevant city in Texas.

This feature enables creating a detailed list of destinations.

You can add new locations, search for a location, or edit existing locations.

Adding a New City Location

Follow the steps below to create a new National Location.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Costing** sub-module.

Step 3   Select the City Locations table. An enhanced grid of City Locations appears on the right hand side of the window. See *Enhanced Grid - Introduction*.

Step 4   Click **New** .on the **Action** toolbar.

Step 5   In the top row, complete the fields listed in Table 5-8.

Table 5-8 *City Location Fields*

Field Name	Description
City Name	Enter the name of the city.
Prefix	Enter the prefix identifying the city.
Length	Enter the required length of the dialed number.

Step 6   Press **Enter** to save the new location.

Rating Administration - Introduction

Administration is a sub-module under **Rating**. It contains various administration functions related to the **Rating** module.

Costing processing

This application enables you to configure Costing Processing jobs. After configuring the Costing Processing job, you can run it immediately, schedule it to run automatically once or periodically, or save it and run it manually when needed.

Costing processing jobs include:

• **Recalculation**: Retroactive calculation of costs according to the currently active Cost Plans. Run this process if calls were calculated according to old or incorrect Cost Plans.

- **Fixed Cost Calculation**: Calculates the fixed costs defined in the system. Schedule this process to run periodically, at least as frequently as the most frequent recurring fixed costs defined in the application.

- **Recalculate Budget Balance**: Retroactive calculation of the Budget Balance according to the current ratings. If your organization uses the Budget feature, you need to run this process whenever you run the Recalculation process.

- **Update Budget Balance**: Call costs are subtracted from the Budget Balance at the end of each data collection cycle. If your organization uses the **No Buffer** option for data collection, (i.e. Continuous Data Collection), you need to schedule this process to run periodically to calculate the balance.

Configuring a Costing Processing Job

Follow the steps below to configure a costing processing job.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Administration** sub-module.

Step 3   In the **General** tab, enter a **Name** and **Description** for the job, then click **Next**.

Step 4   In the **Component** tab, open the job types drop down list and select a job type.

Step 5   For each parameter in the Parameters table whose value you need to set (see Table 5-9) set the parameter value as follows:

—The icon [icon] indicates a Text Box parameter. Click the icon or double-click in the parameter field and enter the desired value.

—The icon [icon] indicates a Selection parameter. Click the icon or double-click in the parameter field to open a **Selection** dialog box, select a value, then click **OK**.

—The icon [icon] indicates a **Date and Time** parameter. Click the icon or double-click in the parameter field to open a **Date and Time** dialog box, select or enter the date and time, then click **OK**.

Step 6   Click **Next**.

Step 7   In the **Configure Costing Processing Job Summary** dialog box, review the job parameters. Then do one of the following:

—To run the job now, click **Run Job Now**.

—To save the job, click **Save**.

—To schedule the job, click **Schedule**.

Table 5-9 *Parameter Description*

Job Type	Parameter	Description
Recalculation	Start	Define start date and time
	End	Define end date and time
Refresh Cost Plans	No parameters	
Fixed Cost Calculation	Enable fixed cost recalculation	Select True or False
	Recalculation start date	Define start date and time
	Recalculation end date	Define end date and time
Recalculate Budget Balance	No parameters	
Billing Discount Calculations	No parameters	
Update Budget Balance	No parameters	

Call Categories

The **Call Categories** feature enables you to view the call categories which can be selected as filtering and grouping criteria for reports and alerts. Call categories define the types of calls that you have in the system. You can group locations according to call categories and also use them as criteria by which to filter report and calls.

You can neither edit nor delete default Call Categories. However, you can add new non-default Call Categories, which then can be edited or deleted.

Creating a New Category

Follow the steps below to create a new call category.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Administration** sub-module.

Step 3   Select **Call Categories** from the upper left pane. The **Call Categories** dialog box displays.

Step 4   Click in the top row, or click **New** in the **Action** toolbar.

Step 5   In the top row, complete the fields depicted in Table 5-10.

Table 5-10 *Call Categories Fields*

Field Name	Description
Full Name of Category	Enter a name for the new category.
Short Name	Enter a code for the new category.

Step 6   Press **Enter** to save the new category.

Deleting a Category

Follow the steps below to delete a call category.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Administration** sub-module.

Step 3   Select **Call Categories** from the upper left pane.

Step 4   Click in the row of the category you wish to delete.

Step 5   Click **Delete** ✕ in the **Action** toolbar.

NOTE

Only non default categories can be edited or deleted. When you select a default category, the delete icon remains grayed out and inactive.

Editing a Category

Follow the steps below to edit a call category.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Administration** sub-module.

Step 3   Select **Call Categories** from the upper left pane.

Step 4   Click in the row of the category you wish to edit.

Step 5   Click **Edit** ✏ in the **Action** toolbar.

NOTE

Only non default categories can be edited or deleted. When you select a default category, the delete icon remains grayed out and inactive.

Step 6   In the row, modify the fields you wish to edit.

Step 7   Press **Enter** to save the edited category.

Recurring Charges

Recurring Charges enable you to define fixed monthly charges. However, defining a recurring charge by itself doesn't activate the charge. To activate a charge you must also assign it to specific persons, devices, or device types. See *Assigning Recurring Charges*.

The list of recurring charges is displayed as an Enhanced Grid. To use the Enhanced Grid capabilities, see *Enhanced Grid - Introduction*.

Defining a New Charge

Follow the steps below to define a new charge.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Administration** sub-module.

Step 3 Select **Recurring Charges Depository** from the upper left pane. The list of recurring charges appears in the grid on the right hand side of the window.

Step 4 Click in the top row or click **New** 📋 in the **Action** toolbar.

Step 5 In the top row, complete the fields depicted in Table 5-11.

Table 5-11 *New Charge Fields*

Field Name	Description
Name	Enter a name for the charge.
Description	Enter a description of the charge.
Amount	Enter the amount to be charged.
Charge Every	Select when to charge this Recurring Charge.

Step 6 Press **Enter** to save the new charge.

Deleting an Existing Recurring Charge

Follow the steps below to delete an existing recurring charge.

Step 1 Click **Rating** at the application main window.

Step 2 Select the **Administration** sub-module.

Step 3 Select **Recurring Charges Depository** from the upper left pane. The list of recurring charges appears in the grid on the right hand side of the window.

Step 4 Click in the row of the recurring charge you wish to delete.

Step 5 Click **Delete** ✕ in the **Action** toolbar.

> **NOTE**
>
> *If you delete an assigned recurring charge, all its assignments are deleted.*

Editing a Recurring Charge

Follow the steps below to edit a recurring charge.

Step 1 Click **Rating** at the application main window.

Step 2 Select the **Administration** sub-module.

Step 3 Select **Recurring Charges Depository** from the upper left pane. The list of recurring charges appears in the grid on the right hand side of the window.

Step 4 Click in the row of the category you wish to edit.

Step 5 Click **Edit** 🖉 in the **Action** toolbar.

Step 6   In the row, modify the fields you wish to edit.

Step 7   Press **Enter**.

Assigning Recurring Charges

This feature enables you to assign a recurring charge to specific devices or device types, and define when to start charging.

NOTE   *You can also assign Recurring Charges from the Devices or Persons dialog boxes.*

The list of assignments is displayed as an Enhanced Grid. To use the Enhanced Grid capabilities, see *Enhanced Grid - Introduction*.

Opening the Recurring Charges Assignment Dialog Box

Follow the steps below to open a **Recurring Charge Assignment** dialog box.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Administration** sub-module.

Step 3   Select **Recurring Charges Depository** from the upper left pane. The list of recurring charges appears in the grid on the right hand side of the window.

Step 4   Click in the row of the recurring charge whose assignment you wish to change and click **Recurring Charge Assignment** icon. The **Recurring Charge Assignment** dialog box opens and displays the list of assignments for the selected recurring charge as an enhanced grid.

Creating a New Assignment

Follow the steps below to create a new assignment.

Step 1   Open the Recurring Charges Assignment dialog box as described in *Opening the Recurring Charges Assignment Dialog Box*.

Step 2   Click in the top row, or click **New** in the **Action** toolbar.

Step 3   In the top row, complete the fields depicted in Table 5-12.

Table 5-12 *New Assignment Fields*

Field Name	Description
Device Name	Enter a device name or click to open a **Device Selection** dialog box and select the required device.
Device Type	Enter a device type. All devices of this type will be charged by this recurring charge.

Field Name	Description
First Name	Output only field. First name of the person to whom the device is assigned.
Last Name	Output only field. Last name of the person to whom the device is assigned.
Starting At	Enter the month from which to commence this charge.

Step 4   Press **Enter** to save the new assignment.

Deleting an Assignment

Follow the steps below to delete an existing assignment.

Step 1   Open the Recurring Charges Assignment dialog box as described in *Opening the Recurring Charges Assignment Dialog Box*.

Step 2   Click in the row of the assignment you wish to delete.

Step 3   Click **Delete** ✕ in the **Action** toolbar.

Editing an Existing Assignment

Follow the steps below to edit an existing assignment.

Step 1   Open the Recurring Charges Assignment dialog box as described in *Opening the Recurring Charges Assignment Dialog Box*.

Step 2   Click in the row of the assignment you wish to edit.

Step 3   Click **Edit** 🖉 in the **Action** toolbar.

Step 4   In the row, modify the fields you wish to edit.

Step 5   Press **Enter** to save the edited assignment.

Call Rate Adjustment

The **Call Rate Adjustment** function allows you to adjust differences between the calculated cost or price of certain calls and the service provider's bill (or any other externally defined cost or price).

The amount allocated to each call can be defined as a fixed amount or can be calculated so that the total amount to be adjusted is allocated according to percentage of number (of calls), duration, or amount of each call.

Adjusting Call Rates

Follow the steps below to adjust call rates.

Step 1   Click **Rating** at the application main window.

Step 2   Select the **Administration** sub-module.

Step 3   From the upper left pane select **Call Rate Adjustment**. The **Call Rate Adjustment** form opens.

Step 4   In the Scope section, complete the fields depicted in Table 5-13.

Table 5-13 *Call Rate Adjustment Fields*

Section	Option	Description
Period	From	Select start date.
	To	Select end date.
Scope	Org. Unit	Click the [i] icon to open the Organization Unit Selection dialog box. Click an Org. Unit line and click Select .
	Data Source	Select **All** or select a Data Source from the drop down list. Selecting **All** disables subsequent scope definition options.
	Trunk Group	Select **All** or select a Trunk Group from the drop down list. Selecting **All** disables subsequent scope definition options.
	Trunk Number	Select **All** or select a Trunk Number. Selecting All disables subsequent scope definition options.
	Service Provider	Select **All** or select a Trunk Number.

Step 5   In the Totals for scope section, click **Recalculate**

Totals for scope   (↺ Recalculate) to view the current totals for the selected scope.

Step 6   In the Additional Amount to be Allocated section, complete the fields as shown in Table 5-14.

Table 5-14 *Additional Amount to be Allocated Fields*

Section	Option	Description
Fixed or Percentage	Fixed	Select to add a fixed amount to each call.
	Percentage	Select to calculate the amount to add to each call according to percentage.

Section	Option	Description
Amount		For allocation by **Fixed** amount, enter the amount to add to each call. For allocation by **Percentage**, enter the total amount to be allocated to all the calls in the scope.
	Trunk Group	Select **All** or select a Trunk Group from the drop down list. Selecting **All** disables subsequent scope definition options.
Calculate By	Calls	Calculate percentage by **Number of Calls**.
	Duration	Calculate percentage by **Duration**.
	Amount	Calculate percentage by **Cost/ Price Amount**.

Step 7 In the History section you can view previous adjustments. Click to open

the drop down months list and select a month [August, 2008 ▼] .

Step 8 Click Start [🔧 Start] to run the adjustment. The

History for the current month is displayed with the top row showing the adjustment details.

6

Managing Activities

Chapter Topics   • *Managing Activities - Introduction*
• *Activity - Main Window*
• *Online Status*
• *Budget Control*
• *Proactive Alerts*

Managing Activities - Introduction

The Activity Analysis module contains the tools for monitoring the activity of the system. It allows an enterprise to define and control the budgets of their personnel and organizational entities. The usage and the thresholds of the usage of the telephony resources, as well as the parameters for the proactive alerts of the system can also be defined.

Once the Activity module is selected, one can access the On-Line Status sub-module, which displays the status of the system and all current alerts.

Activity - Main Window

The Activity main window is displayed when you click the Activity module tab.

Use the Activity main window to configure system alerts and budgets and to view online summaries of specific alert types.

The Activity Sub-module

The Activity Sub-module, in the lower left pane, displays the various activity types that you can access and configure:

• **Online Status**: Display a summary list of all Excessive Usage alerts

• **Budget Control**: Configure budgets and budget groups

• **Proactive Alerts**: Configure Excessive Usage and Budget alerts

When you select one of the activity types, the **Activity Tree** displays the relevant activity tree.

The Activity Tree

The Activity Tree displays the tree of the activity that you select in the Activity sub-module.

Work Area

The work area is composed of two panes.

• The left pane displays a list of items belonging to the activity selected in the activity tree (for example: budget alerts).
• The right pane displays information for items selected in the left pane.

You can hide the right pane by clicking the **Close Details** icon.

You can use the **Search** tool to search for entities in the list in the left pane. You can also add or delete entities.

Online Status

Online Status

The Online Status allows you to view the summary status of a number of modules. Once you select the Online Status option from the lower-left pane in the Activity Main window, you can select either the Excessive Usage or Budget summary options from the tree pane.

Excessive Usage Summary

The Excessive Usage summary displays a list of existing Excessive Usage alerts. The details for each alert record are displayed in the Alerts table.

To display the Excessive Usage summary

Step 1   Select the **Activity** module.

Step 2   From the lower right pane of the **Activity** Main window select **Online Status**.

Step 3   Select the **Excessive Usage** option in the Status Summary tree pane. *A list of existing Excessive Usage alerts are displayed in the work area.*

Step 4   The following information columns are displayed:

Column	Description
Alert Name	Name of the excessive usage alert.
Date	Date and time the alert was issued.
Device Type	Type of device that was involved.
Device Name	Name of device.
Owner	Name of the device owner.
Status	Alert status.
Duration	Call duration.
Cost	Cost of call.
Description	Description of alert.

Step 5   To approve individual alerts, select the relevant alert and then click the Approve button. The selected alert will be removed from the list.

Budget Summary

The Budget summary displays a list of budget alerts that are issued when predefined budget constraints have been exceeded.

NOTE

The procedure to access and display the Budget summary is similar to the Excessive Usage summary.

Budget Control

Budget Control

The budget control provides managers with a tool for controlling allocated communication resources for personnel and organizational units. Budget Control allows you to define budgets and then monitor these budgets by viewing alerts issued for outstanding usage, which are defined in the Proactive Alerts sub-module.

Budget Groups

Budget groups allow you to assign individual budget to specific groups. Users can be allocated a number of different budgets by assigning them to a budget group.

Adding a Budget Group

NOTE

You must first define the budget group before you can assign budgets to the group.

To add a budget group

Step 1   Select the **Activity** module.

Step 2   From the lower left pane of the **Activity** Main window select **Budget Control**.

Step 3   Select the **New Budget Group** 📄 button in the Budget tree pane. The **Edit Budget Group** dialog window appears.

Step 4   Enter a name in the **Group Name** text box and a short description in the **Description** text box.

Step 5   Complete the other relevant fields and then click the **Update** button. The new budget group is created and displayed in the tree pane.

Assign Budgets to a Budget Group

Once a Budget Group has been created, individual budgets can be assigned to a group. There are two ways in which budgets can be added to a group. A budget can be created under the root and then assigned, in which case you must first select the relevant group. The second option is to select a group and then create a budget directly under the group, which will cause the budget to be assigned automatically.

To assign a budget to a budget group

Step 1   Select the **Activity** module.

Step 2   From the lower right pane of the **Activity** Main window select **Budget Control**.

Step 3   Select the **Assign** button in the Budget tree pane. The **Budget Assignment** dialog box appears.

Step 4   Select the relevant budget(s) from the upper section and click the **Add** button. The names of the selected budgets are displayed in the lower section.

Step 5   Click **OK**. The assigned budgets are displayed in the work area.

Add a Budget

Once a budget group has been created, you can create individual budgets and then assign them to a budget group.

NOTE

A budget can also be automatically assigned to a group, by first selecting the relevant group in the tree and then creating the new budget.

To add a budget group

Step 1   Select the **Activity** module.

Step 2   From the lower left pane of the Activity Main window select **Budget Control**.

Step 3   Select the **New Budget** button in the Budget List pane. The New Budget dialog window appears.

Step 1: Configuration – Details Tab

Use the Details tab to set the allocated budget as well as the percentage for call duration/cost above which an alert is issued.

To configure the budget

Step 1   Enter a name and description for the budget in the relevant fields.

Step 2   In the **Status** field, select either **Active** or **Inactive.**

Step 2: Scope Tab

Use the Scope tab to determine the scope of the budget. The scope determines the organizational entities to be included in the budget.

The setup options available in the Scope tab are listed in the following table.

Section	Option	Description
Scope	For Person(s)	Lets you define the users that are included in the scope of this budget.
	For Unit(s)	Lets you define the organizational units that are included in the scope of the budget. All users that a part of the selected organizational unit will therefore be included in the scope of the budget.

To name individual users

Step 1   Select For Persons(s) and click **Select**.

Step 2   In the **Select Personnel** window, select the persons you want to include in the budget and click **OK**.

The window closes and the selected persons appear in the **Entities** text box.

To include all members of selected organizational units

Step 1   Select **For Unit(s)** and click **Select**.

Step 2   In the **Select Organizational Units** window select the organizational units you want to include in the budget and click **OK**.

Step 3   The window closes and the selected units appear in the Scope tab.

Step 3: Filters Tab

The Filters tab allows you to restrict the budget control according to specific filters: device type, call direction, call type or call category.

Section	Option	Description
Device Type	Extension	Include calls associated with selected extensions.
	PIN Code	Include calls associated with selected PIN codes.
	Cellular	Include calls associated with selected cellular phones.
	Calling Card	Include calls associated with selected calling cards.

Section	Option	Description
Call Direction	Incoming	Include incoming calls.
	Outgoing	Include outgoing calls.
	Internal	Include internal calls.
	Other	Include other calls such as conference calls or trunk-to-trunk calls.
Call Types	Business	Include business calls.
	Personal	Include personal calls.
Call Categories	[Select from available]	Click Select and use the Calls Category window to select the required call categories.)

Step 4: Budget Distribution – Budget Tab

Use the Budget tab to set the distribution criteria for the budget.

You set the period type, budget type and budget limits in terms of both costs and call length. The following options are available:

Section	Option	Description
Budget Type	Day	Per day.
	Week	Per week.
	Month	Per month.
	Fiscal Month	Per fiscal month.
	Year	Per year.
	Fiscal Year	Per fiscal year.
Budget	Set to $	Define the budget limit in dollars.
	Set to minutes	Define the budget limit in minutes.

Step 5: Create the Budget Group

Step   Click the **Update** button. The new budget group is displayed in the Budget List in the Work area.

Proactive Alerts

Proactive Alerts

The proactive alerts feature enables setting up the system to notify users of different events defined in advance.

The system can alert the administrator of a user's excessive phone usage to help enforce control over allocated communication resources for personnel and organizational units. Budget alerts can also be defined to notify the administrator when predefined call budgets have been exceeded. Proactive alerts are displayed in the Online Status list.

When configuring an alert you need to schedule the alert. The system will then automatically activate the set alert according to the schedule.

Select the **Activity** module, from the lower right pane of the Activity main window.

Budget Alert

The budget alert provides managers with a tool for controlling allocated communication resources for personnel and organizational units.

The communication budget can be set for an individual member of the organizational personnel, a group of individuals or selected organizational units. You can set the budget by specifying a monetary value or duration. You can also set the percentage of the budget that will trigger an alarm.

The system issues alerts when the total monetary value or total duration of calls for the selected persons/units exceeds the specified percentage of the allocated budget for the alert period. Once a call is included in an alert it will not be reported on again.

To add a budget alert

Step 1   Select the **Activity** module.

Step 2   From the lower right pane of the **Activity** Main Window select **Proactive Alerts**

Step 3   From the upper right pane select **Budget**.

Step 4   Select the **New Alert** button in the work area.

Setting the Budget Alert

Step 1: Alert Configuration – Details Tab

Use the Detail tab to set the allocated budget as well as the percentage for call durations/costs above which an alert is issued.

To configure the alert

Step 1 To set a threshold for call budget: In the **Condition** select the required operator, for example, "**=**" next to the **Alert when budget** field. Enter the percentage in the **%** field.

Step 2 To set a threshold for call duration: In the **Condition** select the required operator, for example, "**=**" next to the **Alert when duration** field. Enter the percentage in the **%** field.

Step 3 Select the relevant **Alert Severity** option.

Step 2: Alert Scope and Period Information – Scope Tab

Use the Scope tab to define the period for alert and the scope of the alert. The scope determines the budgets to be included in the alert.

NOTE

You should normally set the period to cover the time between scheduled alert jobs.

You can choose to include all the calls of the selected period or include only calls made on business or non-business hours or in a specific hour range.

The setup options available in the Scope tab are listed in the following table.

Section	Parameters	Option	Description
Scope	Entity Type	Budget(s)	Lets you select the required entity type. Only Budget(s) is available.
	Entities		Lets you select the budgets that you want to include in the scope of this budget alert. Click **Select** to select specific budgets or select the **For All** radio button to include all existing budgets

Section	Parameters	Option	Description
Period		Predefined	Lets you select a predefined time option from the drop-down list, for example, *Business Hours*.
		Last	Lets you run the alert on the last selected number of days or months.
		From/ To	Lets you select the range of hours in a day that is included in the report. Enter the start and end times in the relevant fields.

Step 3: Alert Delivery Method – Distribution Tab

Use the Distribution tab to set the delivery method of the alert.

You can choose to view the alert report on your browser. You can then navigate the content of the alert report online, print the report on your local printer and save the results in a local file.

Step   Click **OK.** The window closes.

IMPORTANT

Make sure all your parameters were selected correctly before running the alert.

Excessive Phone Usage Alert

The excessive phone usage alert provides online data analysis for alerting on excessive phone usage of individuals or organizational units.

Alerts can be set to report on calls exceeding a set threshold of call duration and/or cost.

The system issues alerts on all calls exceeding the thresholds predefined within configured alert period. Once a call is included in an alert it will not be reported on again.

The alert includes the start time of the call, the resource number and the person with whom this resource is associated, the called number (if available) as well as the call duration and cost.

To add an excessive phone usage alert

Step 1   Select the **Activity** module.

Step 2   From the lower left pane of the **Activity** Main Window select **Proactive Alerts.**

Step 3   From the upper left pane select **Excessive Usage.**

Step 4   Select the **New Alert** button in the work area.

Setting the Excessive Phone Usage Alert

NOTE

You can click Schedule at any time and move directly to running the alert (see: Step 6: Schedule the Report).

Step 1: Alert Configuration – Details Tab

Use the Details tab to set the threshold value/s for call duration/cost above which an alert is issued.

- To set a threshold for call duration: In the **Condition**, select the **Alert when call duration** check box. Set the Condition operator and enter the call threshold in seconds.

- To set a threshold for call cost: In the **Condition**, select the **Alert when call cost** check box. Set the condition operator and enter the call cost threshold in $.

Step 2: Scope Tab

Use the Scope tab to determine the scope of the alert. The scope determines the organizational entities to be included in the alert as well as the alert period.

The setup options available in the Scope tab are listed in the following table.

Section	Option	Description
Scope	For Person(s)	The alert scans calls made by selected persons. The default is the user's name.
	For Unit(s)	The alert scans calls made by all personnel of selected organizational units.
Period	Last _	To set the alert for the last numbered time periods (for example "Last 2 days").
	From / To	Set the alert period: **From** date to **To** date.

To scan individual users

Step 1   In the **Entity Type** field, select **Person(s)**.

Step 2   Click the **Select** button. The **Select Personnel** window opens.

Step 3   Select the person(s) you want to include in the report and click **OK**.

Step 4   The window closes and the selected persons appear in the **Entities** text box.

To scan all members of selected organizational units

Step 1   In the **Entity Type** field, select **Unit(s)**.

Step 2   Click the **Select** button. The **Select Organizational Units** window opens.

Step 3   Select the unit(s) you want to include in the report and click **OK.**

Step 4   The window closes and the selected persons appear in the **Entities** text box.

Step 3: Selection Criteria – Filters Tab

Use the Filters tab to limit the calls included in the alert.

The following options are available for filtering the calls:

Section	Option	Description
Device Types	Extension	Include calls associated with selected extensions.
	PIN Code	Include calls associated with selected PIN codes.
	Cellular	Include calls associated with selected cellular phones.
	Calling Card	Include calls associated with selected calling cards.
Call Direction	Incoming	Include incoming calls.
	Outgoing	Include outgoing calls.
	Internal	Include internal calls.
	Other	Include other calls such as conference calls or trunk-to-trunk calls.
Call Type	Business	Include business calls.
	Personal	Includes personal call.
Call Categories	Select from available	Click Select and select from the available categories.

To set alert selection filters:

Step 1   From the **Device Type** options select the required options for the alert.

NOTE   *By default all devices are selected.*

Step 2   From the **Call Direction** options select at least one of the options.

Step 3   From the **Call Types** options, select at least one of the following: **Business**, **Personal**.

Step 4: Alert Delivery Method – Actions Tab

Use the Action tab to set the delivery method of the alert.

You can choose to view the alert report on your browser. You can then navigate the content of the alert report online, print the report on your local printer and save the results in a local file.

You can choose, on the other hand, to define a Scheduled alert job that can be performed at any day or time according to your selection and dispatched according to the options in the following table:

The available delivery options are:

Section	Parameters	Option	Description
Output	Output Type	Single	Create one alert for all scope personnel.
		Multiple	Create individual alerts for each person included in the scope.
	Printer		Lets you print the alert on any one of the predefined system printers. Click **Printers** to select a printer.
	File Path	Browse	Lets you save the alert to file. Browse to choose the path for the file.
		File Name / File Type	Type the file name and the file type.
Email	E-mail to Entity owners		Lets you send the alert to the persons in the report scope.
	E-mail to Others		Lets you send the alert to selected persons.

Step 5: Schedule the Alert

Step 1   Select the Printer, File Path or E-mail check box to activate the New Schedule ▦ button.

Step 2   In the Scheduled Jobs click the **New Schedule** ▦ button. The **Job Scheduler** dialog box appears.

Step 3   Select the required scheduling options.

The available scheduling options are listed in the following table.

Section	Parameters	Options	Description
	Job Name		For typing a name for the scheduled alert job.
	Description		For typing a description of the alert.
		One time	A single run of the alert at a specified date and time.
		Recurring	Repeated running of the alert on specified days at specified time(s).
One Time Job		Date	The date of the one time scheduled alert (For date selection see Date Selection)
		Time	The time of day of the one time scheduled alert
Recurring Job	Scheduled Days	Daily	The alert will run daily at the specified time(s).
		Weekly	The alert will run weekly at the specified day(s) time(s).
		Monthly	The alert will run every month at the specified
		Every_day(s)	Frequency for daily running of alerts: According to the number entered the alert runs every second, third, etc. day at the specified time(s).
	Scheduled Time in Day	Once at	The alert runs once a day at the specified hour.
		Every_	Frequency of running of alert according to selected frequency units (hours/minutes)
		Hour(s)/Minute(s)	Alert running frequency units.
		From / To	Time period for repeated running of alert.

Step 4   Click **OK.** The window closes.

After you schedule the alert, a summary of the selected parameters is displayed in the Activity Main window.

IMPORTANT

Make sure all your parameters were selected correctly before running the alert.

7

Maintenance

Chapter Topics

Maintenance - Introduction

The Maintenance module allows you to define and maintain all system tasks and settings. Only authorized users are able to schedule various system tasks.

Authorized users can add new data collectors to a site. These data collectors can be set to receive call data from files or from physical sources through different communication ports. Users can import and export organizational information in various formats as well as costing information.

They can configure various costing processing jobs and schedule maintenance operations.

System jobs can be configured to run immediately or scheduled to run later once or periodically.

The system supplies authorized users with wizards for configuring the information necessary for setting up and scheduling system jobs according to job requirements.

Monitor

Monitor

A number of system monitoring elements allow administrators to view various status indicators.

The monitoring elements include:

- **System Health**: Configure system health alerts
- **System Log**: View system logs for maintenance purposes.
- **Calls Viewer**: View call records.
- **General Fields**: View and modify the General Fields defined in the system.
- **Org. Unit Types**: View and add organizational unit types.
- **Archive Catalog**: Lists the archive files in the system and their main properties.
- **Rejected Devices:** Displays calls of devices that were not first imported into the system.
- **Check Vital Signs**: View the system status
- **User Events Log**: Lists users logging activities and tasks performed.

System Health Alert

The Application allows you to configure alerts indicating exceptional system health events, including the following:

- Low amount of SQL free disk space
- Excessive number of bad data blocks
- Number of deleted duplicate calls
- Application license is about to expire
- Application license does not fit computer hardware
- Maximum number of devices has been reached
- Excessive DC_Collector idle time
- A large number of messages in queue indicating a system malfunction.
- Large number of un-priced calls indicating a problem in the pricing process.

Once the alert is set the system performs the check according to the schedule you configured. The actual values are compared to the thresholds and the system then notifies you in cases where the present values exceed the thresholds.

To access the System Health Alert Wizard

Step 1   Select the **Maintenance** module.

Step 2   From the lower left pane of the **Maintenance** Main Window select **Monitor.**

Step 3   From the upper left pane select **System Health**.

Setting the System Health Alert

The Alert Wizard guides you easily through defining the parameters needed for the set alert to suit your needs.

NOTE

You can click Finish at any time and move directly to running the alert (see: Step 3: Generating the Report).

Step 1: Alert Configuration – General Tab

Use the General tab to set the threshold value/s for the system health parameters.

To configure the alert

Step 1   In the **Threshold Parameters**, type the threshold values for each of the system health parameters.

Step 2   Click **Next**.

Step 2: Alert Delivery Method – Distribution Tab

Use the Distribution tab to set the delivery method of the alert.

You can choose to view the alert report on your browser. You can then navigate the content of the alert report online, print the report on your local printer and save the results in a local file.

You can choose, on the other hand, to define a scheduled alert job that can be performed at any day or time according to your selection and dispatched according to the options in the following table:

The available delivery options are:

Section	Option	Description
OutPut	Output	Single / Multiple
	File Type	Lets you save the alert report to file: MS Word MS Excel PDF RTF
	Printer	Lets you print the alert report on any one of the predefined system printers. Click **Printers** to browse for printers.
	File Path	Select the path to the job file. Click **Browse** to browse to the location.
	File Name	The name of the file job.
E-mail To	E-mail to entity owner	Lets you send the alert report to the owner of the entity.
	E-mail to others	Lets you send the alert report to an email recipient selected from a predefined organizational mailing list.

To select alert recipients:

Step 1   When you choose to select the recipients of the alert the following window appears.

Step 2   From the left pane select the organizational unit the person to whom you want to mail the alert belongs to.

Step 3   From the upper right pane select the person and click **Add**.

      The person is added to the lower pane.

Step 4   When you finish selecting recipients, click **OK**.

Step 3: Running the Alert

After you select the delivery method, a summary of the selected parameters is displayed.

IMPORTANT

Make sure all your parameters were selected correctly before running the alert.

You can run the file immediately according to the delivery method you selected or schedule it to run periodically or later.

You can also view the report on your browser. You can then navigate the content of the report online or save the results as a PDF file.

You might want to save the parameters you set for the report. Saving the settings of the report sets the present values of the selected parameters as your default values. These values are then automatically set every time you log in to the system.

System Logs

The system logs are used for maintenance purposes. The logs are a good indication for the administrator of the status of system processes.

The following information columns are displayed:

• Entry ID – Log entry identification number
• Severity – Severity level
• Date – Date and time on which entry was logged
• Instance Name – Relevant instance name
• Entry Text - Description of entry

To display system logs

Step 1   Select the **Maintenance** module.

Step 2   From the lower left pane of the **Maintenance** Main Window select **Monitor.**

Step 3   From the upper left pane select **System Log**.

The Logs view is displayed in the right pane. You can search for specific record/s.
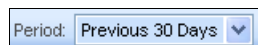
Calls Viewer

The Calls Viewer enables you to view the call records as they are in the database.

You can specify a required period, and then fine tune the selection by applying filters to the various grid columns.

The Call Viewer uses the Application's Enhanced grid. For common grid operations, such as filtering, paging, sorting and exporting the records, see The Enhanced Grid.

To display call records:
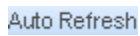
Step 1   Select the **Maintenance** module.

Step 2   From the sub module selection pane of the Maintenance Main Window select **Monitor**.

Step 3   From the upper left pane select **Calls Viewer**.

Step 4   In the Action toolbar, open the **Period** drop-down menu

Period: Previous 30 Days ▾ and select the desired period.

If you use the Call Viewer to view currently occurring calls, use the auto refresh option to have the view automatically refreshed.

To use the Auto Refresh option:

Step 1   To activate Auto Refresh, click **Auto Refresh** Auto Refresh in the Action toolbar.

Step 2   To deactivate Auto Refresh, click Auto Refresh Auto Refresh again.

To delete a call record:

NOTE   *Deleting a call record through the Call Viewer permanently deletes the record from the database, not only from the view.*

Step 1   Click in the line of the record you wish to delete to select it.

Step 2   In the Action toolbar, click the Delete icon ✕.

Step 3   In the confirmation dialog box, click OK.

To delete all call records in the view:

NOTE   *Deleting a call record through the Call Viewer permanently deletes the records from the database, not only from the view.*

Step 1   Click in the line of the record you wish to delete to select it.

Step 2   In the Action toolbar, click the Delete All icon ✕ Delete All .

Step 3   In the confirmation dialog box, click OK.

General Fields

The General Fields option allows users to view the General Fields defined in the system and to modify their displayed names. These fields are specific fields that are taken from the CDR and inserted into the database.

Organization Unit Types

The system allows for flexible organization and customizable unit types. You can edit organizational unit types as well as add new units via this option.

To create a new org. unit type

Step 1   Enter the name for the new org. unit type.

Step 2   Click the **Add New** button. The new org. unit type is displayed in the Existing Types section.

To delete an existing org. unit type

Step 1   Select the relevant type in the Existing Types section.

Step 2   Click the **Delete** button. The selected org. unit type is removed from the list.

Archive Catalog

The Archive Catalog lists the archive files in the system and their main properties, including, sites or data sources, dates and which user made the archive.

Archives can be sorted by different columns by clicking the relevant column header.

Rejected Calls

Rejected Calls may occurs if the System Settings does not allow the creation of non-existent Devices or Account Codes automatically. See General Settings.

The Rejected Calls grid displays the list of rejected calls, showing for each call: the node number, the time it arrived, and the reason for its being rejected. The raw data can also be viewed for each call.

The Rejected Calls uses the Application's Enhanced grid. For common grid operations, such as filtering, paging, sorting and exporting the records, see The Enhanced Grid.

To display the Rejected Calls:

Step 1   Select the **Maintenance** module.

Step 2   From the sub module selection pane, select **Monitor**.

Step 3   From the upper left pane select **Rejected Calls**.

In addition to the common Enhanced Grid operation, you can:

- **Run Rejected Calls report** - In the Action toolbar, click Run Report
  . The Report summarizes the calls per each device by Data Source.
- **Process the rejected calls again** - after creating the missing Devices or Account Codes, click **Process Rejected Calls** in the Action toolbar.
- **Delete all rejected calls** - in the Action toolbar, click **Delete all Rejected Calls** Delete all Rejected Calls
- **Select a Device** - to show only rejected calls for that Device. In the Action toolbar' open the **Device** drop-down list Device: ▼ and select a Device.

Check Vital Signs

Checking the system's vital signs allows the user to view the system status and get a general overview of what is currently happening in the system.

To check vital signs

Step 1   Click on the **Maintenance** tab and then select **Monitor**.

Step 2   Click the **Check Vital Signs** option. The following information is displayed:

   —Product name and version number
   —System entities, such as the number of configured sites, trunks etc. Also allows quick access to the System log.
   —Last Rate update date and time
   —Data collection e.g. total number of calls and access to the Collection log

User Events Log

To display the user events log:

Step 1   Click on the **Maintenance** module.

Step 2   From the lower right pane select **Monitor**

Step 3   In the left pane, select **User Events Log**.

Step 4   This view displays a list of system users, when they logged in and out and the times at which these were performed.

Task Manager

Task Manager

Different tasks are defined in the Application to perform the day to day collection, synchronization and maintenance of the system. The Task Manager is where you can activate maintenance tasks on demand or schedule them in a flexible manner to allow for easy maintenance. The centralized management of system scheduling enables better utilization of system resources and provides a single interface for executing, monitoring and logging the various activities.

An additional functionality in the Task Manager is the Import and Export functionality. It enables easy definition of the organization, and its costing schemes. It also enables synchronization with additional management solutions used in the enterprise.

Database Maintenance (DB Maintenance) in the Application is performed by creating jobs that are defined using specific sets of parameters particular to each type of operation. Multiple jobs can be scheduled to perform the different maintenance processes.

An additional maintenance job performed by the Task manger is archiving of data, by site, data source and by period. The archives keep the "old" data in separate databases. Those databases can each be used separately for generating reports.

The Task Manager elements include the following:

- **Scheduled Jobs:** Enables flexible scheduling of system jobs
- **Adding a Data Collector:** Define new data collectors in an existing site
- **Importing/Exporting Data:** Import/export data from/to various sources
- **Generic Export Calls:** Export calls data as a file for use in external applications
- **Generic Export Calls Summaries:** Export the personnel calls summary data as a file for use in external applications
- **Generic Personnel Import:** Import the generic Import data file
- **Organization Export:** Export All Organization information
- **Database Maintenance Jobs:** Configure database maintenance jobs
- **Automatic User Creation:** Automatically designate selected persons or organizational units as system users
- **Calls Archiving:** Save relevant call data by initiating periodic archives

Scheduled Jobs

The Job Scheduler is based on the SQL scheduler and enables flexible scheduling of system jobs. The scheduler screen allows a user to view all scheduled system jobs and to filter them according to the user's specific interest. One can also modify a scheduled session, or use the screen to define a new schedule for the jobs.

The following options are available:

- **One Time**: When this option is selected you must define the date and time for this occurrence. You also have an option to limit the duration of this occurrence so that it stops after a period of time of operation.
- **Recurring**: When this option is selected, you need to define how often the recurrence should happen - Daily, Weekly or Monthly. The last parameter, which is optional, is to define at what time in the day the occurrence will take place.

Scheduled Jobs View

The Scheduled Jobs View displays information for all the jobs set up in the system.

Column	Description
Process Name	The name of the process running the job as its instance.
Job Name	Job name given by the user when setting up the job.
Enabled	Whether the job in enabled (1) or disabled (0). Disabled recurring jobs will continue to run according to schedule when enabled.
Status	Information concerning the status of the job such as successful completion, next scheduled run time etc.
Description	Job description given by the user when scheduling the job.
Scheduling Summary	Whether the job is a recurring job or scheduled to run once.
Component Type	The type of component configured for the job.
Associated Object	Physical entity associated with the job.
Can be enabled	Select True if you want to enable the process.

Using the Scheduled Jobs toolbar you can change the scheduling information, edit job parameters, disable or enable jobs and delete jobs.

The following table lists the icons of the Scheduled Jobs toolbar.

Icon	Name	Function
	Refresh	Refresh the Scheduled Jobs view.
	Auto Refresh	Automatically refreshes the Scheduled Jobs view if selected.
	Schedule	Open the Scheduled Jobs window to enable changing scheduling setup.
	Edit	Open the job wizard and enable changing the job configuration parameters.
	Enable Job	Enable the selected job.
	Enable	Enable a previously disabled job. (Appears only for disabled jobs).
	Disable	Disable a previously enabled job. (Appears only for enabled jobs)
	Delete	Delete a job.
	Collection Info	Display collection information.

Scheduling a Job

When configuring a job you can choose to run the job immediately or schedule it to be run later.

To schedule a job to run at a specified time(s)

Step 1   In the **Scheduled Jobs** view, click the **Schedule button**.

The Job Scheduler - Web Page Dialog appears.

Step 2   Select the scheduling options according to your requirements.

The scheduling options are listed in the following table.

Section	Parameters	Options	Description
	Job Name		The name of the job to be scheduled
	Description		A description of the job that appears in the Scheduled Jobs view.
	Job Type	One time	A running the job once at a specified date and time.
		Recurring	Running the job repeatedly on specified days at specified time(s).
	Limited Duration to		Limit running the job to a specified time duration.
One Time Job	Run Job At	Date	The date of the onetime scheduled job.
		Time	The time of day of the onetime scheduled job.
Recurring Jobs	Scheduled Days	Daily	The job will run daily at the specified time(s).

Section	Parameters	Options	Description
		Weekly	The job will be run weekly at the specified day(s) time(s).
		Monthly	The job will be run every month at the specified
	For daily running of jobs	Every_day(s)	Frequency for running jobs daily: According to the number entered the job is run every second, third, etc. day at the specified time(s).
	For weekly running of jobs	Every_week(s)	Frequency for running jobs weekly: According to the number entered the job is run every second, third, etc. week at the specified days and time(s).
		Select the days of the week.	For running jobs weekly: The job will run on the days of the week selected (according to the selected frequency).
	For monthly running of jobs	Day_of_every_ month(s)	Frequency for running jobs monthly: According to the numbers entered the job is run at the given date of the month every second, third, etc. month at the specified time(s).
		The (1st, 2nd, 3rd,4th,last) day of the week specified, of every _ month.	Frequency for running jobs monthly: According to the selections the job is run at the specified week of the month on the selected day of every month (or second, third, etc. month) at the specified days and time(s).
	Scheduled Time in Day	Once at	The job is run once a day at the specified hour.
		Every_	Frequency of running jobs according to selected frequency units (hours/minutes)
		Hour(s)/Minute(s)	Frequency units.
		From / To	Time period for repeated running of jobs.

Step 3   Click **OK**.

The window closes.

Adding a Data Collector

Call data collection is the basic task of the Application. The data is collected through the data collectors and saved to the Application database.

There are various types of call collections depending on the data source and connectivity, which include, collecting from the PBX directly or through a buffer – using RS232, collecting via a dial-up modem, and collecting a file from the network, FTP or TCP/IP.

A format file gives the flexibility to collect and parse call records from any PBX without the need for additional programming modifications.

Once data is collected it is parsed by the Data Recognition service and inserted into the database.

You can define new data collectors in an existing site. Data collectors can receive information from files or from one or more physical data sources. When the collector is configured to receive data from more than one physical data source it receives the data from the Call Data Records (CDRs). When adding a data collector you need to specify the data source/s for the collector and configure the collector.

The New Data Collector Wizard guides you easily through the steps required when adding a data collector.

You can add the new data collector immediately or schedule it to be added later at a specified time.

To access the New Data Collector Wizard

Step   Select the **Maintenance** module, from the lower right pane of the Maintenance main window, select **Task Manager** and then from the upper right pane select **Data Collector**.

You must enter all required information before proceeding to the next step.

IMPORTANT

Step 1: General Information and Data Source - General Tab

Use the General tab to name and describe the new data collector and specify the data source for the new collector.

To name and describe the data collector and specify the data source

Step 1   In the **General** section, In the **Name** text box type a name for the data collector and a description in the **Description** text box.

The name and description appear in the Scheduled Jobs View.

Step 2   In the **Data Source** section do one of the following:

—**To specify a data source**: Select the drop-down list and choose a source for the data collector.

—**To receive data from more than one data source**: Select **Obtained from CDR** to instruct the collector to obtain the name of the data source from the CDR.

Step 3   Click **Next**.

The **Collector** tab is activated.

Step 2: Configuring the Collector - Collector Tab

Use the Collector tab to configure the collector. You need to specify whether the data source is a file or a physical connection (Com port) as well as data location or connection information.

To configure the collector

Step 1   In the **Type & Parameters** section, from the type list choose the type of the collector you want to add:

—**DCFile**: For the collector to receive data from a file

—**DCComm**: For the collector to receive information through an Omnitronix type Comm port.

—**DCComm-Dialed**: For the collector to receive information through a dial-up connection from an Omnitronix type buffer.

Step 2   In the parameter table select a parameter that is undefined or whose value you need to change.

NOTE

MA4000 expense management collection setup currently requires TCPIP connectivity.

MA4000 Expense Management currently does not support a direct serial connection. However, a serial to TCPIP connection via an external SMDR buffer can be implemented.

NOTE

The available parameters will differ, depending on the type of collector that was selected. The following table details all the available parameter options.

Parameter	Description
Input File	Enter the input file path including the file name.
Delete Input File	Select whether or not to delete the input file.
Output to Parser	Select whether or not collector will output to parser.
Output File Path	Enter the output file path.
Ini File Path	Enter the Ini file path.
Log File Path	Enter the log file path.
Path to Input File on FTP	Enter the input file path on the FTP.

Parameter	Description
Username	Enter the username to access the FTP site.
Password	Enter the password to access the FTP site.
Address	Enter the FTP site address.
Port	Select the relevant Communication port.
Baud Rate	Select the relevant baud rate.
Data bits	Select the relevant number of data bits.
Parity	Select the relevant parity option
Stop Bits	Select the relevant number of stop bits.
Handshake	Select the relevant handshake option.
Protocol File Path	Select the relevant protocol file path.
Dial Number	Enter the relevant number to dial.

Step 3   Double-click the relevant field and select the value from the window that opens or enter a new value.

Step 4   Follow Step 2 for all parameters you need to edit.

Step 5   Click **Next**.

The **Parser** tab is activated.

Step 3: Configuring the Parser - Parser Tab

Use the Parser tab to configure the parser. You need to define the parsing parameters according to the data source type you selected. You can select either **CR Raw Data**, for raw data for all collectors or **CR Tops**, for raw data for TOPS only.

To configure the parser

Step 1   In the **Type & Parameters** section, from the type list choose **CRRawData** or **CR Tops**.

Step 2   In the parameter table select a parameter that is undefined or whose value you need to change.

The available parameters will differ, depending on the type of collector that was selected. The following table details all the available parameter options.

Parameter	Description
PD9 File Path	Select the relevant PD9 file path.
Output to Inserter	Select whether or to output to inserter.
Output File Path	Enter the output file path
Ini File Path	Enter the Ini file path.
Log Rejected	Select whether or not log is rejected.
Log Processed	Select whether or not log is processed.
Ignore Out of Scope Calls	Select whether or not to ignore out of scope calls.
Outgoing Minimum Duration	Define the minimum outgoing time duration.
Incoming Minimum Ring Time	Enter the incoming minimum ring time.
Incoming Minimum Duration	Define the minimum incoming time duration.
Outgoing Maximum Units	Enter the relevant units.
Outgoing Maximum Duration	Define the maximum outgoing time duration.
Incoming Maximum Ring Time	Enter the incoming maximum ring time.
Incoming Maximum Duration	Define the maximum incoming time duration.
Time Zone Difference in Hours	Enter the relevant hours.

Step 3   To enter a new value double-click the field, select the value from a list and click **OK**.

Step 4   Follow Step 2for all parameters you need to edit.

Step 5   Click **Next**.

A summary of the new data collector configuration is displayed.

Step 4: Adding the collector

You can add the collector immediately or schedule it to be added later. You can also save the setting you configured for the new collector.

IMPORTANT

Make sure all your parameters were selected correctly before running the job.

To add a new data collector immediately

Step   Click **Run Job Now**.

The job is run immediately. You will be notified upon completion.

To schedule the collector to be added later

Step   See Scheduling a Job.

To save the configured settings

Step   Click **Save**.

The settings are saved and will appear as defaults when you start adding a new collector.

Importing / Exporting Data

The Application enables you to import data from various sources and export data to various destinations.

Each Import/Export job must have a unique job name. However, you can configure many Import/Export jobs of the same type. After configuring an Import/Export job you can either run it immediately, save it to run it manually later, or schedule it to run automatically at a pre-set time or times.

System import/export jobs include the following job types:

- **LDAP Import**: Import organizational information through the LDAP protocol. The information is imported from the domain's Active Directory, thereby using the same master information used in the organization for the application. The information includes Organization Units and Personnel.

- **XML Import**: Import customized data in XML format. This capability runs a stored procedure that inserts information from an XML file into the Application database. The XML file and the stored procedure should be prepared in advance in order to import the information

- **DTS Import / Export**: The SQL server tools are used to prepare a DTS Package and to export information from one database to the other. It affords a technician the flexibility to import or export any fields in the database to any external database.

- **Vlist Import**: Import costing tables supplied by Service Providers into the application. Service Providers supply Vlist costing tables in either XML or TDA formats. XML files can imported directly into the Application. To import data from a Vlist.TDA file, you first have to convert it to XML format. A utility is used for this conversion. Launch the utility by navigating to **C:\Program Files\NEC\EM\Utilities**, double-click the utility named **Utilities.Management.exe**, then click the **Vlist Convert** tab.

- **MA4000 DataSync** - synchronizes the application with the MA4000 database. The synchronized entities are: sources, extensions organization units and personnel. The DataSync is always Full, i.e., entities are added or deleted to reflect exactly the MA4000 DB.

- **DNA Import** - provides import of organizational structure from a DNA management system.

- **Import/Export Rating** - enables exporting rating data from one application and importing it into another Application.

- **Standard Import** - enables import of a comma separated text file with a preset fixed list of fields.

You can configure the import/export jobs to run automatically once or periodically.

To configure and run an Import/Export job:

Step 1   Select the **Maintenance** module.

Step 2   From the sub module selection pane select **Task Manager**.

Step 3   From the upper left pane select **Import/Export**.

Step 4   in the General tab, enter **Name** and **Description** for the job, then click **Next**.

Step 5   In the **Component** tab, open the job types drop-down list and select a job type.

Step 6   For each parameter in the parameters table whose value you need to set (see Parameter Description Below), set the parameter value as follows:

—The icon indicate a text box parameter. Click the Icon or double-click in the parameter field and enter the desired value.

—The symbol indicates a selection parameter. Click the Icon or double-click in the parameter field to open a selection dialog box, select a value and click **OK**.

—The symbol indicate s password parameter. Click the Icon or double-click in the parameter field to open a password dialog box, enter the password twice and click **OK**.

Step 7   Click **Next**.

Step 8   In the Export/Import summary dialog box, review the job parameters. Then do one of the following:

—To Run the Job now, click **Run Job Now**.

—To Save the Job, click **Save**.

—To Schedule the job, click **Schedule**. See Scheduling a Job.

Parameter Description

The following parameters can be configured:

Import / Export Type	Parameter	Description
LDAP Import	Host	Enter the host ID.
	Port	Enter the relevant port number.
	Protocol Ver.	Enter the relevant protocol version.
	Base DN	Enter the base DN.
	User DN	Enter the user DN.
	Password	Enter the relevant password.
	Hierarchy	Select the relevant data source options.
	LDAP Schema Path	Select the relevant path.
	Import Type	Select the relevant import type.
	Allow Multiple Assignments	Select True or False.
XML Import	Stored Procedure	Enter the relevant stored procedure.
	Parameter Name	Enter the relevant parameter name
	Input File	Upload and select the relevant input file.
DTS Import Export	Work Directory Path	Enter the directory path.
	Package File Path	Select the package file path.
	Package Name	Enter the package name.
	List of Global Variables	Enter the relevant variables.
VList Import	Data Source	Select the relevant data source.
	Input File	Select the relevant input file.
	Cost Plan	Select the relevant cost plan.
	Create default Service Route	Select True or False.
	Apply Minimum Digits Check for Cost Rule	Select True or False.
	Run Costing Refresh	Select True or False.
MA 4000 Data Sync		
DNA Import	Caapi Path	Enter the Caapi Path.
	Is DNAD	Select True or False.
	Data Source Map	Select the Data Source.
	Purge Ext./Person	Select True or False.
	Remove Ext./Person From Org.	Select True or False.
	Remove Ext./Person From Cost Center.	Select True or False.

Import / Export Type	Parameter	Description
Import Rating	Destination Tree Location	N/A
	File Path	Select a File Path. You can upload a file from your workstation to the server and then select it from the list.
Export Rating	Rating Component Type	Select the Rating component to import.
	File Name	Enter a file Name.
	Export Tree Location	N/A
Standard Import	File Path	Select a File Path. You can upload a file from your workstation to the server and then select it from the list.
	Full Update	Select True or False.
	Starting at Row	Enter the first data row from which to import.

Generic Export Calls

The Application stores the collected records in the database. You can then export calls data as a file to be used in other applications.

The Export Calls function allows you to define the call data to be exported and its format, and also supports filtering calls according to requirements.

You can configure the export jobs to run automatically once or periodically. The Export wizard guides you easily through configuring these jobs.

To access the Generic Export Calls Wizard

Step   Select the Maintenance module, from the lower right pane of the Maintenance main window, select Task Manager and then from the upper right pane select Generic Export Calls.

Step 1: General Information - General Tab

Use the **General** tab to choose a name for the job and enter a description that appears in the Scheduled Jobs view.

To name and describe the job

Step 1   In the **Configuration** section, in the **Name** text box type a name for the new export job and a description in the **Description** text box.

Step 2   In the **Output** section, in the **Export File Name** text box, enter export file's name. This is the file name that will be placed in the Output Files folder and will contain the exported data.

Step 3   If the Name Structure option is selected, click and select the naming structure in which the ▼ file is to be saved, e.g., it can be saved as the name selected in the **Export File Name** field and the current exporting date.

Step 4   The name and description appear in the Scheduled Jobs View.

Step 5   Leave the **Retrieve only new calls** option selected if only new calls (since the previous export) made and received are to be included in this export. If this option is deselected, the **Period** tab is activated. See note at the end for steps on completing the **Period** tab.

Step 6   4 Select the **Append export to an existing file** to transfer exported data to an already existing file in the Output Files folder.

Step 7   Click **Next**.

Step 2: Configure the Period - Period Tab

Use the Period tab to define the period for the job. It is active only when the check box "Retrieve new Calls only" is not checked. You can choose to include all the calls of the selected period or include only calls made on business or non-business hours or in a specific hour range.

The setup options available in the Period tab are listed in the following table.

Section	Parameters	Option	Description
Period	By Date Time	From/To	Lets you select date range that is included in the report. Enter the start and end times in the relevant fields.
	Period		Lets you select a predefined time option from the drop-down list, for example, *Today*.
	Previous Days		Lets you run the alert on the last selected number of days or months.
	Start Date/ End Date		Select the Run Date and select if its days, weeks, months or years.
Hours of Day	From/To		Lets you select the range of hours in a day that is included in the report. Enter the start and end times in the relevant fields.
			Lets you select a predefined time option from the drop-down list, for example, *Business Hours*.

Step   Click **Next**.

The **Scope** tab is activated.

Step 3: Job Scope – Scope Tab

Step 1   Use the Scope tab to define the scope of the job. The scope determines the organizational entities to be included in the alert.

The setup options available in the Scope tab are listed in the following table.

Section	Parameters	Description
Scope	Person(s)	Click **Select** and select the organizational units for the export job.
		See Selecting Personnel.
	Unit(s)	Click **Select** and select the organizational units for the export job.
		See Selecting Organizational Units.
	Device(s)	Click **Select** and select the devices for the export job from the Device Assignment window.
		See Selecting Devices
	Trunk(s)	Click **Select** and select the devices for the export.
		See Selecting Trunks
	Service Provider(s)	Click **Select** and select the Service Providers for the export job.
		See Selecting Service Providers

Step 2   Click **Next**.

Step 4: Selection Criteria – Filters Tab and Common Filters Tab

Step 1   Use the Filters tab to limit the calls included in the job.

The following options are available for filtering the calls:

Section	Option	Description
Call Direction	Incoming	Include incoming calls.
	Outgoing	Include outgoing calls.
	Internal	Include internal calls.
	T2T Incoming	Include incoming trunk to trunk calls.
	T2T Outgoing	Include outgoing trunk to trunk calls.
	Conference Incoming	Include incoming conference calls.
	Conference Outgoing	Include outgoing conference calls.
	Other	Include other calls such as trunk-to-trunk calls.
Call Type	Business	Include business calls.
	Personal	Includes personal call.
Call Categories	Click **Select** and in the Call Categories window, select each desired call category and click **Add**. When all desired call categories have been added, click **OK** to continue.	
Duration	Min.	Select to include calls that exceed a minimum set duration. If selected, add a numeric value.
	Max.	Select to include calls that exceed a maximum set duration. If selected, add a numeric value.
Cost	Min.	Select to include calls that exceed a minimum set cost. If selected, add a numeric value.
	Max.	Select to include calls that exceed a minimum set cost. If selected, add a numeric value.

Section	Option	Description
Dialed Number		Select to include calls made to a defined number or dialing code. You can use an * asterisk as a wildcard to include all calls that begin with a specified number(s). Several numbers can be included if separated by a comma.

Step 2   Click **Next**.

The **Common Filters** tab is activated.

Step 3   In the **Condition(s)** section, complete the following:

Section	Option	Description
Logical Operator	Click ▼ and select **OR** or **AND**	OR = Select items that meet one requirement or the other AND = Select items that meet all requirements included
Field to Filter By		Click ▼ and select the field to filter on
Comparison Operator	>, <, <-, >-, -, <>, =, >=, <=, Between, Like	These operators work with any numeric, character or date values that you enter.
Values		The values of the selected option in the **Field to Filter By**, e.g., if Account is selected, type the account name.

Step 4   Click 📄.

The new filter appears in the text field.

Step 5   Click **Next**.

The **Fields** tab is activated.

Step 5: Define the Format – Fields Tab

Use the Fields tab to define the format for the records to export. The column on the left displays Available Fields, while the column on the right displays fields that will be exported and their order.

Step 1 To add a field, select it in the column on the left and click the

🔁 arrow to add it to the column on the right. Multiple fields can be selected by pressing the Shift key while selecting the required fields. Fields can also be added/removed by double-clicking the relevant field.

Step 2 Change the field display order by using the ⬆⬇ arrow buttons.

NOTE *The available fields depend on the collected CDR fields.*

The following options are available for defining the export format:

Option	Description
Delimiter	Defines that the fields should be delimited by a user defined delimiter, for example, by a comma.
	Select the Delimiter option and enter the type of delimiter in the text box.
	The Length and Alignment fields are disabled and the default parameters are used, when the delimiter option is selected.
	The Format options are still available if a delimiter is selected.
Fixed	Defines that the fields should be a fixed format. In this case the fields Length and Alignment parameters are enabled, and the user can define the length and alignment for each field.
	The Format options for applicable fields can also be defined by selecting the relevant option from the drop-down menu.
Include Header Row	Select this option to include a header row for each field in the exported file.

Taxes

Taxes can be added to Cost fields using formula:

The Text Box will include the name of the fields in square brackets.

The formula can be used to manipulate the value of the fields with mathematical operators and operations such as +,*,/,%.

Any valid expression can be used in the formula.

For instance: add 5% tax to call price and a fixed of 1. ([Price]*1.05) + 1

The following fields are available, depending on the selected Entity Type on the Scope tab:

- Personnel fields
  - Sequence Number
  - Number of Calls
  - Total Duration
  - Total Cost
  - Total Price
  - Total Units
  - Total Fixed Charges
  - Org. Unit Name
  - Org Level 1
  - Org Level 2
  - Org Level 3
  - Org Level 4
  - Org Level 5
  - Org Level 6
  - First Name
  - Last Name
  - Full Name
  - Personnel Info 1
  - Personnel Info 2
  - Period Start
  - Period End
  - Free Text
  - End Of Line
  - Carriage Return
  - Line Feed

- Organizational Unit fields
  — Org. Unit Name
  — Org Unit Type
  — OrgUnit Info 1
  — OrgUnit Info 2
  — Sequence Number
  — Number of Calls
  — Total Duration
  — Total Cost
  — Total Price
  — Total Units
  — Total Fixed Charges
  — Period Start
  — Period End
  — Free Text
  — End Of Line
  — Carriage Return
  — Line Feed
- Devices fields
  — Sequence Number
  — Number of Calls
  — Total Duration
  — Total Cost
  — Total Price
  — Total Units
  — Device Name
  — Device Status
  — Device Type
  — Device Function
  — Device COS
  — Device Info 1
  — Device Info 2
  — Period Start
  — Period End
  — Free Text
  — End Of Line
  — Carriage Return
  — Line Feed

- Trunk fields
  - Sequence Number
  - Number of Calls
  - Total Duration
  - Total Cost
  - Total Price
  - Total Units
  - Trunk Name
  - Period Start
  - Period End
  - Free Text
  - End Of Line
  - Carriage Return
  - Line Feed
- Service Provider fields
  - Sequence Number
  - Number of Calls
  - Total Duration
  - Total Cost
  - Total Price
  - Total Units
  - Service Name
  - Period Start
  - Period End
  - Free Text
  - End Of Line
  - Carriage Return
  - Line Feed
- Details fields
  - Sequence Number
  - Call ID
  - Call Date
  - Call Time
  - Start Time (sec)
  - Duration
  - Phone Number
  - Call type Short Name
  - Answered

- Call Cost
- Call Price
- Units
- Response Time
- Result Code
- Business/Personnel
- Call Category
- PBX Service ID
- Queue Time
- Data Source Cost
- Data Source Price
- Ext. Device Name
- Device First Name
- Device Last Name
- First Name
- Last Name
- Full Name
- Title
- Salutation
- Personnel Info 1
- Personnel Info 2
- Arrived
- Deleted
- TLR Status
- Location
- City Location
- Tax
- Account

Step 3   Click **Next**.

The **Summary** view is displayed.

Step 6: Exporting data

You can export data immediately or schedule it for later. You can also save the settings you configured for the new job.

Make sure all your parameters were selected correctly before running the job.

IMPORTANT

To export data immediately

Step   Click **Run job now**.

The job is run immediately. You will be notified upon completion.

To schedule the job to be run later

Step   Click **Schedule**

See Scheduling a Job.

To save the configured settings

Step   Click **Save**.

The settings are saved and will appear as defaults when you start a new maintenance job.

See Field List for Export Calls Fields Tab

Generic Export Calls Summaries

The Application Stores the collected records in the database. You can then Export the personnel calls summary data as a file to be used in other applications.

The Export calls Summaries enables defining the calls summary fields data to be exported and its format. It also enables filtering calls according to user requirements. You can configure the export jobs to run automatically once or periodically. The Export wizard guides you easily through configuring these jobs.

To access the Generic Export Calls Summaries Wizard

Step   Select the Maintenance module, from the lower right pane of the Maintenance main window, select Task Manager and then from the upper right pane select Generic Export Calls Summaries.

Step 1: General Information - General Tab

Use the General tab to choose a name for the job and enter a description that appears in the Scheduled Jobs view.

To name and describe the job

Step 1   In the **Configuration** section, in the **Name** text box type a name for the new export job and a description in the **Description** text box.

Step 2   In the **Output** section, in the **Export File Name** text box, enter export file's name. This is the file name that will be placed in the Output Files folder and will contain the exported data.

Step 3   If the **Name Structure** option is selected, click and select the naming structure in which the file is to be saved, e.g., it can be saved as the name selected in the **Export File Name** field and the current exporting date.

   The name and description appear in the Scheduled Jobs View.

Step 4   Select the **Append export to an existing file** to transfer exported data to an already existing file in the Output Files folder

Step 5   Click **Next**.

   The **Period** tab is activated.

Step 2: Configure the Period - Period Tab

Use the Period tab to define the period for the job. You can choose to include all the calls of the selected period or include only calls made on business or non-business hours or in a specific hour range.

The setup options available in the Period tab are listed in the following table.

Section	Parameters	Option	Description
Period	By Date Time	From/To	Lets you select date range that is included in the report. Enter the start and end times in the relevant fields.
	Period		Lets you select a predefined time option from the drop-down list, for example, *Today*.
	Previous Days		Lets you run the alert on the last selected number of days or months.
	Start Date/ End Date		Select the Run Date and select if its days, weeks, months or years.
Hours of Day	From/To		Lets you select the range of hours in a day that is included in the report. Enter the start and end times in the relevant fields.
			Lets you select a predefined time option from the drop-down list, for example, *Business Hours*.

Step   Click **Next**.

The **Scope** tab is activated.

Step 3: Job Scope – Scope Tab

Use the Scope tab to define the scope of the job. The scope determines the organizational entities to be included in the alert.

The setup options available in the Scope tab are listed in the following table.

Section	Option	Description
Hierarchy	Hierarchy	Select the Hierarchy type to export: Administrative, Cost Center, Mailing List
	Level	Select if there is a specific level to export, otherwise select All.
Export Type	Entity Type	Select the entity type to export: **Unit** – a summary line for each Unit **Personnel** – a summary line per each person **Device** – a summary line per each device **Trunk** - a summary line for each trunk **Service Provider** - a summary line for each Service Provider
	Entity Filter	Click **Select** and select the Organizational Units\Personnel\Device\Trunk\service Provider for the export job. For All for all entities of the type

When selecting the type of entity to be Unit or Personnel, there are several summarizing options:

Selection	Option	Description
Personnel	Summarize by:	When Personnel is selected as the entity type, you can have: A summary line for each person, or A summary line for each of the devices assigned to the person.
Unit	Summarize by:	When "units" is selected, you can have a summary line for each Unit, Person, or device (a summary per entity) in the scope of Units. Summarize by Org. Units: will result in a summary line for each unit in the scope Summarize by person will result in a summary line for each person in the scope of the units Summarize by Device will result in a summary line for each device in the scope of entities selected.
	Include Sub Units	**Check** the **include sub units** to include the sub units under the level selected with all their assigned personnel and devices **Do not check include sub units** if you want to summarize only the personnel and devices directly under the units selected.
	Aggregate	**Check Aggregate** to summarize for each unit in the scope all the personnel and deices which are below it in the tree, including those of their sub- units **Do not check aggregate** when you want each summary line to summarize only the direct personnel or devices directly under the unit.

Step Click Next.

The **Filters** tab is activated.

Step 4: Selection Criteria – Filters Tab and Common Filters Tab

Use the Filters tab to limit the calls included in the job.

The following options are available for filtering the calls:

Section	Option	Description
Call Direction	Incoming	Include incoming calls
	Outgoing	Include outgoing calls
	Internal	Include internal calls
	T2T incoming	Include trunk to trunk incoming calls
	T2T outgoing	Include trunk to trunk outgoing calls
	Other	Include all other calls
Call Type	Business	Include business calls.
	Personal	Includes personal call.
Call Categories	Click **Select** and in the Call Categories window, select each desired call category and click **Add**. When all desired call categories have been added, click **OK** to continue.	
Duration	Min.	Include calls that exceed a minimum set duration.
	Max.	Include calls that exceed a maximum set duration.
Cost	Min.	Include calls that exceed a minimum set cost.
	Max.	Include calls that exceed a minimum set cost.
Dialed Number		Include calls made to a defined number or dialing code. You can use an * asterisk as a wildcard to include all calls that begin with a specified number(s).

Step 1   Click **Next**.

The **Common Filters tab** is activated.

Step 2   In the **Conditions**, specify conditions, type a value(s) and click .

The new filter appears in the text field.

Step 3   Click **Next**.

The **Fields** tab is activated.

Step 5: Define the Format – Fields Tab

Use the Fields tab to define the format for the records to export. The column on the left displays Available Fields (differs according to the entity scope selected), while the column on the right displays fields that will be exported and their order.

Step 1   To add a field, select it in the column on the left and click the ⟫ arrow to add it to the column on the right. Multiple fields can be selected by pressing the Shift key while selecting the required fields. Fields can also be added/removed by double-clicking the relevant field.

Step 2   Change the field display order by using the ⬆⬇ arrow buttons.

NOTE   *The available fields depend on the collected CDR fields.*

The following options are available for defining the export format:

Option	Description
Delimiter	Defines that the fields should be delimited by a user defined delimiter, for example, by a comma.
	Select the Delimiter option and enter the type of delimiter in the text box.
	The Length and Alignment fields are disabled and the default parameters are used, when the delimiter option is selected.
	The Format options are still available if a delimiter is selected.
Fixed	Defines that the fields should be a fixed format. In this case the fields Length and Alignment parameters are enabled, and the user can define the length and alignment for each field.
	The Format options for applicable fields can also be defined by selecting the relevant option from the drop-down menu.
Include Header Row	Select this option to include a header row for each field in the exported file.

Taxes

Taxes can be added to Cost fields using formula:

The Text Box will include the name of the fields in square brackets.

The formula can be used to manipulate the value of the fields with mathematical operators and operations such as +,*,/,%.

Any valid expression can be used in the formula.

For instance: add 5% tax to call price and a fixed of 1. ([Price]*1.05) + 1

The following fields are available, depending on the selected Entity Type on the Scope tab:

- Personnel fields
  — Sequence Number
  — Number of Calls
  — Total Duration
  — Total Cost
  — Total Price
  — Total Units
  — Total Fixed Charges
  — Org. Unit Name
  — Org Level 1
  — Org Level 2
  — Org Level 3
  — Org Level 4
  — Org Level 5
  — Org Level 6
  — First Name
  — Last Name
  — Full Name
  — Personnel Info 1
  — Personnel Info 2
  — Period Start
  — Period End
  — Free Text
  — End Of Line
  — Carriage Return
  — Line Feed

- Organizational Unit fields
  — Sequence Number
  — Number of Calls
  — Total Duration
  — Total Cost
  — Total Price
  — Total Units
  — Org. Unit Name
  — Org Unit Type
  — OrgUnit Info 1
  — OrgUnit Info 2
  — Total Fixed Charges
  — Period Start
  — Period End
  — Free Text
  — End Of Line
  — Carriage Return
  — Line Feed
- Devices fields
  — Sequence Number
  — Number of Calls
  — Total Duration
  — Total Cost
  — Total Price
  — Total Units
  — Device Name
  — Device Status
  — Device Type
  — Device Function
  — Device COS
  — Device Info 1
  — Device Info 2
  — Period Start
  — Period End
  — Free Text
  — End Of Line
  — Carriage Return
  — Line Feed

- Trunk fields
  - — Sequence Number
  - — Number of Calls
  - — Total Duration
  - — Total Cost
  - — Total Price
  - — Total Units
  - — Trunk Name
  - — Period Start
  - — Period End
  - — Free Text
  - — End Of Line
  - — Carriage Return
  - — Line Feed
- Service Provider fields
  - — Sequence Number
  - — Number of Calls
  - — Total Duration
  - — Total Cost
  - — Total Price
  - — Total Units
  - — Service Name
  - — Period Start
  - — Period End
  - — Free Text
  - — End Of Line
  - — Carriage Return
  - — Line Feed

Step 3   Click **Next**.

The **Summary** view is displayed.

Step 6: Exporting Data

You can export data immediately or schedule it for later. You can also save the settings you configured for the new job.

IMPORTANT

Make sure all your parameters were selected correctly before running the job.

To export data immediately

Step   Click **Run job now**.

The job is run immediately. You will be notified upon completion.

To schedule the job to run later

Step 1   Click **Schedule**.

Step 2   See Scheduling a Job.

To save the configured settings

Step   Click **Save**.

The settings are saved and will appear as defaults when you start a new maintenance job.

See the Field Lists for the Field Tab to review the list of summary fields for the different entities.

Generic Personnel Import

Personnel information is one of the most important information databases in organizations. Enterprises usually have applications where the organizational personnel are listed with their main data (for example a company directory). It is important that this data be easily imported to the Application. The Generic Personnel import enables importing data of the personnel from an external application. Users can define the format of the file to be imported, select information fields and set the delimiter to use.

Note that generic import files always consist of the following format ***.genericimport.txt** (where * = the file name).

There are a number of ways to import the generic import data file. These are:

1. **Local**: select the file from the Input Files directory
2. **Upload**: upload the file from the client (user) machine to the application server. The file is uploaded to the Input Files directory on the application server during the task configuration. If the generic import is run without reconfiguration the file in the Input Files directory will be used and the file from the client machine will not be uploaded
3. **FTP**: FTP protocol is used to access files form a remote FTP server. This file will download each time the generic import is run
4. **Full Path**: a full path is set for the data file. The file is read each time the generic import is run

To access the Generic Personnel Import Wizard

Step   Select the **Maintenance** module, from the lower right pane of the Maintenance main window, select **Task Manager** and then from the upper right pane select **Generic Personnel Import**.

Step 1: General Information - General Tab

Use the **General** tab to choose a name for the job and enter a description that appears in the Scheduled Jobs view.

To name and describe the job

Step 1   In the **Configuration** section, in the **Name** text box type a name for the new export job and a description in the **Description** text box.

Step 2   From the **Hierarchy** drop-down menu, select the required option. The name and description appear in the Scheduled Jobs View.

Step 3   Deselect the **Recalculate Celko Index** checkbox if you want to perform multiple personnel imports, in which case the recalculate Celko Index is irrelevant for each step.

Step 4   Click **Next**.

The **Input** tab is activated.

Step 2: Configure Input File Location - Input Tab

Use the Input tab to define the location of the input file. The file can be located locally or on an FTP site.

The setup options available in the Input tab are listed in the following table.

Section	Parameters	Option	Description
Input File Location	Local	File Path	Enter the location of the input file.
	Upload	File Name	Input file location. Use the Browse button to browse to the file
	On FTP	File Path	Enter the location of the input file.
		FTP Address	Enter the address of the FTP site.
		User Name	Enter the relevant user name to access the FTP site.
		Password	Enter the relevant password to access the FTP site.

Step   Click **Next**

The **Fields** tab is activated.

Step 3: Define the File Format – Fields Tab

Use the Fields tab to define the file format so the data is mapped correctly.

The following options are available for defining the format:

Section	Option	Description
Format	Start at row	Enter the relevant start row number.
	Field Delimiter	Select how you want the fields to be delimited, for example, by a ";" semicolon.
	OU Path Delimiter	Select how you want the OU path to be delimited, for example, by a "\" backslash.
	Select Fields	Lets you select the fields to be included in the job. Click Select Field to select the fields from the window that appears.
	Index of field in input row	Lets you define the position of each field in the input file.

Click here to display a list of fields.

- Address
- Building
- Data Source
- Device Comments
- Device COS

- Device Cost Plan
- Device Function
- Device Info 1-21
- Device Name
- Device Price Plan
- Device Primary
- Device Publish
- Device Status
- Device Type
- Email Address
- Extension Building
- Extension Email
- Extension First Name
- Extension Floor
- Extension Last Name
- Extension Location,
- Extension Room
- First Name
- First, Last Name
- Floor
- Info 1 – Info 21
- Initials
- Job Title
- Last Name
- Last, First name
- Location
- Middle Name
- OU Address
- OU contact person
- OU description
- OU Email address
- OU Fax Number
- OU Info 1 – Info 21
- OU Path
- OU Phone number
- Person Identity
- Personnel status

- Phone Number
- Pin Code BP status
- Room
- Salutation
- Site
- Start Date
- Sub OU Path
- Termination Date
- Title
- User Language
- User Name
- User Password
- User Role
- VIP

Step   Click **Next**. The **Summary** view is displayed.

Step 4: Importing data

You can import data immediately or schedule it for later. You can also save the settings you configured for the new job.

> **IMPORTANT**
>
> *Make sure all your parameters were selected correctly before running the job.*

To export data immediately

Step   Click **Run Job Now**.

The job is run immediately. You will be notified upon completion.

To schedule the job to run later

Step   See Scheduling a Job.

To save the configured settings

Step   Click **Save**.

The settings are saved and will appear as defaults when you start a new maintenance job.

Organization Export

The organization Export functionality is a functionality allowing the administrator to maintain the organization information and handle it in a mixed environment. The function enables exporting the organization information to be used in other applications, so that the data is synchronized.

Organization Export is added to the Task Manager in the Maintenance Module.

To access the Organization Export Wizard

Select the **Maintenance** module, from the lower right pane of the Maintenance main window, select **Task Manager** and then from the upper right pane select Organization Export.

Step 1: Settings - define the settings of the Organization Export

At this stage the settings of the exported files are defined.

Field	Description
Job Name	Name of the job that will be created and shown on the Job Screen (Task Manager).
Job Description	Description of the job that will be created and shown on the Job Screen
File Path	Free Text to allow user to put in any path to suit his needs, it is the responsibility of the user to insert a valid path.
File Name	Name of the file that will be created when export is done.
File Name Format	Allow the user to add prefix or suffix to the file name. In cases when users are doing a daily export, they use this to avoid last day over ride.
Hierarchy	Allow user to choose which hierarchy's information will be exported. Administrative/Cost Centers/Mailing List/All.

Step 2: Available Fields - Configuration of the Organization Export

At this stage the user defined the fields their order and format in the exported file.

General Configuration

Field	Description
Show Header	Marking the Radio Button allows showing the header line of the file to enable reading the format.
Define Header column names	Allow user defining the name of the column header for each selected field to define meaningful name for later use.
Delimited / Fixed	Radio Button that allows the user to select whether the output will be delimited or a fixed position.
	In case of fixed, user must define for each field its length and alignment.
	In case of delimited, user should specify a delimiter.

Available Fields

All Export's available fields are presented in a tree like list for selection.

The fields will be group by four groups, each with a different icon:

Devices ☎

Personnel 👤

Org Units 👥

General ✛

Each Group can be expanded and the list of fields is listed.

Selected Fields

Step 1 Select the required fields to be exported. The fields selected by the user are joined in this list by the order they were chosen.

Step 2 Press the Up/Down buttons to change the order of the fields. Each selected field appears with an icon according to the group it belongs too, so the user will be able to easily distinguish between fields of personnel, Device and Org Unit.

Step 3 Click on one of the selected fields the fields Length Alignment, Format and formula are enabled according to the predefined logic.

Field	Description
Length	Length defined when the fixed length type of export was selected.
Alignment	Alignment selection when a fixed length type of export was selected
Format	The user can define the format of the field according to field's type.

Field	Description
Expression	This box allows the user to enter SQL formulas including string concatenation. This will require advanced user that will be familiar with the way query works behind the scenes but will allow the user to make any type of manipulation on data. (for e.g. concatenating Person.First name + ' ' + Person.LastName).
	For the expression the full list of properties of Org Unit, person and device can be used.
	Validate button allows testing the expression.

Preview

Press the preview button to preview the output before running or saving the job. (Preview shows a sample file, not one from the database.)

Step 3: Saving the Export Organization Configuration

Field	Description
Save	Saves the job and get the user back to the task manager screen
Save As	Saving the format for an additional use under a new name. The format can be modified to allow faster definition of Export format.
Save & Run	Saves the job and get the user back to the task manager screen while activating the Job at the same time
Schedule	Saves the Job and open the Scheduler screen for scheduling the export.

Database Maintenance

The Application enables you to configure **Database Maintenance jobs**.

Each database maintenance job must have a unique job name. However, you can configure many database maintenance jobs of the same type. After configuring a database maintenance job you can either run it immediately, save it to run it manually later, or schedule it to run automatically at a pre-set time or times.

Database maintenance jobs include the following job types:

- **Raw Data GC (Garbage Collection)**: Deletes old raw CDR records after a set period of time. After a CDR record is accepted and its data extracted into a Call record and saved in the Application database, the CDR record is still kept in the Raw Data database. To save disk space, schedule this process to run from time to time.

- **Replay Raw Data**: Extracting data from raw CDR records and creating Call records might fail (most probably because of a fault in the PD9 file). Contact support to fix the PD9 file, and run this process after the PD9 file is fixed.

- **Replay Missing Device Date**: Tries to re-accept rejected calls into the application. Rejected Calls may stem from one of four causes: (a) Nonexistent Extension/Device; (b) non-existent Account Code; (c) Number of devices of a certain device type exceeds licence limit; and

(d) wrong Data Source ID. Correct the rejection cause, and run this process to have the system accept the calls.

- **Personal Calls Cleaner**: Allows personal calls to be deleted from the call data after a user-defined period.
- **Missing Devices Data Cleaner**: Allows you to define how long to keep missing device data before deleting it.
- **DB Logs Cleaner**: Enables system log files to be cleaned in order to free up disk space.
- **Recalculate Celko Index**: Reorganizes the Organization structure tree. Run this process after heavy modifications in the Organizational structure.
- **Database Backup**: Creates a backup of the database and PD9 files. **Note:** You can restore only to an Application with a version number that is **identical** to the version number of the Application from which the backup was made. In this case the system will not load at all. To check the version numbers, click **About** in the Application Header.
- **Application Maintenance**: Cleans up and reorganizes the database and deletes old log files. Schedule this process to run from time to time to free disk space and to make access to the database more efficient, and run it after major modifications to the database
- **Reset Budget Balance Period Job:** Resets the Budget Balance. (i.e., sets the Balance to be equal to the Budget.). Run this process or schedule it to run at the beginning of every Budget Period.
- Replay Inserter Rejects Data
- : Tries to re-accept into the application calls that were not inserted into the database because of an internal database fault.
- **Calls Partitioning**: Divides the Calls Database into partitions to avoid exceeding the SQL Server size limits.

To configure and run a Database Maintenance job:

Step 1   Select the **Maintenance** module.

Step 2   From the sub module selection pane select **Task Manager**.

Step 3   From the upper left pane select **Database Maintenance**.

Step 4   in the General tab, enter **Name** and **Description** for the job, then click **Next**.

Step 5   In the **Component** tab, open the job types drop-down list and select a job type.

Step 6   For each parameter in the parameters table whose value you need to set (see *Parameter Description* Below), set the parameter value as follows:

     —The symbol 🔤 indicate a text box parameter. Click the Icon or double-click in the parameter field and enter the desired value.

     —The symbol 🔲 indicates a selection parameter. Click the Icon or double-click in the parameter field to open a selection dialog box, select a value or option and click **OK**.

—The symbol ▦ indicates a date and time parameter. Click the Icon or double-click in the parameter field to open a date and time dialog box, select or enter date and time, and click **OK**.

Step 7   Click **Next**.

Step 8   In the Database Maintenance summary dialog box, review the job parameters. Then do one of the following:

—To Run the Job now, click **Run Job Now**.

—To Save the Job, click **Save**.

—To Schedule the job, click **Schedule**. See *Scheduling a Job*.

Parameter Description

The following parameters can be configured:

Job Type	Parameter	Description
Raw Data GC	Time to Keep Buffers (hours)	Enter the relevant number of hours.
Replay Raw Data	Data Source	Select the relevant data source.
	Start	Set the start date and time.
	End	Set the end date and time.
Replay Missing Device Date	-	-
Personal Calls Cleaner	Days to Keep Calls	Enter the relevant number of days.
Missing Devices Data Cleaner	Days to Keep Missing Devices	Enter the relevant number of days.
DB Logs Cleaner	Days to Keep Logs	Enter the relevant number of days.
Recalculate Celko Index	-	-
Database Backup	Backup Directory	Enter the relevant backup directory path.
Application Maintenance	-	-
Reset Budget Balance Period Job	-	-
Replay Inserter Rejects Data	Data Source	Select the relevant data source.
	Start	Set the start date and time.
	End	Set the end date and time.

Job Type	Parameter	Description
Calls Partitioning	-	-

Automatic User Creation

You can automatically designate selected persons or organizational units as system users. You can then allocate a role to all the selected users or select the role for each person individually.

The Automatic User Creation Wizard guides you easily through the steps required when configuring an automatic user creation job.

To access the Automatic User Creation Wizard

Select the Maintenance module, from the lower right pane of the Maintenance main window, select Task Manager and then from the upper right pane select Automatic User Creation.

Step 1: General Information - General Tab

Use the General tab to choose a name for the job and enter a description that appears in the Scheduled Jobs view.

Step 2: User Creation Options - Options Tab

To configure new users

Step 1 From the **Language** setting drop-down list select the default language for the new users.

Step 2 To apply a default role for all new user select the relevant box and then select a role from the drop-down list.

Step 3 Click the **Add User** button.

Step 4 The Automatic User Creation window appears.

Step 5 From the **View By** drop-down list in the left pane select the type of grouping to display the organizational personnel and then select the organizational unit of the required person(s).

Step 6 From the **Available Units and Personnel** list select the entities you want to designate as users (persons or organizational units) and click **Add**. The selected entities now appears in the **Selected** list.

Step 7 When you finish selecting entities, click **OK**.

Step 8 The window closes and the selected entities appear in the Automatic User Creation list.

Step 9 Click **Finish**.

Calls Archiving

Saving call data for later reference requires a lot of storage space. The Call Archive however, allows you to save relevant call data by initiating periodic archives, for example, on a quarterly or yearly basis. You can define call archiving parameters that will determine which calls you want to archive.

The New Calls Archiving Wizard guides you easily through the steps required when adding a call archive job.

You can run the call archive immediately or schedule it to run at a specified time.

To access the New Calls Archiving Wizard

Select the Maintenance module, from the lower right pane of the Maintenance main window, select Task Manager and then from the upper right pane select Call Archiving.

Step 1: Configuration - General Tab

Use the General tab to name and describe the new calls archive.

To name and describe the calls archive

Step 1   In the **General** section, in the **Name** field enter a name and then enter a description in the **Description** text box.

   The name and description appear in the Scheduled Jobs View.

Step 2   Click **Next**.

Step 2: Archiving Data Type Selection - Data Tab

Use the data tab to define what data to archive and to set the archive location.

To select the archive data type

Step 1   In the **Archive Data Type Selection** section, select **All** to include calls from all sites and data source, or select either **Sites** or **Data Sources** and then click **Select** to select the sites or data source you want to include.

Step 2   In the **Archive Location** field, enter the archive's location on the system.

Step 3   Click **Next** to continue.

Step 3: Archiving Date Range - Date Range Tab

Use the Date range tab to configure the archive date range.

To set the date range

Step 1   To set a specific date, select the **Date** option and select the relevant date on the calendar.

OR

To define a date range, click the **Range** option and enter the previous number of years, months, weeks or days that you want to include. Select the **Exactly** option to calculate the date range from the current date, or select the **Round to beginning of year** option to round off the selected date range to the beginning of the year.

Step 2   Click **Next** to continue.

A summary of the new data collector configuration is displayed.

Step 4: Running the Calls Archive

You can run the calls archive immediately or schedule it to be run later. You can also save the setting you configured for the new calls archive.

IMPORTANT

Make sure all your parameters were selected correctly before running the job.

To run immediately

Step   Click **Run Job Now**.

The job is run immediately. You will be notified upon completion.

To schedule the job to run later

Step   See Scheduling a Job.

To save the configured settings

Step   Click **Save**.

The settings are saved and will appear as defaults when you start adding a new calls archive.

Costing

Costing Processing

The Application enables you to configure Costing Processing jobs. After configuring the Costing Processing job you can run it immediately, schedule it to run automatically once or periodically, or save it now and run it manually when needed.

Costing processing jobs include:

* **Recalculate**: Retroactive calculation of costs according to the currently active Cost Plans. Run this process if calls were calculated according to old or incorrect Cost Plans.

* **Refresh Cost Plans**: When you modify Cost Plans in the database, the modifications are not active until you run the Refresh Cost Plan process. This process uses the current Cost Plans data (as it is in the database) to rebuild the internal Cost Plans structures which the application uses to calculate the costs. Always run this process after modifying Cost Plans.

* **Fixed Cost Calculation**: Calculates the fixed costs defined in the system. Schedule this process to run periodically at least as frequently as the most frequent recurring fixed costs defined in the application.

* **Recalculate Budget Balance**: Retroactive calculation of the Budget Balance according to the current Cost Plans. If your organization uses the Budget feature, you need to run this process whenever you run the Recalculate process.

* **Update Budget Balance**: Call costs are subtracted from the Budget Balance at the end of each Data Collection cycle. If your organization uses the **No Buffer** option for Data Collection, (i.e. Continuous Data Collection), you need to schedule this process to run every now and then to calculate the balance.

To configure a Costing Processing Job

Step 1   Select the **Maintenance** module.

Step 2   From the sub module selection pane select **Costing**.

Step 3   From the upper left pane select **Costing Processes**.

Step 4   in the General tab, enter **Name** and **Description** for the job, then click **Next**.

Step 5   In the **Component** tab, open the job types drop-down list and select a job type.

Step 6   For each parameter in the parameters table whose value you need to set (see Parameter Description Below), set the parameter value as follows:

   —The icon indicates a text box parameter. Click the Icon or double-click in the parameter field and enter the desired value

— The symbol ⬛ indicates a selection parameter. Click the Icon or double-click in the parameter field to open a selection dialog box, select a value and click **OK**.

— The symbol ⬛ indicates a date and time parameter. Click the Icon or double-click in the parameter field to open a date and time dialog box, select or enter date and time, and click **OK**.

Step 7   Click **Next**.

Step 8   In the Configure Costing Processing Job Summary dialog box, review the job parameters. Then do one of the following:

— To Run the Job now, click **Run Job Now**.

— To Save the Job, click **Save**.

— To Schedule the job, click **Schedule**. See Scheduling a Job.

Parameter Description

The following parameters can be configured:

Job Type	Parameter	Description
Recalculate	Start	Define start date and time.
	End	Define end date and time.
Refresh Cost Plans	-	-
Fixed Cost Calculation	Enable Fix cost recalculation	Select Thru or False.
	Recalculation start date	Define start date and time.
	Recalculation end date	Define end date and time.
Recalculate Budget Balance	-	-
Billing Discount Calculations	-	-
Update Budget Balance	-	-

Resources Cost/Price Plan

This function allows you to assign default cost or price plans to groups of resources. You can define the resource group by Site, Data Source, Device Type and Range of Device Names.

NOTE *The usage of calls is done per route or service. In the CDR you can see which service or route was used and therefore know which cost plan to apply.*

To define a cost/price plan for resources:

Step 1   Select the **Maintenance** module.

Step 2   From the sub module selection pane, select **Costing**.

Step 3   In the upper left pane, select the **Resource Cost/Price Plan** option.

Step 4   The Resource Cost/Price Plan grid opens.

Step 5   Do one of the following:

—To create a new assignment, click new 📄.

—To edit an existing assignment, click in the assignment row to select it, then click **Edit.**

Step 6   Click in each sell to enter a value, or click the arrow head to open a selection dialog box and select a value. Complete the following fields:

Option	Description
Site/Data Source	A unique number identifying the Clint.
Device Type	Select a device type to assign the plan the Device Type.
Range Start	To assign the plan to a range of devices, enter the first and last device names in the range.
Range End	
Cost Plan	Select either Cost or Price Plan.
Price Plan	

Step 7   Press **Enter** to save the assignment.

Calendars

The Calendar function allows you to display the defined calendars. Calendars define specific holidays on which certain call rates or discounts may apply.

Calendar Entries

Calendar Entries allows you to define calendar entries for specific calendars. For example, you want to define when holidays will occur so that you can assign special discounts or rates to these days.

To create a new calendar entry

Step 1   Click on the **Maintenance** tab and click **Costing** in the lower left pane.

Step 2   In the upper left pane, select the **Calendar Entries** option.

Step 3   Click on the **New** 📑 button. The Edit Calendar Entry dialog box opens.

Step 4   Complete the following fields:

Option	Description
Calendar Entry Name	Enter a name for the entry.
Calendar Entry Category	Select the relevant category from the drop-down list.
Belongs to Calendar	Select which calendar the entry is assigned to.
Start	Select the start date and time.
End	Select the end date and time.
Day of Week	If the *Weekend* category is selected you can define which days to include.
Last Day of Week	If the *Weekend* category is selected you can define the last day of the week.

Step 5   Click **Update**. The new entry is displayed in the entries list.

To edit an existing calendar entry

Step 1   Click on the **Maintenance** tab and click **Costing** in the lower left pane.

Step 2   In the upper left pane, select the **Calendar Entries** option.

Step 3   Select the relevant entry and then click on the **Edit** button. The Edit Calendar Entry dialog box opens.

Step 4   Make the required changes and then click **Update** to save.

Call Categories

This feature enables you to view the call categories which can be selected as filtering criteria for reports and alerts. Call categories define the types of calls that you have in the system. You can group locations according to call categories and also use them as criteria by which to filter report and calls.

Call Category names, when those are <u>not</u> the default ones, can be modified. Double click on the entry, or select the entry and click the edit icon then you can edit the name.

City Locations

City locations give you a better resolution of the destination in the report. For example, let's say that the prefix for Texas in the United States is 972. However to have a better resolution you could allocate specific cities within Texas with unique prefixes, for example, Dallas as 9721, Plano as 9722 etc. So even though the costing is the same for the whole of Texas, the report will display the actual name of the relevant city in Texas.

This feature enables creating a detailed list of destinations.

You can add new locations, search for a location or edit existing locations.

To add a new location

Step 1   Click on the **Maintenance** tab and click **Costing** in the lower left pane.

Step 2   In the upper left pane, select the **City Locations** option.

Step 3   Click on the **New** 📄 button.

The Edit City Location dialog box opens

Step 4   Enter a name for the new city location.

Step 5   Type a prefix and the required length of the telephone number.

Step 6   Click **Update**.

The window closes.

Taxes

The Taxes function allows you to create and edit taxes.

To create a new tax

Step 1   Click on the **Maintenance** tab and click **Costing** in the lower left pane.

Step 2   In the upper left pane, select the **Taxes** option.

Step 3   Click on the New button. The Edit Taxes dialog box opens.

Step 4   Complete the following fields:

Option	Description
Tax Name	Enter a name for the tax.
Value	Enter the percentage value of the tax.

Step 5   Click **Update**. The new tax is displayed in the taxes list.

To edit an existing tax

Step 1   Click on the **Maintenance** tab and click **Costing** in the lower left pane.

Step 2   In the upper left pane, select the **Taxes** option.

Step 3   Select the relevant tax and then click on the Edit button. The Edit Tax dialog box opens.

Step 4   Make the required changes and then click **Update** to save.

Call Rate Adjustment

The Call Rate Adjustment function allows you to adjust differences between the calculated Cost or Price of certain calls and the service provider's bill (or any other externally defined cost or price).

The amount to be allocated to each call can be defined as a **fixed** amount, or can be calculated so that the total amount to be adjusted is allocated according to **percentage** of **number** (of calls), **duration** or **amount** of each call.

Adjust Call Rates

Step 1   Select the **Maintenance** module.

Step 2   From the sub module selection pane, select **Costing**.

Step 3   In the upper left pane, select the **Call Rate Adjustment** option.

The **Call Rate Adjustment** form opens.

Step 4   In the Scope section, complete the following fields to define the adjustment scope:

Section	Option	Description
Period	From	Select start date.
	To	Select end date
Scope	Org. Unit	Click the [i] icon to open the Organization Unit selection dialog box, click an Org. Unit line, and click Select .
	Data Source	select All or select a Data Source from the drop-down list. Selecting All disables subsequent scope definition options.
	Trunk Group	select All or select a Trunk Group from the drop-down list. Selecting All disables subsequent scope definition options.
	Trunk Number	Select All or select a Trunk Number. Selecting All disables subsequent scope definition options.
	Service Provider	Select All or select a Trunk Number.

Step 5   In the Totals for scope section, click **Recalculate**
Totals for scope   (⤺ Recalculate)to view the current totals for the selected scope.

Step 6   In the Additional amount to be allocated section, complete the following:

Section	Option	Description
Fixed or Percentage	Fixed	Select to add a fixed amount to each call.
	Percentage	Select to calculate the amount to add to each call according to percentage.
Amount		For allocation by **Fixed** amount, enter the amount to add to each call. For allocation by **Percentage**, enter the total amount to be allocated to all the calls in the scope.
Calculate By	Calls	Calculate percentage by Number of **calls**.
	Duration	Calculate percentage by **Duration**.
	Amount	Calculate percentage by Cost/Price **Amount**.

Step 7   In the History section you can view previous adjustments. Click to open the drop-down months list and select a month

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Step 8   Click Start   🗦 **Start**   to run the adjustment.

The History for the current month is displayed with the top row showing the adjustment details.

Permissions

Permissions

System Security incorporates all options restricting the feature sets (roles) and data; This means that the functionality one can access in the system is restricted and predefined, as well as to which call data can be viewed.

The manner in which the rights per user are defined offers a flexible and friendly method.

Security allows full control over the user capability to use any tree / menu options in the application.

Defining the security for each user includes the possibility to indicate which of the tree / menu options he can access. As well as the option to restrict the data a user can view in the DB.

When you define a new user you need to allocate the user with a role thus defining the access privileges. Users are allocated roles via the Org. Utilities module in the Personnel section.

Roles are defined in a tree structure, similar to other functionality in the system. The system has three **built in roles**:

• **Administrator** - with full privileges
• **Manager** – with privileges for the organization unit managed
• **User** – with the minimal rights of viewing his Individual Calls Report

NOTE

Built in roles cannot be modified or deleted.

To view system roles

Step 1   Select the **Maintenance** module, and then from the lower right pane of the Maintenance main window, select **Permissions**.

The Permissions view is displayed.

The work area displays a list of available system roles.

Step 2   Click on each role in the tree in the left pane to view the role's details.

To add a new role

Step 1   In the Permission's view work area click the new 📄 button.

The **Role Details** window opens.

The privileges, structured in a tree, appear and the list of privileges can be selected from the tree.

Step 2   Complete the following fields:

Parameters	Option	Description
Name		Enter a name for the new role.
Description		Enter a short description of the role.
Status	Active	Select this option to make the role active. Active roles can be assigned to users.
	Inactive	Select this option to make this role inactive. Inactive roles cannot be assigned to users.

Step 3   Expand the **Privileges** tree in the lower pane and select the privileges you want to extend to the new role.

An entire module can be selected, or partial functionality of a module can be selected, or the module can be not selected at all. When an entire module is not selected it will not appear in the navigation, when a module is partially selected only the selected options will be enabled, and others (tree objects or menu options) disabled.

Step 4   Click **Save** to save the new role.

The new role now appears in the tree area.

To edit an existing role

Step 1   From the **Permissions** view, in the work area, click on the relevant role to select it.

Step 2   Click the **Edit** 📝 button.

The **Role Details** window opens.

Step 3   Make the necessary changes.

Step 4   Click **Save** to save the changes.

To delete an existing role

Step 1   In the **Permissions** view, work area, click on the relevant role to select it.

Step 2   Click the **Delete** ❌ button to delete the role. A system message appears.

Step 3   Click **OK** to confirm deletion of the role. The role is deleted from the system.

Step 4   Click the **Save** button to save the new role. The new role is added and displayed in the System Roles list.

System Settings

System Settings

The System Settings maintenance tasks include the configuration of:

- **Business Hours:** Enables you to define your organization Working Hours.
- **Device Types:** Allows you to define new Device types based on the application predefined device types.
- **Fiscal Periods:** Enables you to define your organization Fiscal Periods.
- **General Settings:** Enables you to change various system setting definitions.
- **List Editor:** Allows you to define the list of valid values that can be assigned to certain descriptive database fields.
- **Masking Settings:** Enables you to mask the display of certain codes and numbers, like Pin Codes and Phone numbers. To unmask you must enter two passwords.
- **Regional Settings:** Allows you to define your organization Regional settings.
- **Report Settings:** Allows you to define general report options for to all reports.
- **Offline Reports:** Enables you to define parameters to streamline offline reports.

Set Business Hours

To set business hours, complete the following:

Step 1   Click on the **Maintenance** module.

Step 2   From the lower right pane select **System Settings**.

Step 3   In the tree pane, select **Business Hours** from the tree.

Step 4   To create new business hours, click ![icon] or click ![icon] in the **Business Hours** field to view an existing template.

NOTE   *To delete an existing template, select it and click ![icon].*

Step 5   In the Name field, type the name of the template.

Step 6   In the Working Days section, click ![icon] in the First Day and Last Day field and select the range of days to be in included in the template.

Step 7   In the Working Hours section, to highlight the working hours, click in the orange colored box (labeled Working Hours) and drag the cursor over the hours which are working hours. The boxes which the cursor is dragged over should change their color to orange.

Step 8   To undo or change any hours to Non Working Hours, click on the blue box (labeled Non Working Hours) and drag the cursor over the hours which are non-working hours. The boxes which the cursor is dragged over should change their color back to blue.

Step 9   Click **Updat**e to save your hour settings.

Device Types

This feature allows the user to assign new device types, based on which one can perform filters to run reports.

The Device Types screen includes a table displaying information on the device types in the system.

The table titles are explained in this table:

Resource Type	The type of resource, for example: cellular, extension, PIN code, Calling Card and Pager.
Base Type	The resources type the new type is based on.
Code	The resource type code.
Description	A short description of the resource type.

To create a new device type

Step 1   Click the **New** button. The **Create Device Type** window opens.

Step 2   Enter the device **Name**.

Step 3   Enter a brief **Description**.

Step 4   Select a **Base Type** from the drop-down menu.

Step 5   Enter the device **Code**.

Step 6   Click **Update**.

Fiscal Periods

When an enterprise uses proprietary fiscal periods, there is an option to define the specific fiscal year and months.

To define fiscal periods

Step 1   Click on the **Maintenance** tab and click **System Settings** in the lower left pane.

Step 2   In the upper left pane, select the **Fiscal Periods** option.

Step 3   Complete the following fields:

Section	Option	Description
Fiscal Periods	Year	Select the relevant year from the drop-down menu options.
	Start Date	Select the starting date for the year. Once a start date is selected the end dates for all fiscal periods are automatically calculated based on the start date.
	Start from end of previous year	Select this checkbox to have the new year start at the end of the previous year.
	End Date	The period end dates are automatically calculated on the basis of the year start date. Changing the end date in one period will alter the other periods as well.

Step 4   Click the **Update** button to save.

General Settings

The System Settings General Settings option enables changing various system setting definitions. Its use is restricted to system administrators only. For a list of General Settings options for each release, look in the Release Notes document for that release.

List Editor

New descriptive fields have been added to the database to allow the customer to define required field for individual use, e.g. Device Status – status levels can be defined as required.

Step 1   Click on the Maintenance tab and click System Settings in the lower left pane.

Step 2   In the upper left pane, select the List Editor option.

NOTE

Values can be added for (Device) Device Function, Device Class of Service, Device Status and (Personnel) Person Status.

Complete the following fields:

Option	Description
List Name	Select the required property to be defined.
List Item Name	Type the item name as you would like it to appear.
Existing Items	Displays listed items for that value which have already been entered.

Step 3   Click the **Add New** button to add an additional value typed in the List Items Name field and add it to the Existing Items field (without overriding an existing item).

Step 4   To delete an existing value, highlight the value title in the Existing Items field and click the **Delete** button.

Masking Settings

To set the displayed character instead of selected numbers, complete the following steps:

Step 1   Click on the **Maintenance** module.

Step 2   From the lower right pane select **System Settings**.

Step 3   In the tree pane, select **Masking Settings** from the tree.

Step 4   Complete the following:

Section	Option	Description
Mask Characters	Character	Type the character which is to appear instead of the masked digits.
Phone Number Mask	Number of Digits (Business Calls)	Click ▼ and select a number corresponding to the number of digits to be masked in business type calls.
	Number of Digits (Personal Calls)	Click ▼ and select a number corresponding to the number of digits to be masked in PIN numbers of personal type calls.
PIN Code Mask	Number of Digits (Business Calls)	Click ▼ and select a number corresponding to the number of digits to be masked in PIN numbers of business type calls.
	Number of Digits (Personal Calls)	Click ▼ and select a number corresponding to the number of digits to be masked in personal type calls.
Duration Mask	Personal Calls	Click Select to display the Call Categories window. Select the applicable call category, e.g., Long Distance, and click Add to include the category. Once all desired categories have been added, click OK.

Section	Option	Description
	Business Calls	Click Select to display the Call Categories window. Select the applicable call category, e.g., Long Distance, and click Add to include the category. Once all desired categories have been added, click OK.
Location Mask	Hide (Personal Calls)	Select if to hide all personal calls.

Offline Reports

Data for reports resides in more than one data base table. Aggregating the data for a report takes time. There is a mechanism that concentrates all calls into one temporary table, updated on daily/monthly basis. Working versus one table and not with many views improves significantly the performance and gives the user the option to choose the call parameters he wants to refer to.

If a report period is used that is outside the 'saved table' the on-line database will be used.

A new option called Offline Reports has been added Under Maintenance\System Settings

This is where you define the parameters by which the reports are run.

For example, if you run reports mainly on the Administrative hierarchy and you are mainly interested in reports on a full month and you select to run the reports on the first of the month, select the following entries:

1. Administrative
2. Predefined: Last month
3. Total Number of calls – the total number of calls that was added to the temporary offline table. If the number is too high, some of the parameters can be changed.

The default number of calls will be calculated according to the default parameters in the screen. The "Recalculate" button will recalculate the total number of calls after changing some of the parameters.

The default value for the number of records is 1 million while the maximum value is 3 million.

Click the Update button in order to save the setting.

When working with the Offline Reports – only one language can be used. When the Offline tables are created for the reports, they are created according to the default language (in the Web.Config).

It means that if the default language (in Web.Config) file is German – the Offline tables will be created for German users only. English users can still generate reports using the normal method, not the Offline method.

There is a new task - Offline Table Settings - in the Scheduled Jobs list – Maintenance – Task Manager – Scheduled Jobs.

Schedule the job in such a way that the off-line tables are created prior to the reporting.

It is recommended running this job at quiet times as the process will use many resources and may last.

Clicking on the "Configuration Wizard" icon opens the Offline Table UI. Unlike in the rest of the jobs, this is not a Tab wizard UI.

Only Administrators have permissions to edit this screen.

The data is saved under the Activity database under the table Offline reports.

NOTE

The database will grow drastically which may have effect on MSDE\SQLExpress installations and on hard disk requirements.

Regional Settings

The Regional Settings options enable you to customize the application to the display convention of your country.

The following settings can be defined by selecting the relevant options from the drop-down menus:

Section	Option	Description
Currency Selection	Culture	Defines language and some other country dependent conventions.
	Currency symbol	Enter the currency Symbol of your country.
	No. of digits after Decimal	Select number of digits after the decimal point. Most countries use 2 or 3 digits.
	Decimal Separator	Select the currency decimal separator symbol used in your country.
	Thousands separator	Select the currency thousands separator symbol used in your country.
	Positive currency format	Select the format used in your country for positive currency sums.
	Negative currency format	Select the format used in your country for negative currency sums.

Section	Option	Description
Data Format	Date Separator	Select the date separation symbol used in your country.
	Time Separator	Select the time separation symbol used in your country.
	Short date format	Select your country convention for short dates display format.
	Long date format	Select your country convention for long dates display format.
	Time Format	Select your country convention for time display format.
	First day of week	select the first work day of the week in your country.

Report Settings

Report Settings lets you define general default settings for your reports such as the location of the reports folder, page layout and branding.

To define report settings

Step 1   Click on the **Maintenance** tab and click **System Settings** in the lower left pane.

Step 2   In the upper left pane, select the **Reports** option.

Step 3   Complete the following fields:

Section	Option	Description
General	Reports Root Folder	Enter the location of the reports root folder.
Local Printer	Page Size	Select the relevant page size from the drop-down menu.
	Page Orientation	Select the relevant page orientation.
Server Printer	Page Size	Select the relevant page size from the drop-down menu.
	Page Orientation	Select the relevant page orientation.
Branding	Company Name	Enter your company's name.
	Company Address	Enter your company address.
	Image Logo	Click on the **Browse** button to select an image file for your company logo.

Step 4   Click **Update** to save the report settings.

8

My Portal

My Portal - Introduction

The My Portal module enables viewing and operating the application from one central and easy-to-use interface. My Portal consists of 6 components; each handles different entity types in the application.

- **Organization Units:** Handles records of all organization units which are part of your viewing permissions.
- **Personnel:** Handles records of all personnel which are part of your viewing permissions.
- **Devices:** Handles records of all devices
- **Calls:** Handles records of your calls and calls made by other persons for which you have viewing permissions.
- **Reports:** Contains User Defined Report saved in the Reports module of the application.
- **Alerts:** Displays the application alerts.

Most of My Portal operations and options are common to all My Portal components. See the following topics:

- My Portal Grid Description
- Paging and Sorting
- Filtering and saving Favorites
- Updating the Database
- Exporting Data

In addition, each component has its component-specific options and operations. These are described separately for each component.

Getting Started

Permissions

To be able to access My Portal, the System Administrator must define you as a My Portal user and grant you the appropriate permissions. This is done in the User tab of the Personnel record.

The data you can view in My Portal depends of the authorizations you are granted in your user definition. You can view only the entities which are part of your viewable entities. Operations for each of the views depend on your role and permissions for each of the functions.

Accessing My Portal

To access My Portal:

Step 1   Select **My Portal** module.

> *When you close My Portal, it "Remembers" its state. So next time you open My Portal, it opens in exactly the same state (components are opened or closed, filters are set or not, and so forth) as it was last time you used it.*
>
> **NOTE**

Step 2   To open or close My Portal components:

—**To open a closed component**, click the component icon in the Component Menu bar (See above).

—**To close an open component**, click again the component icon in the Component Menu bar or click in the action toolbar.

—**To exit My Portal**, simply click on one of the other application modules.

Operating My Portal

My Portal Grid Description

Each component displays a selection of data records of one type of entity in the application's Enhanced Grid format, where each row represent one record, and each column displays the content of one data field.

All My Portal grids are of the same structure, and offer similar common options and operations. In Addition, each component grid may offer additional component-specific options and operations.

Each Component grid is made up of the following parts (top to bottom):

- **Action** toolbar - contains tools for saving and using Favorite filter settings and component-specific tools and options.
- **Column headings** bar - each column represents one data field.
- **Filters** bar (may be shown or hidden) - contains the current filter settings.
- Nine rows of **data** - each row represents one record.
- **Status** bar - shows grid status, contains Paging information and tools and the Export and Help tools.

Basic Operations

Paging the Data

If the number of data records in the current selection exceeds the number of data rows in the grid, the records are spread among two or more "pages".

Look for the paging status and tools in the Status bar. It displays the number of data records in the selection, the number of pages, and the currently displayed page.

Figure 8-1 *Paging Status and Tools*

In the example above you have 22 records; the crossed filter icon indicates that the data is not filtered; and you are viewing now the second page out of 3.

- **To display the next page**, click the plus sign.
- **To display the previous page**, click the plus sign.
- **To go to a specific page**, click and hold the slider and slide it until you see the desired page number, and release.

Sorting the Data

You can sort the records by one of the columns.

An arrow in the column heading indicates that the records are sorted by that column. For example `Last Name ▲` indicates that the data is sorted by ascending order of field Last Name. An arrow pointing up or down indicates ascending or descending order correspondingly.

To sort the records:

• Right click in the column heading and select the required sort order from the drop-down menu.
• Or click in a column heading to sort by that column.
• **To reverse the sort order**, click in the column heading again.

For each component You can sort by one column only at a time.

Filtering

Setting and Applying Filters

Use filtering to display only the required data. You can apply filters to more than one column at a time. When multiple filters are applied, the logical relation between the filtering condition is AND, that is, only records fulfilling all of the conditions will be displayed.

To set and activate filters:
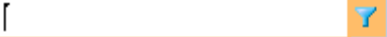
Step 1   If the filters bar is not shown, right click in any of the columns heading and select **Filter bar**.

Step 2   In a column to which you wish to apply a filter, click the filter icon ▼ and select from the drop-down menu the appropriate relation for the filter.

Step 3   Click in the filter cell (not on the icon), a value entering text box opens ⌈_____ ▼⌉ , enter the appropriate value.

Step 4   To activate all currently set filters now, press **Enter**. Or wait until all filters are set and then activate all set filters at once in Step 6.

Step 5   Repeat Step 2 to Step 4 for each column to which you wish to apply a filter.

Step 6   To activate all set filters, click any of the filter icons in the filters bar and select **Apply All Filters**.

Step 7   The new selection is displayed. The paging information and tools in the status bar reflects the results of applying the filters.

Figure 8-2 *Paging Status and Tools After Filtering*
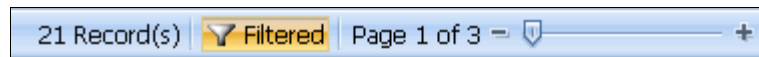
To clear one filter or all filters:

Step 1   If the filters bar is hidden, right click in any of the columns heading and select **Filter bar**.

Step 2   Click the filter icon ▼ of the filter you wish to clear and select **Clear This Filter**; or click any filter icon and select **Clear All Filters**.

Step 3   The new unfiltered list (or the list without the cleared filter) is displayed. the number of records and the paging tools in the status bar reflects current unfiltered status.

Figure 8-3 *Paging Status and Tools With No Filtering*
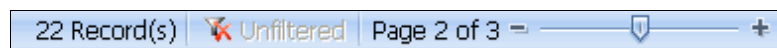
Saving and Using Favorite Filters

The Favorites feature enables you to save current filter settings as a Favorite in the Favorites list, and then apply any of the saved settings by selecting them from the Favorites list.

To save filter settings as a favorite:

Step 1   Set and activate the required filter settings.

Step 2   In the Actions toolbar, click **Add to Favorites** in the Save As dialog box, type a name for the new favorite.

Step 3   If you wish to make it your default filters setting, check the **Set as Default** check box.

Step 4   Click **Save**.

Step 5   The new setting is added to your favorites list.

To use a favorite filters setting:

Step 1   In the Actions toolbar, open the **Select Favorite...** drop-down list.

Step 2   Select the desired Favorite.

The selected setting is applied.

To Organize your favorites list:

Step 1   In the Actions toolbar, click **Organize Favorites** ⭐.

Step 2   In the **Organize Favorites** dialog box:

—To delete a favorite, click in the favorite line to select it, then click **delete** ✕.

—To edit a favorite, click in the favorite line to select it, and then click **Edit** ✏️.

—To change the default favorite, check or uncheck the **default** check box. There can be only one default favorite.

Step 3   Close the Organize Favorites dialog box.

Updating the Database

Through My Portal you can add, edit and delete records in the database. It is important to understand that while other My Portal actions effects only your view of the application, but does not affect the database in general. The New, Edit and Delete actions permanently modify the database, thus effecting the application and all its users. Updating the database through My Portal is equivalent to updating the database through any of the other modules of the application.

To add, edit or delete Entities

Step 1   To edit or Delete a record, click in a line to select a record.

Step 2   Click one of the icons **New** 📄, **Edit** ✏️ or **Delete** ✕. Or open the **Options** drop-down menu ▦ **Options** and select **New** 📄, **Edit** ✏️ or **Delete** ✕.

Step 3   Proceed according to the component type.

Exporting Data

You can export the data from My Portal components into various file formats on your local work station. The Export file will contain all the currently selected records according to the set filters.

To be able to open and handle these files on your computer, the appropriate file types must be recognized and the appropriate program to open the file must be installed.

The available file types are:

• **HTML** - Contains the data in a print ready format that can be opened for display by any browser program, e.g., Microsoft Internet Explorer, and can be edited by any HTML editing program, such as RoboHelp.

- **PDF** - Closed picture files that can be read by Adobe Acrobat Reader, but cannot be opened for editing.
- **XML** - Data files containing both the data and the data description. Suitable to be imported to certain programs.
- **EXCEL** - Excel files are spreadsheet files that can be opened and edited by Microsoft Excel.
- **TIFF** - Graphic files that can be opened and edited by graphic programs, e.g. Microsoft Paint.
- **RTF** - Contains the data in a print ready format. These are word processing files that can be opened and edited by most word processing programs, e.g. Microsoft Word
- **TEXT** - Comma separated text files. i.e. the file contains the data, but no data description. Can be opened and edited by any text editor, such as Notepad. These files can be used to import the data into customized programs.

To export data to a file- all formats:

Step 1   In the component from which you wish to export data, set the filters so that the component will contain the data you wish to export in the desired order.

Step 2   Click 🖳 at the right hand side of the status bar.

Step 3   From the drop-down list, select the desired file type.

Step 4   From the drop-down list, select the desired page layout: **Portrait** or **Landscape**.

Step 5   In the drop-down list, click **Export Now**.

The exported file is created and displayed on your screen.

Step 6   Save the file.

To export data to an Excel file:

Step 1   In the component from which you wish to export data, set the filters and the sort order so that the component will contain the data records you wish to export in the desired order.

Step 2   In the Actions toolbar, Click the **option** menu [:] **Options** and select Export from the drop-down menu.

The exported file is created and displayed on your screen.

Step 3   Save the file.

My Portal Components

Organization Units

Through the Organization Units component of My Portal you can view and export Organization Unit records. You can filter and sort the records to view and export only those records that interest you.

In addition, you can do the following permanent updates in the database:

- Delete an existing Organization Unit
- Edit an existing Organization Unit
- Add a new Organization Unit anywhere in the organization
- Add a new Organization Unit as a child Unit
- Assign Personnel to an Organization Unit

To delete an Organization Unit:

Step 1   Click in the **Organization Unit** row to select it.

Step 2   In the **Action** toolbar, click **Delete** ✕ or click the **Option** menu
            [Options] and select **Delete** from the drop-down menu.

Step 3   In the **Delete** dialog box, check the **Delete Permanently** check box and click **Delete**.

To edit an Existing Organization Unit:

Step 1   Click in the Organization Unit row to select it.

Step 2   In the Action toolbar, click **Edit** ✏ or click the **Option** menu
            [Options] and select **Edit** from the drop-down menu.

            The Organizational Unit Details dialog box opens with the selected Organization Unit displayed.

Step 3   View and update the properties as required.

To add an Organization Unit anywhere:

Step 1 In the **Action** toolbar, click **New** or click the **Option** menu
     Options   and select **New** from the drop-down menu.

     In the **Organization Units Selection** dialog box, select the parent unit
     for the new unit. See Selecting Organization Units.

Step 2 The **Add Organization Unit** Dialog box opens with the selected unit
     displayed as the parent unit.

Step 3 Fill in the properties of the new organization unit and click **Update**.

To add an Organization Unit as a child:

Step 1 Click in an Organization Unit row to select the parent unit.

Step 2 In the **Actions** toolbar, click the **Option** menu Options ,
     select **Other Options** from the drop-down menu, and then
     select **Add Child Org. Unit**.

     The **Add Organization Unit** window opens with the selected unit
     displayed as the parent unit.

Step 3 Fill in the properties of the new organization unit and click **Update**.

To assign Personnel to an Organization Unit:

Step 1 Click in an Organization Unit row to select it.

Step 2 In the **Actions** toolbar, click the **Option** menu Options ,
     select **Other Options** from the drop-down menu, and then
     select **Assign Personnel**.

     The **Personnel Selection** window opens with the selected unit displayed
     as the parent unit.

Step 3 Select the Personnel to assign to the selected organization unit and click
     OK. See Selecting Personnel.

Personnel

Through the Personnel component of My Portal you can view and export Personnel records. You can filter and sort the records to view and export only those records that interest you.

In addition, you can do the following permanent updates in the database:

- Delete a Person
- Edit a Person properties
- Add a Person anywhere in the organization tree

In addition you can preview the following detailed reports for a selected person:

- Previous 30 Days detailed Report
- Last Month detailed report

To delete a Person:

Step 1   Click in the **Person** row to select him or her.

Step 2   In the **Action** toolbar, click **Delete** ✕ or click the **Option** menu
                 [Options]   and select **Delete** from the drop-down menu.

Step 3   In the **Delete** dialog box, check the **Delete Permanently** check box and click **Delete**.

To edit a Person:

Step 1   Click in the Person row to select him or her.

Step 2   In the Action toolbar, click **Edit** ✐ or click the **Option** menu
                 [Options]   and select **Edit** from the drop-down menu.

           The **Personnel Details Editor** dialog box opens with the selected Person displayed.

Step 3   View and update the properties as required.

To add a Person:

Step 1   In the **Action** toolbar, click **New** or click the **Option** menu
             | Options | and select **New** from the drop-down menu.

Step 2   In the **Organization Units Selection** dialog box, select the Organization
             Unit to which you wish to add the new Person. See Selecting
             Organization Units.

             The **Personnel Detail Editor** Dialog box opens.

Step 3   Fill in the properties of the new Person and click **Update**.

To preview a detailed report:

Step 1   Click the **Person** row to select him or her.

Step 2   Click the **Option** menu | Options | and select **Previous 30
             Days** or **Last Month** from the drop-down menu.

Devices

Through the Devices component of My Portal you can view and export
Device records. You can filter and sort the records to view and export
only those records that interest you.

In addition, you can do the following permanent updates in the
database:

• Delete a selected Device
• Delete a selected Site or Data Source
• Edit the selected Device, Site or Data Source properties
• Add a Device, Site or Data Source
• Add a range of Devices.

In addition you can preview the following detailed reports for a selected
Device:

• Previous 30 Days detailed Report
• Last Month detailed report

To delete a Device:

Step 1   Click in the row of the Device you wish to delete to select it.

Step 2   Click **Delete** or click the **Option** menu | Options | and
             select **Delete** from the drop-down menu.

Step 3   In the **Delete** dialog box, check the **Delete Permanently** check box and
             click **Delete**.

To delete a Site or Data Source:

Only authorized users can delete a site or a Data Source.

NOTE

Step 1 Click in the row of the entity you wish to delete to select it.

Step 2 Click the **Option** menu 🗒 **Options** , select **Other Options**, and then select **Delete selected Site** or **Delete selected Data Source**.

Step 3 In the **Delete Confirmation** dialog box, enter an appropriate **password** and click **Delete**.

To edit a Device, Site or Data Source:

Step 1 Click in the row of the entity you wish to edit to select it.

Step 2 Do one of the following:

—For Devices, click **Edit** 🖊 or click the **Option** menu 🗒 **Options** and select **Edit** from the drop-down menu.

—For Sites and Data Sources, click the Option menu 🗒 **Options** , select **Other Options**, and then select **Edit selected Site** or **Edit selected Data Source.**

The **appropriate editor** dialog box opens with the selected entity displayed.

Step 3 View and update the properties as required and click **Update**.

To add a Device:

Step 1 Click **Create Device** 🗐 or open the **Option** menu 🗒 **Options** and select **Create Device** from the drop-down menu.

Step 2 In the **Select Data Source** dialog box, select a Data Source, select a Data Source and click **Next**.

Step 3 In the **Edit Device** dialog box. fill in the appropriate properties and click **Update**.

To add a Device Range:

Step 1 Click the **Option** menu 🗒 **Options** and select **Add Device Range** from the drop-down menu.

Step 2 In the **Add Device Range** dialog box, select a Data Source and a Device Type, define the first and last Device Names and click **OK**.

To add a Site or Data Source:

Step 1   Click the **Option** menu [Options], select **Other Options**, and then select **Add new Site** or **Add new Data Source.**

The Appropriate Dialog box opens.

Step 2   Fill in the properties of the new Site or Data Source and click **Update**.

To preview a detailed report:

Step 1   Click in the **Device** row to select it.

Step 2   Click the **Option** menu [Options] and select **Previous 30 Days** or **Last Month** from the drop-down menu.

Calls

Through the Calls component of My Portal you can view and export Call records. You can filter and sort the records to view and export only those records that interest you. For example, you can set the filters to display the calls of a certain person at a certain date, look for calls to a specific dialed number, review all international calls from a certain Organization Unit, and so forth. In addition, you can permanently delete calls.

To delete a Call:

Step 1   Click the **Call row** to select it.

Step 2   In the **Action** toolbar, click **Delete** ✕ or click the **Option** menu [Options] and select **Delete** from the drop-down menu.

Step 3   In the delete confirmation dialog box, click **OK**.

To delete all Calls in the selection:

Step 1   Set the filters for the calls you wish to delete.

Step 2   In the **Action** toolbar, click **Delete all**.

Step 3   In the delete confirmation dialog box, click **OK**.

Reports

Through the Reports component of My Portal you can view, run and permanently update User Defined Reports. you can:

• Delete an existing User Defined Report

• Edit, run and save the report.

To delete a Report:

Step 1   Click in the **Report** row to select it.

Step 2   In the **Action** toolbar, click **Delete** ✕ or click the **Option** menu
          Options   and select **Delete** from the drop-down menu.

Step 3   In the Delete Confirmation dialog box, click **OK**.

To edit, run or save a Report:

Step 1   Click in the Report row to select it.

Step 2   In the Action toolbar, click **Edit** 🖉 or click the **Option** menu
          Options   and select **Edit** from the drop-down menu.

Step 3   The Report Configuration tabs window opens. You can now edit the report configuration. See Configuring a Report.

Step 4   Do any of the following:

          —To preview the report, click the **Preview** icon.

          —To run the report, click the **Run** icon.

          —To permanently change this User Defined Report, click the **save** icon.

          —To create a new User Defined Report with the edited configuration without overwriting the original report. Click the **Save As** icon, type a name and description for the new report, and click **OK**.

Alerts

The Alerts component of My Portal enables you to view the application Alerts. You can filter the Alerts by Severity, Date, Event Type and Action.

For additional information or support on this NEC Corporation product, contact your NEC Corporation representative.

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Expense Management User Guide

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