Expense Management

Private Calls Management

Administration Guide

NEC Corporation

November 2010
NDA-30985, Issue 2

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Introduction

The Private Calls Management application enables personnel to flag calls as “private calls,” indicate which are business-related calls, and submit this information to the organization.

- Once in every reporting period the application generates calls lists and notifies the users.
- The users view their calls list, mark the private calls, and then submit their approval.
- The Private Calls Administrator follows up on the process.
- The Private Calls Administrator configures the length of the reporting period, how long the users have to submit their approval, when to send alerts about calls, and so on.

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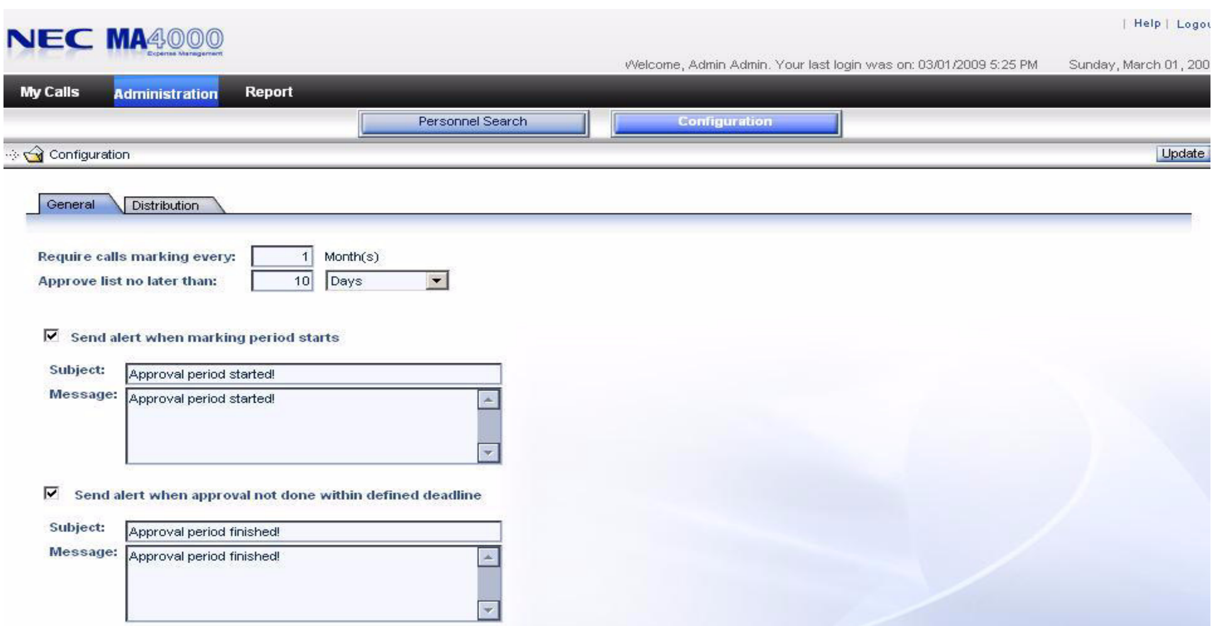
Private Calls Administration

The Private Calls Administrator can use administration functions to set parameters for private call processing. This chapter explains how to configure the system for private call processing.

Configuring Private Calls

Private Calls configuration allows you to define the length of the call period, expected private call approval times, when to send alerts, the alert message content, and other private call variables.

Figure 2-1 *Private Calls Configuration*



To configure the Private Calls Management:

Step 1 Select **Administration** > **Configuration** > **General**.

Step 2 Fill in the following information, as required for your configuration:

Require calls marking every—To define the reporting period, enter the desired duration in months.

Approve list no longer than—To define the deadline for approval, enter a number in the field and select **Days** or **Weeks**.

Send alerts when marking period starts—Check this box to send alerts at the start of the marking period. You must also enter **Subject** and **Message** texts for the start-of-period alert.

Send alerts when approval not done within defined deadline—Check this box to send alerts at the marking period deadline, check the check box. You must also enter **Subject** and **Message** texts for the start-of-period alert.

Step 3 If you wish to automatically generate a report of overdue users, make these specifications:

Generate report with users who didn't approve their lists—Check this box to indicate you want to generate the report of overdue users.

File Type—This field is under the **Distribution** tab. Click the tab and select a file type to indicate the output format.

File Path—Check this check box to specify a path for the file; otherwise the report will be written to the default path of ..\Reports\ExportedReports. To specify they path after checking this box, click **Browse...,** enter a file path and click **OK**.

E-mail to others—If you wish to send the generated report to other people, check this check box. You must then click **Recipients...**, select and **add** or **remove** recipients, and click **OK**.

Step 4 Click the **Update** button. You changes are saved.

Calls Approval Follow up

To follow up on the personal calls approval process, you can:

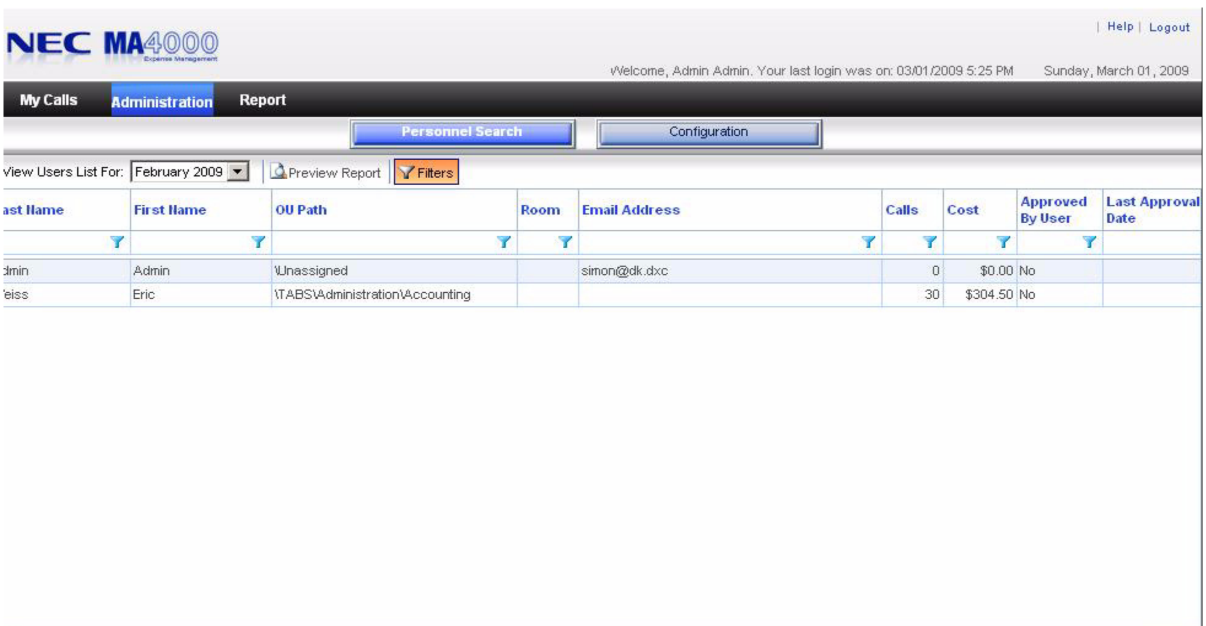
- View the current state of private calls approval.
- View or print a list of **Users Who Did not Approve Their Calls On Time**.

To view the approval state of a specific person:

Step 1 Select **Administration** > **Personnel Search**.

Step 2 From the drop-down list of periods in the **View Users List for** field, select the required period. The list of persons who have calls appears in the Enhanced Grid Format.

Figure 2-2 *Private Calls Follow-up Grid*



Step 3 Use the Enhanced Grid to:

- Sort the list by any of the columns
- Filter the list by any combination of columns
- Export the grid content to any one of a number of file formats

To view the Users Who did not Approve Their Calls On Time:

Step 4 Select **Administration** > **Personnel Search**.

Step 5 From the **View Users List for** drop down list of periods, select the required period.

Step 6 Click the **Preview Report** button. The report preview appears on your screen. Use the preview options to:

- Page through the report.
- Go to a specific page of the report.
- Change the size of the display.
- Generate a printable PDF file from the report.

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