Configuring Reports for Users, Managers, and Administrators

Regardless of your level of security access, you can access, generate, and view the reports in this chapter.

This chapter also includes information to help you understand the report output.

Generate reports in one of the following ways:

- on demand (you will need to specify a date range)
- on a scheduled basis

Note The ART administrator sets the parameters for configuring the ART function.

Generating Individual Bills

Use this procedure to generate, view, or mail summary or detail information about individual phone bills.

You can either view pregenerated summary reports or generate new reports on demand. If you generate a new report, you must specify a date range.

The following interactive fields apply to the Individual Bill screen:

- Report Type
  - Summary—indicates the summary of all calls for a selected period (the total number of calls made and the charges incurred).
  - Detail—indicates the call types (Internal, Local, Long Distance, International, or On Net) for all calls over a selected period.
- Available Reports—provides a list of pregenerated reports (the default is the latest pregenerated report). Other reports appear in reverse chronological order. The last choice in the list is “Generate New Report.”
- From Date—provides a place to include a date range if you select Generate New Report from Available Reports.
- To Date—provides a place to include a date range if you select Generate New Report from Available Reports.
- View Report—click to view the report.
- Send Report—click to mail the report.

Procedure

Follow this procedure to view and mail your individual bill:

Step 1 Choose **Bill** > **Individual Bill** from the ART main menu.

Step 2 Choose **Summary** or **Detail**.

Step 3 Choose a date range.

Step 4 Click **View Report**—see “Understanding the Individual Bill Report.”

Step 5 Click **Send Report**—see the procedure for “Mailing Your Report.”

Understanding the Individual Bill Report

The report groups information by the user name in ascending order. The report fields include

- Date and Time—of call origination

- Call Classification—sorted in ascending order
  - Internal
  - Local
  - Long Distance
  - International
  - On Net
- QOS—Quality of Service achieved on calls made
- Duration—the number of seconds that the call was connected

Mailing Your Report

You can access the Mail To mailing template from any report screen.

Your Mail To screen has the following interactive fields:

- Send—sends the mail to the address(es) listed in the To and Cc address boxes.
- Cancel—cancels the current attempt to mail the report, closes the template, and returns control to the previous screen.
- To and Cc—provides capability so that when you click on either button, another screen displays a list of users from which you can select addresses to receive the report.
- Subject—provides a place to enter the subject of the mail or leave it blank.
- Message—provides a space below the Subject field for the message of the mail. Sending a message is optional.

Procedure

To send a report, perform the following steps:

Step 1 Click on **Send Report** from any screen.

Step 2 Click on the **To** and **Cc** buttons to obtain a list of all users.

- Choose the name(s) from the list of users.
- Click **OK**—to return to the mail template with all the addresses displayed in the respective address boxes.

- Click **Cancel**—to return to the mail template with no address selected.

Note You can also enter addresses directly into the text box.

Step 3 Enter a subject in the **Subject** line (optional).

Step 4 Enter a message in the Message area (optional).

Step 5 Click **Send**—to send the report with this mail as an attachment.