

OA Reporter User Guide



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OA Reporter User Guide

(Version 1)

INTRODUCTION

OA Collector collects call records (SMDR) from an Inter-Tel AXXESS phone system and provides management reports using *OA Reporter*. This call accounting system (*OA Collector* and *OA Reporter*) is called *OA Reporter*.

These management reports provide information as to the use and needs of your most valuable business tool, your phone system. Management reports will enable you to make decisions about your business based on facts.

OA Reporter can be purchased as a single license or multi-user license. With a multi-user license, a single registration number will allow *OA Reporter* to be installed on as many PC's as required.

OA Collector

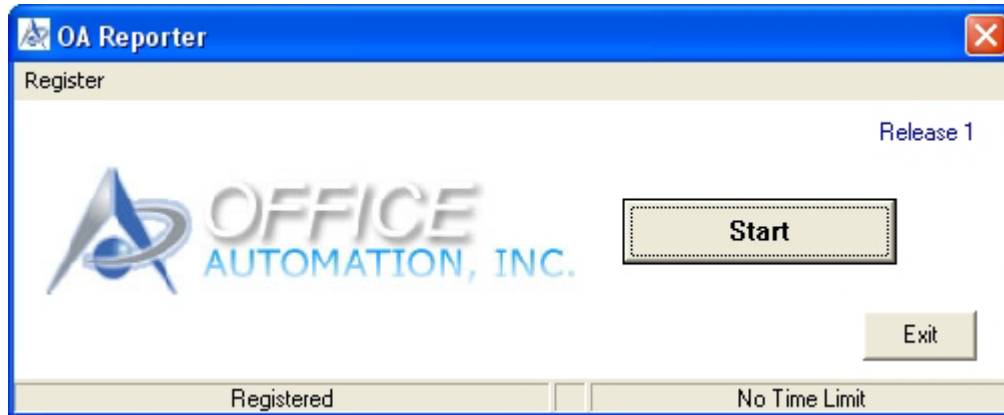
OA Collector captures call records (SMDR) from the Inter-Tel AXXESS and places them into files.

OA Reporter, based upon selected parameters, locates the required records then sorts and processes these records to create the requested call report.

A separate document is available that discusses *OA Collector* in more detail. Always remember *OA Reporter* is dependent on *OA Collector* running 24x7! If *OA Collector* is not running, there will be no records to view.



STARTING OA Reporter



The current status of your trial or registration of *OA Reporter*, is located at the bottom of the *START* screen. If during or on completion of your trial and *OA Reporter* is purchased, the *Register* selection will take you to the *Registration* form.

REGISTER

This form allows the entry of the registration number after *OA Reporter* has been purchased. This number must be entered exactly the way it is presented including dashes.

If the registration number is emailed to you, you may wish to copy and paste the number into the form to insure the number is entered correctly.

Contact Office Automation (407-702-1000) for more information on pricing and options.



The image shows a Windows-style dialog box titled "OA Collector Registration". The dialog has a blue title bar with a close button (X) in the top right corner. Below the title bar, there is an "Exit" button. The main text area contains the following instructions: "To Register This Software, This Computer Must Have Access To the Internet. Please Provide An Email Address (Not Required) So We Can Notify You When An Update Is Available. If For Some Reason This Computer Does Not Have Access To The Internet, Contact Office Automation Inc. For Help." Below this text are two input fields: "Enter Registration Number" and "Enter Email Address For Update Notification". A "Register" button is positioned below the second input field. At the bottom of the dialog, there is a label "Computer ID" and a text box containing the value "2EBB-C863-54D6-D1CE".

START SCREEN

After selecting *Start*, you will be taken to the main screen of *OA Reporter*.



From this screen you can make several choices. If the *Path To .KAR Files* is empty or if the path assignment is incorrect, you will need to select *Locate Collection Call Records*. If this path is missing or incorrect then *OA Reporter* will not have any call records to select.

LOCATE OA Collector CALL RECORDS

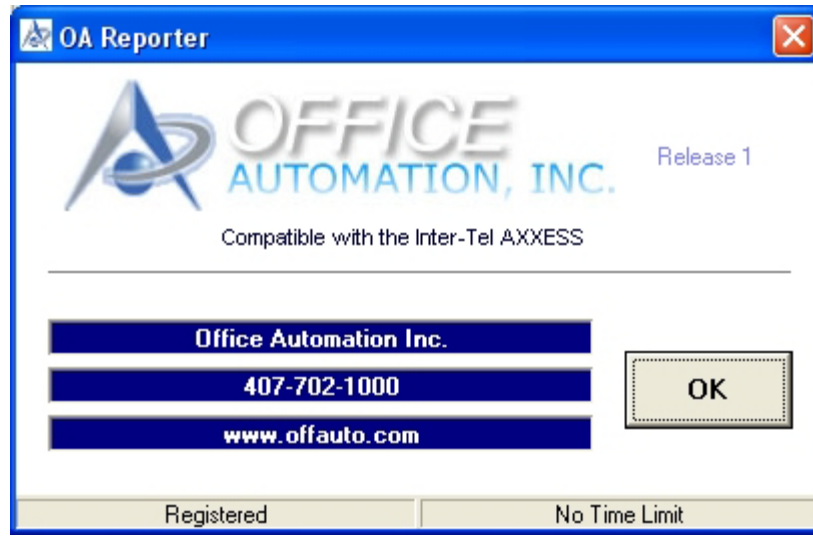
Select *Locate Collection Call Records* and select the path to the *OA Collector* KAR files. Select any KAR file in the folder to define the path.

Your system administrator should mark the folder where the *OA Collector* is storing the KAR records as SHARED for access by *OA Reporter* users.

ABOUT

The *About* screen reveals important information about *OA Reporter* such as the current release and the status of your trial or registration.

Office Automation contact information can also be located here.



OA Reporter DATABASE

The next area when first starting to use *OA Reporter* is the database. This database defines all the stations, nodes, departments, trunks, trunk groups, account codes, dialed digits and DNIS digits.

This information only needs to be defined once and changed as needed.

Database

Exit Account Codes Dialed Digits DNIS Digits

Nodes

Node Local Edit

Extensions

Clear Save Delete

Ext Name

Department Sales Edit

Ext.	Name	Department	Node
100	Operator	Sales	Local
118	Teri	Service	Local
133	Randy	Sales	Local

Trunks

Clear Save Delete

Trunk

Trunk Group Main Edit

Trunk	Trunk Group	Node
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cas.mdb

Even though you can collect data and run some of the reports without completing the database information, the *OA Reporter* will be missing valuable information or in some cases, not be able to provide all the data.

All call records are stored in files where *OA Collector* is installed. The files are named by date. For example, records stored on November 16, 2009 would be located in a file named, *11162009.KAR*. At midnight the file name changes to match the date.

We do not recommend editing or deleting any data from this database as it could adversely effect or completely disable *OA Reporter*!

In order to backup your *OA Reporter* database, you can copy the entire *cas.mdb* database to a safe location. The *cas.mdb* database file is the *OA Reporter* database used to process the set of records required for running specific reports. In the event of hardware failure or upgrade, re-install *OA Reporter* and copy the saved *cas.mdb* database to the installed folder and overwrite the newly installed *cas.mdb* default database. Contact Office Automation (407-702-1000) for help.

TIP: If you have purchased the multi-user license and each person does not wish to complete the *OA Reporter* database entries, one person can perform the task and then share their database with others. Each person would just copy the completed *cas.mdb* and overwrite their installed *cas.mdb* default database.

OA Reporter DATABASE – NODES

Nodes were introduced to the AXXESS system with AXXESS version 5.1 (*OA Reporter* does not support AXXESS 5.0, the only unsupported version, but does support lower versions like 4.4 and lower). Each networked AXXESS system can be connected together as one system and call records from multiple nodes can be “funneled” to one node. Each system is assigned a node number and name.

Use the drop-down box to reveal the defined Nodes. The node name *Local*, will always be in the list and is not subject for deletion. If you do not have any networked AXXESS systems, assign all extensions to *Local*.

If the node name does not appear in the drop-down box, use the *Edit* key to reveal a new screen. Enter in the text box the name of the node. At this point, you have two options. Press the *Add* button and insert the new node name in the list or check the box below the text box labeled, *Assign This Node To All Extensions Associated With Checked Node(s) Listed Below*.

By making this selection, when the *Add* button is pressed, the new node is assigned to any node names in the list below.

To *delete* nodes, select the node(s) from the list and press the *Delete* button.

OA Reporter DATABASE – EXTENSIONS

Each extension (station) should have 4 items of information assigned: *node*, *extension number*, *name*, and *department*.

The extension must match the station as assigned in your AXXESS system.

When you have selected all 4 items, press *SAVE* to add the extension to the database.

If the name is not defined, *OA Reporter* will insert ~????~ as a reminder.

By using the *Clear* button, the typed entry will be removed from the text box.

To delete an extension, use the Windows standard method (SHIFT or CTRL) to highlight extensions you wish to delete. Any highlighted extensions will be removed when the *DELETE* button is pressed.

There is no editing of extensions. To change information for an extension, delete and re-enter the extension.

OA Reporter DATABASE – DEPARTMENTS

When selecting a *Department*, use the drop-down box to reveal the defined departments. If the department name does not appear, use the *EDIT* button to reveal a *Department Edit* screen.

Departments are not part of the AXXESS database but an *OA Reporter* feature will allow grouping of extensions for viewing as one.

To add a *department*, simply type the name in the text box and press *ADD*. If the name already exists, you will not be able to add the name. Try selecting a different name.

There is another option before selecting *ADD*. Below the text box for adding the new department is a check box labeled, *Assign This Department To All Extensions Associated With Checked Departments Listed Below*. This function allows reassignment of extensions to the new department name. Check this box and check the existing *department* name located in the list below.

You can delete departments by checking the department you wish to delete and then press the *DELETE* button.

OA Reporter DATABASE – TRUNKS

Define your *trunks* and *trunk groups*. There are 3 items of information needed: *nodes*, *trunk number*, and *trunk group*.

Each *trunk* in the AXXESS is assigned an extension number. The number here must match the number assigned in the AXXESS system. Because these numbers are not as obvious as the station numbers, you may need to ask Office Automation to supply a list of *trunk numbers* from your system by viewing your AXXESS database.

When the *node*, *trunk number* and *trunk group* have been assigned, press the *Save* button. *OA Reporter* will not allow duplicate numbers. Use the *Clear* button to clear the text boxes.

If you need to delete any trunks, use the Windows control (SHIFT and CTRL) keys to highlight trunk entries, then press the *Delete* button.

You cannot edit trunk entries. Delete the entry and re-enter.

OA Reporter DATABASE – TRUNK GROUPS

Each *trunk* is assigned a *trunk group*. *OA Reporter* can be generated based on these groups of trunks as one entry. Use the *Edit* button to access the *Trunk Group Edit* screen.

Even though the AXXESS programming uses trunk group assignments, *OA Reporter* allows you to name and organize trunk groups independent from the AXXESS data with the exception of the trunks themselves, which must match the AXXESS assigned numbers.

Enter a new name for a trunk group in the text box. You have two options. Press the *Add* button and if the trunk group name is not a duplicate name, it is entered into the list.

If you choose to use the checkbox located under the text box labeled, *Assign This Trunk Group To All Trunk Numbers Associated With Checked Trunk Groups Listed Below*.

If this is selected, then when *Add* is selected, any trunk numbers assigned to any of the checked trunk groups will be move to the new trunk group.

To delete any trunk group, simple check the trunk group name and press *Delete*.

There is no editing of the trunk group. Delete the trunk group and re-enter.

OA Reporter DATABASE – ACCOUNT CODES

At the top of the database screen is the entry point for adding account codes. Account codes are used in the Inter-Tel AXXESS system to tag calls.

For example, if your customer is assigned an account code and this account code is used when placing or taking calls, then a report can be generated to show how many of your company's calls were used to service that account code's customer.

To create a new account code, simply enter the new account code and press *Add*. Duplicate numbers are not allowed. Account codes must match the assigned account codes in the AXXESS!

To delete, use the Windows highlight method (SHIFT and CTRL) to select account codes for deletion, and press the *Delete* button.

OA Reporter DATABASE – DIALED DIGITS

OA Reporter provides a unique way to track calls based on either the number dialed by a company employee or Caller ID information supplied by your telephone company.

If there are numbers you wish *OA Reporter* to watch for, enter them here. A name can also be assigned to that number for easier reference.

OA Reporter DATABASE – DNIS/DID DIGITS

Most users do not know about or care about DNIS/DID digits. It is a technical term your vendor is familiar with and is used to steer calls when they arrive in your AXXESS system.

But management of your telephone system can benefit by tracking DNIS/DID data.

If you have a T1 circuit with E&M trunks or more common today a PRI circuit, chances are your system is using DNIS/DID digits to route certain calls through your AXXESS.

For example, your telephone company might assign a four-digit number to indicate when someone has dialed your toll free number, your FAX machine, or a particular extension. When this four-digit number comes into the AXXESS, the AXXESS is programmed to recognize that number and send it to the appropriate place in your system.

You may wonder why do this? With a full PRI circuit, you have 23 channels to route calls in and out of your system. In order to get the optimum use of all 23 channels, you do not want to dedicate individual circuits just for certain calls. You want to use any of the 23 channels for whatever is needed at the time. This optimizes your circuits. When this

is done, there has to be a way to identify a call when it arrives because it can appear on any of the 23 channels. By assigning a DNIS/DID number, the call can be identified and routed easily.

Still confused? Don't worry. Ask Office Automation for a list of your DNIS digits and where they ring. Enter the DNIS digit number and a name (association) into the database.

See the *OA Collector User Guide* appendix for recommended AXXESS configuration.

You will be able to see a complete breakdown of how many people are calling your 800 numbers, fax machines, departments, extensions, etc.

[View Records/Print OA Reporter – Overview](#)

Hopefully you now have defined the path to your call records and entered you AXXESS specific information to the *OA Reporter* database. With those tasks done, you are now ready to view records and print reports.

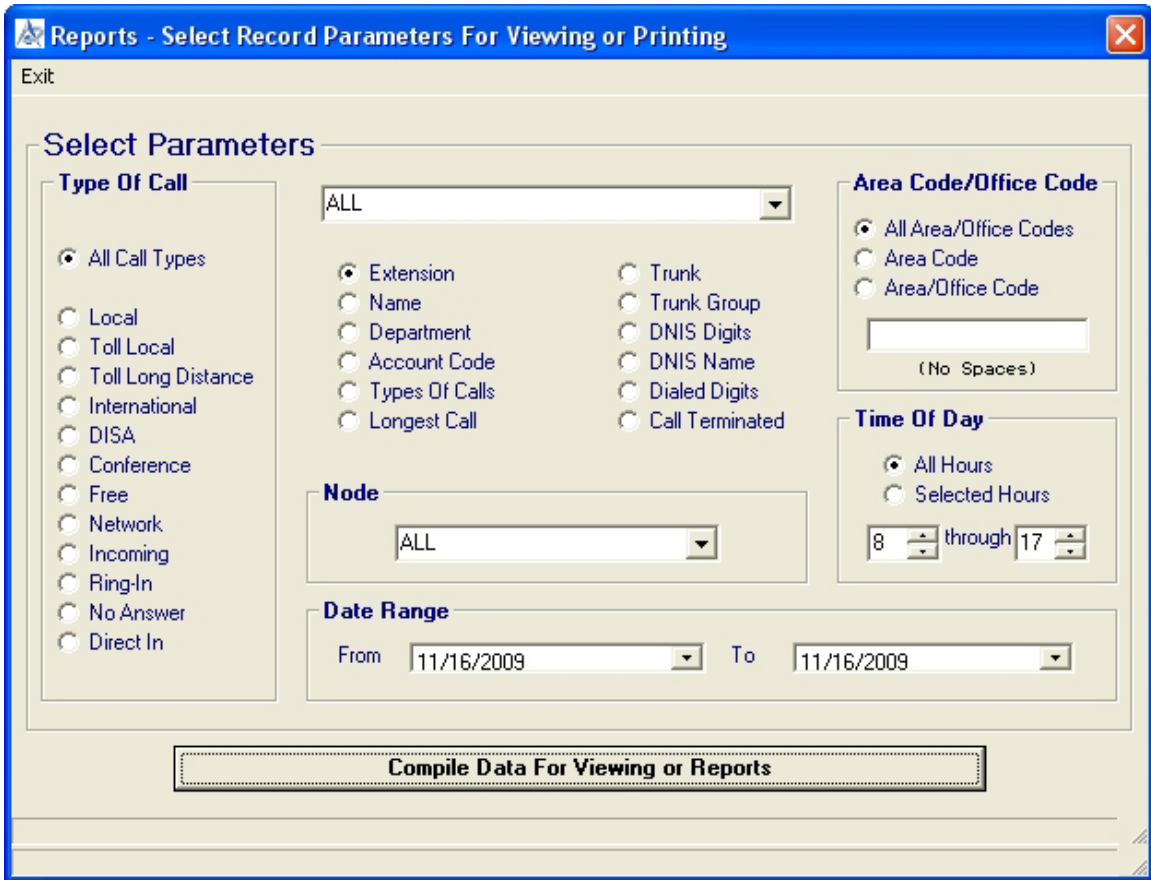
If *OA Collector* has not had an opportunity to capture call records, then viewing records and printing reports will produce no results. Give *OA Collector* a chance to capture some call records before entering this area.

OA Reporter does not have to be running in order for your call records to be captured. *OA Collector* is the only part of *OA Reporter* that must be running 24x7 to capture the call records.

When you start *OA Reporter*, from the main screen you will typically select *View Records/Print Reports*.

Setting the path and entering database information should only need to be done whenever changes have been made to your AXXESS system or *OA Collector's* KAR files location.

Below is the screen used for setting all the parameters when running *OA Reporter*. *OA Reporter* has almost any parameter associated with an AXXESS call record. This should allow for locating almost any scenario for proper management reporting.



Select Parameters

Select Parameters is the first screen you will see when *View Records/Print OA Reporter* is selected from the main screen.

OA Reporter provides literally hundreds of combinations. Everything from a specific type of call on a specific hour of the day, in a specific area code/office code, to all records collected. The choice is yours, and this screen is where you can select those parameters for your report.

Type of Call

The Inter-Tel AXXESS defines calls by the type of call made using the following:

- Local
- Toll Local
- Toll Long Distance
- International
- DISA
- Conference
- Free
- Network
- Incoming
- Ring-In
- No Answer
- Direct In

OA Reporter provides the selection of all these devices or any one of them individually. When selected, *OA Reporter* will sort the calls based upon the type of call.

After the type of call is selected, a number of other parameters to focus on the specific records you are interested in may be chosen.

Node

Use the drop-down box to select either ALL nodes or a specific node. If the node does not appear in the drop-down list, go to *OA Reporter* Database and enter the new node.

Device

Select the device from the following options:

- Extension
- Name
- Department
- Account Code
- Types Of Call
- Longest Call
- Trunk
- Trunk Group
- DNIS Digits
- DNIS Name
- Dialed Digits
- Call Terminated

When one of the above options is selected, use the drop-down box to define a specific device from that option or select ALL for all devices related to that option.

Call Terminated may be an unfamiliar call type. *Call Terminated* represents a flag the AXXESS call record (SMDR) places on a call record when the calling party disconnects from the call before the AXXESS user does.

This could happen naturally or it can be an indication the call was dropped. Use this reporting tool if you are experiencing dropped calls. This report may help identify the trouble.

Date Range

OA Reporter provides selection by date range. Use the drop-down calendar to select the *From* and *To* date.

If *OA Collector* has not captured call records for one of the dates that fall in the date range, there will not be any call records to view and a .KAR file will not be created. There can easily be days where no records are captured like weekends or holidays.

It can also be an indication *OA Collector* is not running due to some hardware or programming error.

Area Code/Office Code

OA Reporter allows assignment of a specific area code or an area code/office code combination.

The number dialed or the Caller ID number will scan for the selected area code/office code.

Do not use spaces when setting both area code and office code. For example, to sort for records in the 863-area code and the 682-office code, you would enter 863682.

Time Of Day

Report data can be sorted by calls made within a specific hour or hours. By choosing *Selected Hours*, call records will be sorted based upon the two selectable boxes.

The hours must be defined using military time, 00-23.

The hours selected include those hours. To select a single hour, define both boxes with the same number. For example, to see calls placed during the 10:00am hour only, both entries would be 10.

Select Parameters - Summary

The *Select Parameters* screen allows the user to define all specifics of a call record to produce the record set needed.

By default the *Select Parameters* screen is already set to show all calls for the current date. If you enter the screen and wish to see the current days calls, select *Compile Data For Viewing or Reports*.

If you wish to define something other than all calls on the current date, as described above, select your parameters and use the *Compile Data For Viewing or Reports*.

After pressing the *Compile Data For Viewing or Reports* button, there will be a delay as *OA Reporter* locates and sorts records to produce your data.

This delay can take some time depending on the number of records and the speed of the PC running *OA Reporter*.

It is not recommended to select a large date range that may produce thousands of call records. *OA Reporter* will process any request but the amount of time could be lengthy.

Once the calls are sorted, a box will appear that states, *Data Ready. View Results?* This is an opportunity to continue on and see the results or cancel out and set new report parameters.

Once *OA Reporter* starts compiling data, there is no way to stop the process, so you will have to wait until all data has been sorted.

Report Screen

The report screen provides for viewing the records and printing a report based upon the *Select Parameters* screen.

The screenshot shows a window titled "Station Report - ALL". It contains several sections:

- Date Range Record Summary:** From Date: 11/16/2009, To Date: 11/16/2009, Days w/Records: 1, # Of Records: 3.
- Report Totals:** Incoming: 0, Outgoing: 3, All Calls: 3, Duration: 01:01:53, Cost: \$6.30.
- Report Criteria:** Type Of Call: ALL, Station: ALL, Node: ALL, Area/Office Code: ALL, Time Of Day: ALL.
- Summary and Detail Tables:** A grid with columns for Station, Name, Dialed, Start, Duration, Cost, and Date. It is divided into Summary Total Calls, Summary Incoming Calls, Summary Outgoing Calls, Detail Total Calls, Detail Incoming Calls, and Detail Outgoing Calls.

Station	Name	Dialed	Start	Duration	Cost	Date
100	Operator	4077021000	11:20:00 AM	00:00:03	\$0.00	11/16/2009
118	Teri	8888301086	12:13:00 PM	00:59:13	\$6.00	11/16/2009
133	Randy	4077021000	9:31:00 AM	00:02:37	\$0.30	11/16/2009

At the bottom, there is a status bar: Type Of Call = ALL | Station: ALL | NODE: ALL

Date Range Record Summary

This frame contains the date range selected, how many days have records, and the total number of records. This provides a base for understanding the report record set.

The *Days w/Records* is not the number of days of the date range but number of days that had at least one or more records. There could be any number of reasons why a day has no records. Holidays, weekends, or for some reason the *OA Collector* is not operating.

The *# of Records* indicates the total number of records in this date range. It does not represent the number of records based upon any parameters selected, that figure is represented in another area of the report screen.

For example, there may be a total of 100 records in a date range selected but only 30 of them match the report criteria.

Report Totals

This frame of information provides a summary of report totals based upon the parameters set.

The entries are *Incoming*, *Outgoing*, *All Calls*, *Duration*, and *Cost*. *Duration* and *Cost* are for *All Calls* while *Incoming* and *Outgoing* are part of the *All Calls* total.

This frame is a quick resource for understanding the base of calls viewing.

Report Criteria

Report Criteria is a summary of the parameters set in the *Select Parameters* screen.

This is simply a convenient frame of information in the event you need a reminder of how the report data was sorted.

Report Folders

OA Reporter provides six folders representing the data compiled based on your parameters. These folders make a quick and easy view of the data collected.

A printed report can be generated to represent each folder.

The folders represent the following:

- *Summary Total Calls*
- *Summary Incoming Calls*
- *Summary Outgoing Calls*
- *Detail Total Calls*
- *Detail Incoming Calls*
- *Detail Outgoing Calls*

Simply click any of the folder names and that folder's data appears.

Select Report To Print

If a printed report is needed for the data appearing on the *Report Screen*, press the *Select Report To Print* button.

A box will appear providing a means to select any of the reports represented by the folder on the screen. Select the report and press the *Print Report* button.

The report will appear showing a summary of information about the report followed by the report data as represented in the report folder.

The report can be printed or exported as an HTML or text file.

OA Reporter SUMMARY

OA Reporter provides complex data sorting in a very simple format. It is our goal to provide comprehensive call accounting without the need for extensive training or having to call a customer support number every time you wish to use the program.

We think you will find this program logically moves through screens using common terminology. You will now have valuable information how your business operates to make more informed decisions. Managing your business will become easier.

Contact Office Automation (407-702-1000) with any questions.