

Updating the Organization Table

1. Start from the CAS main menu.
2. Highlight **Organization Configuration Menu** and press **Enter**.
3. To reassign an existing cost center *extension*, or *personnel* entry (along with its detail records) to another *department*, *cost center*, or *extension* (respectively), highlight the appropriate **Move... Between** function and press **Enter**. Then:
 - Press **D**.
 - Follow screen instructions to select the destination, the origin, and effect the transfer.
 - Press **E** to exit.
4. To add, delete, or, change individual entries, highlight **Edit Organization Table** and press **Enter**. Then:
 - Press **D**.
 - To view the next entry on this level, press **N**.
 - To view the prior entry on this level, press **P**.
 - To add an entry, press **A**, enter values and press **Esc**.
 - To remove an entry, press **R** and confirm.
 - To change an entry, press **U**, change values, and press **Esc**.
 - To move to a detail level, press **D**.
 - To return to master level, press **M**.
 - Press **E** to exit.

Updating the Account Code Table

1. Start from the CAS main menu.
2. Highlight **Site Configuration Menu** and press **Enter**.
3. Highlight **Edit Account Code Table** and press **Enter**.
4. Press **D**. Then:
 - To display the next entry, press **N**.
 - To display the previous entry, press **P**.
 - To add a new entry, press **A**, enter an *account code* and *account name* and press **Esc**.
 - To remove an entry, press **R**, type **y** to confirm, and press **Enter**.
 - To change an entry, press **U**, enter changes and press **Enter**.
 - To exit, press **E**.

Deleting Call Records from Storage

1. Start from the CAS main menu.
2. Highlight **System Configuration Menu** and press **Enter**.
3. Highlight **Delete Call Records from Storage** and press **Enter**.
4. Press **S**, enter a *cut-off date*, and press **Esc**.
5. Press **E** to exit.



INTUITY™

Call Accounting System
Quick Reference

Running Reports

1. Start from the CAS main menu.
2. Highlight **Reports Menu** and press **Enter**.
3. Highlight desired report type and press **Enter**.
4. For a Selection Report, press **N** until report of interest appears on display. Then:
 - to define report, press **U**, enter values and **Esc**.
 - to generate report now, press **G**. If necessary, press **U**, enter values and **Esc** or, simply, press **G**.
5. For other reports, highlight desired report and press **Enter**. Then:
 - For an Abandoned Calls Report:
 - to define report, press **U**, enter values and **Esc**.
 - to generate report now, press **G**. If necessary, press **U**, enter values and **Esc** or, simply, press **G**.
 - For any Organization Report, press **N** until report of interest appears on display. Then:
 - to define report, press **U**, enter values and **Esc**.
 - to generate report now, press **G** if necessary, press **U**, enter values and **Esc** or, simply, press **G**.
 - For any other report, press **U**, enter changes, and **Esc** or, simply, press **G** to generate report now.

Running Reports

NOTE

If you sent the report to the terminal, the screen shows one page at a time. Move through the pages using the arrow keys, the **Enter** key, or the **Page Up** and **Page Down** keys.

Scheduling Reports

1. Start from the CAS main menu.
2. Highlight **Reports Menu** and press **Enter**.
3. Highlight **Schedule Reports** and press **Enter**.
4. Press **N** until schedule of interest appears on display.
5. Press **U** and enter a *report code* from the list in the next panel.
6. Enter any other values and press **Esc**.
7. For a Selection Report, the procedure is complete.
8. For other reports, press **D**. Then, if necessary, press **U**, change values on display, and press **Esc**.
9. Press **E** to exit.

Report Codes

Code ANI/Demographics Reports

NPAI	Area Code Report for Incoming Calls
NPAO	Area Code Report for Outgoing Calls
CSI	City/State Report for Incoming Calls
CSO	City/State Report for Outgoing Calls
ACR	Abandoned Calls Report

Code Selection Report

SRn	Selection Report (<i>n</i> = 1 to 30)
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Code Organization Reports by Site

ODSn	Organization Detail Report (<i>n</i> = 1 to 9)
DSSn	Department Summary (<i>n</i> = 1 to 9)
CSSn	Cost Center Summary (<i>n</i> = 1 to 9)
ESSn	Extension Summary Report (<i>n</i> = 1 to 9)
OSSn	All Summary by Site Reports (<i>n</i> = 1 to 9)

Code Account Code Reports

ACD	Account Code Detail Report
ACS	Account Code Summary Report

Code CDR Analysis Reports

BDT	Busy Day Trunk Utilization Report
BHT	Trunk Group Busy Hour Report
CTY	Call Type Report
DATE	Date Report
DURA	Duration Report
STRF	Site Report
TIME	Time of Day Report
TRNK	Trunk Group Report
ACDR	All CDR Analysis Reports