TSA SOFTWARE SOLUTIONS

CAAB

CAAB XL

User Guide

February 2021

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TSA SOFTWARE SOLUTIONS

CAAB

CONTENTS

1 TSA SOFTWARE LICENCE AGREEMENT 6

8. TECHNICAL SUPPORT 8

2 INTRODUCTION 12

2.1 WHAT IS CAAB XL? 12

2.2 ABOUT THE CAAB XL USER GUIDE 13

2.2.1 Navigating the User Guide 13

2.3 CAAB XL HELP 13

2.3.1 The TSA Help Desk 13

2.3.2 Check CAAB XL Software Version 13

3 CAAB XL APPLICATIONS OVERVIEW 14

4 NAVIGATING CAAB XL 15

4.1 SCREEN LAYOUT 15

4.1.1 The Shortcut Window 15

4.1.2 The Explorer Tree 16

4.1.3 The Application Window 16

4.2 MENU BAR 18

4.3 TOOLBAR LAYOUT 19

4.3.2 Search Mode 22

4.4 CUSTOMISING THE CAAB XL SCREEN DISPLAY 25

4.4.1 Sort by Column Headings 25

4.4.2 Adjust Column Width 26

4.4.3 Display Selected Fields 26

5 REPORTS 27

5.1 REPORT PARAMETERS 27

5.2 REPORT FILTERS 28

5.2.1 Standard Filters – Call Date Range and Call Time Periods 28

5.2.2 Call Date Range ... *29*
5.2.3 Report Flags ... *29*
5.2.4 Standard Filters ... *30*
5.2.5 Advanced Filters ... *31*
5.3 REPORT GENERATION ... 35
5.3.1 Export a Report ... *36*
5.4 STANDARD REPORT GROUPS ... 37
5.4.1 Management group Report Types ... *38*
5.5 ADDITIONAL REPORTS ... 39
5.5.1 Unregistered Resources ... *39*
5.5.2 GST ... *39*
5.5.3 Top N Reports ... *39*
5.5.4 Inbound ... *40*
5.5.5 Unused Resources ... *40*
5.6 CARRIER COMPARISONS ... 40
5.7 USAGE AND TRAFFIC REPORTS ... 40
5.8 FAVOURITES ... 41
5.9 ADVANCED REPORT OPTIONS ... 41
5.9.1 Drilling Down Within a Report ... *41*
6 ADMINISTRATION ... 42
6.1 OVERVIEW OF ADMINISTRATION ... 42
6.1.1 Department Administration ... *44*
6.1.2 Staff Administration ... *48*
6.1.3 Account Code Administration ... *51*
6.1.4 Scheduled Reports ... *53*
6.2 SETUP WIZARDS ... 55

ABN 95 060 089 205
16 Mayneview Street Milton QLD 4064
PO Box 1531 Milton BC QLD 4064
Phone +61 7 3858 6300
Email support@tsa.com.au Web www.tsa.com.au

6.2.1 Site Configuration Wizard ... 56
6.2.2 Trunk Wizard ... 58
6.2.3 Extension Wizard ... 62
6.2.4 Autodetect Wizard ... 63
6.3 CATEGORY ADMINISTRATION ... 64
6.4 SITE DATA ... 65
6.4.1 Route/Trunk Administration ... 65
6.4.2 Authority Code Administration ... 66
6.4.3 Extension Administration ... 67
6.5 SECURITY ... 69
6.5.1 Groups ... 69
6.5.2 Users ... 70
6.6 CONFIGURATION DATA ... 71
6.6.1 Mark-ups ... 71
6.6.2 Business Calendar ... 74
6.6.3 SMDR Alerts ... 74
7 DATABASE TOOLS ... 76
7.1 CALL TABLE UTILITIES ... 76
7.1.1 Re-cost Data ... 77
7.1.2 Archive Data ... 79
7.1.3 Restore Data ... 80
7.1.4 Delete ... 81
7.1.5 Raw Data Import ... 82
7.2 BROWSE CALL TABLES ... 83
8 APPENDIX A – CALL DATA FIELDS ... 84
9 APPENDIX B - WILD CARDS & EQUATION ARGUMENTS ... 87

ABN 95 060 089 205
16 Mayneview Street Milton QLD 4064
PO Box 1531 Milton BC QLD 4064
Phone +61 7 3858 6300
Email support@tsa.com.au Web www.tsa.com.au

9.1.1 = (Equals) *87*

9.1.2 > (Greater Than) *87*

9.1.3 < (Less Than) *88*

9.1.4 >= (Greater Than or Equal To) *88*

9.1.5 <= (Less Than or Equal To) *89*

9.1.6 <> (Not Equal To) *89*

9.1.7 !< (Not Less Than) *90*

9.1.8 != (Not Equal To) *90*

9.1.9 !> (Not Greater Than) *91*

9.1.10 Like *92*

9.1.11 Not *94*

10 APPENDIX C **95**

10.1.1 Digital Translation *95*

11 APPENDIX D – FREQUENTLY ASKED QUESTIONS (FAQ) **96**

When I load my CAAB License details I receive the message “Invalid Unlock Code”, even though the code matches the one on the license sheet. Why? 96

Why is my report empty? 96

Why are there no calls in *Browse Call Table*? 96

How do I run a workstation setup? 96

Why do I get an “Invalid Connection” message when opening CAAB? 97

Why won’t my SMDR Service start? 97

ABN 95 060 089 205
16 Mayneview Street Milton QLD 4064
PO Box 1531 Milton BC QLD 4064
Phone +61 7 3858 6300
Email support@tsa.com.au Web www.tsa.com.au

1 TSA SOFTWARE LICENCE AGREEMENT

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IF YOU AGREE TO THE TERMS AND CONDITIONS, PLEASE CLICK ON THE "I ACCEPT" BUTTON AT THE END OF THIS AGREEMENT AND YOU WILL THEN BE BOUND BY THIS AGREEMENT AND YOU WILL BE ALLOWED TO ACCESS AND OPERATE THE SOFTWARE. BY OPERATING THE SOFTWARE YOU AGREE TO BE BOUND BY THIS AGREEMENT. IF YOU DO NOT AGREE TO THE TERMS AND CONDITIONS, PLEASE CLICK ON THE "I DO NOT ACCEPT" BUTTON AT THE END OF THIS AGREEMENT. IF YOU CHOOSE THE "I DO NOT ACCEPT" OPTION, YOU WILL NOT BE ALLOWED TO ACCESS THE SOFTWARE.

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1.1 This agreement takes effect from the time you commence installing the Software by agreeing to these terms and conditions through clicking the 'I ACCEPT' button

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2.1 A licence to operate the Software is provided to you in contemplation of you paying the Fee to TSA

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3.1 Specific conditions of use apply to the type of licence you have acquired from TSA. The Software is licensed based on the number of devices connected and or collected from.

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This Agreement allows you to install one Instance of the Software on the hard disk and operate this instance of the Software in one virtual or physical Operating System Environment on a single assigned Server. That server is the licensed server for your Software Licence. You may not assign the same licence to more than one Server.

4. Restrictions on Use

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5.1 All Intellectual Property Rights now existing or in future arising in the Software and/or Related Documentation are owned by and remain the property of TSA or its suppliers and are protected by national laws and international treaty provisions

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5.4 Pursuant to clause 5.3, you will take all such steps and do all such things necessary as directed by TSA to give effect to the assignment of any Intellectual Property Rights that arise directly or indirectly from your use of the Software and/or Related Documentation

6. Termination

6.1 This Agreement is effective until terminated

6.2 This Agreement will terminate automatically if you fail to comply with any provision of this Agreement. No notice is required to terminate this Agreement if you fail to comply with any provision of this Agreement.

6.3 Upon notice of termination from TSA, you must, at TSA's option:

(a) Return the Software and any Related Documentation (including notes made in relation thereto) to TSA and permanently delete or destroy any further copies of the Software and/or Related Documentation; or

(b) Destroy the Software and any Related Documentation (including copies and/or notes made in relation thereto)

6.4 Upon termination of this Agreement, all rights that have accrued to TSA are not affected. In addition, clauses 5, 9 and 10 of this Agreement remain in force.

7. Update Policy

7.1 TSA may create, from time to time, updated versions of the Software at TSA's absolute discretion. TSA is under no obligation to provide or release updated versions of the Software.

7.2 TSA may make any such updated versions available to licensees who have paid the update fee

7.3 If you acquire an updated version of the Software, then all copies of the previous versions must be returned to TSA or destroyed at TSA's election and not used, except for one copy which may be retained solely for archival purposes

8. Technical Support

8.1 TSA neither offers nor provides technical support of the Software under the Agreement. The Person from whom you purchased the licence may provide technical support for the Software under terms and conditions agreed between you and that Person and you hereby release TSA from any liability, loss or claim arising from support of the Software provided by any other Person.

9. Warranty and Indemnity

9.1 In addition to other limitations upon TSA's liability set out in this clause, TSA does not warrant or promise that the Software and/or Related Documentation:

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(b) is error or virus free;

(c) can be used without interruption; or

(d) will be accurate, effective and/or reliable.

9.2 Furthermore, TSA does not warrant or promise that any errors in the Software and/or Related Documentation will be corrected

9.3 You must rely upon your own investigations as to whether the Software and/or Related Documentation will meet your needs and the environment in which the Software is to be operated

9.4 TSA will not be liable under or in connection with this Agreement for any damage to your computer system, loss of income, loss of actual or anticipated profits, loss of business, loss of anticipated savings, loss or damage to or corruption of data, loss of goodwill, loss of reputation or for any direct or consequential loss or damage of any kind howsoever arising

9.5 You irrevocably indemnify TSA against any liability, claim or proceeding that is made or commenced against TSA, and against any liability, loss (including consequential loss), damage or expense that is incurred or suffered by TSA arising from a breach of this Agreement by you or as a result of your use of the Software

9.6 To the maximum extent the law allows, TSA excludes all other conditions, warranties, terms and undertakings, express or implied, statutory or otherwise, relating to the Software and Related Documentation or technical support including but not limited to warranties of quality, performance, satisfactory quality or fitness for a particular purpose

9.7 Any non-excludable liability of TSA is limited, at TSA's election, to repairing or replacing the Software or providing equivalent software, provided that in all circumstances TSA's maximum liability to you for any cause whatsoever will be limited to the amount paid for this licence and TSA can in its discretion decide to refund you at any time instead of repairing or replacing the Software.

10. Confidentiality

10.1 You must not disclose any of TSA's Confidential Information whether marked confidentially or not, immaterial of how it came into your possession except when:

(a) disclosure is necessary to comply with your obligations under this Agreement; and/or

(b) the disclosure is to any of your officers, employees, agents or consultants to the extent that person needs to know the Confidential Information in order to perform a function in connection with the Software. In such instances, you must take all reasonable steps to ensure that the person to whom a disclosure is made is bound by this confidentiality provision; and/or

(c) the disclosure is required by law

10.2 You may not copy any Confidential Information which you are not allowed to disclose and may only use such information to the extent necessary to make appropriate use of the Software and/or Related Documentation

10.3 Your obligation not to disclose TSA's Confidential Information survives termination of this Agreement

10.4 If this Agreement is terminated then you must return to TSA or destroy, at TSA's discretion, all Confidential Information, including any works derived from Confidential Information

11. Miscellaneous

Approvals and consents

11.1 Unless this Agreement expressly provides otherwise, a party may give or withhold an approval or consent in that party's absolute discretion and subject to any conditions determined by the party. A party is not obliged to give its reasons for giving or withholding a consent or approval or for giving a consent or approval subject to conditions.

11.2 Where this Agreement refers to a matter being to the 'satisfaction' of a party, this means to the satisfaction of that party in its absolute discretion

Further acts

11.3 Each party must at its own expense promptly execute all documents and do or use reasonable endeavours to cause a third party to do all things that another party from time to time may reasonably request in order to give effect to, perfect or complete this Agreement and all transactions incidental to it

Severability

11.4 If a Court or other competent authority decides that any provision of this Agreement is void or otherwise ineffective in whole or in part than any other part of the other terms and conditions of this Agreement shall continue in full force and effect

Entire agreement

11.5 This Agreement constitutes the entire agreement between the parties with respect to the subject matter of this Agreement and supersedes all previous agreements, arrangements or undertakings between the parties relating to the subject matter of this document and any representations or warranties previously given or made

Assignment

11.6 You may not assign this Agreement nor any of the rights or obligations hereunder nor sub-licence the use (in whole or in part) of the Software and/or Related Documentation without the prior written consent of TSA, which may be given at TSA's absolute discretion

Notices

11.7 All notices shall be given:

(a) To TSA via email at support@tsa.com.au ; or

(b) To you at either the e-mail or postal address you provide during any ordering process

11.8 Notices will be deemed received when an e-mail is received in full (or else on the next business day if it is received on a weekend or a public holiday in the place of receipt) or 3 days after the date of posting

Goods and services tax

11.9 Where:

11.9.1 A party (Supplier) makes a taxable supply to another party (Recipient), the Recipient must pay to the Supplier an additional amount equal to the GST payable by the Supplier (unless the consideration for that taxable supply is expressed to include GST). The additional amount must be paid when any consideration for the taxable supply is first paid or provided. The Supplier must provide to the Recipient a tax invoice at the time of payment.

11.9.2 A party indemnifies, reimburses or makes a contribution (Contribution) to the other party, and the other party can obtain an input tax credit on an acquisition associated with the Contribution, the amount of the Contribution for the first party is reduced by the amount of that input tax credit. The reduction is to be made before any increase under clause 11.9.1.

11.9.3 Terms are used in this clause they have the meanings given to them in the A New Tax System (Goods and Services Tax) Act 1999 (Cth)

Governing law

11.10 This document is governed by the law of Queensland and the parties submit to the exclusive jurisdiction of its Courts. The parties will not object to the exercise of jurisdiction by these Courts, either for forum, non conveniens or on any other basis

12. Definitions

12.1 **Confidential Information** means information, including any of the following information (whenever it was obtained) in relation to the party's:

(a) Business, operations or strategies

(b) The terms of this Agreement

(c) Information designated as confidential by a party

(d) Information acquired by the other party solely by virtue of provisions of this Agreement

(e) Intellectual property or other property

(f) Actual or prospective customers, clients or competitors

Information is not confidential in any of the following circumstances:

(a) It is in the public domain, unless it came into the public domain by a breach of confidentiality

(b) It is already known by the other Person at the time this Agreement is entered into

(c) It is obtained lawfully from a third party without any breach of confidentiality

12.2 **Fee** means the fee charged by TSA for the Software

12.3 **Instance** means the Software is installed on a Server by executing the Software's setup or install procedure or by duplicating an existing instance

12.4 **Intellectual Property Rights** means in relation to TSA or its suppliers, all and any patents, patent applications, trademarks, service marks, trade names, registered designs, unregistered design rights, copyrights, know how, trade secrets, domain names, internet addresses, rights in Confidential Information, and all and any other intellectual property rights, whether registered or unregistered, and including all applications and rights to apply for any of the same now or in the future entered into or enjoyed by TSA or its suppliers.

12.5 **Operating System Environment** means one Instance of an operating system and Instances of applications, if any, configured to run on that operating system Instance. An Operating System Environment may be physical or virtual.

12.6 **Operate** means executing or running the Software on a computer under your control, whether or not the computer is usually under your control or not

12.7 **Person** means any legal person or entity but also includes a partnership, trust or other entity which is not a legal person

12.8 **Personnel** means officers, employees, representatives, agents, professional advisors or subcontractors of you

12.9 **Related Documentation** means any documentation that is provided to you with the Software or is ancillary to the Software

12.10 **Server** means a physical hardware system capable of running the Software. A hardware partition or blade is considered to be a separate physical hardware system.

12.11 **Software** means the software provided to you under the terms of this document.

12.12 **Third Party** means a person not a party to this Agreement

13. Interpretation

13.1 In the interpretation of this Agreement, the following provisions apply unless the context otherwise requires:

(a) Headings are inserted for convenience only and do not affect the interpretation of this Agreement

(b) A reference in this document to a business day means a day other than a Saturday or Sunday on which banks are open for business generally in Brisbane, Australia

(c) If the day on which any act, matter or thing is to be done under this document is not a business day, the act, matter or thing must be done on the next business day

(d) A reference in this Agreement to dollars or $ means Australian dollars and all amounts payable under this Agreement are payable in Australian dollars

(e) A reference in this Agreement to any law, legislation or legislative provision includes any statutory modification, amendment or re-enactment, and any subordinate legislation or regulations issued under that legislation or legislative provision

(f) A reference in this Agreement to any agreement or document is to that agreement or document as amended, novated, supplemented or replaced

(g) A reference to a clause, part, schedule or attachment is a reference to a clause, part, schedule or attachment of or to this Agreement

(h) An expression importing a natural person includes any company, trust, partnership, joint venture, association, body corporate or governmental agency

(i) Where a word or phrase is given a defined meaning, another part of speech or other grammatical form in respect of that word or phrase has a corresponding meaning

(j) A word which denotes the singular also denotes the plural, a word which denotes the plural also denotes the singular, and a reference to any gender also denotes the other genders

(k) A reference to the word ‘include’ or ‘including' is to be construed without limitation

(l) A reference to this document includes the agreement recorded in this document.

2 INTRODUCTION

2.1 WHAT IS CAAB XL?

CAAB XL is a flexible, multi-site Call Accounting application for Windows. It is designed to interface with telephone systems to capture data for calls made and received. CAAB XL provides essential information organisations requires for controlling communication costs.

At CAAB XL's core is the **Management Console**. Able to be run from across a LAN or WAN, providing a single access point for all operations. Features include Microsoft-style interface, a configurable shortcut bar and Setup Wizards. Its expandable architecture allows existing and future modules to be integrated without re-installation.

The **Reporting Module** provides access to all information in the database, reporting on telephone calls by extension, authority code, account code, personnel, room and department. Reports can be produced in text, graphic, detailed or summary formats. Report output can be redirected to screen, printer, email or file; and can be formatted for MS Excel, Lotus, MS Exchange, MS Mail, MS Word, MS Access, HTML, Data Interchange or a customised format for organisations requiring direct import to a third party Software Application. All reports are organized into easy-to-navigate groups.

The **SMDR (Station Message Detail Record) call collection module** calculates call costs and records calls. It scales for small key systems or large telephone system networks, allowing real-time monitoring of calls from any management console.

The **Database Management module** provides the tools to configure and administer the CAAB XL database. It includes call-record archives, restore and delete options to maintain data at manageable levels, on-line integrity checking and facilities to export and import data.

The **Multi-Site Module** consolidates call data from different phone systems and different sites, and can handle tens of thousands of calls per hour.

The **Hospitality Console**, a front-office module, is a reservation and guest-billing system for small-to-medium hotels and motels.

The **Operator Directory module** is a user-friendly directory for switchboard and reception operators, which includes e-mail integration for delivery of operator received phone messages. It allows for multiple users to update concurrently.

The **Traffic Analysis module** provides network analysis for trunk routes in and out of the telephone system.

2.2 ABOUT THE CAAB XL USER GUIDE

The CAAB XL User Guide acts as an operator guide for software users and includes comprehensive reference information. Refer to the Installation Guide for documentation regarding initial installation and configuration.

The User Guide assumes the reader is familiar with concepts such as:

- Computer terminology and basic networking (WAN/LAN) concepts
- Windows Operating Systems and common functionality
- Business applications ie. Excel, Access, Exchange

2.2.1 Navigating the User Guide

The User Guide has been designed as a reference tool, and can be navigated using:

- Table of Contents
- Go To Page (**SHIFT-CTRL-N** to go to page number)
- Word/Phrase Search (Use **CTRL-F** to search the documentation)

2.3 CAAB XL HELP

Whenever the notation *"What's This"* appears, it can be clicked to display Help information about the visible page.

2.3.1 The TSA Help Desk

TSA Software Solutions provides a Help Desk service for all clients.

In Australia, call **1300 889 588**

Outside of Australia call **+61738586300**

Service operates Monday to Friday 8:00 AM to 5:00 PM (EST).

2.3.2 Check CAAB XL Software Version

The TSA Help Desk requires the current Software Version to provide support. To view information about the software version of CAAB XL, click *Help* and select *About CAAB XL*

3 CAAB XL APPLICATIONS OVERVIEW

CAAB XL provides these Applications:

- Reports
- Administration
- Database tools

Reports

The Reports function recalls and outputs call data in a specified report format, allocating costs and duration to the relevant extension, department, cost centre, trunk and/or route.

Administration

The Administration facilities provide a range of reports for administration of Business units, Staff, Charge codes, Mobile phones, Carrier data, Sites, and Configuration data.

This section also includes setup Wizards and report automation features.

Database Tools

Database tools provide access to the call database and the facilities to import and export data.

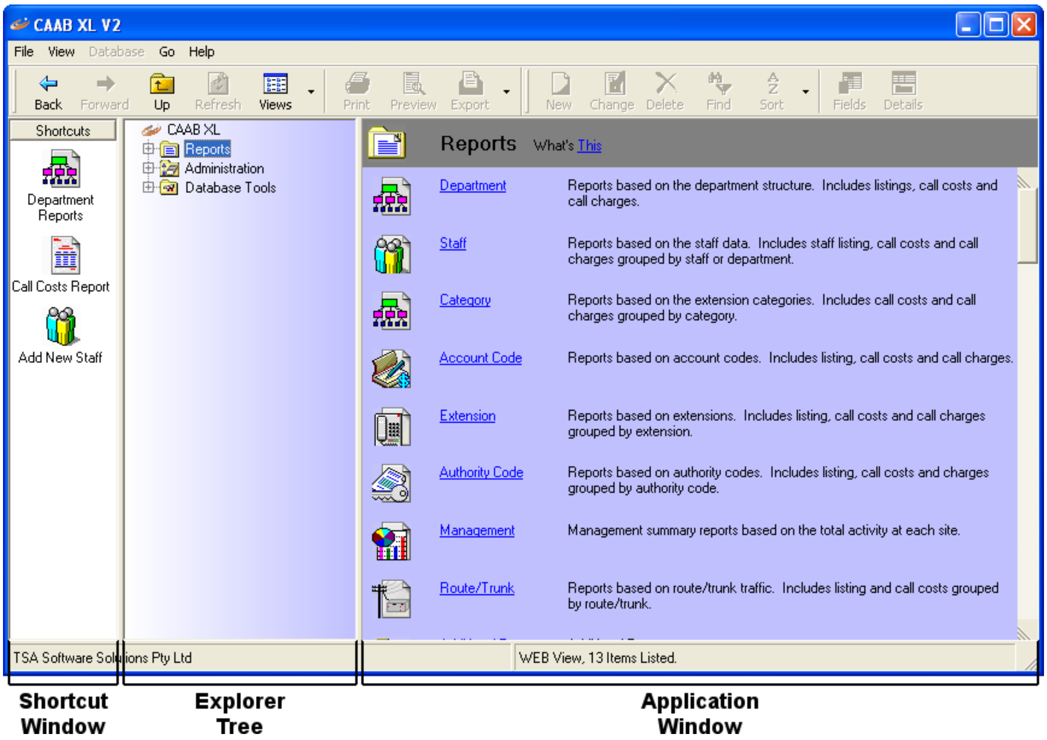
![TSA Software Solutions]

4 NAVIGATING CAAB XL

4.1 SCREEN LAYOUT

The CAAB XL application provides an easy-to-navigate screen layout divided into three sections:

- Shortcut Window
- Explorer Tree
- Application Window



CAAB XL Screen Layout

4.1.1 The Shortcut Window

Commonly used applications can be set up and displayed in the Shortcut Window for easy access (without having to navigate within the Explorer tree).

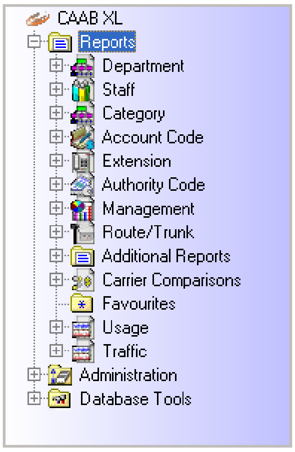
To Set Up a Shortcut:

- Click and drag a folder or application into the Shortcut Window
- Release the mouse button to add the Shortcut
- Right-click the new Shortcut to rename it if required

4.1.2 The Explorer Tree

The Explorer Tree provides access to the entire range of applications within CAAB XL using the mouse or the up/down keys on the keyboard.

Where a ✚ appears beside an entry, click on this to expand the contents.

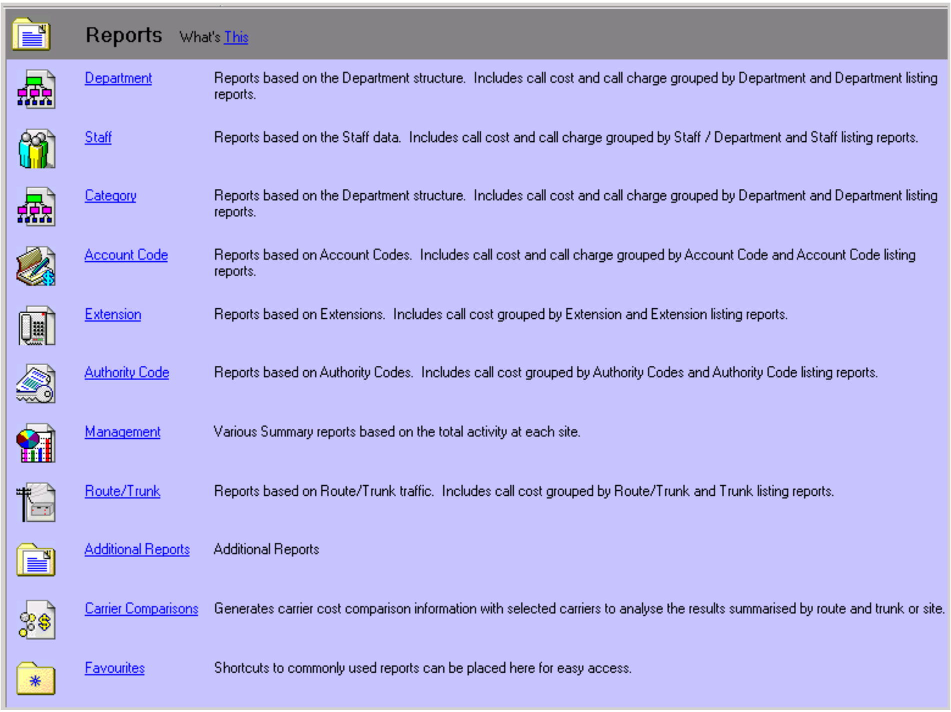


CAAB XL Explorer Tree

4.1.3 The Application Window

The Application Window displays options that correspond to the selection in the explorer tree.

The example below shows the Reports Application Window.



Application Window – Reports

To activate *What's* *This* for the Report application:

- Click *What's* *This*
- A popup displays information about the selected application:

When entering data, or viewing a generated report, the Application Window displays applicable database content.

Reports – Staff - Call Charges By Staff Report – Entering Data

4.2 MENU BAR

The Menu bar contains several menus that provide a range of functions to CAAB XL.

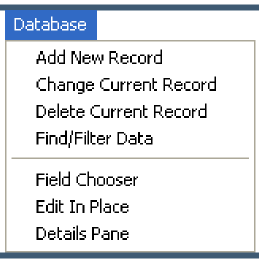
File Menu

The File menu provides various print, export and database options, and exit.

View Menu

- The View menu provides a range of options to change how the display is presented.
- Options can be checked or unchecked, and views can be changed to suit individual requirements.

Database Menu

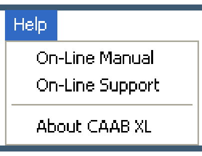


- The Database menu provides the facilities to add a new record, change a current record and delete a current record.
- These menu options are an alternative to using the corresponding Toolbar buttons.

Go Menu

- The Go menu provides four options for navigating the display. Go back, forward, up one level or directly to the Home Page.

Help Menu



- The Help menu provides access to the PDF manual, On-Line Support website and CAAB XL version information.

4.3 TOOLBAR LAYOUT

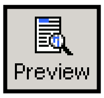
There are a wide variety of functions that can be performed using the toolbar at the top of the screen. Many of these functions will be familiar already.

CAAB XL Toolbar

4.3.1.1 Toolbar Report Buttons

The Report facility works in conjunction with Print, Preview and Export on the Toolbar:

- Queues the report to the printer. If more than one printer is available, select from a list of printers.



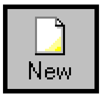
- Displays the generated report output on the screen. This opens options to **print**, **save**, **email** or **perform drill down** for further details. Report can be displayed in full screen format or split screen in the Application Window.

- Displays the Auto Run Options window where report data is set in PDF or Excel formats. Options are available to select an Effective Date, and configure the Auto Run option.

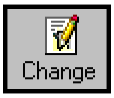
4.3.1.2 Toolbar Database Buttons

Database functions are selectable when the Application Window displays a table of records.

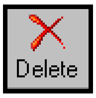
Eg. Administration | Staff, or Database Tools | Browse Call Table.



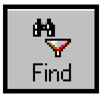
- Provides the facility to enter a new record into the database being accessed.



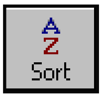
- Displays details of a nominated database record.
- The record can be selected and edited. Click *Change* to save.



- Deletes a selected record

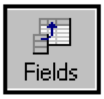


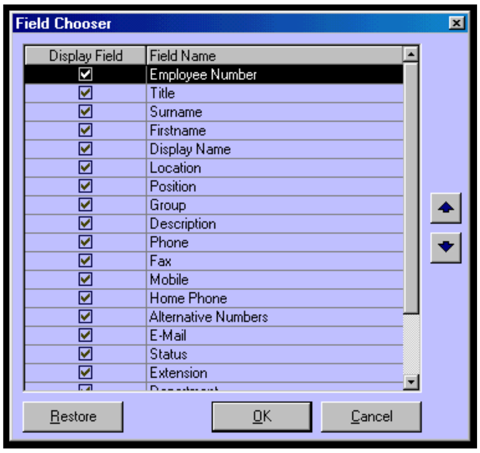
- *Find* allows the database to be searched in a variety of ways. The first thing it does is displays or hides the "Search and Filter". For more information, refer to the *Search Mode* section.



- Allows the database to be sorted by a particular field in either ascending or descending order

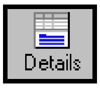
- *Fields* displays the Field Chooser Window. The Display Field checkboxes can be checked to select fields to display. This allows a more streamlined display with only the information required from the database, eliminating clutter in the Application screen. These settings are unique to each user on the system.





- The Restore button resets the display to the default settings.

- Allows table fields to be edited without opening the full record display.



- Shows/hides the detail panel under the application screen. This panel contains the details of the record to which the cursor is currently pointing.

4.3.2 Search Mode

The Search and Filter screen allows three levels of search functionality:

- Search
- Standard Filter
- Advanced Filter

4.3.2.1 Search

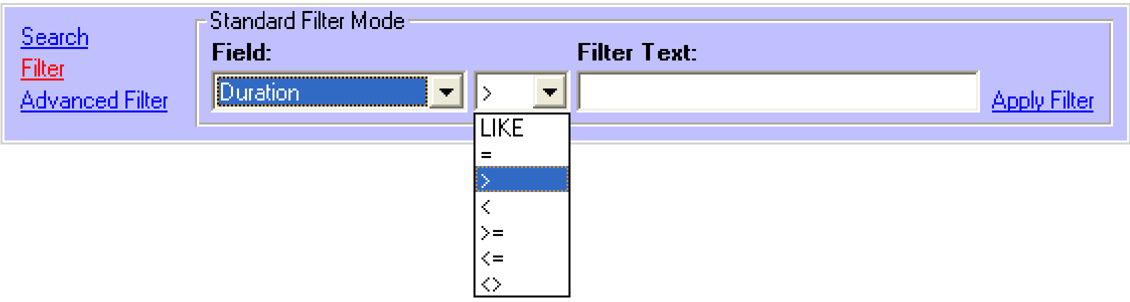
Within Search, these facilities are provided to search information:

Search

- *Search Field*: Select a Search Field from a drop down menu
- *Search Text*: Enter data for CAAB XL to locate
- *Find Previous/Find Next*: Once the Search parameters have been entered, use the Up and Down arrows to move from one matching record to another.

4.3.2.2 Standard Filter Mode

Filter Mode allows a search term from a dropdown list, and a Filter Equation to be applied.



Search – Standard Filter

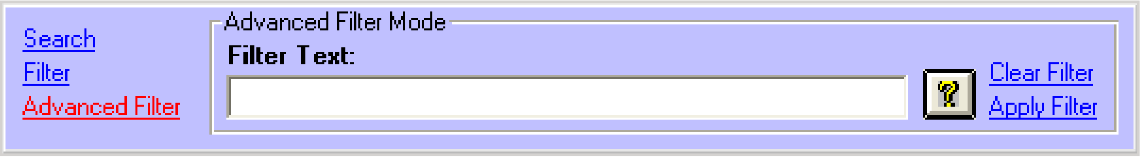
The Filter Equation provides the facility to apply equation checks:

- \> Greater than
- < Less than
- = Equal to
- <> Not equal to
- LIKE Equals the filter text (allows use of * and ? wildcards)

Click *Apply Filter* to apply.

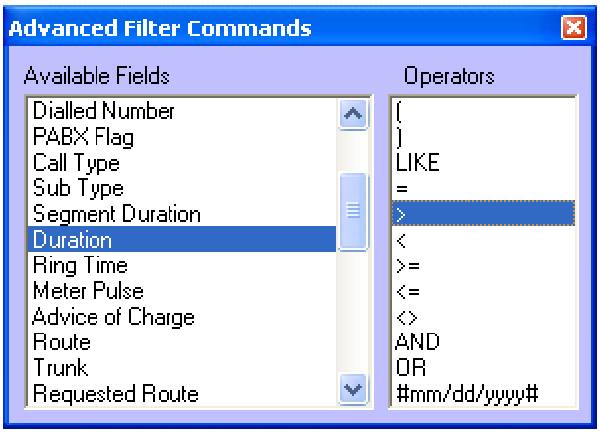
4.3.2.3 Advanced Filter Mode

Advanced filtering allows multiple filtering parameters to be applied. This can be achieved by entering the search terms into the filter text directly, or using the Advanced Filtering Command table to build complex filter strings..



Advanced Filter

- Click to launch the Command table:



Advanced Filter – Command table

- By double-clicking on either *Available Fields* or *Operators* create a formula to be used in the filtering. A simple example of this would be:
  - Double-click **Duration**
- Double-click **>**

This adds the search term to the Advanced Filter:

- Add a value to the search string:

Advanced Filter – Create a search string

Below are examples of more complex formulae and the results they will produce:

Filter text	Result
`Employee Number > 1001`	All employees with numbers over 1001.
`Position LIKE AB*`	All records with positions starting with "AB".
`Group = Research and Location=A27`	Displays Research members in A27.
`Description = "Room 702"`	Entries with "Room 702" in their description.
`Surname = "Smith" OR Surname = "Brown"`	All entries with Smith or Brown as surname.

Filter Equation Formulae/Results

4.4 CUSTOMISING THE CAAB XL SCREEN DISPLAY

CAAB XL Screen Layout can be customised to individual user requirements.

Some of the options available allow:

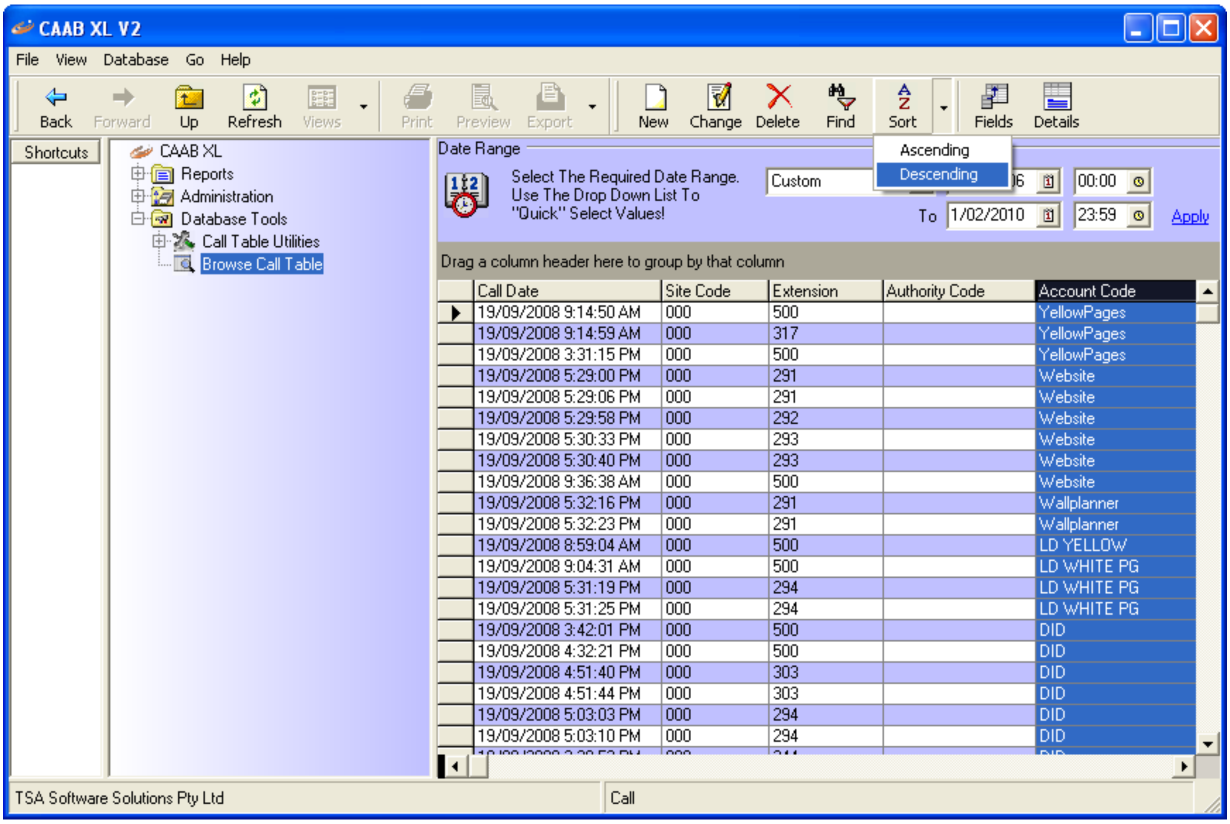
- Sort data by column headings
- Change the column layout
- Adjust the column widths
- Display selected fields

Settings can be changed at any time to suit the task being worked on.

4.4.1 Sort by Column Headings

There are various ways to sort data by column heading. The instruction shows the easiest way:

To Sort data by Column Headings:



Column Heading – Sort Descending

- Highlight the column header to sort by
- Click *Sort* (use the drop down to sort descending)

4.4.2 Adjust Column Width

Column width can be adjusted to suit the data that will be displayed in a table.

To Change Column Widths:

Adjust Column Width

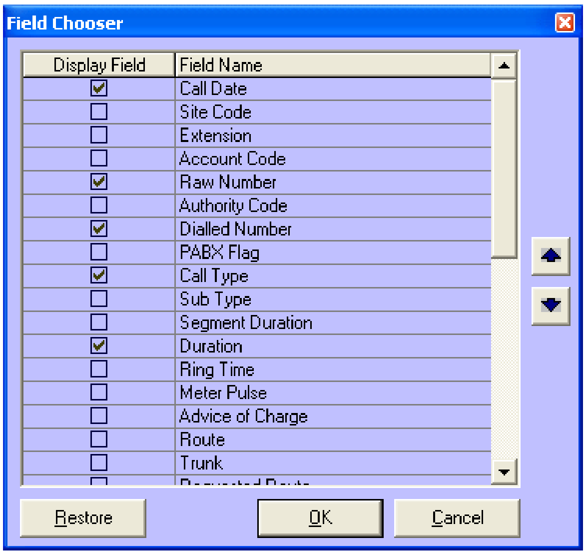
- Place the cursor on the line between the column headers
- When the ✛ cursor displays, click and drag the column edge

4.4.3 Display Selected Fields

The Field Layout Editor allows table data to be displayed for selected fields only, eliminating irrelevant information from being visible.

To open the Field Layout Editor – click the Fields button on the Toolbar.

> *The Fields button is active only if you are working within a Database.*



Field Layout Editor – Select fields to display

- Check fields to include, and uncheck fields to be omitted
- Click *OK* to apply
- Click *Restore* to return to a previous set of selected fields, or *Cancel* to exit without saving
- Use the arrow keys to change the order fields are presented

5 REPORTS

CAAB XL Reports provides the facility to generate reports and manage call accounting.

5.1 REPORT PARAMETERS

The CAAB XL Reports Application uses the parameters shown below for accounting Report generation purposes. Go to *CAAB XL → Reports*.

Report type	Parameter description
Department	Staff members are grouped in CAAB XL by Department. CAAB XL provides reports with detailed call accounting data at Department level.
Staff	Accounting reports can be generated to allocate call costs to each staff member.
Category	Bills and Accounts can be generated, allocating call costs to Clients and calculate "On-The-Phone" duration for charging staff-to-client time.
Extension	Accounting can be generated to allocate call costs to each extension of the Telephone System.
Route/Trunk	Reports can be generated to provide actual cost, marked up charges, call type and destination analysis grouped by the Routes/Trunks that carried the calls.
Management	Provide actual cost, marked up charges, call type and destination analysis grouped by site.
Call Traffic	Analysis of call traffic in various formats.
Carrier comparison Summary	Reports carrier cost comparison information with selected carriers to analyse the results grouped by Route, Trunk or Site. This report assists to analyse the merits of one carrier over another.
Additional Reports	Additional reports comprise a variety of reports that provide information such as, Unregistered Resources, GST billing and Top N reports.
Favourites	If some reports are used more often than others, they can be copied to the *Favourites* area for quick access.

Report Parameters for Accounting Reports

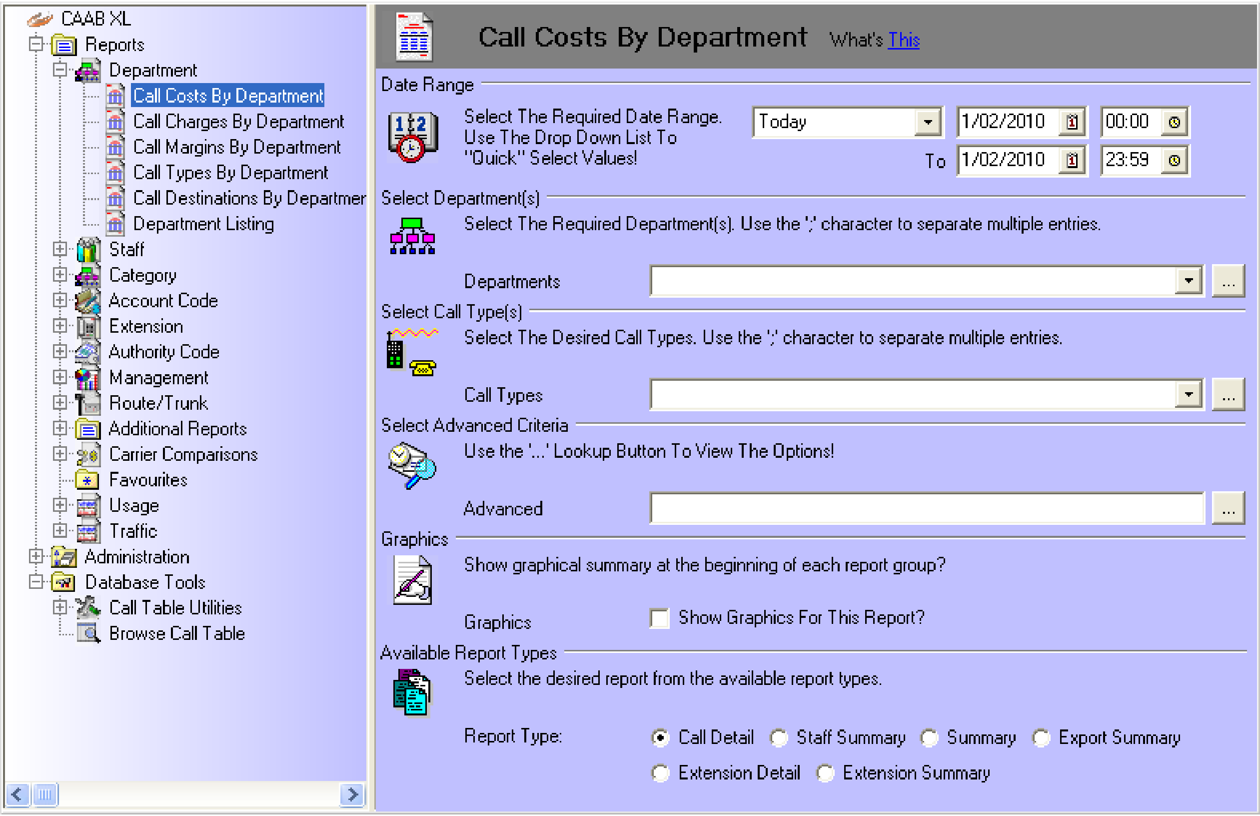
5.2 REPORT FILTERS

Report filters allow parameter selection to customise Reports to suit user requirements.

Manipulating the parameters to create customised reports will enable the generation of reports for many different scenarios that suit the organisation requirements.

Parameters are selected from windows with drop-down lists. Although a wide range of parameters is available, as CAAB XL becomes more familiar, repetitive reports can be automated for scheduled periodic generation. A batch report generation option is also available, further enhancing the ability to produce Reports in an efficient and timely way.

Eg. Below is the Report Filters available for the *Call Costs by Department* Report.



Call Costs by Department – Report Filters

5.2.1 Standard Filters – Call Date Range and Call Time Periods

When completing the parameters for a report to be generated, some of the standard filters are often required fields. Two filters that appear on almost all reports are:

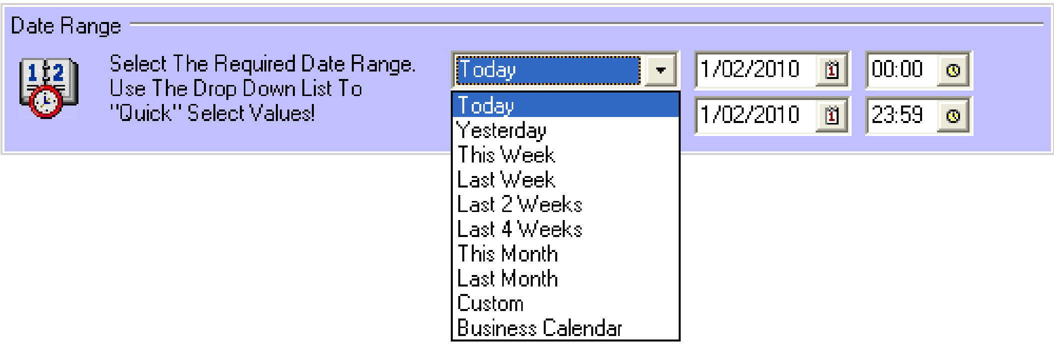
- Call Date Range
- Call time period

These filters allow selection from call date range options and call time period for most reports.

5.2.2 Call Date Range

The Call Date range filter provides a dropdown list allowing date range selection.

CAAB XL uses the Computer's System Date to calculate and display Call Date range options. A week starts on Sunday and ends on Saturday.



Call Date Options Dropdown List

- The dropdown list provides quick date range selection for commonly used ranges
- For specific selection, the calendar and clock selectors are available for defining start and end times

5.2.3 Report Flags

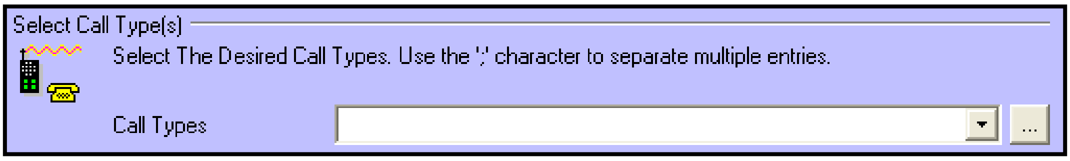
Report flags are entries that do not affect the database information but add attributes to Reports so they display such things as:

- Report type – Summary, detail, etc
- Graphical display – Includes graph headers at the top of each detail report

5.2.4 Standard Filters

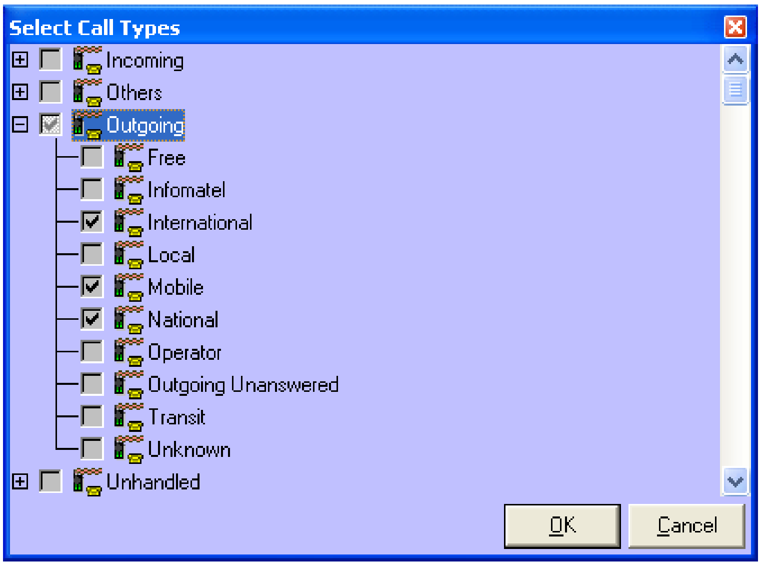
CAAB XL Reports provide a variety of standard filters, all or some of which can be specified for a report. The same actions are usually required to select report parameters using dropdown lists and the window selection button.

Eg. the Call Type selection allows selection of Call Type from a range of Incoming, Outgoing and Other calls.



Select Call Type(s)

- Click  to view available options



Select Call Type(s) – Picker

- Choose the desired options and click *OK* to apply

5.2.5 Advanced Filters

Advanced Filters provides functionality to define reports using more complex parameters to produce required reports. CAAB XL Advanced Filters are accessed by the Call Filters, More Call Filters and Directory Filters links.

Advanced Filters Selection

- Click ... in the Select Advanced Criteria section
- This launches the Advanced Filters Picker

The links at the top of the Picker allow the user to navigate the advanced filters available:

- Call Filters
- More Call Filters
- More Call Filters (2)
- Directory Filters

5.2.5.1 Call Filters

Filter	Limits the call data selection by...
Extension Filter	Matching the call extension field.
Authority Filter	Filtering the call records by the authority code of each entry.
Account Code	Matching the account code(s) of the extension which made the call.
Actual Cost	Specifying the actual cost of the call. Use mathematical operators such as <,>,= or <>.
Duration	Specifying the call duration in seconds. Use mathematical operators such as <,>,= or <>.
Dialed Number	Specifying a filter on the actual phone number(s) dialled.
Call Zone	Specifying the call zone of the dialled number.

5.2.5.2 More Call Filters

Filter	Limits the call data selection by...
Site Filter	Matching the call site field. This only applies in a Multi-Site Situation.
Route Filter	Specifying the actual route used by the PABX to access the outside world.
Trunk Filter	Specifying the actual trunk used by the PABX to access the outside world.
Meter Filter	Specifying the number of meter pulses recorded by the PABX during the call.
Ring Time	Matching the incoming call’s ring duration in seconds.
PABX Filter	Matching the PABX data (condition code) recorded for the call.
Call Time	Specifying a filter on the time of the phone call.

5.2.5.3 More Call Filters

Filter	Limits the call data selection by...
Carrier Filter	Matching the call carrier field
Rate Plan	Matching the call rate plan
Crystal Syntax	Entering valid Crystal Report syntax to be used instead of **ALL OTHER** selections. Note: This is for advanced users only.

Below are some examples of Crystal Syntax:

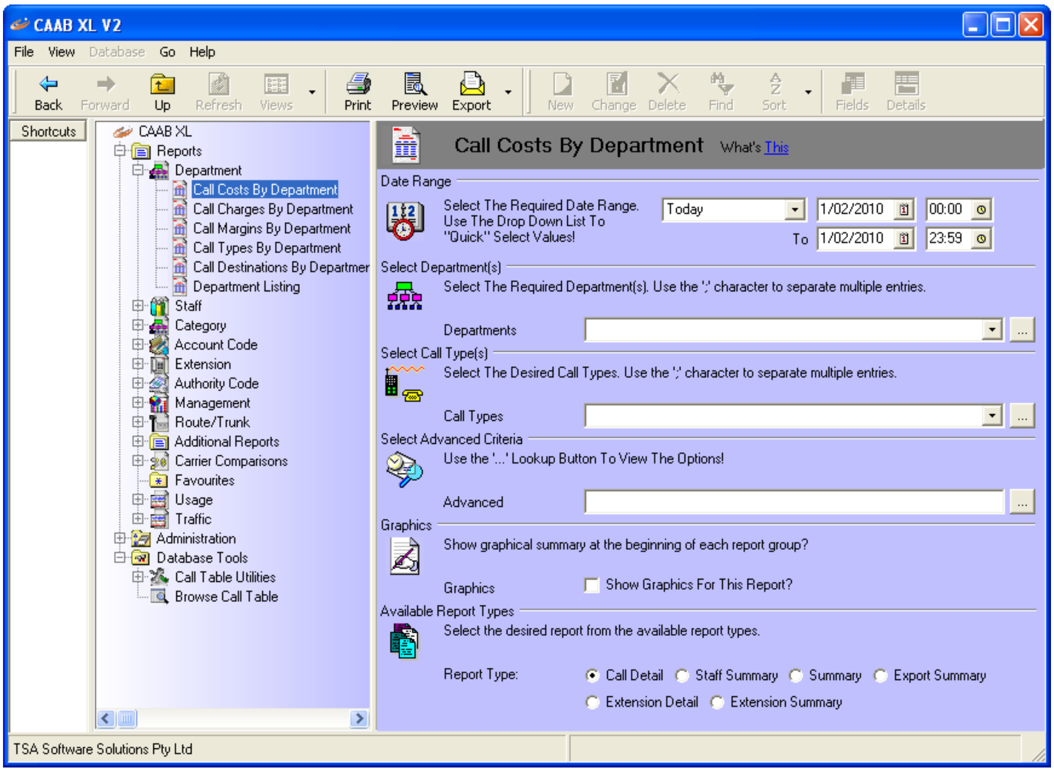
- To return non-blank Authority Codes
  ```
  {Call.AuthCode} <> ''
  ```
- Find Dialled Numbers that match the ones listed
  ```
  {Call.DialledNum} in ["0277775555","0277775556","0277775557"]
  ```
- Return records where customer's first name matches, say, "Dan" or "Don" (names such as "Doug" or "Rob" will NOT be returned)
  ```
  {customer.FIRST NAME} like  "D?n"
  ```
- Return records where customer's last name is, say, "Johnson", "Olson" or "Olsen"
  ```
  {customer.LAST NAME} like "*s?n*"
  ```
- Return only calls which have no Authority or Account Codes
  ```
  {Call.AcctCode} = '' AND {Call.AuthCode} = ''
  ```

5.2.5.4 Directory Filters

Filter	Limits the call data selection by...
Room Filter	Matching the room number of the extension which recorded the call record(s)
Location Filter	Matching the location of the extension which recorded the call entry
Extension Filter	Matching the directory extension field
Surname Filter	Specifying the surname of the person who initiated the call record
First Name Time	Specifying the first name of the operator who initiated the call record
Description Filter	Specifying a filter for the description of the directory entry(s)

5.3 REPORT GENERATION

This section of the CAAB XL User Guide discusses how to produce reports.



Department Reports – Call Costs By Department

- Select the report to execute
- Set Filters as desired
- To generate the report, select from the Toolbar:
  - **Print** – to output the report directly to printer
  - **Preview** – to generate and open the report in a separate window
  - **Export** – to specify a file format to output to (see more detail below)

Note that options to Print and Export are also available from the Report Preview window.

5.3.1 Export a Report

The Export function allows reports to be output using a wide range of file formats.

The destination for the Report can be any of these options:

- Adobe Acrobat (.PDF)
- Crystal Reports (.RPT)
- Microsoft Excel (.XLS)
- Microsoft Word (.RTF)
- Rich Text Format (.RTF)
- Tab Separated Text (.TTX)
- Text (.TXT)

To Export a Report:

- Click *Export* from the Toolbar (or from the Preview Toolbar)
- Select File Format and location to save the report
- Select any further details as prompted (further options are dependent on the format selected)

5.4 STANDARD REPORT GROUPS

Standard reports are available for generation. These are organised by the following types:

- Department
- Staff
- Category
- Account Code
- Extension
- Authority Code
- Route/Trunk

Reports may be generated as per the table below for each type:

Report Type	Report Output
Call Costs	Provides information about incoming and outgoing calls and costs allocated.
Call Charges	Provides information about incoming and outgoing calls and marked up charges.
Call Margins	Provides information about outgoing calls, actual costs, marked up charges and profit/loss margins.
Call Types	Provides information about call records grouped by call types.
Call Destinations	Provides information about outgoing calls, actual costs, marked up charges and profit/loss.
Call Duration Profile	Provides information about calls, grouped by call durations. (note: not available for Departments)
Listing	A detailed listing for selected group.

5.4.1 Management group Report Types

The Management group differs to the groups above in the set of reports available. They are designed to generate summary reports based on the total activity for each site.

The Management group makes the following Report Types available:

Report Type	Report Output
Executive Summary	Provides call details, actual cost, marked up charge and margin grouped by call type for each site.
Destination	Provides information about call details, actual cost, marked up charge and margin grouped by destination for each site.
Hourly Graph	Provides a visual representation of call counts per hour block for calls allocated to each site.
Graphical Executive Summary	Provides information about call details, actual costs, marked up charges and margins grouped by call types for calls allocated to each site.

5.5 ADDITIONAL REPORTS

CAAB XL has a number of additional reports that cannot be grouped in the same way standard reports are. These reports have been made available together in the Additional Reports section of the Explorer Tree and organised by seb-sections:

- Unregistered Resources
- GST
- Top N
- Inbound
- Unused Resources

The reports available are discussed below.

5.5.1 Unregistered Resources

The Unregistered Resources Report tracks resources in use, but not registered.

Report by:

- Unregistered Account Codes
- Unregistered Extensions
- Unregistered Authority Codes
- Unregistered Route/Trunks

5.5.2 GST

The GST Reports generate reports containing call prices apportioned into cost and tax components.

Report by:

- Department
- Staff
- Account Code
- Extension

5.5.3 Top N Reports

Top N Reports provide a range of Reports showing the longest, most expensive or most frequently dialled call and user information. *N* refers to the number of entries required, which is defined via the *Number of Records to List* filter.

Report by:

- Site
- Calls by Extension (Top N calls for selected extensions)
- Extension (Top N Extensions in terms of call cost and duration)
- Calls by Staff (Top N calls for selected staff)
- Staff (Top N staff members in terms of call cost and duration)
- Extension

5.5.4 Inbound

Analyse inbound calls for sites. Allows tracking of answered and abandoned calls.

Report by:

- Site
- Extension
- Department

5.5.5 Unused Resources

The Unregistered Resources Report tracks resources registered, but not used.

Report by:

- Unused Extensions
- Unused Authority Codes
- Unused Route/Trunks

5.6 CARRIER COMPARISONS

The Carrier Comparison reports are designed to allow the organisation to analyse carrier costs based on real call data. Compare call information against selected carriers, dates and times.

Carrier Comparison can be performed in detail by selecting *Generate Data,* or in *Summary* form.

5.7 USAGE AND TRAFFIC REPORTS

The Usage and Traffic Report sections allow customised statistical reports to be run as follows:

Usage Reports - generate analysis reports based on Usage by:

- Route
- Site
- Extension
- Department

Traffic Reports - analyse call traffic by:

- Traffic Data Generator
- Trunk Utilisation
- Route Traffic
- Site Traffic
- Trunk Detail Listing

5.8 FAVOURITES

The *Favourites* section is empty by default. It has been included so users can add regularly used reports to a single section.

Similar to using the Shortcut Window, to add a report to the *Favourites* section, simply drag and drop it into place.

5.9 ADVANCED REPORT OPTIONS

5.9.1 Drilling Down Within a Report

CAAB XL provides a drill-down feature when viewing Summary reports in Preview. This allows users to obtain more detailed information about call information for a Directory or Extension, without needing to run a second report.

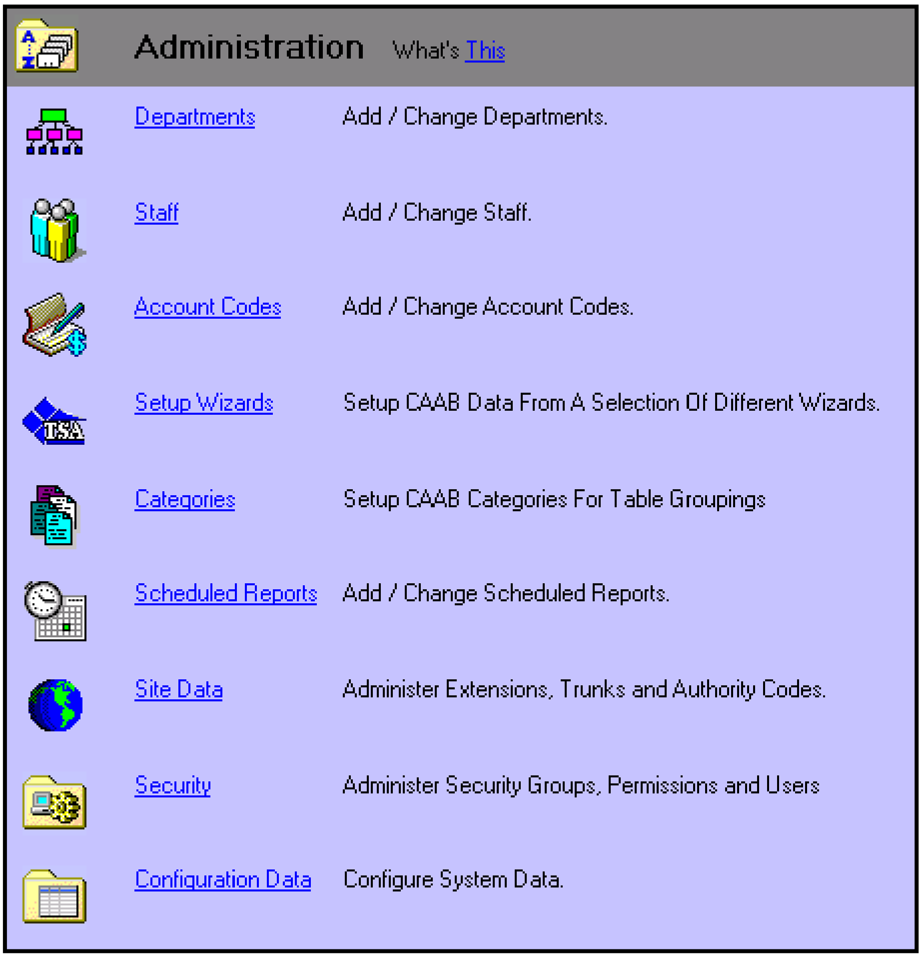
By double-clicking an entry, details are opened in a sub-report in a separate tab.

The detail output is treated as a separate report, which can be printed or saved as required. A new tab is opened for each entry double-clicked.

6 ADMINISTRATION

6.1 OVERVIEW OF ADMINISTRATION

The CAAB XL Administration facility provides a range of activities for system administration.



Administration Reports

Departments

CAAB XL allows staff to be defined into up to five levels of departments and sub-departments for detailed call accounting by Department, Division, Section, etc.

Staff

CAAB XL can also be utilised as a staff database containing information essential to the management of employees. The Staff database is linked to Departments and Extensions.

Account Codes

If the business requires clients to be billed for time spent on the telephone, or calls made on their behalf, Account Codes assist with this task. Each client is assigned an Account Code with the relevant charge rate and Department. When calls are made to the client, the Account code is entered into the telephone number pad and passes the Call Database to be accessed as needed for client billing.

Setup Wizards

These wizards allow for rapid initialisation of the database, as well as instant update of existing Extensions, Authority codes and Account numbers.

Scheduled Reports

Any reports generated on a regular basis can be set to generate at regular, predefine periods, eliminating the need for operator intervention completely.

Site Data

The applications here will access data that relates to each site.

- Route/Trunk –add and maintain the Route and Trunk details for the relevant site.
- Authority Code –allocate PIN numbers to a staff members and an optional call cost mark-up.
- Extension – Enter Extension Management information (e.g. Extension Number, Mark-up, Staff Allocated, and Description) and the Extension's telephone system details.

Security

CAAB utilises Microsoft SQL's built in Security functionality. This consists of two components: Groups and Users. This configuration takes advantage of the more advanced security features available in SQL Server.

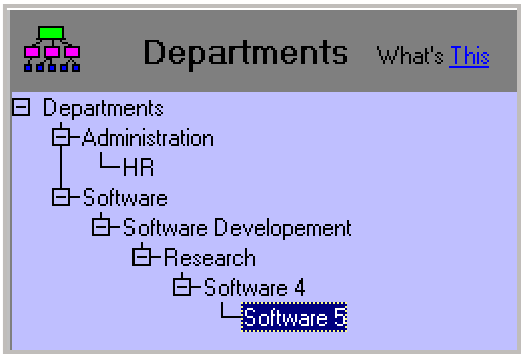
Configuration Data

In the Configuration data section, set up:

- Mark-ups – Cost Mark-ups which can be applied to Staff, Account Codes, Extension or Authority Code.
- Business Calendar – Accounting periods specific to the organisation. Once configured, preset accounting period can be selected when generating account reports
- Call Alerts – Configure predefined messages to be e-mailed when certain events occur on the system.

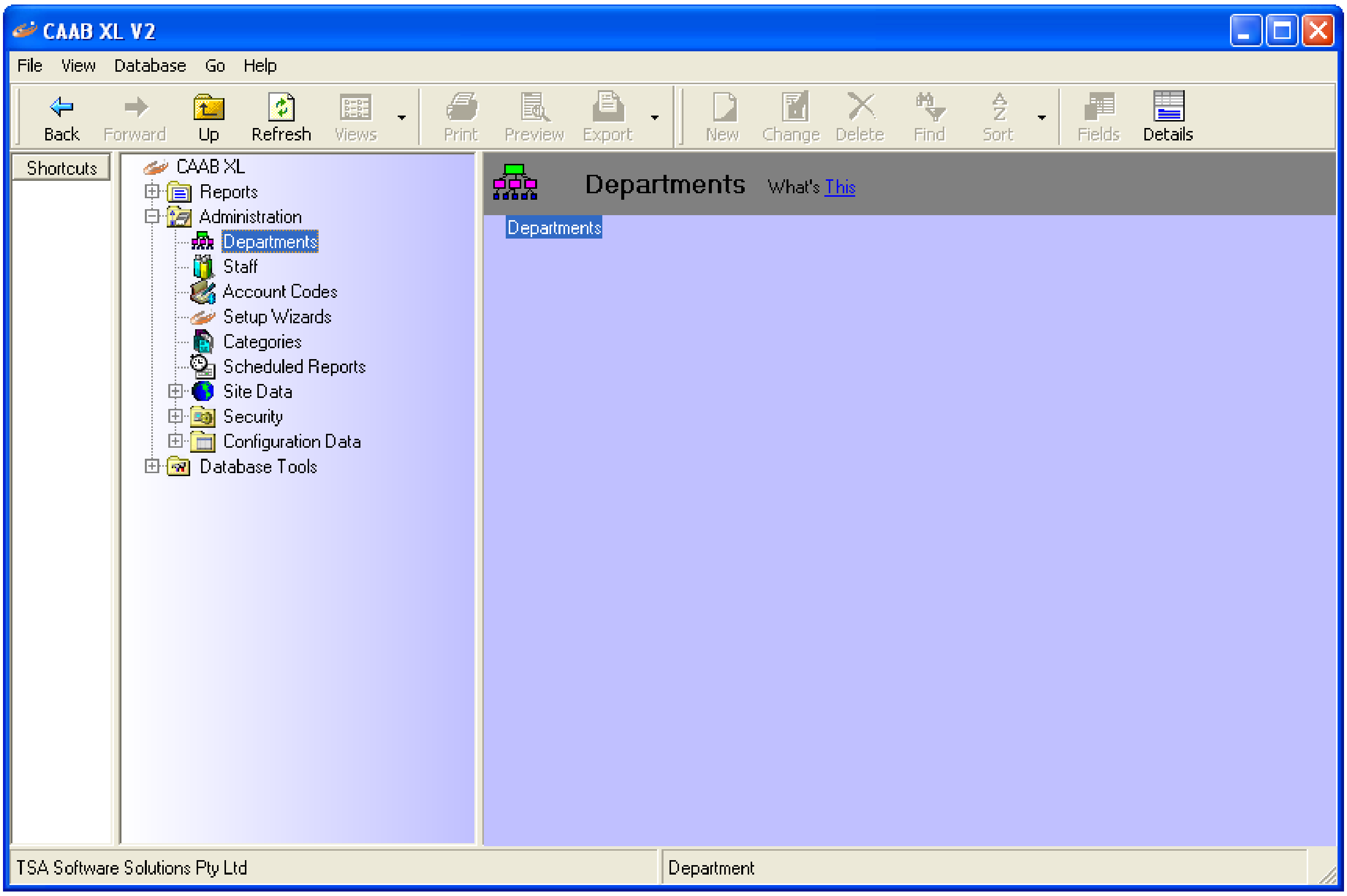
6.1.1 Department Administration

Departments are configured to allow reporting across groups of staff. CAAB XL Department allows top-level departments to contain five levels of sub-departments if required



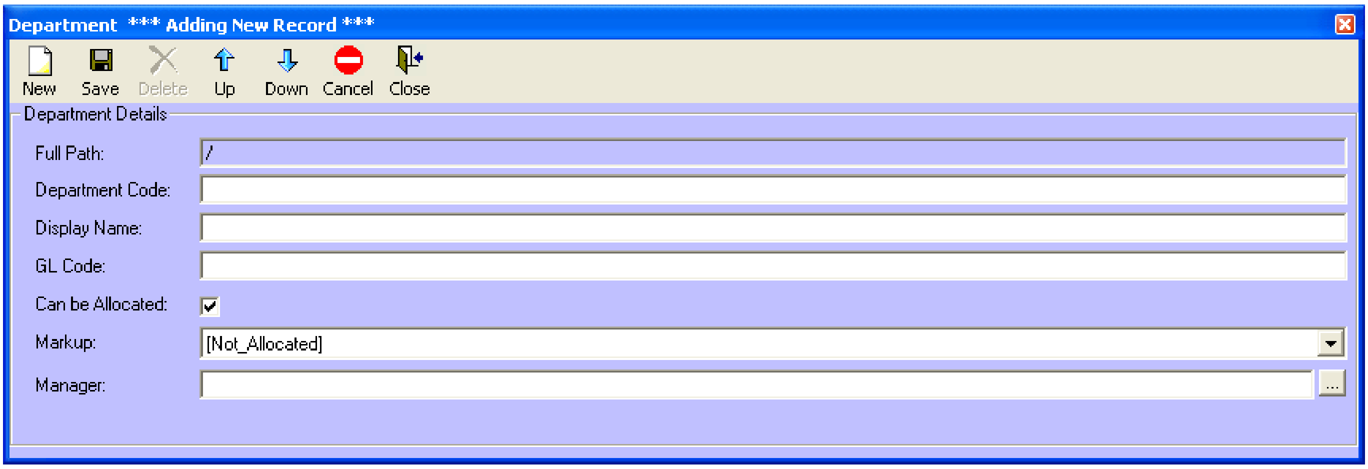
Departments – Five sub-department levels available

To configure Departments go to *Administration* → *Departments*:



CAAB XL – Administration - Departments

- Click *New* in the Toolbar to open the *Department – Add New Record* screen



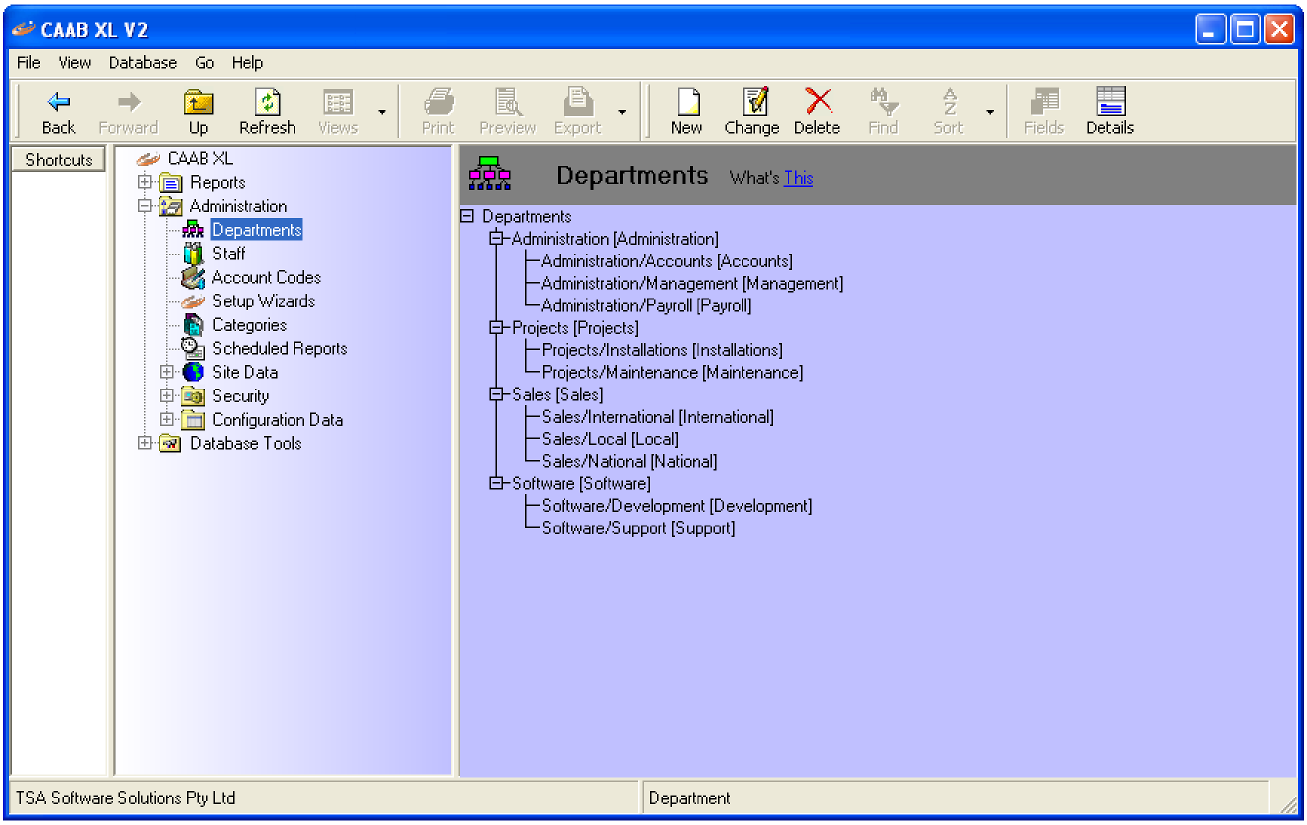
Departments – Add New Record

- Enter the *Department Code*, *Display Name* and *GL Code*.
- Check or uncheck the Can be Allocated checkbox to specify the department branch can be allocated to a directory. This may be switched off for department branches where no entries are to be assigned at this level (Eg. If entries are to be assigned to sub-departments only)
- Select a Mark-up from the dropdown list if required
- If required, select a Department Manager
- Click *Save* when complete to save the department to the CAAB XL database.

> *The Manager field allows you to allocate a staff entry as manager for a designated department. This field does not currently affect reporting – it is for information only.*

6.1.1.1 Add Departments or Sub-departments

Departments can be added in a five level structure. Once the first level has been put in place, set up sub-departments in a tree structure.



Departments – Sub-Departments tree structure

- Select a (Parent) Department
  - Eg. “Software”
- Highlight “Software”, and Click *New* on the Toolbar
- Enter the data for the new Sub-department
  - Eg. “Research and Development
- *Save* to record the new sub-department in the CAAB XL database

Departments – New Sub-department added

6.1.1.2 Editing Departments

In order to change a Department or sub-department:

- Highlight the Department
- Select *Change* from the Toolbar

To delete a Department:

- Highlight the Department
- Select *Delete* from the Toolbar

Departments may only be deleted if no staff or extensions are currently assigned to the department (including sub-departments).

6.1.2 Staff Administration

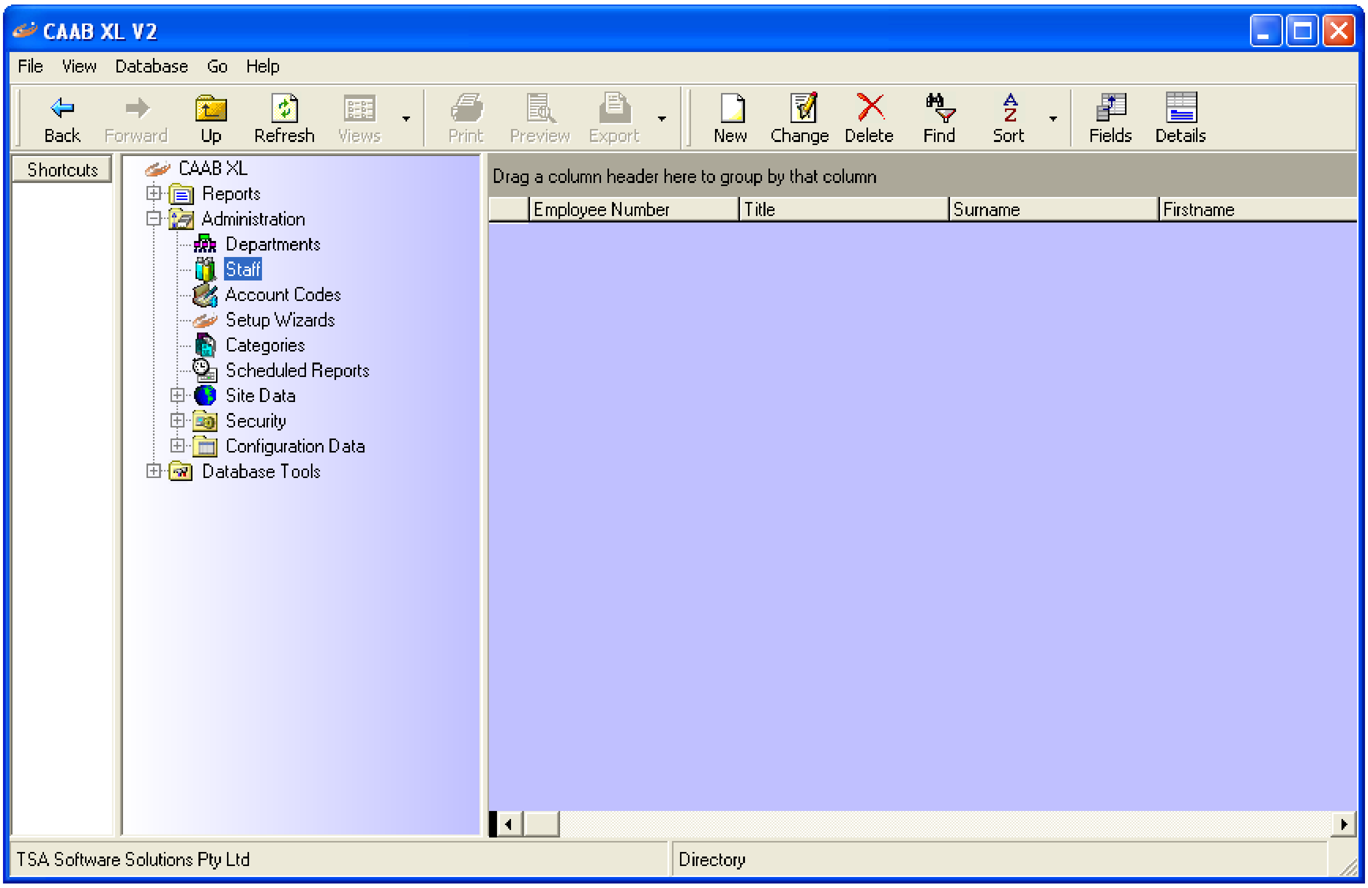
CAAB XL's Staff database allows extension call data to be allocated to specific staff members.

The database is linked to Departments and Extensions, which negates the need for multiple entry of information.

When setting up a new Staff record, CAAB XL provides a three-layer screen for completion of:

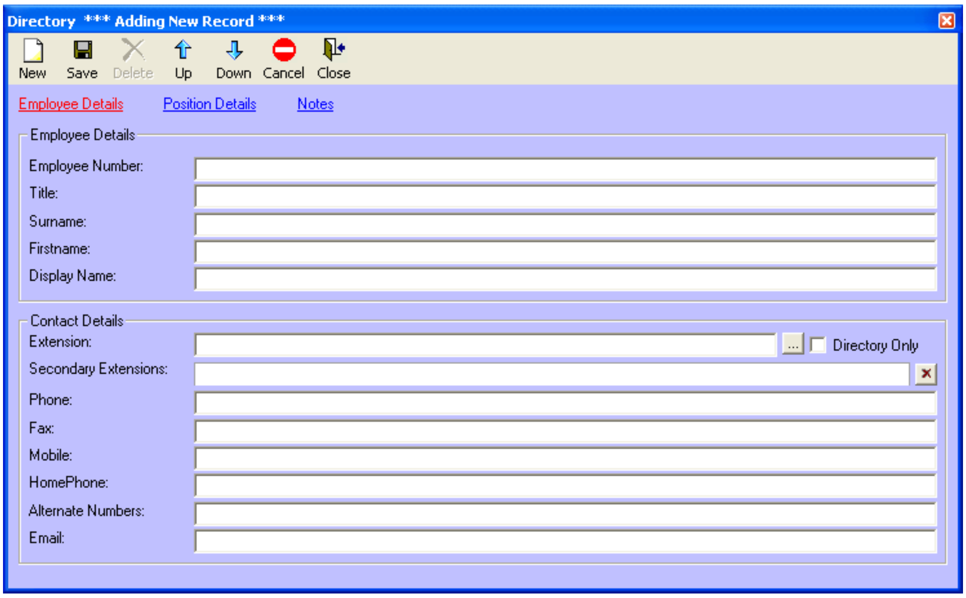
- Employee Details
- Position Details
- Notes

To configure Departments go to *Administration* → *Staff*:



CAAB XL – Administration - Staff

- Click *New* in the Toolbar to open the *Directory – Add New Record* screen



Staff Directory – Add New Record – Employee Details

6.1.2.1 Employee Details

This section of the screen contains fields for entry of general details for the employee (Employee Number, Title, Surname, Firstname). Data entry is free text.

The Display name is entered automatically by the system after the general details have been entered.

6.1.2.2 Contact Details

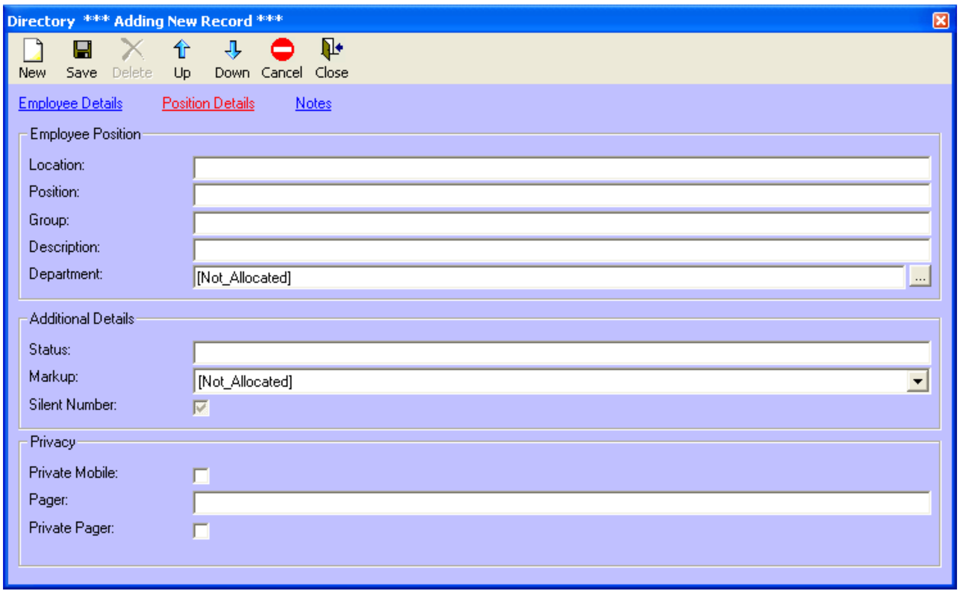
This section of the screen allows Staff member's telephone facilities to be set up:

- **Extension** – type the number or select from the drop-down list.
- **Directory Only checkbox** – determines when a staff member will be billed for calls made from the extension assigned to them. Extensions can be allocated to multiple staff members, but only one staff member can be billed for calls. Directory information may be entered with no extension for use in the CAAB Operator Directory application. If the Directory Only checkbox is checked, calls will not be billed to that staff member.
- **Secondary Extensions** – just as multiple staff can be assigned to a single extension, multiple extensions can be assigned to a single staff member. A typical example is two additional extensions for fax and modem. This field is a display only field and will be activated when the Secondary Extension is set up.
- The fields for **Phone, Fax, Mobile, HomePhone, Alternate Numbers** and **Email** details are free text.

The information for staff members provides the organisation with a system that co-exists as a Telephone Call Costing system and a staff database.

6.1.2.3 Position Details

Click the Position Details link to display the Position Details screen:



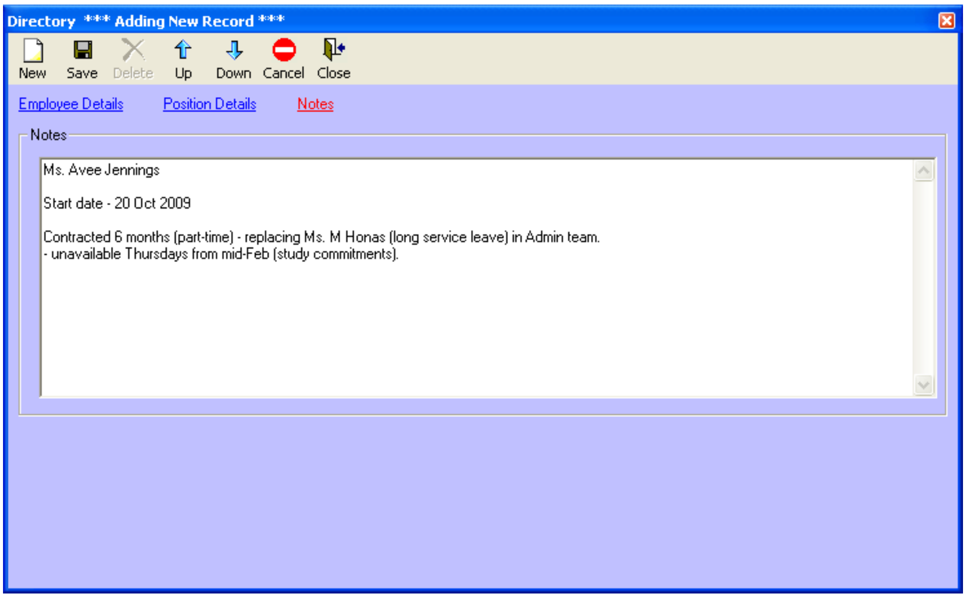
Staff Directory – Add New Record – Position Details

- Enter location (where the staff member works), position title, group and enter a description (optional)
- Select a Department

> *Selection of the correct Department in the Position Details screen is crucial to the efficient operation of CAAB XL. The Department field provides a list for allocation of a Department to the staff member. This ensures all calls processed for this staff member's extension will also be assigned to the selected department.*

- Enter Additional Details:
  - Enter the staff member's status (e.g. Permanent, Probationary, Part-time)
  - Allocate a mark-up (optional)
  - Tick the silent number checkbox if this facility is required
- Enter the Privacy Details:
  - Tick the Private Mobile checkbox if required
  - Enter the Pager details if appropriate
  - Tick the Private Pager checkbox if required

When all details have been entered, click the Notes link to display the Notes screen for entry of any additional information about Staff members.



Staff Directory – Add New Record – Notes

6.1.2.4 Editing Staff Details

To Change Staff information:

- Select the Staff member in the Application Window
- Click *Change* from the Toolbar

To Delete Staff information:

- Select the Staff member in the Application Window
- Click *Change* from the Toolbar

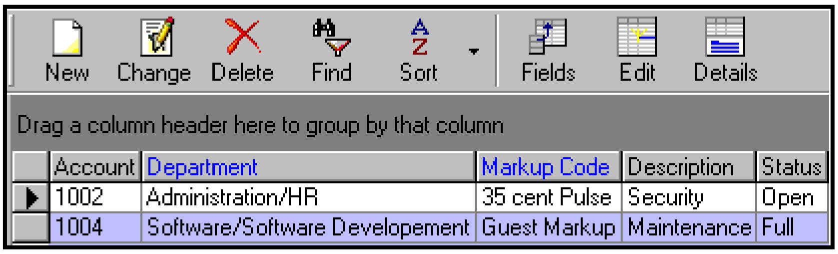
Staff members may only be deleted if no extension is currently assigned to them.

6.1.3 Account Code Administration

Configure Account Codes in order to bill clients for time spent on the telephone calls, or for calls made on their behalf.

Account Codes sets up a code for each client with the relevant charge rate, General Ledger Account and Department.

When calls are made to a client, the relevant code is entered into the telephone number pad and carried through to the Call Database to be accessed as needed for client billing. The Telephone System supplier will be able to advise of the ability for the telephone system to accept Account Codes.



Account Code Administration

- Click *New* to enter a new account code.

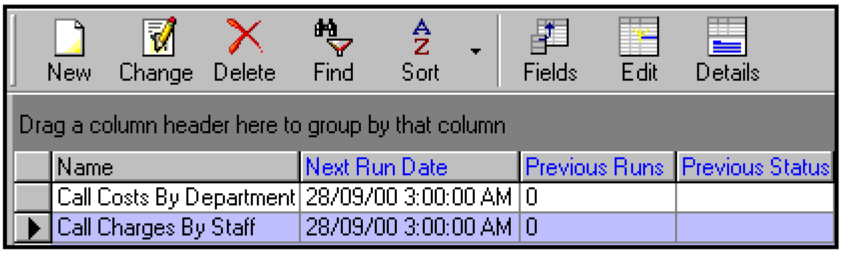
Account Codes Window

- **Account Code:** Enter the code to enter when an Account Code call is made. The number should be kept as short as possible to simplify entry at point of call. (Maximum length 16 characters)
- **Department:** Select the department this Account Code is within.
- **Mark-up:** A mark-up can be selected for an Account Code. Select a mark-up from the dropdown menu if required.
- **Description:** Description of the account.
- **Status:** Current account status.
- **General Ledger Code:** The general Ledger Code for this account

6.1.4 Scheduled Reports

Schedule regular CAAB XL reports to be run automatically using the Schedule Reports function.

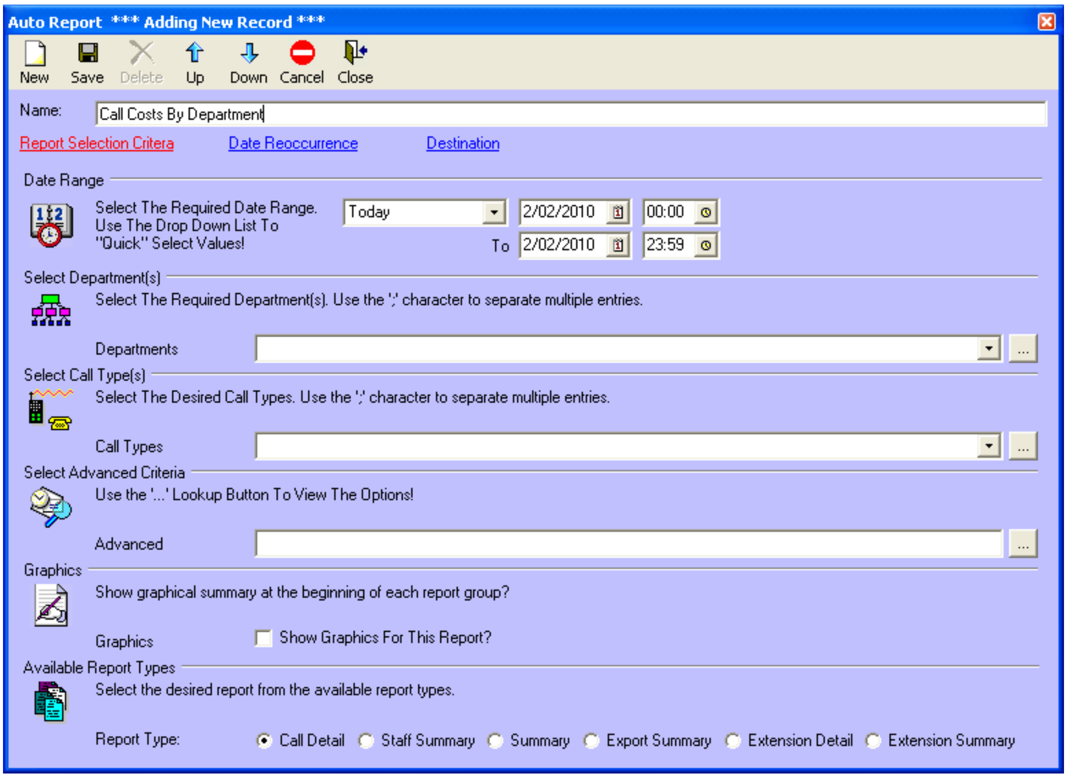
Note: Scheduled Reports requires the CAAB Autoreports service to be configured. To Schedule reports to output to email, CAAB Emailer service must also be configured. Refer to the Installation Guide for setup steps.



Scheduled Reports

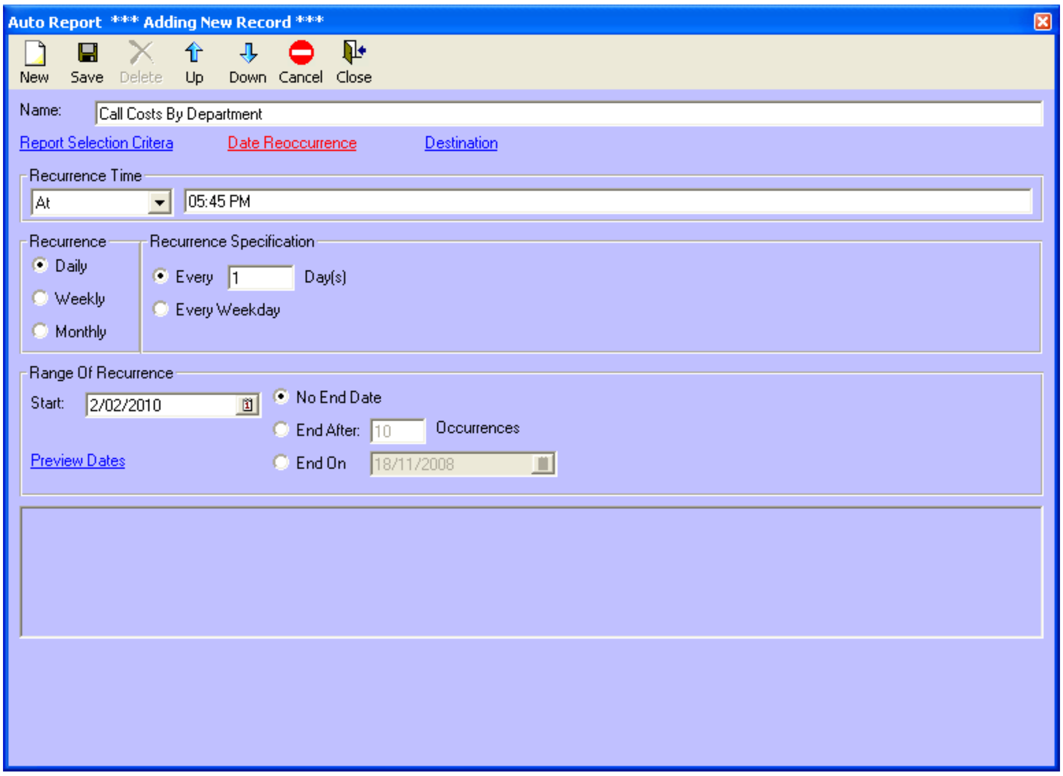
To select a report to run automatically perform the steps below:

- Click *New* from the Toolbar
- Choose the report to automate from the popup and click *OK*



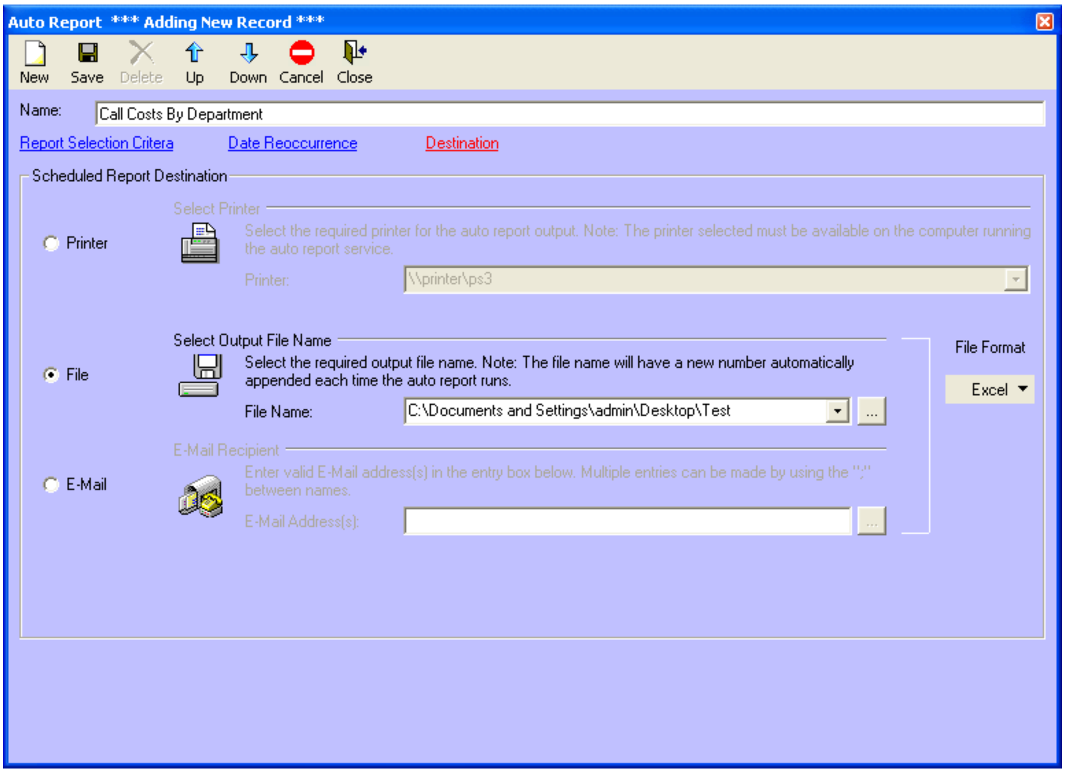
Scheduled Reports – Report Selection Criteria

- Enter Report Selection Criteria
  - The fields available are dependent on the report selected
  - Enter the parameters as per configuring a standard report
  - When complete, click *Date Reoccurrence*



Scheduled Reports – Data Reoccurence

- Enter Date Reoccurrence information:
  - Configure the terms of the schedule on this screen
  - Configure a time to run the report, and a period before re-running
  - When complete, click *Destination*



Scheduled Reports – Destination

- On the Destination screen, select one of the following output methods:
    - Printer → Select Printer   (uses PDF format)
    - File → Select file to output to → Select file format
    - E-Mail → Select E-mail recipient   (uses PDF format)

6.2 SETUP WIZARDS

Setup Wizards have been designed to quickly and easily load site, extension and Route/Trunk details.

Setup Wizard Selection

- **Site Configuration** – Configure the details of each site (PABX).
- **Trunk Wizard** – Enter trunk/route details in a range of trunks.
- **Extension Wizard** – Set up a range of extensions.
- **AutoDetect Wizard** – This routine will read through the call database and create any Extensions, Account Codes, Authority Codes, Routes or Trunks that appear on calls but are not in the database.

6.2.1 Site Configuration Wizard

The Site Wizard allows CAAB XL to be configured to each specific site on the system. A site is determined as a separate location, defined by a different data source, PABX or Telephone system.

The opening display screen shows any sites already set up and provides the option to add a *New* site, *Copy* the details of an existing site or *Modify* an existing site.

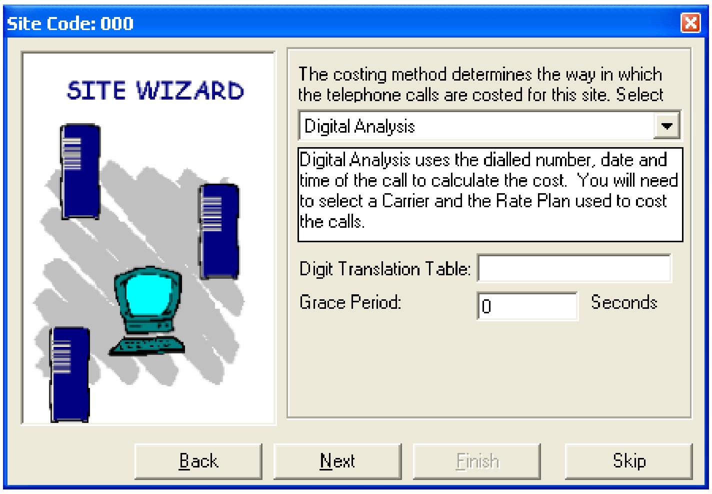
Site Wizard – New, Copy, Modify

Select the most appropriate option to proceed, and confirm the Site details:

Site Wizard – Site details

- **Site Code** – A unique three digit number is generated automatically
- **Description** – Enter a description for the site.
- **Country** – The country selected defines the rates available for the system.
- **Telephone Number** – The telephone number of the licensed site. This number *must* be identical to the Telephone number in the CAAB XL licence details.

Enter default Costing Method details:



Site Wizard – Costing Method

A Costing Method must be selected for the site. This method will be utilised for all calls made via a trunk that has not been set up in CAAB XL.

This section also allows selection of a Digit Translation table and Grace Period for call costing.

The Digit Translation table is designed to convert "Short-dial" numbers into measurable telephone numbers, or to strip prefixes from telephone numbers to allow for accurate costing. For more information see the *Digital Translation* section of the User Guide.

Information on configuring the Digit Translation table is available in *Appendix C*.

The Grace Period is the minimum duration a call must run before CAAB XL assigns cost for it. The actual call duration is calculated as the total duration less the grace period. This option only applies if digital analysis is used for the selected Costing Method.

Enter the Call Carrier and Rate Plan required for the system:

Site Code Wizard – Carrier and Rate Plan

These are the fields CAAB XL uses for calls from trunks that have not been set up. The first dropdown menu displays the Carriers available to the system. The second dropdown menu displays the Call plans available for the Carrier selected.

Define the PABX type in operation:

Site Wizard – PABX Type

Select the telephone system for the site. It is imperative the correct telephone system type be selected for CAAB XL to recognise data being monitored.

The *Use the site code generated from the PABX* checkbox should only be used if the PABX is capable of generating an office equipment number to identify different sites. **TSA Support must be consulted before proceeding with this option checked**.

The *Derive Site Code from Route* checkbox should only be used if call data from multiple sites is being collected from a single source and route numbers on each site are unique.

Select *Finish* and the configuration will be saved.

6.2.2 Trunk Wizard

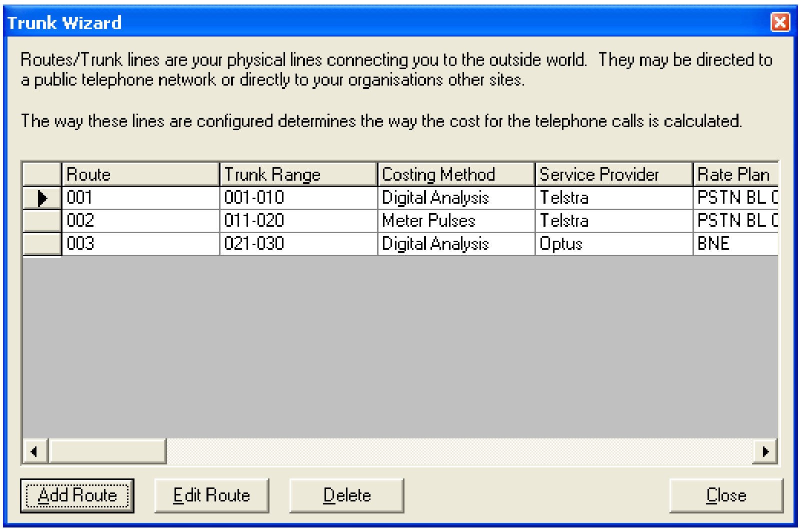
A telephone system includes multiple telephone lines within the service. Each of these lines is called a trunk.

Each trunk can be programmed to deal with certain call types. Eg, some trunks may deal with incoming calls only, others may deal with outgoing calls and still others may only carry tie line calls. When a group of trunks are programmed to carry the same type of calls they are generally clustered into a route. Each route is given a unique route number and each trunk assigned to that group has its own number.

Grouping similar trunks into routes makes it easier for them to be programmed and easier to report on.

Contact the telephone system supplier to obtain the route/trunk details.

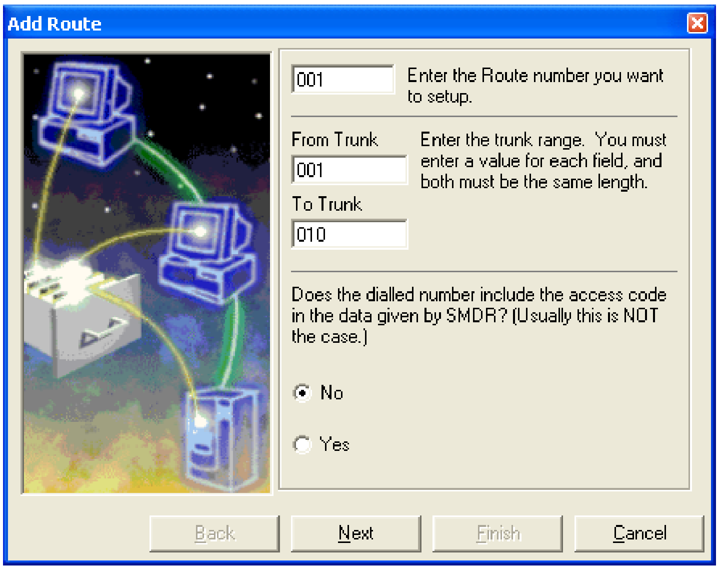
- Launch Trunk Wizard (*CAAB Management → Administration → Setup Wizards → Trunk Wizard*)



Trunk Wizard

Use the Trunk Wizard to Add, Change or Delete entries for trunks and routes. The Add Route/Trunk screen allows for the entry of important information in a series of steps.

Enter Route/Trunk and Access Code:



Trunk Wizard – Add Route

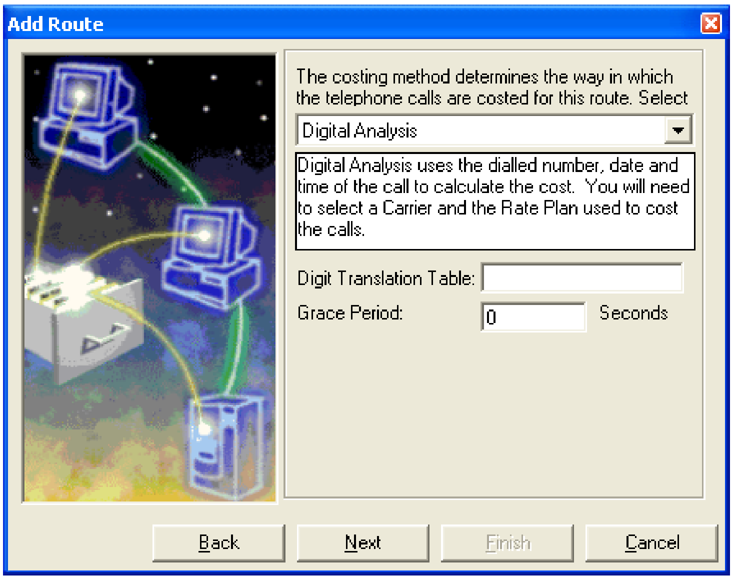
- Enter the route number, and the first and last trunk record number in the range to be loaded
- Set up an access code if required. Select *Yes* to enter an access code

Trunk Wizard - Enter Access Code

Eg. In order to get an outside line, users may need to dial an access code "0". If this access code is being sent from the telephone system to the CAAB XL software, then the code should be included here. This ensures call costing is performed against the phone number only.

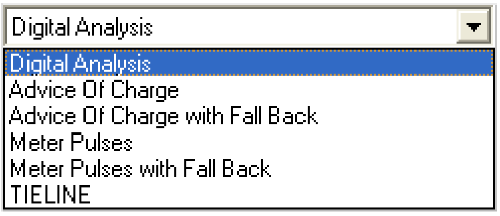
> *Be aware that you should be absolutely certain that the access code is sent from the telephone system. If a "0" access code is defined where it is not sent, any call with a preceding zero will have the "0" stripped. This will have a disastrous effect on call costing for Mobile Calls, STD and IDD. If in doubt contact your telephone system supplier.*

Enter Costing method and Grace Period:



Add Route Wizard (1)

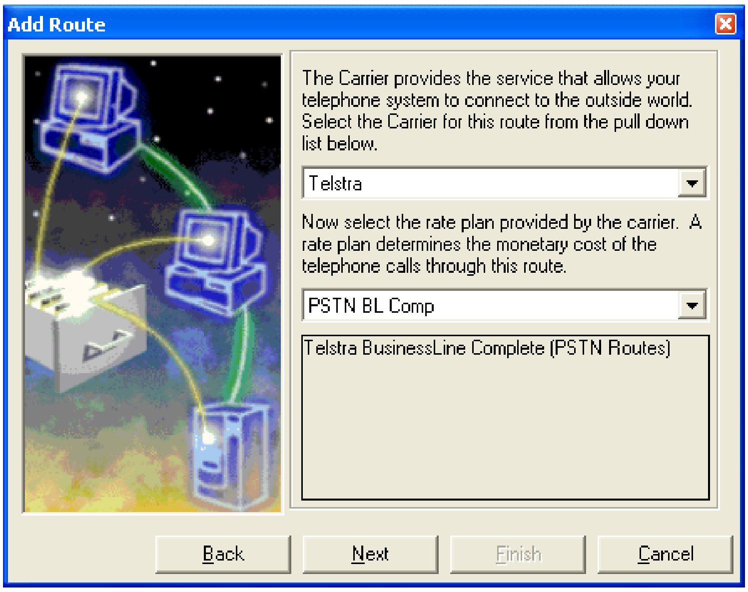
- Select the Costing Method for this route from the dropdown list



Trunk Wizard – Select Costing Method

- Enter a grace period. This only applies if digital analysis is used for the costing method

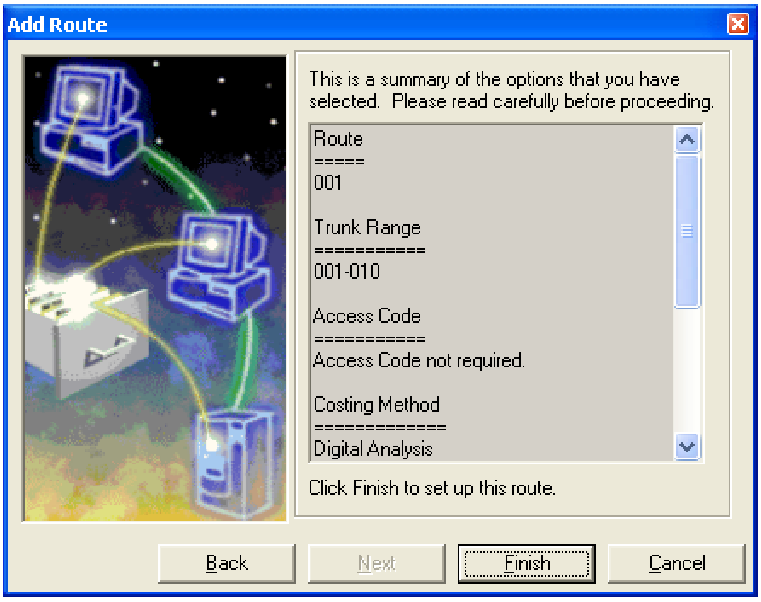
Enter the Carrier and Rate Plan:



Add Route Wizard (2)

- Select the Carrier for this Trunk/Route from the dropdown list. All carriers supported by CAAB XL are displayed
- Selecting a Carrier populates the Rate Plan dropdown list. Select the Rate Plan in operation

Verify entered details before clicking *Finish* to save:



Add Route Wizard (3)

6.2.3 Extension Wizard

Using the extension wizard create entries for a range of extensions.

- Launch *Extension Wizard* (*CAAB Management* → *Administration* → *Setup Wizards* → *Extension Wizard*)
- Enter the extension number range:

Extension Wizard – Enter Extension Number range

CAAB XL searches the database existing extension entries. A summary screen displays extensions not found in the database that are eligible to be added.

Extension Wizard – Summary

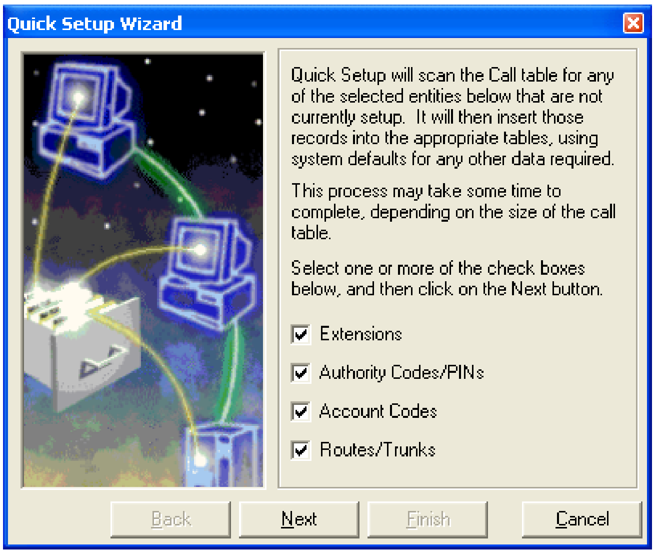
In this example, CAAB XL found no new extensions eligible to add to the database.

- Verify the Extension Range is correct and select *Finish* to add new entries to the database

6.2.4 Autodetect Wizard

The Autodetect Wizard is provided to update Extensions, Authority Codes, Account Codes and Routes/Trunks. This routine will read through the call database and create any Extensions, Account Codes, Authority Codes, Routes or Trunks that appear on calls but are not in the database.

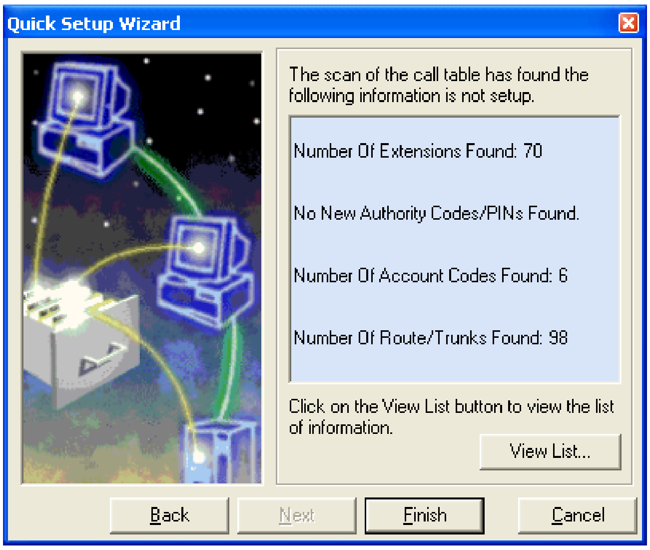
Run the Autodetect Wizard regularly to update the database with changing data.



Autodetect Wizard

- Uncheck any components that are not to be updated
- By default, all are checked
- Click *Next* to continue.

The Autodetect Wizard will scan for call records that contain fields not found in the database. When complete, a confirmation screen displays the number of updates to be made



Autodetect Wizard – found records

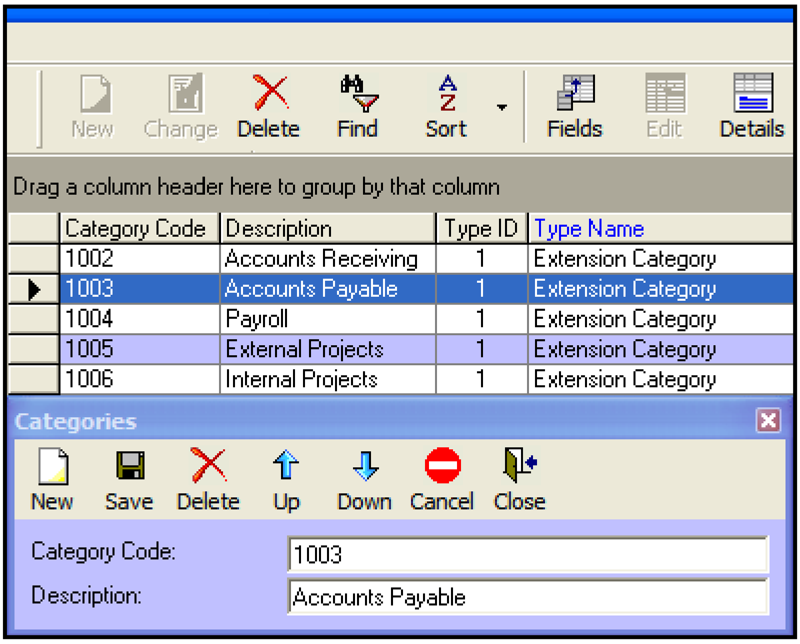
For more information click *View List....* Click *Finish* to apply changes and exit.

6.3 CATEGORY ADMINISTRATION

CAAB can allocate call costs to particular Categories. Categories may be used as Cost Centres for accounting purposes, Projects, Contractor call billing, or any other reason call costs must be dissected other than, or as well as, the organisational structure.

Extensions are assigned to a particular category, and the costs of an extension's calls are allocated to the assigned category for reporting. As an extension is moved from one category to another, calls made after the move will be assigned to the new category. This occurs independently of the allocation of calls to staff and departments.

To create a new Category click *New*:

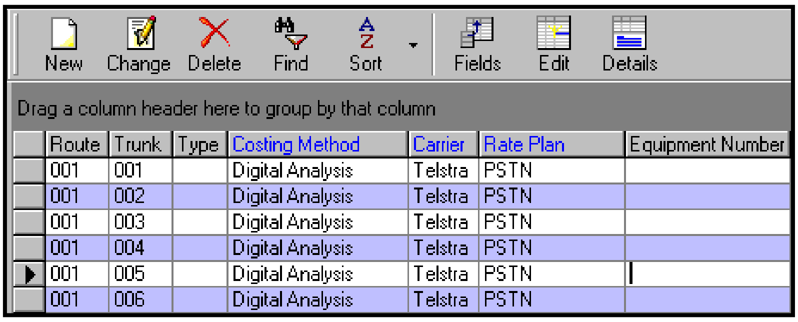


Categories – Add new Category

- Enter a Category Code. This must be unique for each Category
- Enter a Description.
- Once created, they can be assigned to Extensions in *Extension Administration*

6.4 SITE DATA

6.4.1 Route/Trunk Administration



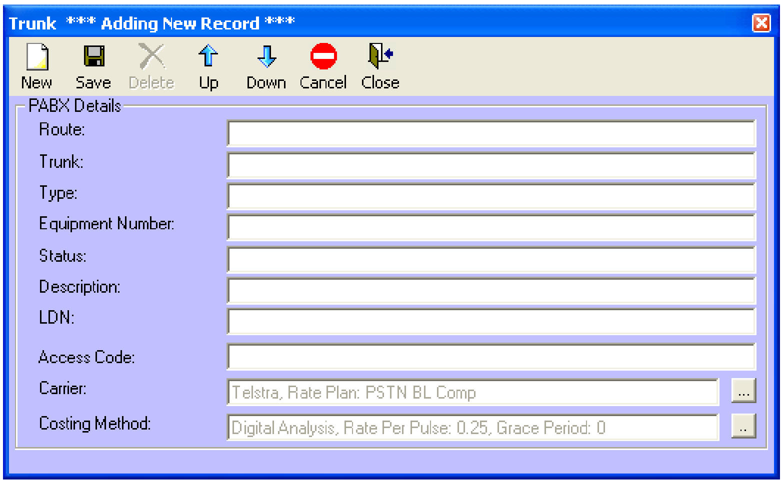
New Change Delete Find Sort Fields Edit Details

Drag a column header here to group by that column

Route	Trunk	Type	Costing Method	Carrier	Rate Plan	Equipment Number
001	001		Digital Analysis	Telstra	PSTN	
001	002		Digital Analysis	Telstra	PSTN	
001	003		Digital Analysis	Telstra	PSTN	
001	004		Digital Analysis	Telstra	PSTN	
001	005		Digital Analysis	Telstra	PSTN	
001	006		Digital Analysis	Telstra	PSTN	

Route/Trunk Administration

The trunks and their details can be set up in the Trunk Wizard. To maintain these details, use *Site Data → Route/Trunk Administration*. Click *New* to add a new entry or *Change* to edit an existing entry:



Route/Trunk Administration – Add new record

- **Route:** A unique number assigned in the telephone system to the trunk group
- **Trunk:** The number assigned to the trunk within the trunk group
- **Type:** Type of traffic carried on the trunk.
- **Equipment Number:** Within the telephone system each line is assigned an equipment number.\
- **Status:** Record the current line status.
- **Description:** A brief description of the trunk.
- **LDN:** Listed Directory Number. The telephone number assigned to the trunk.
- **Access Code:** Any access code used on the trunk, if applicable
- **Carrier:** The telecommunications carrier using this trunk.
- **Costing Method:** The costing method supported by the carrier using this trunk.

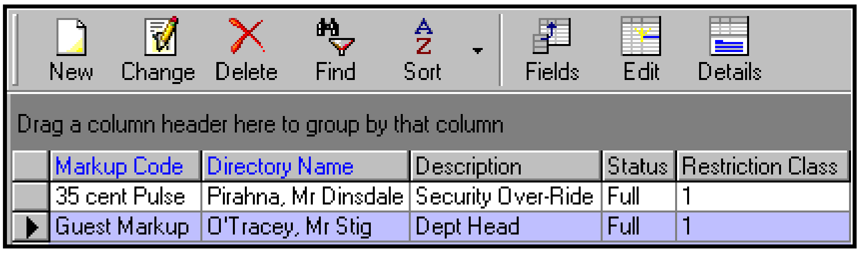
6.4.2 Authority Code Administration

If the organisation has extensions with limited outside access, the telephone system may be programmed to accept authority codes via the telephone keypad. If configured, unless a user has an authority code, they may not be able to dial certain numbers. This can be an effective way of ensuring telephone abuse is kept to a minimum.

Another use for Authority codes is in a hospitality scenario, where guests are granted outside call access when their assigned authority code is entered.

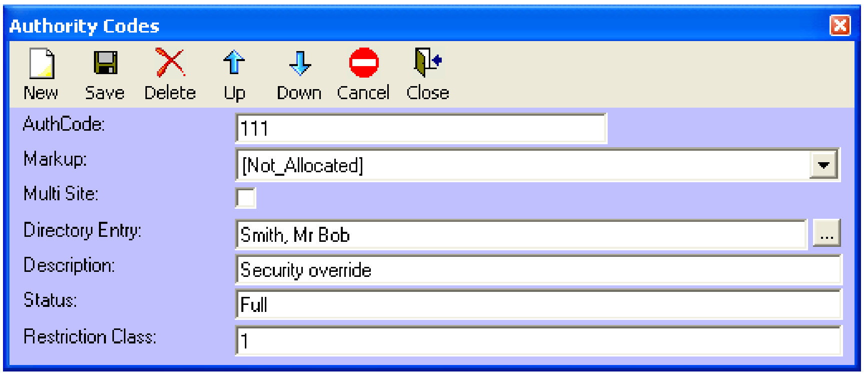
In order to report on calls made using authority codes, configure each code in CAAB XL with the operator's details.

The telephone system supplier can advise if the system can accept Authority Codes.



Authority Code Administration

Click *New* to add a new entry or *Change* to edit an existing entry:



Authority Codes Window

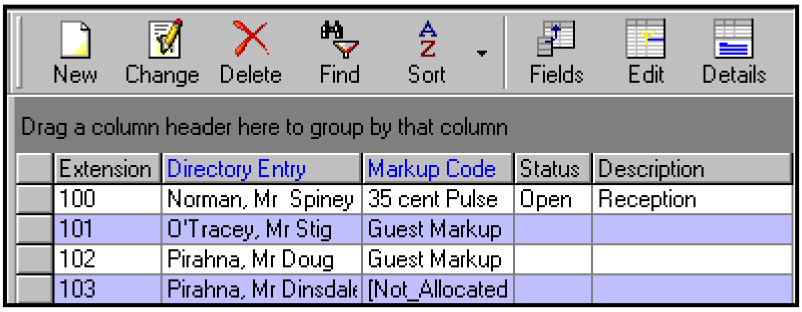
- **Auth Code:** The digits entered when an Authority Code call si made. The number should be kept as short as possible to simplify entry at point of call, but long enough to make "code cracking" difficult. (Maximum length 16 characters)
- **Mark-up:** A mark-up can be selected for an Authority Code. The mark-up will be applied when billing the Authority Code.
- **Multi Site:** This checkbox will advise CAAB XL if the Authority Code exists on more than one site.
- **Directory Entry:** Used to assign a staff member to this Authority Code
- **Description:** A description of this Authority Code

- **Status:** Current status of the Authority Code.
- **Restriction Class:** Status of outside access applied to the extension. For example: Full Access (local, STD, IDD etc.), Local Calls Only and Internal Calls only.

> *Restriction Class is an information field and does not directly affect call access.*

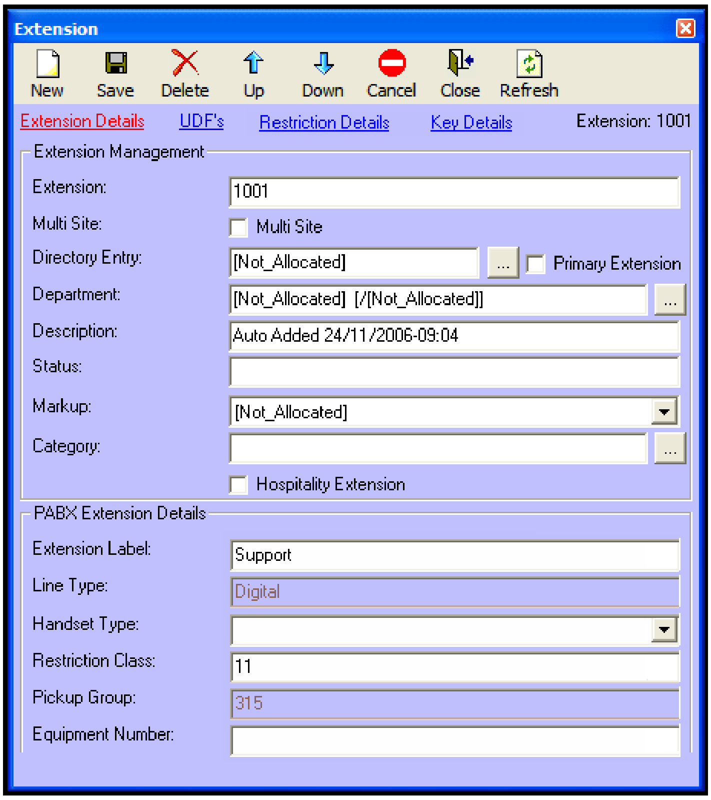
6.4.3 Extension Administration

CAAB XL's Extension database allows information to be recorded against each extension in the telephone system. The database is linked to Departments and Staff, which negates the need for multiple entries of information.



Extension Administration

Click *New* to add a new entry or *Change* to edit an existing entry:



Extension Window – Extension Details

- **Extension:** Enter the extension number in the same format it appears in the telephone system.
- **Multi Site:** This checkbox will advise CAAB XL if this extension exists on more than one site.
- **Directory Entry:** Assign a staff member to this extension if required.
- **Primary Extension:** If a record is set as a Primary Extension all reporting for this extension will be costed to the staff assigned to this record. The default setting for this field is "Yes". Only one entry for each extension number can be assigned as Primary.

> *If "Primary Extension" is selected and there is already a primary record assigned to the directory, CAAB XL will prompt the user to either keep the existing primary record or change it to the one selected.*

- **Department:** Select the department the assigned staff member belongs to.

> *Allocating an extension directly to a department will override the department allocation of any staff member who has this extension assigned to it.*
>
> *Only allocate an extension directly to a department if this is to happen. Otherwise, assign the owner of the extension in the staff table to the department.*

- **Description:** A written description of this extension.
- **Status:** Current status of the extension.
- **Mark-up:** A mark-up can be selected for an Extension. The mark-up will be applied when billing the Extension.
- **Category:** If Categories are used to allocate call costs, select the appropriate category for this extension.
- **Hospitality Extension:** If the CAAB Hospitality Module is in operation, check this checkbox on all extensions guests are checked-in to. Typically, room extensions would be checked as Hospitality only, and administration entries would remain unchecked.

> *Please confirm the correct mark-up is assigned to the extension prior to a guest check-in. Hospitality calls CANNOT be re-costed if incorrect – a manual invoice will be required.*

6.5 SECURITY

CAAB XL utilises Microsoft SQL's inbuilt security features to shape and restrict user access and functionality based on the security levels of a user.

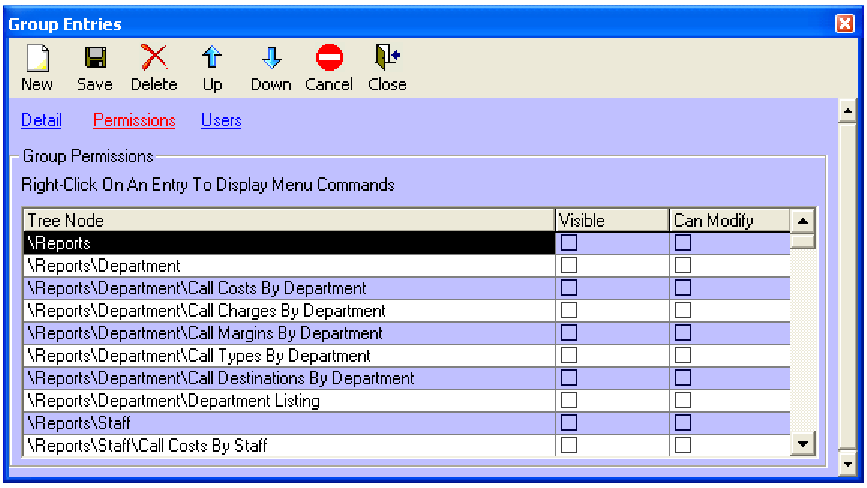
6.5.1 Groups

CAAB XL is designed to permit access and functionality on a group basis. Users logging into CAAB XL do not need access levels granted individually.

Each user is added to a group, which will entitle them to access levels according to the group entitlements.

Click *New* to create a new group or *Change* to edit an existing one.

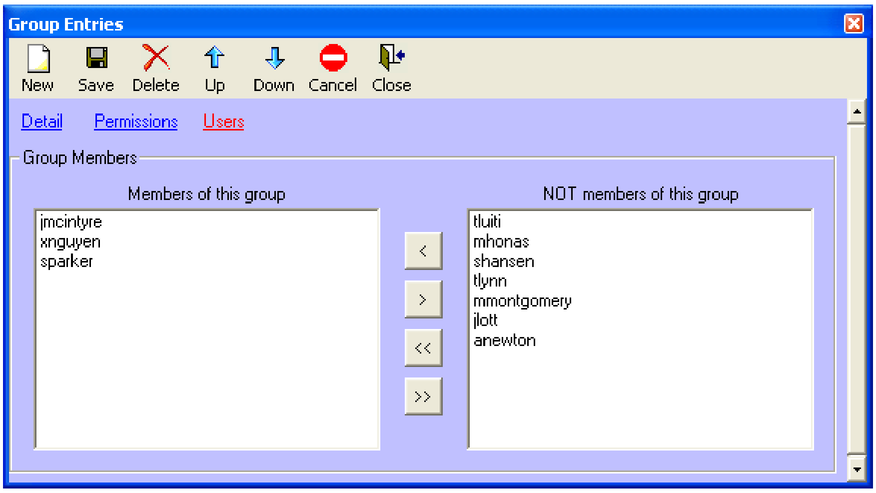
- Enter a unique Group name which will easily identify this group for later selection.
- Enter a more detailed description of the group. Now click "Save".
- Click on Permissions



Security Administration – Group - Permissions

- For each tree node, tick *Visible* and/or *Can Modify* as required for this groups permissions

- Click on Users



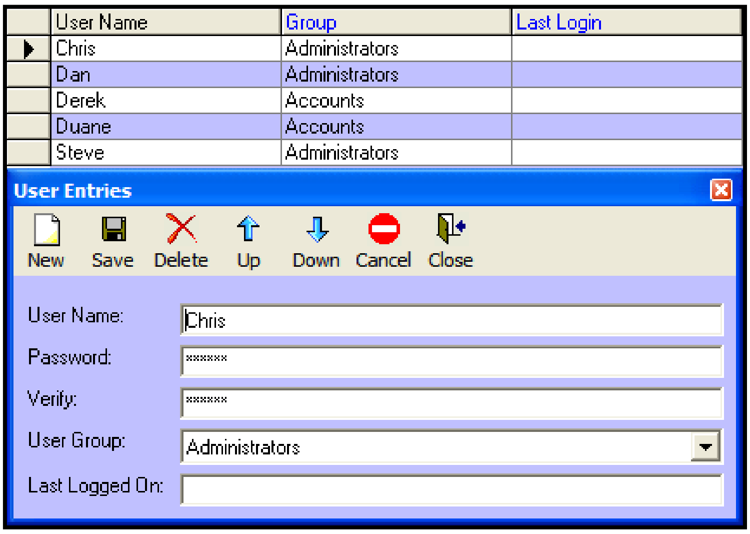
- Select users who are to be members of this group.
- Click Save when complete

> *If the users have not yet been configured, they can be selected later, or added to the group at the time they are set up.*

6.5.2 Users

This section outlines adding users to the system, assigning them to groups for access and functionality levels, and setting password and permissions.

Click *New* to create a new user or *Change* to edit an existing one:



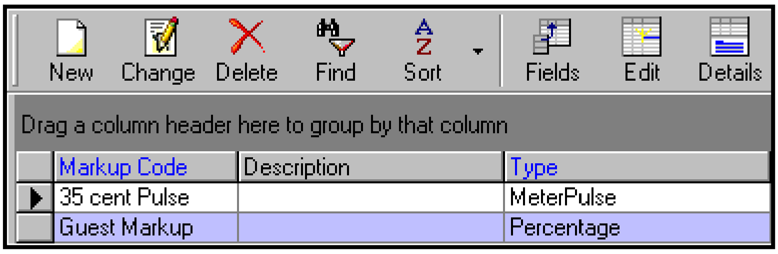
Users Administration – Add new User

- Confirm User Name and Password, and add to a group if required
- After first login, a record is kept each time users access the system. The last login date and time is displayed in the *Users Administration* table

6.6 CONFIGURATION DATA

6.6.1 Mark-ups

CAAB XL allows Cost Mark-ups to be applied to calls made by Staff, Account Codes, Extensions or Authority Codes. Mark-ups can be applied in several ways.



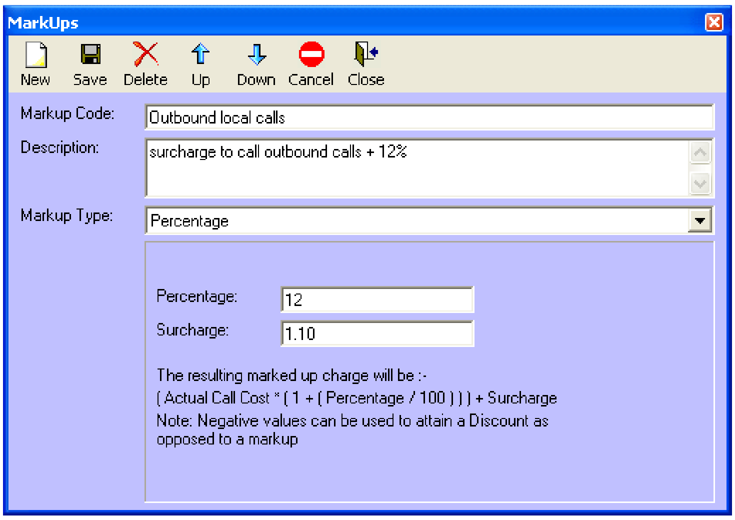
Mark-up Code Table

Click *New* to create a new mark-up or *Change* to edit an existing one:

- Enter a Mark-up Code and Description
- There are four ways to apply a mark-up on the system (discussed below):
  - Percentage Mark-up
  - Meter Pulse Mark-up
  - Per Minute Mark-up
  - Custom Script Mark-up

Percentage Mark-up

Percentage mark-up allows selection of a percentage to mark-up or down the call costs for anyone using this Mark-up type.



Mark-up Administration – add new Mark-up – Percentage

- **Percentage:** The percentage to mark-up the cost of calls. Use a negative value to apply discounts.

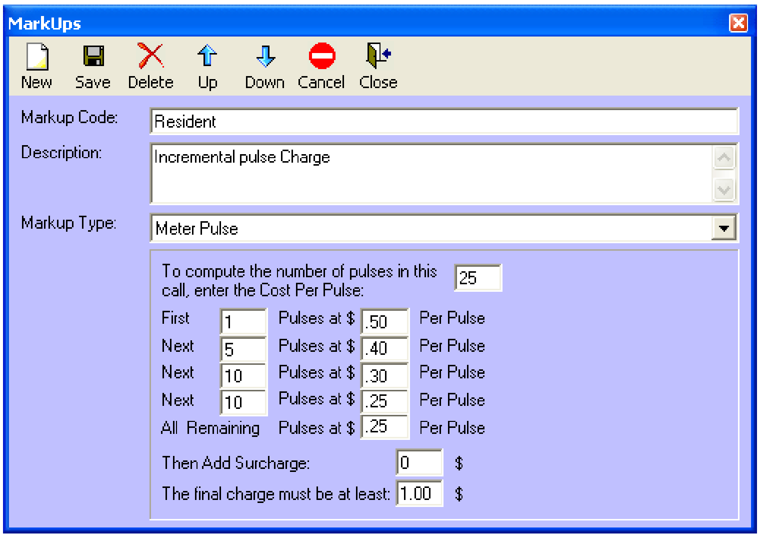
- **Surcharge:** A surcharge amount. This amount is entered in dollars (i.e. 1.2 is accepted as $1.20). When mark-ups are applied, percentages are calculated before surcharges are added.

Meter Pulse Mark-up

The Meter Pulse mark-up applies a modified cost to all meter pulses received during calls made by anyone using this Mark-up type.

This type of mark-up can be used for calls that receive meter pulses from the Telephone exchange.

Alternatively, CAAB XL can calculate meter pulses for calls that do not contain pulses. To do this, enter a value in the *number of pulses in this call* field. CAAB XL will divide the call cost by this value when calculating meter pulse totals.

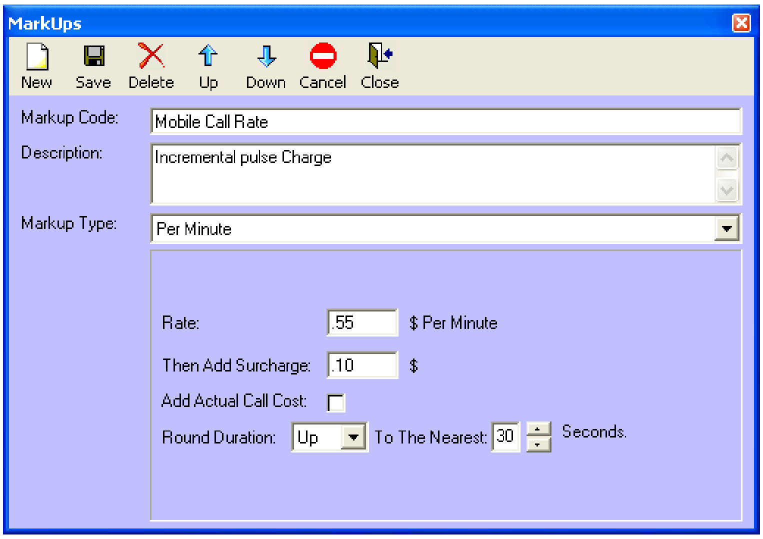


Mark-up Administration – add new Mark-up – Meter Pulse

- **Calculation:** Enter the call cost per pulse as required using the *number of pulses* at *value per pulse* fields.
- **Surcharge:** Add an optional surcharge if required
- **Final Charge:** Call costs may have a minimum charge rate defined. In the above example, if a call contained two pulses, the calculated cost would be 90 cents, but the final charge would be $1.00 in keeping with the final charge figure.

Per Minute

The Per Minute mark-up will apply a cost by call duration for all calls made by anyone using this Mark-up type.



Mark-up Administration – add new Mark-up – Per Minute

- **Calculation:** Enter the rate per minute
- **Surcharge:** Add an optional surcharge if required
- **Add Actual Call Cost:** If checked, the selected rate is calculated in excess of the call cost. If unchecked, the selected rate is calculated as the total call cost.
- **Round Duration:** Define rounding (up/down), and a value.

Custom Scripts

Custom Scripts allows a Visual Basic script to calculate call costs. Please contact the TSA Help Desk if more complex mark-ups are required.

6.6.2 Business Calendar

CAAB XL's Business Calendar function allows customised accounting periods to be defined.

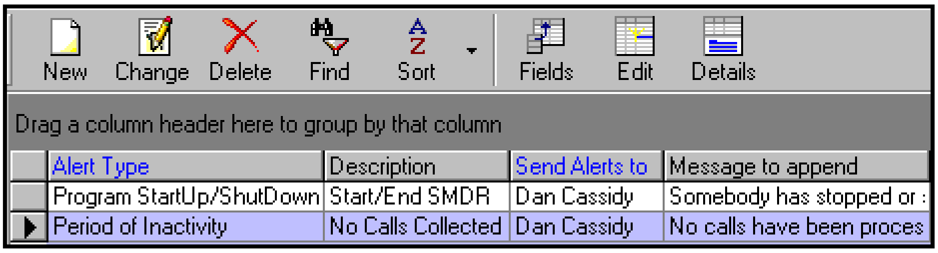
To add a new period:

- Click *New* in the Toolbar
- Enter *From* and *To* dates
- Click *Save*

When reports are generated, select *Business Calendar* in the *Date/Time* filter. The system will automatically select the last valid Business Calendar period for reporting.

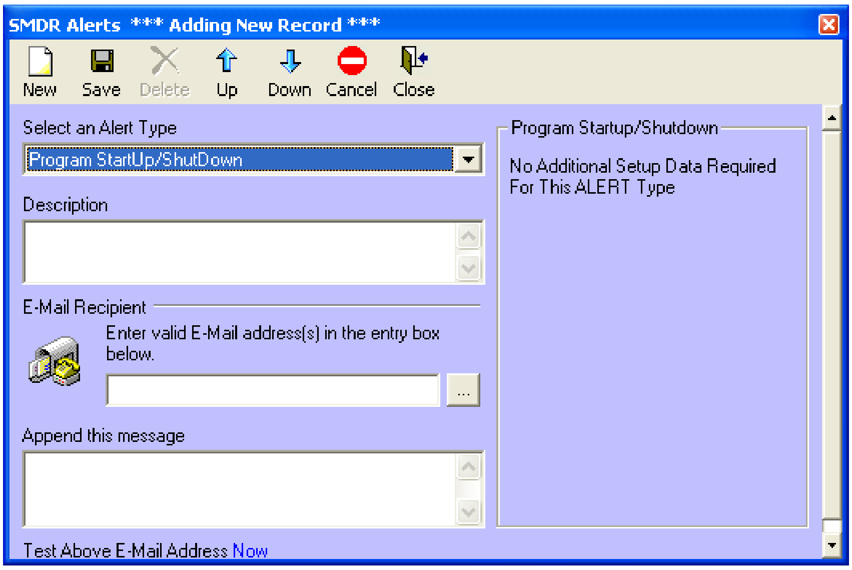
6.6.3 SMDR Alerts

Send e-mail messages informing of a range of conditions that may occur on the system.



SMDR Alerts Administration

Click *New* to create a new alert or *Change* to edit an existing one:



Alert Details

An alert is made up of several components shown listed below:

- **Alert Type:** There are 12 SMDR Alert types set up on the system.
    - Program Startup/Shutdown
    - Period of Inactivity
    - Daily Statistics
    - Low Disk Space
    - New Trunks
    - New Extensions
    - New Account Codes
    - New Authority Codes
    - Dialled Number
    - Cost of Call greater than a given amount
    - Duration of a Call greater than a given amount
    - Uncostable Call

Additional fields become available depending on the Alert type selected.

- **Description:** This is the description that will attach to this alert entry.

- **E-Mail Recipient:** Enter E-Mail address(es) for person(s) to be notified by this alert.
- **Appended Message:** Additional information to include in the alert
- **Test E-Mail Address:** Sends a test message to the E-Mail Address(es).

7 DATABASE TOOLS

CAAB XL provides a range of Database Tools to assist with data management.

Database Tools	What's This
Call Table Utilities	Reprocess Call Costs, Assignments and Markups and Archive, Restore and Delete Call records.
Browse Call Table	View / Modify Call Records.
Import CAAB Ti Data	Run the CAAB Ti data Import Wizard to add external data from either a text file or an Excel file
Export CAAB Ti Data	Run the CAAB Tidata Export Wizard to export external data to either a text file or to an Excel file

Database Tools

7.1 CALL TABLE UTILITIES

There are several utilities available within CAAB XL.

To access, navigate to *CAAB XL → Database Tools → Call Table Utilities*

Call Table Utilities	What's This
Re-Cost	Recalculate the Cost, Assignments and/or Markup Charge for selected Call records.
Archive	Copy Call Records to an Archive directory.
Restore	Restore Archived Call Records from an Archive folder
Delete	Delete Call Records from the Call Table
Raw Data Import	Reprocess Call Costs, Assignments and Markups and Archive, Restore and Delete Call records.

Call Table Utilities

7.1.1 Re-cost Data

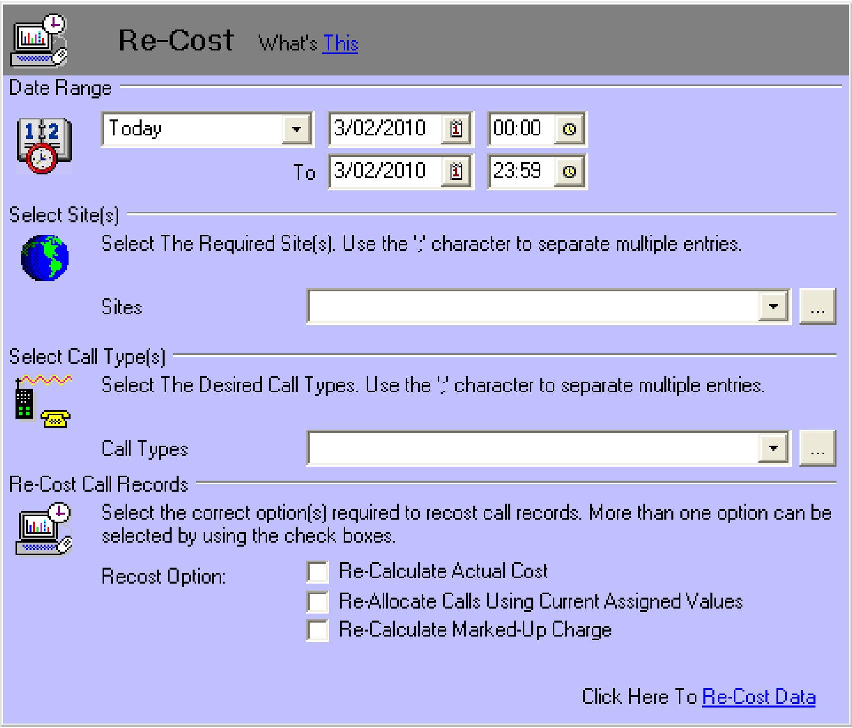
Re-cost Data allows records with cost already assigned in the live data file to have costs updated.

The function is useful if new rate tables have been loaded and must be applied to existing call records, if new trunks/routes have been loaded, or where calls were processed with an incorrect carrier or rate plan.

Important! If using *Central Processor*, ensure it is <u>STOPPED before running a re-cost</u>. Restart *Central Processor* after re-cost is complete. To stop and start Central Processor:

- Launch *Central Manager* from *START* → *Programs* → *CAAB XL*
- Click the *Services Manager* link
- In the *Service Controller For [CProc]* section, click *Stop*
- When the re-cost is complete, click *Start* to restart *Central Processor*

Re-cost Options



Call Table Utilities – Re-cost

- **Recalculate Actual Cost:** Actual record costs are recalculated and written to the live data file.
- **Re-allocate Calls using Current assigned values:** Records are reprocessed and assigned to modified Departments or Cost Centres.
- **Re-Calculate Marked-Up Charge:** Marked-Up call costs for each record are recalculated, taking into account any mark-up applied by extension, account code, authority code or trunk.

7.1.2 Archive Data

Archive Data is a tool designed to process call records into an archive directory for storage.

It is important to note this is NOT a substitute for database backup.

Archive Options:

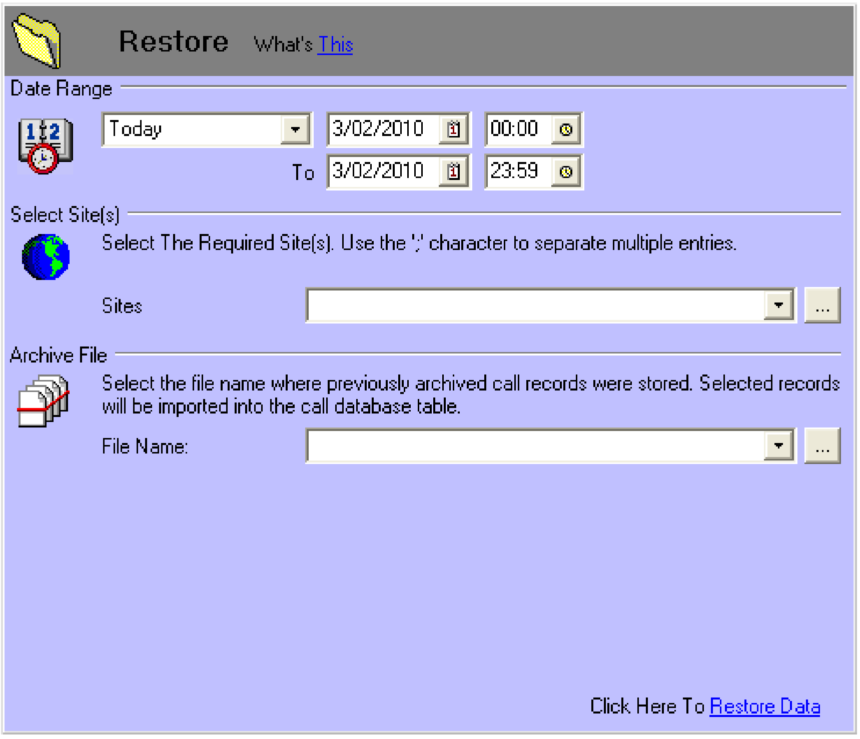
Call Table Utilities – Archive

- Select the **Date Range** of the call data to be archived.
- If required, particular **Sites** can be selected to be archived. Leaving the sites field blank will archive calls for all sites in the system.
- **File Format:** Select file format and optionally specify a file path to write to.
- **Delete Archived Records:** If checked, CAAB XL will delete data from the database as it archives.

7.1.3 Restore Data

Restore recovers previously archived records to the live data file for reporting.

Restore Options:



Call Table Utilities – Restore

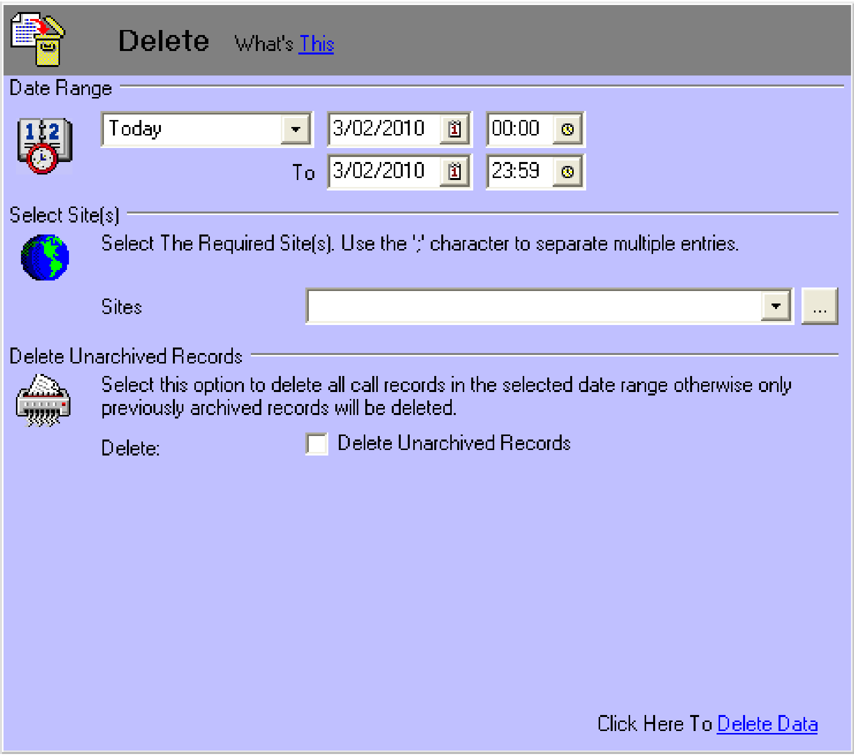
- Select the **Date Range** of the call data to be restored.
- If required, particular **Sites** can be selected to be restored. Leaving the sites field blank will restore calls for all sites in the system.
- Browse to and select the **Archive File** to restore into the live data. It is important to ensure that the file selected contains the required data. That is, it contains call records which fall within the date range and sites specified. The name of the file is indicative of the range of calls it contains.

7.1.4 Delete

Note: The Delete option allows batch deletes from the live database

It is important all preparations for archiving and backup of records are complete before deleting data. Be very aware of the finality of this routine. **Unless data has been archived or copied, it cannot be recovered, salvaged or undeleted.**

Delete Options:



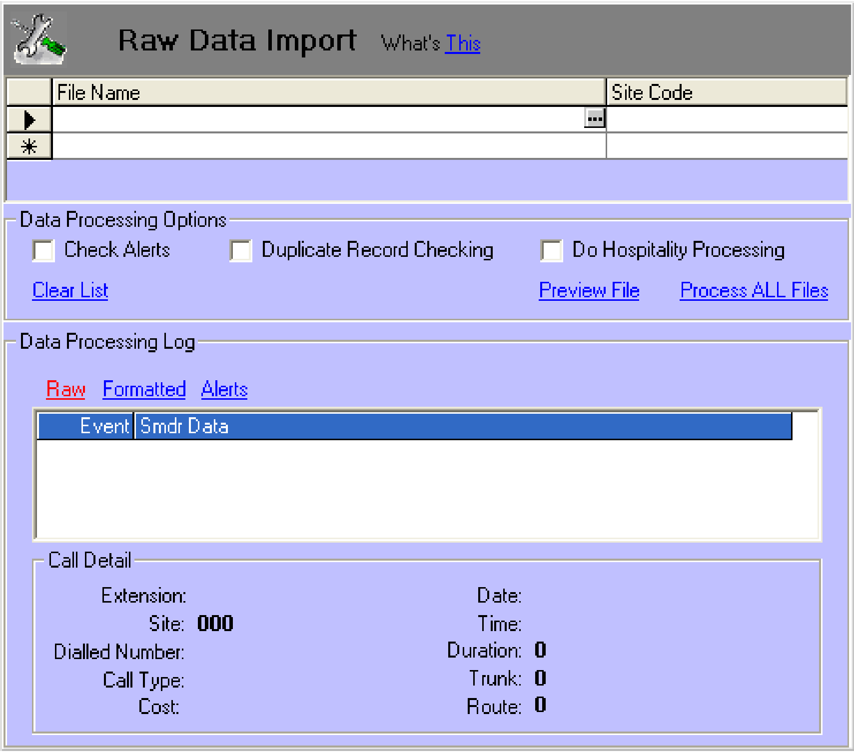
Call Table Utilities – Delete

- Select the **Date Range** of the call data to be deleted.
- If required, particular **Sites** call data can be selected to be deleted. Leaving the sites field blank will delete calls for all sites in the system.
- **Delete Unarchived Records:**
  - If *Delete Unarchived Records* box is NOT checked, only call records that have been previously archived are deleted. This is the recommended way to run Delete tasks.
  - If *Delete Unarchived Records* box is checked, ***all call records within the selected time/site range select will be deleted!*** This includes all unarchived records.

Unarchived records cannot be restored. Use this option with caution.

7.1.5 Raw Data Import

CAAB has the ability to convert call data stored in a file directly into the database. File data must be in the format of the telephone system for the site selected.



Call Table Utilities – Raw Data Import

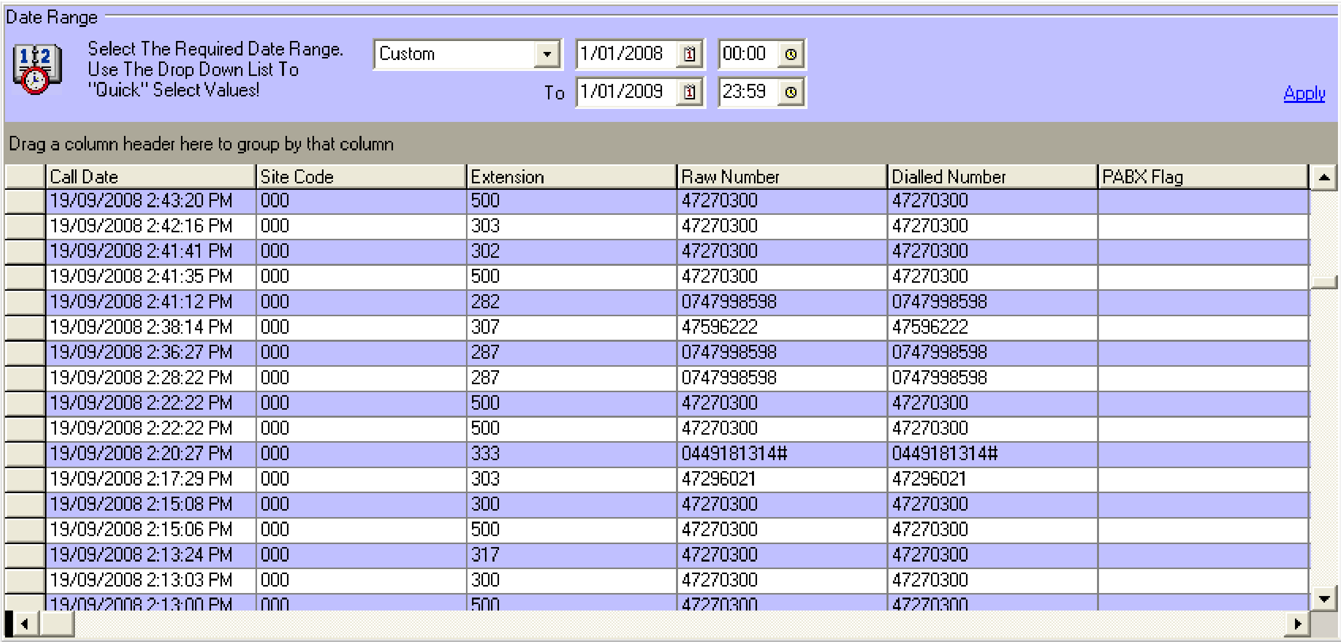
- Use [...] in the File Name column to select a file to import.
- Enter the site number the data is to be allocated to. Multiple files may be added to be processed simultaneously.
- **Data Processing Options:**
  - **Check Alerts:** If checked, every record will be referenced against configured alert entries.
  - **Duplicate Record Checking:** If checked, ensures no record is processed twice.
  - **Do Hospitality Processing:** If the organisations license permits Hospitality Processing, this checkbox will be selectable.
- **Clear List:** Removes any selected files from the list.
- **Preview File:** Preview how the data will be processed before actioning the import.
- **Process All Files:** Start the data import.

The Data Processing Log displays the call data that is being processed or previewed.

Once the import is completed the user is prompted to remove the files from the grid.

7.2 BROWSE CALL TABLES

The Browse Call Tables feature allows users to view and edit call data directly.



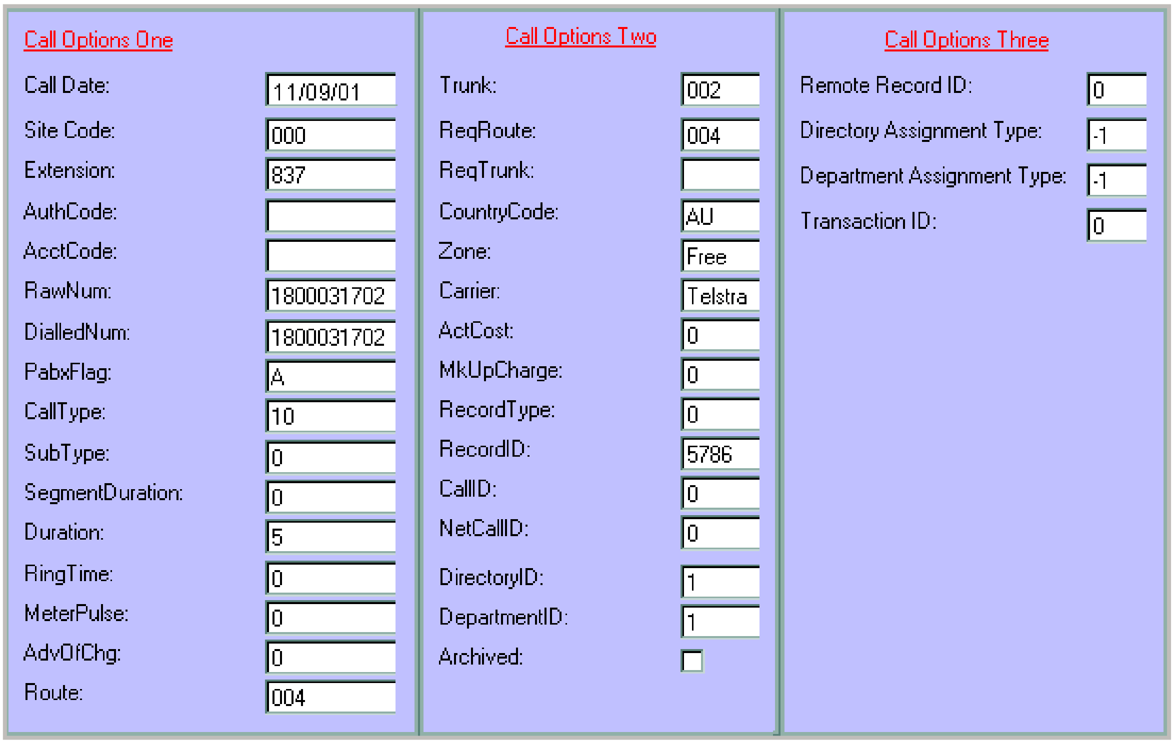
Browse Call Tables

Use *New* to manually add a new call record or *Change* to alter an existing record.

For more information about the columns available, refer to *Appendix A – Call Data Fields*.

8 APPENDIX A – CALL DATA FIELDS

Below is the layout for the maintenance of call records. The layout is broken down into three sections:



Call Options One

Call Date:	11/09/01
Site Code:	000
Extension:	837
AuthCode:	
AcctCode:	
RawNum:	1800031702
DialledNum:	1800031702
PabxFlag:	A
CallType:	10
SubType:	0
SegmentDuration:	0
Duration:	5
RingTime:	0
MeterPulse:	0
AdvOfChg:	0
Route:	004

Call Options Two

Trunk:	002
ReqRoute:	004
ReqTrunk:	
CountryCode:	AU
Zone:	Free
Carrier:	Telstra
ActCost:	0
MkUpCharge:	0
RecordType:	0
RecordID:	5786
CallID:	0
NetCallID:	0
DirectoryID:	1
DepartmentID:	1
Archived:	☐

Call Options Three

Remote Record ID:	0
Directory Assignment Type:	-1
Department Assignment Type:	-1
Transaction ID:	0

Maintenance Call Records

Fields included for CAAB XL Call Data are:

- **Call Date:** The date and time the incident was initiated. The format must be identical to the other call records.
- **Site Code:** The three-digit number that applies to origin of the incident. More Information
- **Extension:** The Extension this incident occurred on. More Information
- **AuthCode:** Any authority code used during this incident. More Information
- **AcctCode:** Any account code information used during this incident. More Information
- **RawNum:** The number that was entered when this incident was instigated.
- **Dialled Number:** The telephone number assigned to this record. This differs from the raw number in that any prefixes that have been stripped will not be shown in this field.
- **PABX Flag:** Any code put down by the telephone system to indicate any special conditions applied to this incident.

- **Call Type:** This numerical field accesses a "Call Type" data file to display the type of call. Table 1 shows a typical Call Type setup.

Call Type	Description	Call Group
1	Incoming answered	Incoming
2	Incoming no answer	Incoming
3	Local	Outgoing
4	National	Outgoing
5	International	Outgoing
6	Operator	Outgoing
7	Infomatel	Outgoing
8	Mobile	Outgoing
9	Not Allocated	Outgoing
10	Free	Outgoing
11	Internal	Others
12	User defined	Others
38	Unknown	Outgoing

Table 1 – CAAB XL – Call Types

- **Segment Duration:** If a call has been transferred between extensions then this field will contain the duration, in seconds, of the segment of the call used by this extension.
- **Duration:** Total duration of the call in seconds.
- **Ring Time:** The amount of time, in seconds, an incoming call rang before it was answered.
- **Meter Pulse:** Number of Meter Pulses registered on a call.

- **Advice of Charge:** Advice of charge given by telephone system.
- **Route:** The route that this incident took place on. More information
- **Trunk:** The trunk that this incident took place on. More information
- **Requested Route:** The route the telephone system expected the call to take place on. More information
- **Requested Trunk:** The trunk the telephone system expected the call to take place on. More information
- **Country Code:** The country Code is determined by CAAB XL at the point of collection. The code allows the reporting program to access the country table to determine the country of origin/destination of the call. **Error! Reference source not found.** shows a typical Country Code setup.

Country ID	Country	Country Code
12	Aruba	AW
13	Australia	AU
14	Austria	AT
15	Azerbaijan	AZ
16	Bahamas	BHS
17	Bahrain	BH
18	Bangladesh	BD
19	Barbados	BB

Table 2 – CAAB XL – Country Codes

- **Carrier:** The call Carrier is determined by CAAB XL at the point of collection. The code allows the reporting program to access the carrier table to determine the call costs.
- **Actual Cost:** The cost of the call as calculated on the system.
- **Mark-up Charge:** The charge out rate once any mark-ups have been applied. More Information
- **Record ID:** Quick link reference for this record.
- **Call ID:** Quick link reference for this call.
- **Directory ID:** Quick link to directory entry assigned to the extension that made the call.
- **Department ID:** Quick link to department entry, which is assigned to the directory entry, which is assigned to the extension that made the call.
- **Archived:** A tick will be placed in this field when the call record has been archived.

9 APPENDIX B - WILD CARDS & EQUATION ARGUMENTS

There are a wide variety of “Wild Card” characters and equation arguments usable in reporting filters. This section is designed to provide a more detailed insight into their use.

9.1.1 = (Equals)

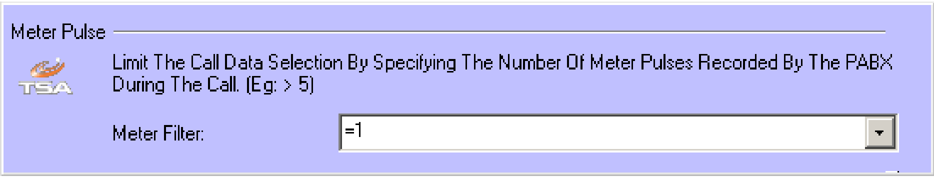
Compares two expressions (a comparison operator).

When non-null expressions are compared, the result is TRUE if both operands are equal; otherwise, the result is FALSE..

- **Syntax:**

```
= Expression
```

- **Arguments:**



- **Example:**
  The result will be that only calls receiving one Meter Pulse will be included in the report.

9.1.2 > (Greater Than)

When expressions are compared, the result is TRUE if the filtered operand has a higher value than the filter operand; otherwise, the result is FALSE.

- **Syntax:**

```
> Expression
```

- **Arguments:**

- **Example:**
  The result will be that only incoming calls that rang for longer than 30 seconds (before being answered), will be included in the report

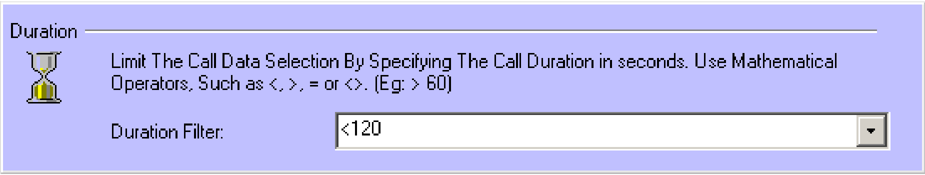
9.1.3 < (Less Than)

When expressions are compared, the result is TRUE if the filtered operand has a lower value than the filter operand; otherwise, the result is FALSE. A TRUE result fulfils the filtering requirement and passes the filter.

- **Syntax:**

```
< Expression
```

- **Arguments:**



- **Example:**

The result will be that only calls with duration less than 120 seconds will be included.

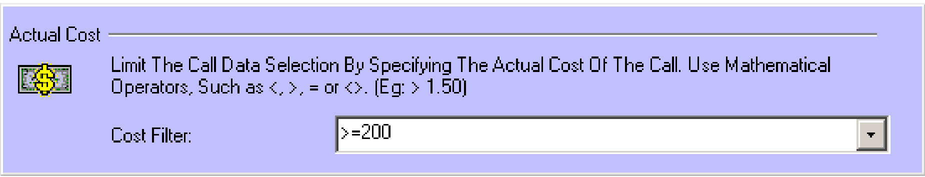
9.1.4 >= (Greater Than or Equal To)

Compares two expressions (a comparison operator). When non-null expressions are compared, the result is TRUE if the filtered operand has a higher or equal value than the filter operand; otherwise, the result is FALSE.

- **Syntax:**

```
>= expression
```

- **Arguments:**



- **Example:**

The result is that only calls costing $2.00 or more will be included in the report.

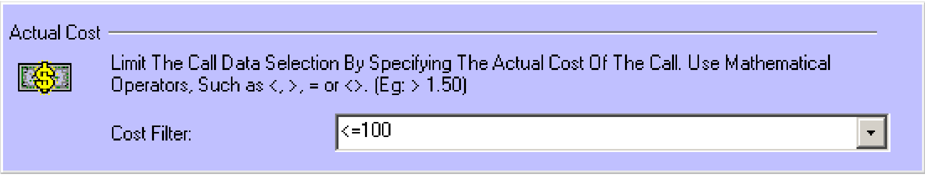
9.1.5 <= (Less Than or Equal To)

Compares two expressions (a comparison operator). When non-null expressions are compared, the result is TRUE if the filtered operand has a lower or equal value than the filter operand; otherwise, the result is FALSE.

- **Syntax:**

```
=< expression
```

- **Arguments:**



- **Example:**

The result will be that only calls costing $1.00 or less will be included in the report.

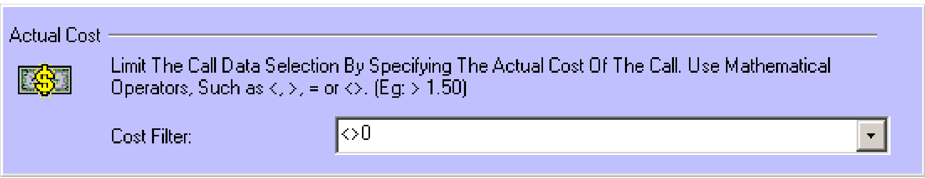
9.1.6 <> (Not Equal To)

Compares two expressions (a comparison operator). When non-null expressions are compared, the result is TRUE if the filtered operand is not equal to the filter operand; otherwise, the result is FALSE.

- **Syntax:**

```
<> expression
```

- **Arguments:**



- **Example:**

The result will be that only costed calls (i.e. No 0 value call data) will be included in the report.

9.1.7 !< (Not Less Than)

Compares two expressions (a comparison operator). When non-null expressions are compared, the result is TRUE if the filtered operand does not have a lower value than the filter operand; otherwise, the result is FALSE.

- **Syntax:**

```
!< expression
```

- **Arguments:**

- **Example:**

The result will be that only calls costing $100 or more will be included in the report.

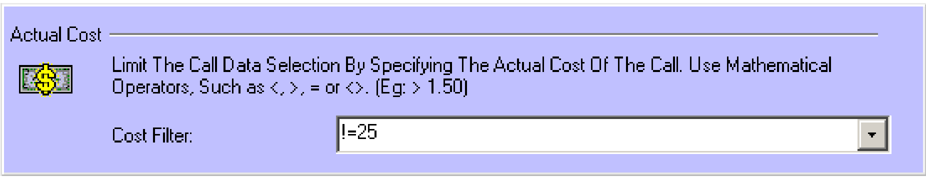
9.1.8 != (Not Equal To)

Compares two expressions (a comparison operator). When non-null expressions are compared, the result is TRUE if the filtered operand is not equal to the filter operand; otherwise, the result is FALSE.

- **Syntax:**

```
!= expression
```

- **Arguments:**



- **Example:**

The result will be that only calls that didn't cost $25 will be included in the report.

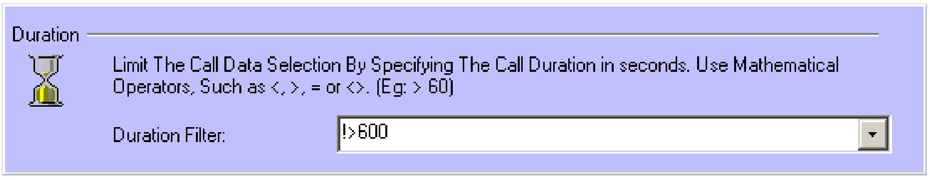
9.1.9 !> (Not Greater Than)

Compares two expressions (a comparison operator). When non-null expressions are compared, the result is TRUE if the filtered operand does not have a higher value than the filter operand; otherwise, the result is FALSE.

- **Syntax:**

```
!> expression
```

- **Arguments:**



- **Example:**

The result will be that only calls shorter than 10 Minutes (600 seconds) will be included in the report.

9.1.10 Like

Determines whether or not a given character string matches a specified pattern. A pattern can include regular characters and wildcard characters. During pattern matching, regular characters must exactly match the characters specified in the character string; wildcard characters, however, can be matched with arbitrary fragments of the character string. If any of the arguments are not of character string data type, CAAB XL converts them to character string data type, if possible.

> *Please note that if a LIKE command is not used and an equation filter is not found then LIKE will be assumed and applied as the filter*

- **Syntax:**

  `LIKE match_expression`

  or

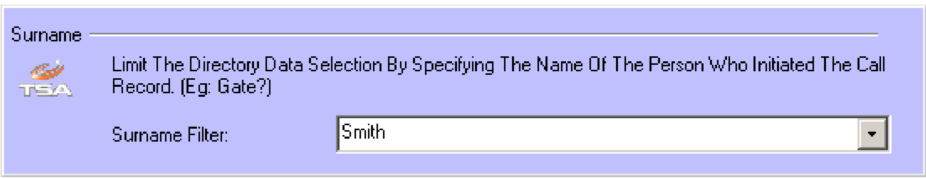
  `match_expression`

- **Arguments:**

  Where `match_expression` is any valid string of characters to be compared with this particular field.

- **Example 1:**

- **Example 2:**



The result in both examples will be that only Staff members with a surname of “Smith” will be included in the report.

Match_expression for LIKE can include these valid wildcard characters.

Wildcard character	Description	Example
*	Any string of zero or more characters.	LIKE '*computer*' finds all relevant fields with the word 'computer'.
?	Any single character.	LIKE '?ean' finds all four-letter relevant fields that end with ean (Dean, Sean, etc.)
?*	Any string of one or more characters.	LIKE '?*' finds all relevant fields with any characters at all.
[ ]	Any single character within the specified range ([a-f]) or set ([abcdef]).	LIKE '[C-P]arsen' finds relevant fields ending with arsen and beginning with any single character between C and P, for example Carsen, Larsen, Karsen, etc.
[^]	Any single character not within the specified range ([^a-f]) or set ([^abcdef]).	LIKE 'de[^l]*' all relevant fields beginning with de and where the following letter is not l.

When performing string comparisons, all characters in the pattern string are significant, including leading or trailing spaces.

If a comparison in a query is to return all rows with a string LIKE '`abc` ' (`abc` followed by a single space), a row in which the value of that column is '`abc`' (`abc` without a space) is not returned.

However, trailing blanks, in the expression to which the pattern is matched, are ignored. If a comparison in a query is to return all rows with the string LIKE '`abc`' (**abc** without a space), all rows that start with **abc** and have zero or more trailing blanks are returned.

9.1.11 Not

Negates a Boolean input. Determines whether or not a given character string or value matches a specified pattern. A pattern can include regular characters and wildcard characters. During pattern matching, regular characters must exactly match the characters specified in the character string; wildcard characters, however, can be matched with arbitrary fragments of the character string.

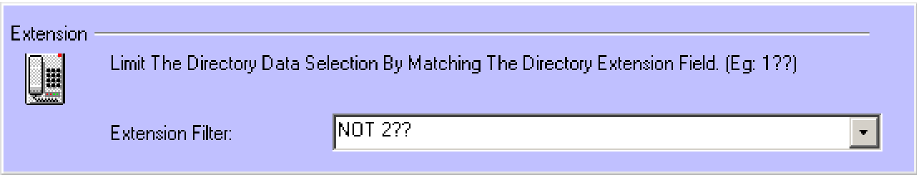
- **Syntax:** `NOT boolean_expression`
- **Arguments:**

  Where `boolean_expression` is any value to be compared to the relevant field.

- **Example 1:**

  The result will be that Staff members with a surname of “Smith” will not be included in the report.

- **Example 2:**



  The result will be that calls made from the 200 to 299 extension range will not be included in the report.

- **Result Value:**

  NOT reverses the value of any Boolean expression. Any fields that fall within the NOT parameters will not be included in the report output.

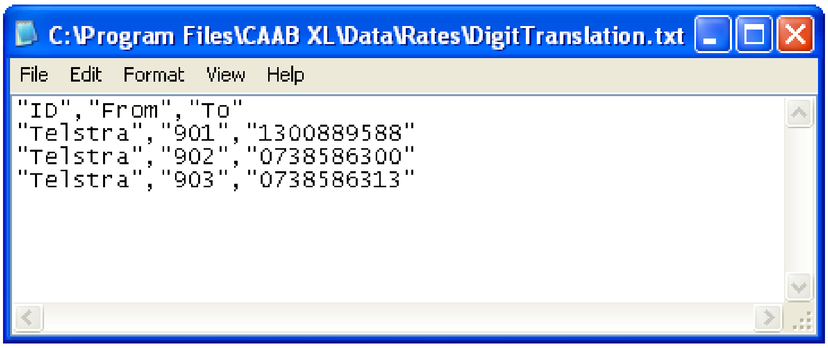
The use of NOT negates an expression.

10 APPENDIX C

10.1.1 Digital Translation

If the telephone system is set up with short dial numbers for speed dialling, set the prefix in the digital translation table to allow CAAB XL to recognise the destination.

For example, if a supplier dialled regularly, consider setting their contact number as a short dial number. In order for CAAB XL to cost the call correctly, set the short dial number in the Digit Translation table.



Digital Translation – Example of Path

Another scenario might be that the PABX is using Least Cost Routing (LCR) to determine the best carrier for each call. To achieve this it inserts a prefix into the number dialled to force it via the selected carrier. By using the Digit Translation table, prefixes can be removed from the beginning of the number, reverting to the number dialled, for reporting.

The "DigitTranslation.txt" file should reside in the `\Data\Rates` directory within CAAB XL. The full default location is:

```
C:\Program Files\CAAB XL\Data\Rates\DigitTranslation.txt
```

If the table doesn't exist simply create the file in this location.

Edit the table as shown in the example above. The first line contains header information which will always be:

```
"ID","From,"To"
```

The fields are quote delimited and comma separated. Each subsequent line should be treated the same way.

- **ID:** this identifies the type of translation to be used. This is the field selected in the *Digit Translation Table* area in the Site Wizard.
- **From:** The short-dial number to be converted, or the prefix to be stripped.
- **To:** The end result. This can be a telephone number as in the example above, or simply left blank if there are prefixes that must be removed.

Please note: a blank a field it should be entered as:

"" **(There is no space between)**

11 APPENDIX D – FREQUENTLY ASKED QUESTIONS (FAQ)

When I load my CAAB License details I receive the message "Invalid Unlock Code", even though the code matches the one on the license sheet. Why?

The unlock code field is a numeric composite of all of the other fields. Unless all of the fields match the license sheet, the unlock code will return as invalid. Verify that **ALL** fields match the details on your license sheet exactly.

Note: The offending field is quite often the support date.

Why is my report empty?

There are a number of reasons why you may not be seeing any records in a report. Here are some:

- You have supplied a *From date* which is later than the *To date*.
- You are running an extension report without the appropriate extensions configured in CAAB
- A combination of filters has countered each other resulting in no data being returned. An example of this is filtering by incoming call, while also filtering on calls costing greater than a certain amount. As incoming calls cost nothing, these filters will match no data when combined.
- The call collection service may have stopped on your system. Check the SMDR Service is running.

Why are there no calls in *Browse Call Table*?

There are a number of reasons this might occur. They include:

- The call collection service may have stopped on your system. Check the SMDR Service is running.
- You have supplied a *From date* which is later than the *To date*.
- The previous access to *Browse Call Tables* may have left filters in place which have restricted the data you are seeing. CAAB remembers the settings used when you exit a module. If a filter is used to only display certain calls, that filter will remain in place until somebody selects *Clear Filter*. To do this click on the *Find* button in the tool bar and select *Filter*. Click on *Clear Filter*.

How do I run a workstation setup?

It is a simple matter of selecting *Workstation* as the Setup Type during installation. The first time you run the CAAB Management application, you will be presented with the database selection screen. Select the existing CAAB database on your network and the workstation in stance will run up.

Why do I get an “Invalid Connection” message when opening CAAB?

This indicates that CAAB cannot see the database in order to access the data. You will normally be presented with the option of selecting the correct connection parameters at this point - this gives you the opportunity to point the application at the correct SQL server database.

If you know the SQL server name or IP address, have the correct security access codes/levels, and know the name of the database, you should be able to configure these parameters yourself. Otherwise, you may need to get this information from your DBA, or contact the TSA support desk for assistance.

Why won’t my SMDR Service start?

There are a number of reasons this might occur. Check the following:

- Check that the service is logged in has Administrator permissions in Windows.
- Recreate a brand new database, licence this and confirm SMDR starts, if it does the database may be corrupt. If so, you can run *Compact and Repair* on the database or contact TSA to take you through a DBUpgrade process which should rectify the database.
- The CAAB rates folder may not contain valid rates. The support desk should be able to assist with this.
- Registry clean may need to be done to remove CAAB registry settings.