Updating the Organization Table

1. Start from the CAS main menu.

2. Highlight **Organization Configuration Menu** and press Enter.

3. To reassign an existing cost center *extension*, or *personnel* entry (along with its detail records) to another *department*, *cost center*, or *extension* (respectively), highlight the appropriate **Move... Between** function and press Enter. Then:
   - Press D.
   - Follow screen instructions to select the destination, the origin, and effect the transfer.
   - Press E to exit.

4. To add, delete, or, change individual entries, highlight **Edit Organization Table** and press Enter Then:
   - Press D.
   - To view the next entry on this level, press N.
   - To view the prior entry on this level, press P.
   - To add an entry, press A, enter values and press Esc.
   - To remove an entry, press R and confirm.
   - To change an entry, press U, change values, and press Esc.
   - To move to a detail level, press D.
   - To return to master level, press M.
   - Press E to exit.

Updating the Account Code Table

1. Start from the CAS main menu.

2. Highlight **Site Configuration Menu** and press Enter.

3. Highlight **Edit Account Code Table** and press Enter.

4. Press D Then:
   - To display the next entry, press N.
   - To display the previous entry, press P.
   - To add a new entry, press A, enter an *account code* and *account name* and press Esc.
   - To remove an entry, press R, type **y** to confirm, and press Enter.
   - To change an entry, press U, enter changes and press Enter.
   - To exit, press E.

Deleting Call Records from Storage

1. Start from the CAS main menu.

2. Highlight **System Configuration Menu** and press Enter.

3. Highlight **Delete Call Records from Storage** and press Enter.

4. Press S, enter a *cut-off date*, and press Esc.

5. Press E to exit.

INTUITY™
Call Accounting System Quick Reference

Running Reports

1. Start from the CAS main menu.

2. Highlight **Reports Menu** and press Enter

3. Highlight desired report type and press Enter.

4. For a Selection Report, press N until report of interest appears on display. Then:
   - to define report, press U, enter values and Esc.
   - to generate report now, press G. If necessary, press U, enter values and Esc or, simply, press G.

5. For other reports, highlight desired report and press Enter Then:
   - For an Abandonded Calls Report:
     - to define report, press U, enter values and Esc.
     - to generate report now, press G. If necessary, press U, enter values and Esc or, simply, press G.
   - For any Organization Report, press N until report of interest appears on display. Then:
     - to define report, press U, enter values and Esc.
     - to generate report now, press G if necessary, press U, enter values and Esc or, simply, press G.
   - For any other report, press U, enter changes, and Esc or, simply, press G to generate report now.

Running Reports

NOTE

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

Scheduling Reports

1. Start from the CAS main menu.

2. Highlight **Reports Menu** and press Enter.

3. Highlight **Schedule Reports** and press Enter.

4. Press N until schedule of interest appears on display.

5. Press U and enter a *report code* from the list in the next panel.

6. Enter any other values and press Esc.

7. For a Selection Report, the procedure is complete.

8. For other reports, press D. Then, if necessary, press U, change values on display, and press Esc.

9. Press E to exit.

Report Codes

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

Code	Selection Report
SRn	Selection Report (n = 1 to 30)

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

Code	Account Code Reports
ACD	Account Code Detail Report
ACS	Account Code Summary Report

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