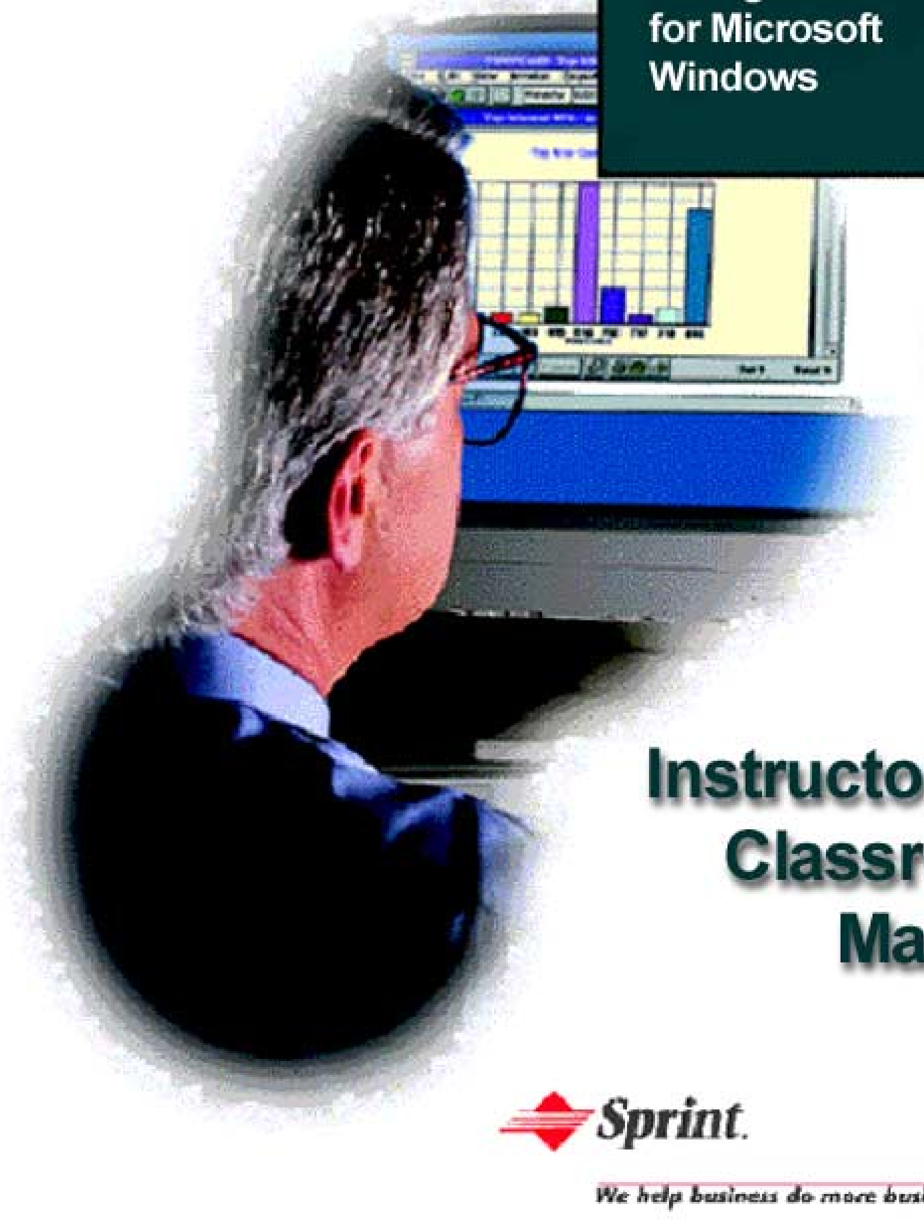
An Introduction to

SPRINT FŌNVIEW®

A Comprehensive Billing Data Program for Microsoft Windows



Instructor-led Classroom Manual

Sprint.

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Screen images in this book were capured with Corel Capture 6 and manipulated with Adobe PhotoShop 4.

Technical Support

Ask your Sprint Representative for details about how you can use FONVIEW to better manage your business and get more from every dollar you spend on communications.

Refer to your Sprint FONVIEW Users Guide

Call the FONVIEW Helpline Toll Free number 1-800-786-1222

Visit Sprint on the World Wide Web at: www.sprint.com

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Understanding FONVIEW®

FONVIEW AND THE MICROSOFT WINDOWS OPERATING SYSTEM

Sprint's FONVIEW telecommunications management system is designed for use with the Microsoft Windows operating system. Most of the features of this program reflect standard conventions used by developers of Windows applications. You should be familiar with the Windows operating system, the use of a mouse, drop down menus, etc. If not, you are strongly encouraged to take the time to learn more about this operating system to best use this program. Refer to your Windows Operating System User's Guide for assistance with operating system functions.

OVERVIEW

FONVIEW is Sprint's comprehensive, PC-based telecommunications management system. FONVIEW contains value-added analytical software for managing monthly invoicing data. Each month the customer receives their invoice data on diskettes or CD-ROM.

FONVIEW offers a broad array of tools for managing Sprint's invoice data. By receiving your invoices in data form and loading them into this program, Sprint customers can:

- Review invoices, both at the consolidated and detail levels
- Customize description fields and hierarchy groupings
- Generate more than 90 pre-defined call detail, summary and management reports
- Customize defined reports using filters
- Generate very specific Ad-Hoc reports
- Generate sophisticated Re-Billing reports

With FONVIEW you can manipulate the invoice data in your invoices and see them on the screen, print formatted reports and export data for use in other software applications.

START AND OPEN FONVIEW

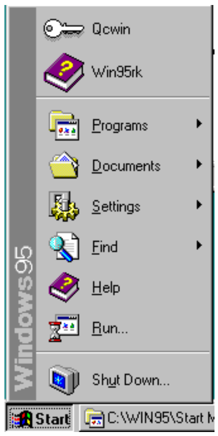


Figure 1-1 Start Menu

Action Steps - Opening FONVIEW in Windows 95

	What you type or do	What happens
1.	Click once on the **Start** button on the Taskbar, and use the mouse to navigate to **Programs**.	Opens a listing of available programs.
2.	Navigate to and click on **FONVIEW** and click on **the Icon** in the sub-menu Menu. 	The **FONVIEW** program begins and a **Opening Message** dialog box opens.

FONVIEW is designed to work in the Windows environment. Most commands are similar whether in the Windows 3.1, Windows NT or the Windows 95 operating system. There will be slight differences on your screen from the illustrations in this manual if you are working in Windows 3.1 or Windows NT.

Action Steps - Opening FONVIEW in Windows 3.1

	What you type or do	What happens
1.	Double-click on the **FONVIEW** Program Group in the Windows Program Manager.	Opens the Program Group.
2.	Find and double-click on the **FONVIEW Icon.**	The **FONVIEW** program begins and a **Opening Message** dialog box opens.

Looking at the FONVIEW Window

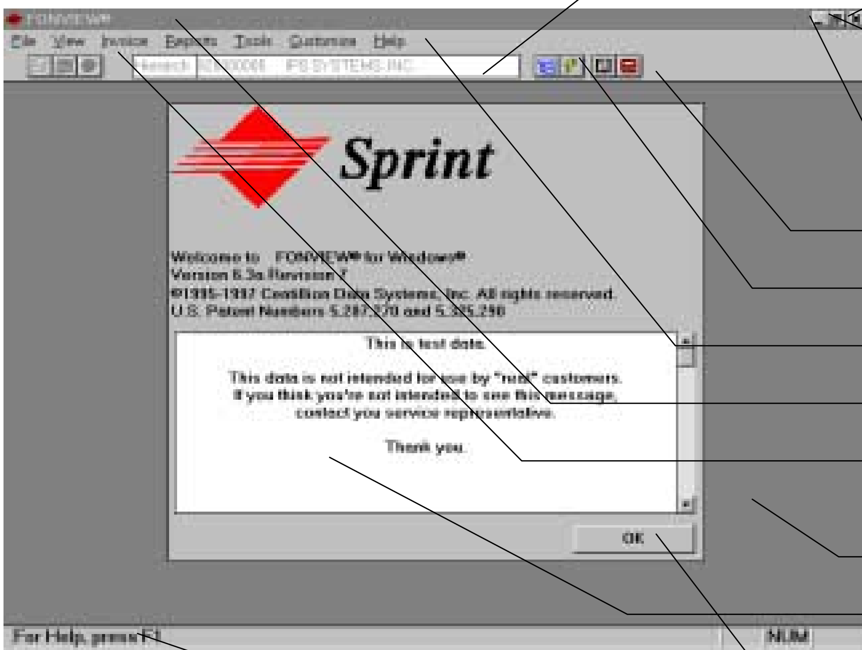


Figure 1-2 Sprint Opening Screen

New Terms - Components Of The FONVIEW Window

Title Bar	Across the top of every window in FONVIEW is a bar which names the screen below. Instructions often refer to these title bars in identifying the current window. The title bar will change as sub-windows below it are opened.

Menu Bar	The horizontal menu bar at the top of the window contains commands and sub-menus that allow you to execute various functions. The menu bar items change depending on which window you are in. Clicking once on a Menu command drops down a list of related commands or takes your directly to the function.
Object Window	The Object Window shows you which part of the Sprint Invoice you are working with. It can show any level, from the entire Sprint Invoice to individual Service Level accounts.
Toolbar	FONVIEW's toolbars give you shortcuts to Menu commands simply by clicking once on one of the toolbar button tools. The appearance and names of these toolbars will change automatically depending on the window in which you are working. If a button tool on any toolbar is grayed out, then its function is temporarily unavailable.
Workspace	As you use FONVIEW, windows will open up in this workspace. These windows may be moved and re-sized to see more than one window at the same time.
FONVIEW Message Screen	Sprint FONVIEW can send you important messages with your monthly data which will open automatically when the program is started.
OK Button	Most message screens and dialog boxes will have an OK button on them. Pressing OK closes the window and continues the program.
Status Bar	At the bottom of the window and most dialog boxes is a line which gives you further information about the currently selected item.

Loading the Data

Your Sprint FONVIEW monthly billing data is sent to you either on one or several 3.5 inch diskettes or, if you have a large amount of information, on a CD-ROM. When you install FONVIEW® for the first time, the installation program checks to see if you have a CD-ROM reader in your computer and offers you the option to install the program for loading from a CD-ROM. To change from one procedure to the other, you will need to re-install your FONVIEW program. For further information about FONVIEW installation, refer to Appendix 1 of this book.

Action Steps - Loading the FONVIEW data from diskettes

	What you type or do	**What happens**
	Click once on the **OK** button in the *Message Screen* (if you have not done so already). 	The Message screen closes and the Workspace is clear.
1.	Insert the Sample Data diskette in Drive a:	Diskette clicks into drive.
2.	Click once on *“**Tools”*** on the **Menu Bar.**	A Drop Down List of commands will appear. At the bottom of the list is ***“Load Data…”.***

3.	Click once on the ***"Load Data…"*** Command**.**	The **Load Data Options** dialog box opens with the option to load FONVIEW and/or graph data. 
4.	Make certain both the ***Load FONVIEW® Data*** and ***Load Graph Data*** boxes are check marked and click **Load.** 	The **Load Data - Insert Disk** dialog box (figure 1.3, below) will appear.

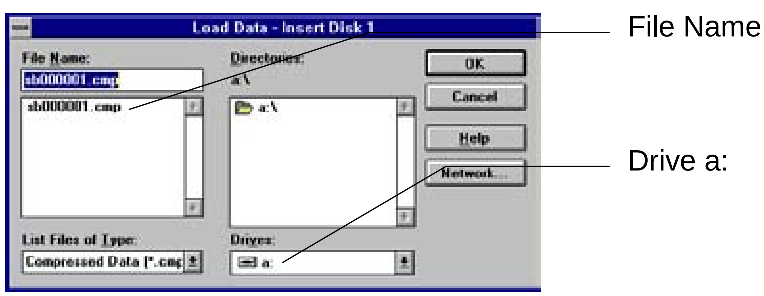


Figure 1-3 Load Data dialog box

5.	Make certain that the **Drives** List is on Drive a:, highlight the **File name** and click **OK**.	A message box appears showing you the progress in de-compressing the data file and loading the information.

LOADING FROM A CD-ROM - Follow the same procedure as above, except the drive letter will be your CD-ROM drive letter. Data on a CD-ROM is Read-only and will not be loaded onto your hard drive, but some structural information must be loaded.

Learning the IPS Story

Reggie Rivera and Sindy Samuelson work for International Produce Source, a Florida company which has recently expanded its operation to California. Reggie and Sindy are responsible for using their telecommunication services efficiently.

There is a Western Region which handles the western states while the rest of the country and most of the international sales are supervised from Florida. IPS has the following Service Level Accounts:

Catalogue Sales132000295
Customer Service132000335
Florida Administration147000955
Florida Operations148000715
California Sales FonCards157000545
California Sales Offices156000505

Let’s look at IPS’ Consolidated Invoice.

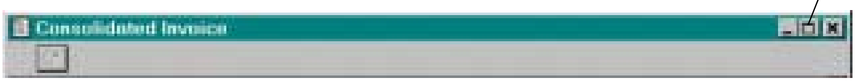
THE CONSOLIDATED INVOICE

Action Steps - Accessing the Consolidated Invoice.

	What you type or do	What happens
1.	On the toolbar, Locate and click once on the Consolidated Invoice Button Tool.	The IPS Consolidated Invoice appears in a window.

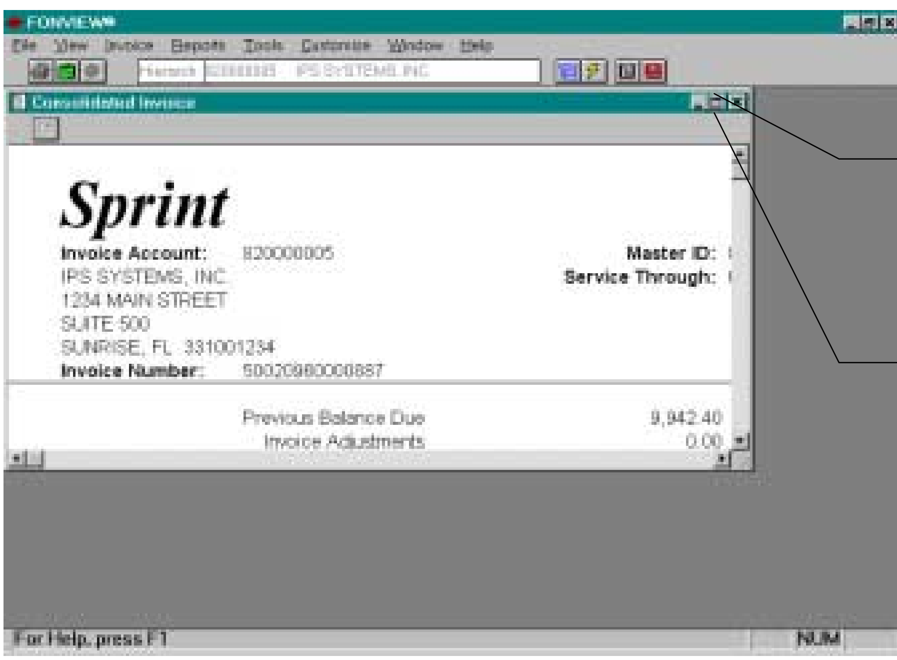
Consolidated Invoice Button Tool

2.	Maximize the Consolidated Invoice window by clicking once on the second button from the right, in the upper right hand corner of the Consolidated Invoice Title Bar.	The IPS Consolidated Invoice maximizes to cover the available window space.



<u>Maximize</u> or Restore window tool

Let's take a quick look at the IPS Consolidated Invoice before exiting FONVIEW.



Maximize Screen Button

NOTE: The second group of controls are for the client screen (The Consolidated Invoice)

Figure 1-4 Consolidated Invoice opened

Exiting FONVIEW

Action Steps - Closing FONVIEW

	What you type or do	What happens
1.	Click on **File** in the ***Menu Bar.***	The Drop Down Menu List appears.
2.	Click on **“Exit”**. 	The **FONVIEW** program exits.

*We did not close the Consolidated Invoice before exiting. Will it still be open in the workspace when FONVIEW is opened again**?***

Skill Review

Exercises:

A. Open **FONVIEW.**

1. Using either the Windows 95 or Windows 3.1 techniques, open FONVIEW
2. Click **OK** on the Welcome Screen

B. Load data file. (make sure data disk is in drive a:)

1. Click on the **Tools** Menu
2. Click on the **Load Data…** command
3. Make certain both **Load FONVIEW® Data** and **Load Graph Data** options are check marked
4. Click on the **Load** button
5. Highlight file name
6. Click **OK**

Application Project:

1. To help Reggie and Sindy prepare an Accounts Payable report for Accounting, we agree to open the Consolidated Invoice and find the total and write it here.

Total Outstanding Balance _____________

When you have finished the excercises and project applications, close the FONVIEW program.

2. Reviewing the Invoice

2.1 How the Consolidated Invoice is organized
- Accessing the Consolidated Invoice
- Windows Control Buttons Review
- Looking at the Consolidated Invoice Window

2.2 Looking at Call Detail By Account
- The 3 Levels of the Consolidated Invoice
- Navigating through the Consolidated Invoice

2.3 Looking at the Call Detail Usage Report
- Looking at a Call Detail Usage Report
- How the Call Detail Usage Report is organized.

2.4 Other Detailed Items
- Non-usage Charges and Taxes
- Discounts and Promotions

2.5 Skill Review
- Exercise
- Application Project

How the Consolidated Invoice is organized.

Action Steps - Accessing the Consolidated Invoice.

	What you type or do	What happens
1.	Using previous knowledge, open **FONVIEW** and click on the **OK** button in the Message window to clear the Workspace.	FONVIEW opens and the Workspace is clear.
2.	Click once on the ***Consolidated Invoice*** button tool to open the invoice in the Workspace. 	The Consolidated Invoice opens in the Workspace.
3.	Using the *maximize* window control in the title bar of *the Consolidated Invoice* Window**, Maximize** the ***IPS Consolidated Invoice***. 	The invoice maximizes on the screen.

Maximize/ Restore button

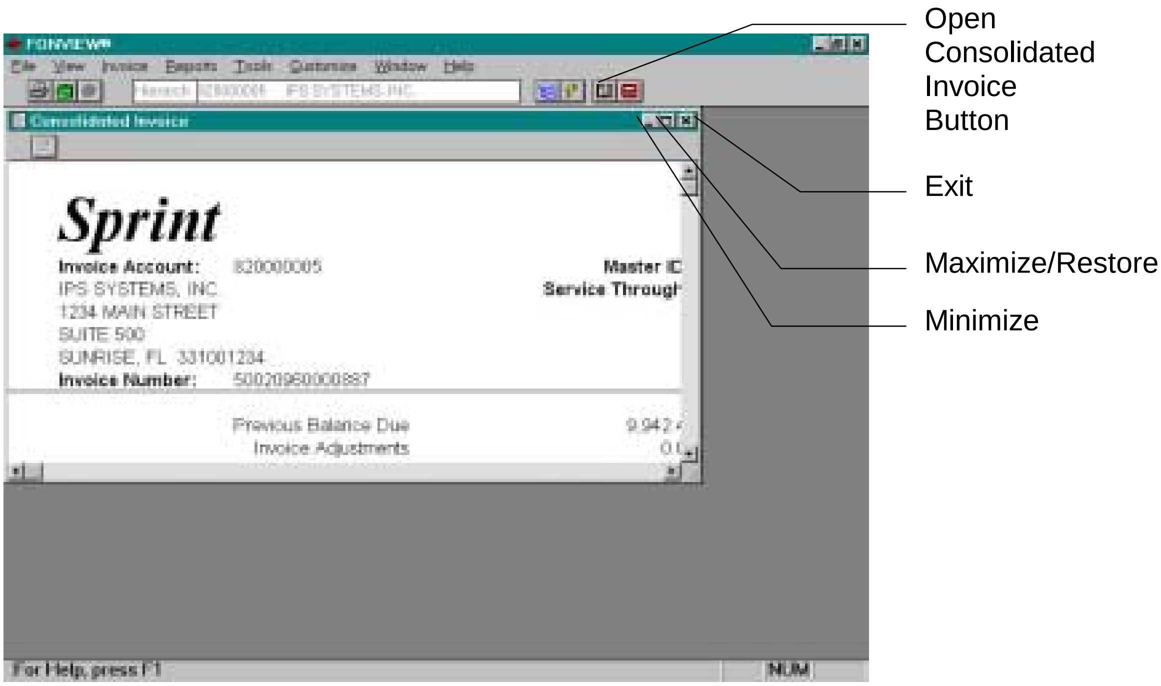


Figure 2-1 Opening the Consolidated Invoice

Windows Control Buttons Review.

Maximize/ Restore	In all Windows 95 screens, three buttons appear on the upper right hand corner of the Title Bar. The middle button is the **Maximize/Restore** button. Clicking once on this button maximizes the size of the screen attached to that Title Bar. Clicking again, restores it to its previous size which can be set by the user. Be sure to note <u>that every open window</u> as well as the main program has these tools.
Minimize	The left-most button is the **Minimize** button, which minimizes the size of the screen to a small object at the bottom of the screen. In the case of a Program, this button places the program on the Windows 95 Task Bar.
Exit	The right button is a quick exit of the screen or Program. This is the button you will most often use to leave a window.

INVOICE INFORMATION

Above the solid line is the general information about the invoice data. It includes:

Invoice Account
Account Name and address
Invoice Number
Master ID (for the Master Account)
Service Through Date

Below the line are the totals for various consolidated tele-communication services.

Below the solid line, we can scroll through the IPS Consolidated Invoice to see the information it contains and detail for the various services.

New Terms

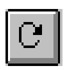
Scrolling	Scrolling is the process of navigating up-and-down or side-to-side through a table or document. The IPS Consolidated Invoice has vertical **scroll bars**, with three methods for scrolling: • Click and drag the **scroll box** to move through the invoice at your own pace. • Click above or beneath the scroll box in the scroll bar to move through a screen-sized area. • Click the up or down **scroll arrow** to move one row of information at a time. Horizontal scroll bars work similarly.

Action Steps - Looking at the Consolidated Invoice.

	What you type or do	What happens
1.	*Scroll* through the IPS Consolidated Invoice using the vertical **scroll-bar**.	The invoice information is available for viewing. Notice that the General Information above the line is not scrolled.
2.	Look at the various categories of charges.	Notice **Current Charges** and **Discounts and Promotions** are the two major categories.

Looking at Call Detail Usage By Account

New Terms

Drill Down button 	Button for viewing further detailed information about an account or service in the invoice.
Back Up tool button 	Button which moves the screen back up one level from detail to a total.

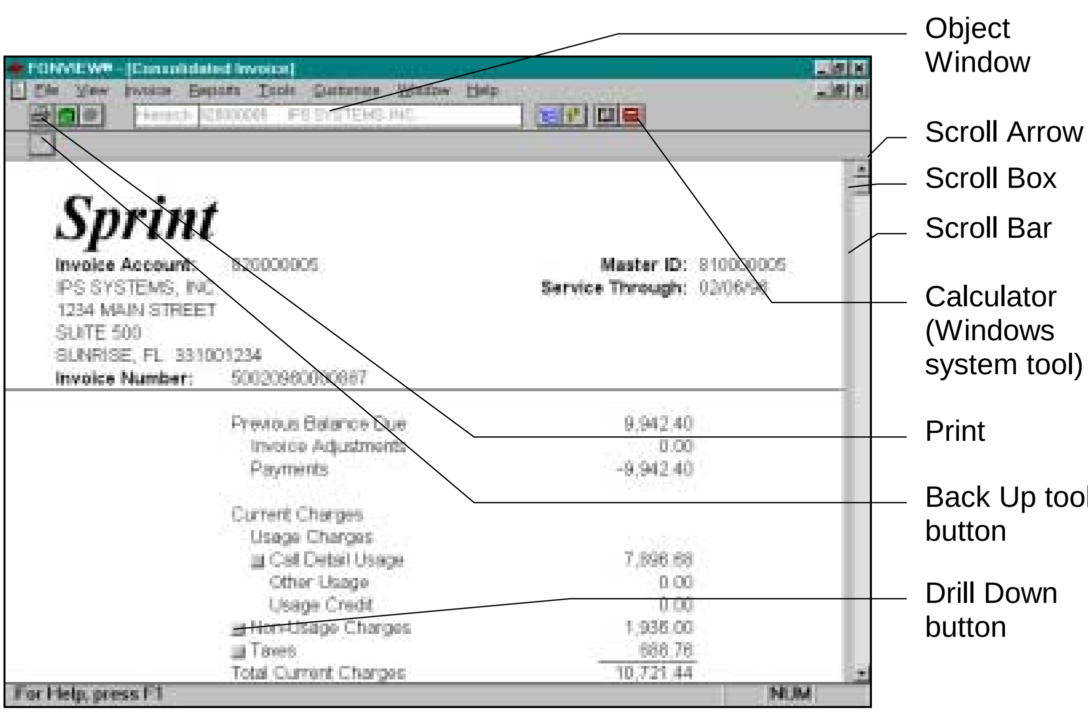
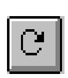


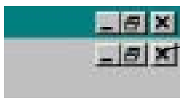
Figure 2-2 The IPS Consolidated Invoice

New Terms - The 3 levels of the Consolidated Invoice.

Master Account	The top level of your Consolidated Invoice is the Master Account level which represents all Service levels of your Sprint Account.
Invoice Points	By clicking on Drill-down buttons, invoice points can be accessed. These are sub-divisions of your invoice which may lead to individual detail of each account.
Defined Reports	Drill-down buttons from the Invoice points, lead to defined reports from the Consolidated Invoice regarding individual accounts.

Action Steps - Navigating the Consolidated Invoice

	What you type or do	What happens
1.	Click once on the **Drill Down button** next to ***Call Detail Usage*** 	A screen appears in the Workspace showing the Invoice Points for accounts which have charges. This is the 2^{nd} of 3 levels of detail.
2.	Click once on the **Back Up tool button.** 	The screen returns to the 1^{st} or top level of the Consolidated Invoice.
3.	Click again on the **Drill Down button** next to ***Call Detail Usage.***	The screen returns to the Invoice Points for Service Level accounts.
4.	Click once on the **Drill Down button** next to ***CA SALES CARDS***.	A Report is produced on the screen which shows the call detail for California FonCards. This is the 3^{rd} level of detail.

	At the third level of the Consolidated Invoice a report is generated. Since this is a separate window, there are no Back-up Tool Buttons available. The screen must be exited using the Exit button in the Title Bar.	
5.	Click on the **Exit** button of the report screen (be careful not to click on the Exit button for FONVIEW, the top button). 	Since this is a report, the Exit button must be used. The screen returns to the 2nd level, the Service Level Accounts.
6.	Click on the **Back Up tool button.**	The screen returns to the 1st level, the IPS Consolidated Invoice, Master Account level.

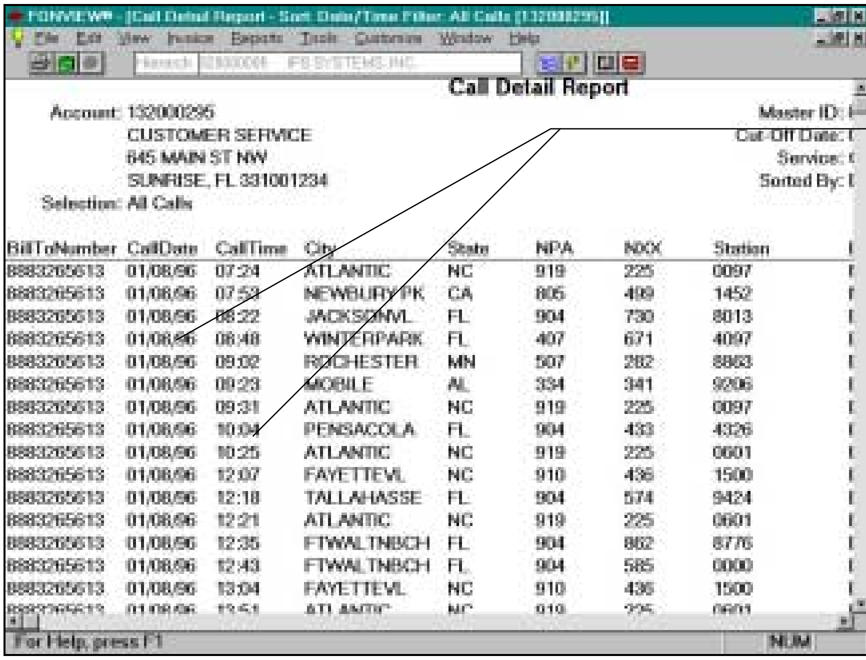
Exit Report
(Level 3)

Looking at the Call Detail Usage Report

Action Steps - The Call Detail Usage Report for Customer Service

	What you type or do	What happens
1.	Use the **Drill Down buttons** to access **the *Call Detail Usage Report*** for the ***Customer Service account***.	The detail report for the Customer Service, Service Level account appears on the screen.
2.	*Scroll* down using the vertical **scroll bar**. Look at how the report is sorted.	Note that calls are listed by date and time of day as shown in Figure 2.3.
3.	*Scroll* to right using the horizontal **scroll bar**.	Notice the column detail for each call.

When moving through windows, it is sometimes easy to get lost. You can usually tell where you are by noticing that the name of each window is located in the title bar of the program or the window itself.



Calls are sorted by Date, and then Time of service.

Figure 2-3 Call Detail Report

Description of Column Headers (fields)

BillToNumbers	Number billed for call.
CallDate	Date call took place.
CallTime	Time call took place.
City	City of phone number called.
State	State of phone number called.
NPA	Area Code of number called.
NXX	Exchange of number called.
Station	Last four digits of number called.
DayPart	**D** = day, **E** = evening, **N** = night
CallDuration	Length of call in decimal format.
CallCost	Cost charged for call.

Action Steps - Returning to the Consolidated Invoice.

	What you type or do	What happens
1.	Click on the **Exit** button of the report screen.	The screen returns to the 2nd level, the Service Level Accounts.
2.	Click on the **Back Up tool button.**	The screen returns to the 1st level, the ***IPS Consolidated Invoice.***

Other Detailed Items

Action Steps - Looking at Other Charges

	What you type or do	What happens
1.	Use the **Drill Down button** to access the ***Non-Usage Charges*** detail.	Look at how Non-Usage charges are organized.
2.	Click on the **Back Up tool button.**	The screen returns to the 1st level, the IPS Consolidated Invoice
3.	Use the **Drill Down button** to access the ***Taxes*** detail.	Notice how Taxes are charged. Note Federal, State and Other categories.
4.	Click on the **Back Up tool button**	The screen returns to the 1st level, the IPS Consolidated Invoice
5.	Use the **Drill Down buttons** to access ***Discounts*** and to access ***Promotions*** detail.	Look at how Discounts and Promotional amounts are applied.

STOP When you have finished looking at other charges, close the Consolidated Invoice.

Skill Review

Exercises:

A. Find total *Call Detail Usage* charges for ***Catalogue Sales***.

1. Open the Consolidated Invoice
2. Maximize the Consolidated Invoice window
3. Click on the Drill Down button next to Call Detail Usage

Catalogue Sales, Total Charges: $___________

B. Find number of calls for ***Florida Administration*** on January 10th.

1. Click on the Drill Down button next to ***Florida Administration***
2. Scroll down list to the end of the January 10th calls
3. Scroll to right until totals for 1/10 appear

How Many Calls? ______________

C. Find the Total Discount amount applied to the ***FL ADMINISTRATION*** service account portion of the invoice.

1. Close open report window.
2. Use **Back Up** button to reach 1st level
3. Click on **Drill Down** button next to Discounts
4. Scroll down the window until the total discounts for ***FL ADMINISTRATION*** appears

What discount applies? $________________

Application Project

1. Catalogue Sales has a phone charge which must be charged on an invoice to one of IPS' customers. Sindy has a note from her boss that when the invoice comes in, to find a call charged to 800 326-5611 on January 12th , between 8:15 and 8:30 AM from 805 987-4704, in Camarillo, California. Help Sindy find the detail on that call and the cost and duration of that call. *Hint*: 800 326-5611 is CATALOGUE SALES toll-free number.

2. Reggie needs to find out the total cost of all calls for all Service Level accounts for January 8th. Since you have been to a FONVIEW class, he has asked for your help in determining this total. *Hint*: Access each detail account and add total charges for 1/8 for each account.

3. FLORIDA ADMINISTRATION has a digital T1 line. Sindy has been asked by accounting to find how much IPS is charged on this invoice only for that access. *Hint*: Check detail in Non-Usage charges.

STOP When you have finished the Application Project, exit the Consolidated Invoice.

3. Standard Reports

3.1 Call Detail Reports

- Understanding Hierarchies and Accounts
- Selecting an Account
- The Hierarchy Selection Window
- Call Detail Report Options
- Sorting Options
- Filters
- Previewing the Report

3.2 Call Summary Reports

- Call Summary Reports Dialog Box
- Sorting Options
- Detail and Display Options
- Exporting Reports

3.3 Management Analysis Reports

- Management Analysis Reports Dialog Box
- Sorting Options
- Detail Options

3.4 Graphs

- Bar Graphs
- Pie Graphs
- Line Graphs

3.5 Knowledge Skills

- Exercise
- Application Project

Call Detail Reports

Your Sprint FONVIEW invoice contains tables of information about your telecommunications usage in relational database form. This allows you to build reports from this data by creating reports which show this information in a way that you can define and that is most useful to you. Using the Call Detail Reports command allows you to organize the specific information about each call and arrange it in a report form for viewing, printing or exporting to another program.

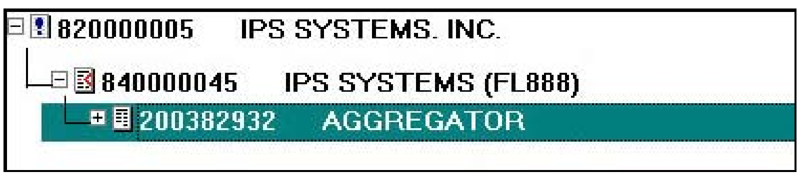
New Terms - Database terms.

Relational Database	A *database* is an orderly collection of data organized in records and fields, pertaining to a specific topic. Examples of databases include: Customer Lists Order Records Telephone Books Product Listings A *relational database* management system, like **FONVIEW**, contains *tables* of data from your invoice and allows you to organize, manipulate, query, export, view and print this data.
Table	A *table* is used to store, organize, and view data on a particular topic. FONVIEW contains numerous tables containing records on related topics, such as customer records, rates, and phone numbers.
Report	A *report* is used to show, print and export customized information from the FONVIEW database. A report makes no modifications or edits to the database's actual records.

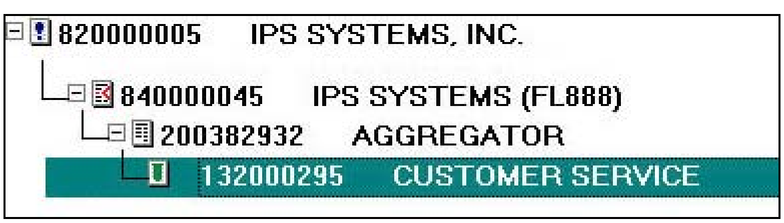
MORE NEW TERMS - Understanding FONVIEW's hierarchies and their sub-levels.

Hierarchy	A *hierarchy* is simply a defined grouping of various accounts or entities within your invoice. The ***Sprint hierarchy***, which contains all accounts, has been defined by your Sprint customer representative and your company, and cannot be modified without the help your Sprint Customer Service. However custom hierarchies can be defined in this program as we will explore.

Aggregator Level	Service level accounts may be grouped together for accounting and billing purposes on an Aggregator level. Summary and Management Analysis reports can be generated at this level as well as at the hierarchy level.

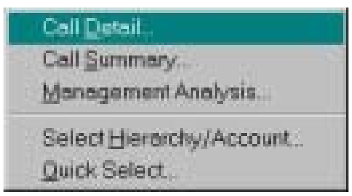


Service Level Account	The basic component of the FONVIEW invoice is the service level account which represents a particular location and/or type of service. Only service level accounts have usage or call detail records and they may only have a second service associated with them if its a FONCARD. This is the <u>*only*</u> level that Call Detail Reports can be generated from.



Your FONVIEW invoice may look significantly different from the sample company we are using. For further information on Hierarchies, refer to Appendix 2 of this manual. For a discussion of how this refers to your specific invoice, contact your Sprint Customer Representative.

Action Steps - Accessing Call Detail Reports

	What you type or do	What happens
1.	Click once on **Reports** in the FONVIEW menu.	The Reports Menu opens.
2.	Click once on the **Call Detail…** Command. 	Since Call Detail Reports can only be produced for a Service Level Account, a dialog box asking you to chose an account opens… 
3.	Click once on **YES** to open the Hierarchy window. 	The Hierarchy Selection dialog box opens to allow selection of a Service Level Account.

An account may have already been selected by previous actions or the Hierarchy Screen can also be accessed by the **Select Hierarchy or Account** tool button or by selecting the **Select Hierarchy…** command from the **Reports** Menu.

If an account has already been selected, no dialog box will appear and all subsequent reports will refer to that account.

The **"+"** signifies that additional information lies below.

IPS **Sprint Hierarchy**. Notice icon is an **"!"** Exclamation Point.

Figure 3-1 Hierarchy Tree

4.	Look at the IPS **Sprint Hierarchy.**	The plus sign **(+)** in front of the IPS Sprint Hierarchy lets us know that additional items are available at the next level down.
5.	Double-click directly on the IPS **Sprint Hierarchy**. 	The next hierarchy level appears. 
6.	Double-click on **IPS SYSTEMS (FL888).** Note that + signs show at all hierarchy levels.	The Aggregator level appears. 
7.	Double-click on **AGGREGATOR**. Note that a **+** sign shows before AGGREGATOR.	The Service Level Account appears. 

8.	Click once on **CUSTOMER** SERVICE to highlight this ***Service Level*** account.	Note that no **+** or **-** signs appear before a Service Level Account. It is the basic level of the Hierarchy.
9.	Click once on the **Select** button to make this account the active account. 	The **Call Detail Report Options** dialog box replaces the Hierarchy Selection dialog box. Note that ***Customer Service*** is shown in the Object Window

New Terms

Sort	Sorting database records organizes them in a requested field order, such as by date, name or record number.
Filter	A filter applied to a database, allows only data matching a particular criteria to pass into a report or view.

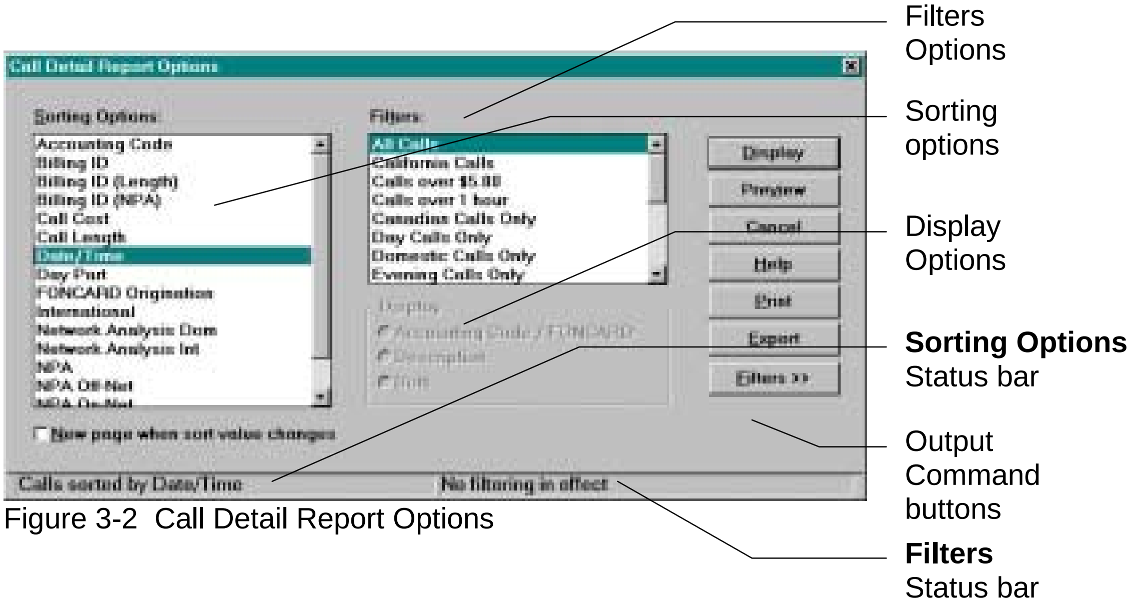


Figure 3-2 Call Detail Report Options

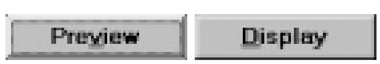
The **Call Detail Report Options** dialog box allows you the options of both Sorting and Filtering invoice records to display them in the way you would like to see them.

For IPS' **Customer Service**, Account 132000295, we will prepare a report which is <u>sorted by Date/Time</u> and <u>filtered for all Domestic Calls.</u>

Action Steps - Preparing a Call Detail Report

	What you type or do	What happens
1.	In the **Sorting Options:** pane, make certain that ***Date/Time*** is highlighted.	This is the FONVIEW default. Records will be displayed in Day order and then by Time. Note the explanation in the Sorting Options status bar.
2.	In the **Filter:** list, locate and highlight ***Domestic Calls Only.***	This option will show only calls made in the United States. Note the explanation in the Filters status bar.

PREVIEW OR DISPLAY



While there are a number of buttons available once the Sort and Filter options are set, the most common choices are to **Preview** or **Display** the results in a Report. **Preview** is the most useful since your report is already formatted for printing and exporting.

3.	Click once on the **Preview** button. 	The designated Report appears in a screen window.

4.	Maximize the **Call Detail Report** on the screen.	The report covers all the available Workspace.

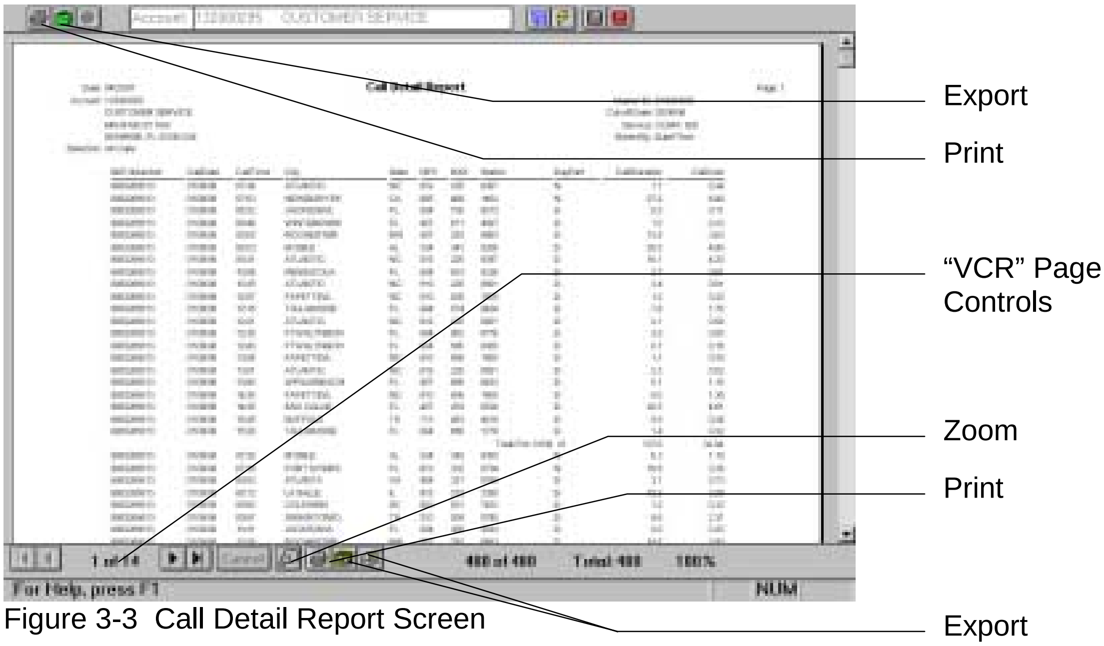
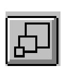
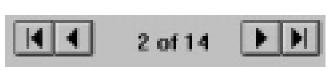


Figure 3-3 Call Detail Report Screen

Action Steps - Viewing the Previewed Report

	What you type or do	What happens
1.	Click once on the Zoom button. 	The report shrinks in size to show a preview of the printed page.
2.	Click once again on the Zoom button.	The report enlarges for easier viewing.

“VCR” Page Access Buttons (lower left of screen)



3.	Click once on the “VCR” Next Page button. 	The report screen shows Page 2.

4.	Click once on the "VCR" Last Page button.	The report screen shows Page 14, the last page of the report.
5.	Click once on the "VCR" First Page button	The report returns to Page 1.

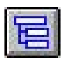
From this screen the report may be printed or exported for use in another program such as a word processor, spreadsheet or database. We will cover exporting in an upcoming topic.

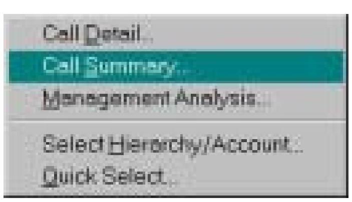
6.	Click once on the **Exit** button of the report Window.	The Detail Report closes and the workspace is clear.

Call Summary Reports

Sometimes Summary information showing the bigger picture is more useful than reports showing individual call detail. FONVIEW has a specific reporting section for this purpose.

Action Steps - Opening Summary Reports

	What you type or do	What happens
1.	Click once on the ***Select Hierarchy or Account*** button tool. 	We must go back and select a hierarchy or our Summary Reports will only reflect the currently chosen account. The ***Hierarchy Selection*** dialog box opens.

2.	Highlight the Sprint (top) Hierarchy, ***IPS SYSTEMS, INC. 820000005*** and then click on the **Select** button.	The Hierarchy Selection dialog box closes and the item chosen appears in the object window at the top of the screen.
3.	Click once on **Reports** in the FONVIEW menu.	The **Reports** Menu opens.
4.	Click once on the **Call Summary**… Command. 	The ***Call Summary Reports*** dialog box opens.

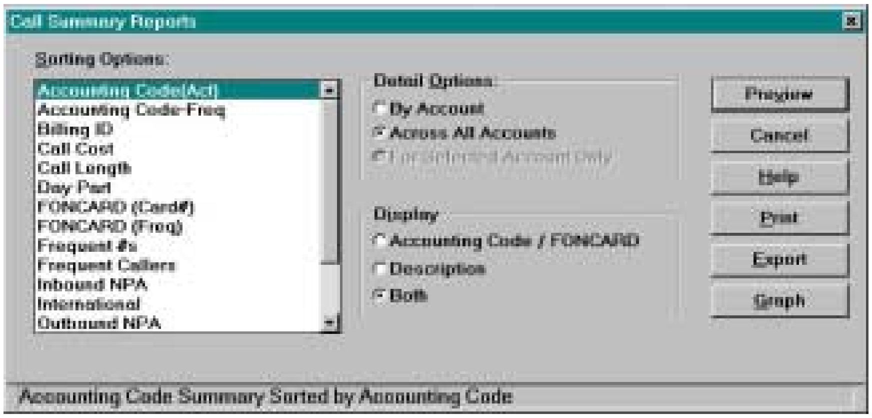


Figure 3-4 Call Summary Report dialog box

We will choose a report which will show us <u>the most frequently called numbers</u> and limit it to <u>numbers called at least 10 times.</u>

Action Steps - Defining and viewing the report

	What you type or do	What happens
1.	Using the arrow keys on the keyboard, move down the ***Sorting Options*** list noting the changes in ***Detail Options, Display*** and ***Status bar***.	Only options which can be used for the chosen sorting option are accessible. Note the descriptions in the status bar.
2.	Locate and select the ***Frequent #'s*** sorting option.	The selection is highlighted.
3.	Click once on the **Preview** button. 	The ***Frequency Cut-Off*** message box appears. 
4.	Change the value in the ***Frequency Cut-off*** message box to "*10*" and click once on **OK**.	The requested report generates on the screen.

5.	Maximize the report	The report expands to cover all of the available workspace. Note that the sorting order is *Descending* by default.

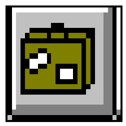
Note that all the buttons that were available for the Detail Report are available for the Summary Report as well as a new button for displaying a graph. We will look at that capability a little later in this lesson.

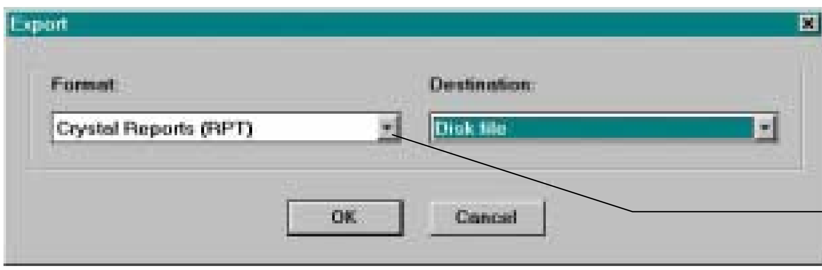
Also note that while the report was generating, that numbers appeared to the lower right of the screen showing the records searched. This is a function of the underlying database and has no significance to the report.

EXPORTING DATA

Sometimes it is important to be able to use the data generated from FONVIEW in other programs, such as spreadsheets, word processors or databases. FONVIEW offers many opportunities to Export data directly from its report Preview windows.

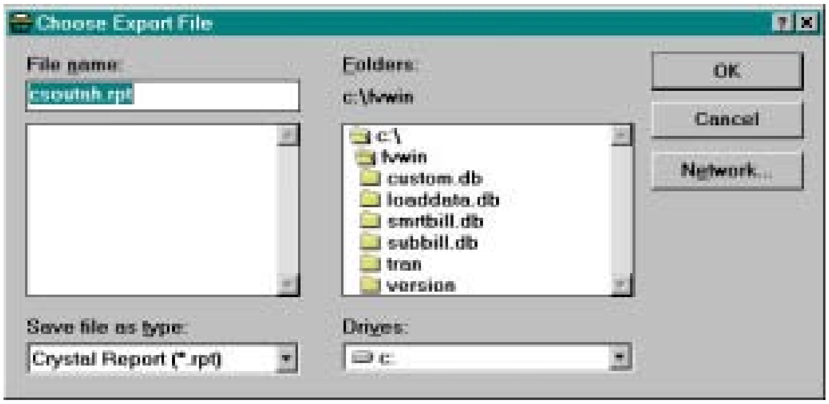
Action Steps - Exporting the report

	What you type or do	What happens
1.	With the previously generated report still on the screen, locate and click once on the **Export** tool button. 	The Export dialog box opens.



Drop-Down List

2.	In the **Drop-Down list** under **Format**, select ***Crystal Reports (RPT).***	Crystal Reports (RPT) appears as the selected Format.
3.	Be certain that ***Disk file*** is chosen under **Destination:**	This is the default and should already be highlighted.
4.	Click once on **OK.**	The Windows **Choose Export File** dialog box opens.



5.	Under **File Name:**, change the name to **frequent.rpt** and click **OK**.	The report has been exported as a Crystal Report.
6.	Click on the Exit button of the Report Window.	The report closes.

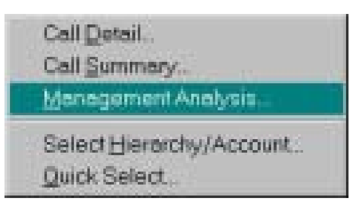
The **Print: Save As…** Command also gives you the ***Export*** dialog box. Saved Reports must always be in a format accessible to a program other than FONVIEW. FONVIEW does <u>not</u> retain saved reports in its own format.

Management Analysis Reports

Sprint has defined certain analysis reports to help in the management of your telecommunications services. These are found in the Management Analysis Reports section of the Standard Reports.

We will generate a report showing ‘inbound workload’ which will show us calls charged for and incoming for this customer. Even though the report is generated ‘Across all accounts’, the numbers will be from the toll-free accounts. This report shows when there is the most traffic to these numbers and can help in making strategic staffing decisions to meet this demand.

Action Steps - Opening Management Analysis Reports

	What you type or do	What happens
1.	Click once on **Reports** in the FONVIEW menu.	The **Reports** Menu opens.
2.	Click once on the **Management Analysis**… Command. 	The ***Management Analysis Reports*** dialog box opens.
3.	Using the arrow keys on the keyboard, move down the ***Sorting Options*** list noting the changes in ***Detail Options***.	Only options which can be used for the chosen sorting option are accessible. Note the descriptions in the status bar.

4.	Locate and select ***Inbound Workload*** in the **Sorting Options.**	The selection is highlighted. Note that only "***Across All Accounts"*** is available in the ***Detail Options.***
5.	Click once on the Preview button to view the report. 	The report is generated.

Note that all the tools and buttons that were available for the Detail Report are available for the Summary Report as well as a new tool button for displaying a graph. We will look at that capability a little later in this lesson.

When you have finished looking at the report, close the report window.

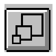
Graphs

Because sometimes a picture is worth a thousand words (or numbers), graphs can give you a pictorial look at your data. Graphs are only available for certain Summary and Management Analysis Reports and their style is pre-determined by the type of data contaned in the report.

We will look at a Bar Graph, a Pie Graph and a Line Graph. Since we will have to generate reports to see these graphs we will get more practice in generating Standard Reports.

Action Steps - Viewing a Bar Graph

	What you type or do	What happens
1.	Using previous knowledge, Preview a **Management Analysis Report**, **Across All Accounts** which is sorted for **Frequent Country** called.	The report is generated**.**
2.	Locate and click once on the **Display Graph** tool button on the Toolbar. 	A bar graph of the data in the report is generated.
3.	Maximize the Graph window.	The Graph window expands to fill the available workspace. Only a portion of the graph can be seen.

3.	Click once on the **Zoom** tool button to get a better view of the whole graph. 	The graph sizes itself to fit the window.

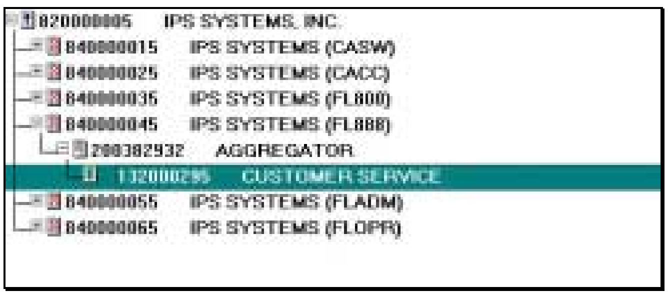
Note that this graph may be printed, exported or emailed (provided you have the proper email system).

When you have finished looking at the graph, close the graph and report windows.

.

Action Steps - Viewing a Pie Graph

	What you type or do	What happens
1.	Click once on the **Select Hierarchy or Account** button. 	The Hierarchy Selection dialog box opens.
2.	Using your new knowledge, select the ***Customer Service***, Service Level Account, as shown below.	The Hierarchy Selection dialog box closes. The selected account is displayed, grayed out, in the *object window* of the toolbar.



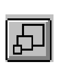
3.	Using your new knowledge, set up <u>*but do not*</u> Preview, a **Call Summary Report**, for the Selected Account which is sorted for ***Call Cost***.	The report is ready for use. 
4.	Locate and click once on the **Graph** button on the right of the dialog box. 	A pie graph of the data in the report is generated.
5.	Maximize the Graph window.	The Graph window expands to fill the available workspace. Only a portion of the graph can be seen.

6.	Click once on the **Zoom** button to get a better view of the whole graph.	The graph sizes itself to fit the window.

Graphs may be accessed by either the Graph Button on the Call Summary or Management Analysis Reports dialog box or by the use of the Graph Tool Button after the report has been generated.

When you have finished looking at the graph, close the graph window.

Action Steps - Viewing a Line Graph

	What you type or do	What happens
1.	Using your new knowledge, access the **Hierarchy Selection** dialog box and Select the ***IPS Sprint Hierarchy***.	The Hierarchy Selection dialog box opens, and after selection, closes. The hierarchy chosen appears in the object window in the toolbar.
2.	Using your new knowledge, Preview, a **Management Analysis** Report, sorted by ***Historical Usage***.	The report is generated
3.	Click once on the **Graph** tool button in the Toolbar. 	The **Graph Data** dialog box opens. 
4.	Make certain that the ***Calls*** option is selected and click **OK**.	A Line graph of the data is generated. Since our sample data only covers one month, there is simply a dot on the graph.
5.	Maximize the Graph window.	The Graph window expands to fill the available workspace. Only a portion of the graph can be seen.
6.	Click once on the **Zoom** button to get a better view of the whole graph. 	The graph sizes itself to fit the window.

When you have finished looking at the graph, close the graph and report windows

Knowledge Skills

Exercises:

A. Detail Reports - For **Customer Service** (Account 132000295), how many night calls were made and what was the Total Call duration of those calls.

1. Click Select ***Hierarchy or Account*** button
2. Double-click top Hierarchy icon to open
3. Double-click **Hierarchy 840000045** icon to open
4. Double-click **Aggregator** icon to open
5. Highlight Account ***132000295 CUSTOMER SERVICE***
6. Click **Select**
7. Click on **Reports** Menu
8. Click on **Call Detail…** Command
9. Highlight ***Call Length*** in **Sorting Options**
10. Highlight ***Night Calls Only*** in **Filters**
11. Click **Preview** button

How Many? ___________ **Total Call Duration?** ___________

B. Summary Reports - For **Customer Service** (Account 132000295), how many calls made in this billing period were between <u>15 and 30 minutes long</u> and what was <u>the total cost of those calls</u>.

1. Click ***Select Hierarchy or Account*** button
2. Highlight the Sprint hierarchy icon for IPS SYSTEMS
3. Click **Select**

4. Click on **Reports** Menu
5. Click on **Call Summary…** Command
6. Highlight ***Call Length*** in **Sorting Options**
7. Click **Preview**
8. Click on **Start With Selected Account** option button
9. Click in Account text box and type: "*132000295*"
10. Click **OK**

How many calls between 15 and 30 minutes?
____

Total Cost of these calls? $___________

C. Management Analysis Reports - Across all Accounts, find which day of the current billing period the most calls were made.

1. Make certain the Sprint Hierarchy for IPS SYSTEMS is still selected
2. Click on **Reports** Menu
3. Click on **Management Analysis…** Command
4. Highlight ***Daily Usage*** in **Sorting Options**
5. Click **Preview**

Which Day? _________

D. Export this report as a ***CSV*** file named dailyuse.csv.

1. Click on **Export** tool button
2. Select the **Comma Separated Values (CSV)** format and Disk file as the destination
3. Click **OK**
4. Click **OK,** in the next dialog box
5. In the **Number and Date Format Dialog box**, click to add a check mark for both options.
6. Click **OK**
7. Rename the file ***dailyuse.csv***
8. Click **OK**

E. Graph Summary Report - Recreating the graph in Viewing a Pie Graph (Section 3.4), find the percentage of calls between $5.00 and $10.00 for Customer Service (Account 132000295).

1. Go to **Section 3.4,** on page 52, locate and re-create the Summary Report for Customer Service, sorted by Call Cost.
2. Click on **Graph** command button
3. Maximize the Graph

Percentage of calls? __________

Application Project

1. Sindy has asked you to create a Call Detail Report for ***FLORIDA OPERATIONS*** (148000715) that shows all evening calls sorted by area code (NPA)
2. She needs it *exported* as an Excel 4.0 file named “acodes.xls”.

3. Sam asks you which Area Code calls into IPS' toll free numbers the most. To find out you generate a Summary Report across all accounts for in-bound NPA. Hint: Note summaries at the end of each account's charges.

4. He would like you to prepare it as a bar graph based on number of minutes and export it in Crystal Reports format named "npa_in.rpt".

5. Sindy has just gotten a request from accounting. ***Using Hourly Usage*** as a **Sorting Option**, create a Management Analysis Report for her which will show which hour of the day has the most call traffic.

4. Customizing Standard Reports

4.1 Customizing Call Detail Filters
- Customize Call Detail dialog box
- Creating a new filter
- Using the new filter
- Editing the new filter
- Deleting user-defined filter

4.2 Customizing Hierarchies
- Customize Hierarchies dialog box
- Creating a new hierarchy
- Using the new hierarchy

4.3 Customizing Accounts
- Changing descriptive name

4.4 Customizing FonCards
- Assigning FonCard names
- Creating Detail FonCard Report
- Editing FonCard names

4.5 Accounting Codes Customization and Maintenance
- Viewing Accounting Codes
- Customizing Accounting Codes
- Using Accounting Codes in a Report

4.6 Knowledge Skills
- Exercise
- Application Project

Customizing Call Detail Filters

As we have learned, Filters allow us to select specific information from the Sprint Invoice data for reporting. So far, we have used the standard Filters provided in the FONVIEW program.

We will design our own Filters to define even more specific criteria.

New Terms

LATA	Local Access and Transport Area (LATA) - Geographical areas designated by the FCC.
Jurisdiction	The jurisdiction is a territory covered, such as Interstate, Intrastate, InterLATA, IntraLATA, Domestic or International jurisdictions.

Action Steps - Accessing FONVIEW Filters.

	What you type or do	What happens
1.	Click once on **Customize** in the FONVIEW menu.	The Customize Menu opens.
2.	Click once on the **Filters…** Command. 	The **Customize Call Detail Filters** dialog box opens.

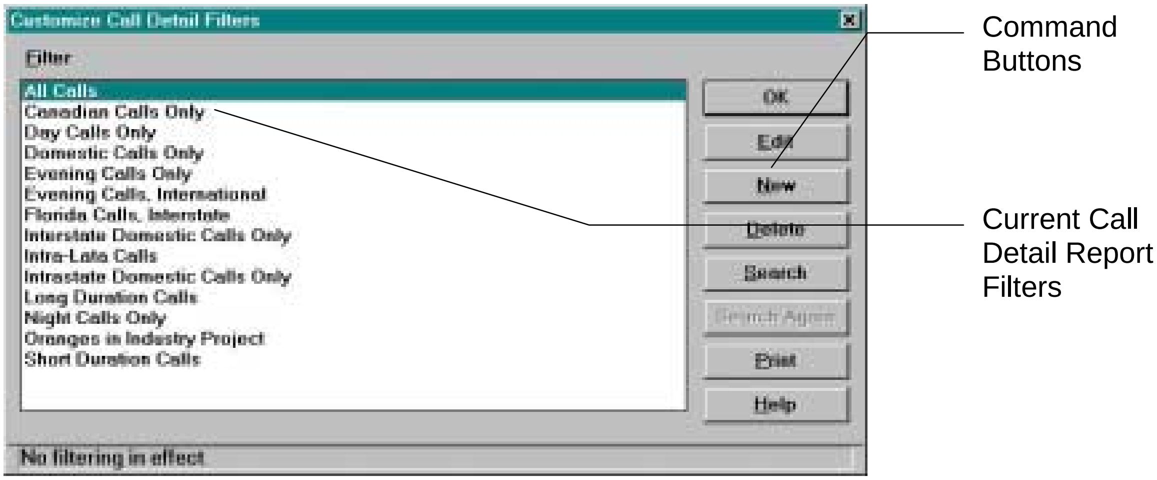


Figure 4-1 Customize Call Detail Filters dialog box

3.	Select the ***Canadian Calls Only*** Filter.	The Filter is highlighted
4.	Click once on the **Edit** button. 	The **Filter Information** dialog box opens. Note it is *Read Only*. Note that the Description, Status Text, and all options under all tabs are grayed out. We cannot change Standard FONVIEW Filters.
5.	Click once on the **Cancel** button. 	The **Filter Information** dialog box closes revealing the **Customize Call Detail Filters** dialog box again.

Now that we understand that Standard FONVIEW Filters cannot be edited, we will make a new filter to show only International Calls made in the evenings.

Action Steps - Creating a Filter

	What you type or do	What happens
1.	Click once on **New button** in the **Customize Call Detail Filters** dialog box.	The **Filter Information** dialog box opens, this time it is not *Read Only*.

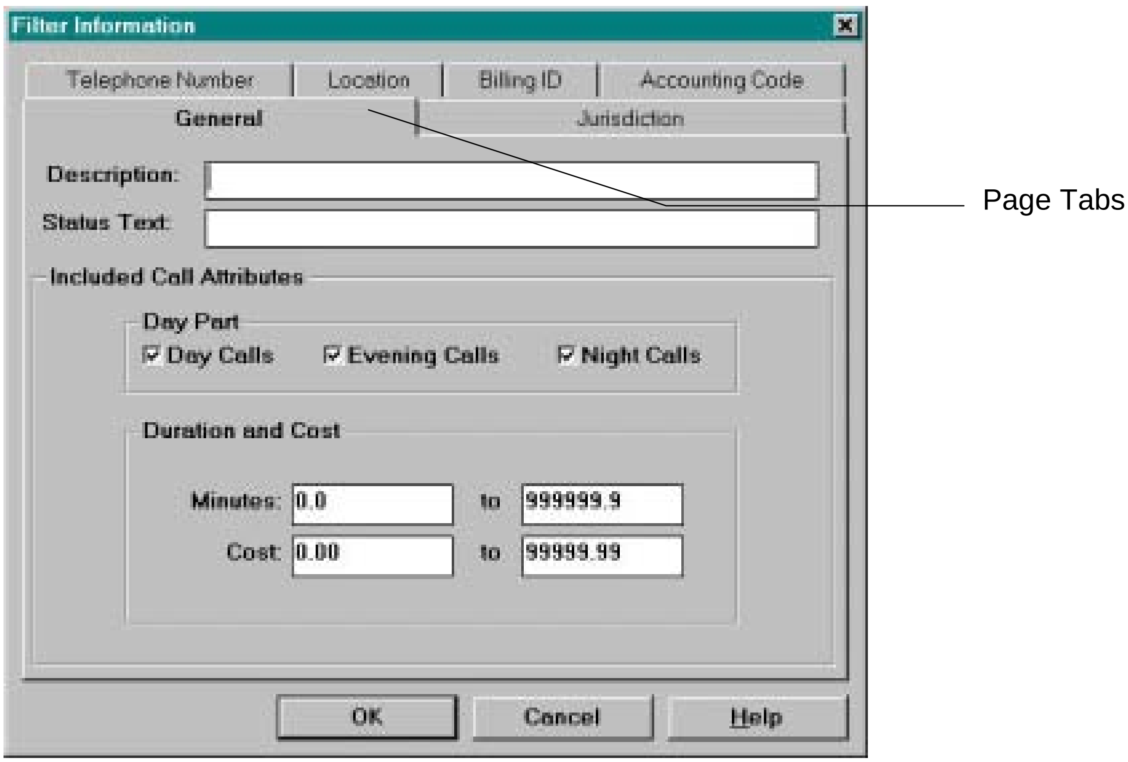


Figure 4-2

2.	In the Description field, where the cursor is flashing, type: *"Evening Calls, International"* and press the ***tab*** key on the keyboard.	The information is entered and the cursor moves to the Status Text field.
3.	In the Status Text field, type: *"All international calls made in the evening."*	The information appears in the Status Text field.

4.	Under the **Day Part** section, click once on the **Day Calls** and **Night Calls** check marks, de-selecting them.	The information in the Status Test field is entered and the check marks in the Day Calls and Night Calls boxes are gone.
5.	Click once on the **Jurisdiction** page tab.	The Jurisdiction page of the dialog box opens.

6.	Under the **Included Jurisdictions** section, de-select the check boxes in **Intrastate**, **Interstate**, and **Canadian**.	All the check boxes are empty now except International.
7.	Click **OK** in the **Filter Information** dialog, and then **OK** in the **Customize Call Detail Filters** dialog boxes.	The dialog boxes close and the workspace is clear. Note new filter is placed in list alphabetically.

We have designed a new filter. We will now create a report ***for FL ADMINISTRATION*** (147000955) using our new filter.

Action Steps - Creating a Call Detail Report using the new Filter

	What you type or do	What happens
1.	Using your new knowledge, select the ***FL ADMINISTRATION*** Service account in the **Select Hierarchy** dialog box. (Page 38)	The FL ADMINISTRATION account shows in the object window on the toolbar.

2.	Using your new knowledge, open the **Call Detail Reports Option** dialog box from the **Reports** menu.	The dialog box opens to create a Call Detail Report.
3.	**(DATE/TIME** should already be highlighted in the **Sorting Options** list.) In the **Filters** list, select ***Evening Calls, International***.	The Evening Calls, International Filter is highlighted. Note the **Status line** for this Filter contains the information you typed into the **Status Text** field when creating this Filter.
4.	Click once on the **Preview** button to generate the report you designed  .	The report generates on the screen.

When you have finished looking at the new report, exit the report window

Unlike Standard Report Filters we can edit filters that we have created. Now we will edit the “Evening Calls, International” filter to “Night Calls, domestic”. Note that an “edited” filter replaces the original filter in the filter list.

.

Action Steps - Editing a Filter

	What you type or do	What happens
1.	Using your new knowledge, return to the **Customize Call Detail Filters** dialog box using the **Customize** menu and the **Filters…** command.	The **Call Detail Filters** dialog box opens

2.	Locate and select the ***Evening Calls, International*** Filter.	The *Evening Calls, International* Filter is highlighted.
3.	Click the Edit button. 	The Filter Information dialog box opens.
4.	Highlight the current description by clicking and dragging across the field.	*Evening Calls, International* is highlighted.
5.	Type: "*Night Calls, Domestic*" and press the tab key on the keyboard.	The information is entered into the Description field and the Status Text field is highlighted.
6.	Type: "*All domestic night calls*."	The Status Text information is replaced by what has been typed.
7.	In the **Day Part** section, de-select **Evening Calls** and select **Night Calls**.	Night Calls is the only option check marked.
8.	Click on the **Jurisdiction** page tab.	The Jurisdiction page opens.
9.	De-select **International** and select **Intrastate** and **Interstate**.	All boxes in the Domestic section are check marked.
10.	Click **OK**. 	The Filters Information dialog box closes revealing the **Customize Call Detail Filters** dialog box.
11.	Look at the **Filters** list.	Note that the ***Evening Calls, International*** Filter has disappeared from the list and the ***Night Calls, Domestic*** Filter has been created.

Our final step in this topic is to delete a Filter. You should still be in the Customize Call Detail Filters dialog box.

Action Steps - Deleting a Filter

	What you type or do	What happens
1.	Locate and select the ***Canadian Calls Only*** Filter.	The Canadian Calls Only Filter is highlighted.
2.	Click the **Delete** button. 	A Cannot Delete Filter message box appears. 
3.	Click **OK** to close the message box and select the **Night Calls, Domestic** Filter.	The Night Calls, Domestic Filter is highlighted.
4.	Click the **Delete** button.	The Delete Filter Confirmation message box opens. 
5.	Click on the **Yes** button. 	The deleted Filter disappears from the Filter list.
6.	Exit the Customize Call Detail Filters dialog box.	The workspace is clear.

Customizing Hierarchies

The Sprint Hierarchy contains all of the accounts and entities associated with a particular Sprint invoice. It cannot be edited or deleted. However, custom hierarchies can be created which will associate accounts, or even other created hierarchies, for report purposes.

Action Steps - Customizing Hierarchies.

	What you type or do	What happens
1.	Click once on **Customize** in the FONVIEW menu.	The Customize Menu opens.
2.	Click once on the **Hierarchies…** command. 	The Customize Hierarchies dialog box opens.

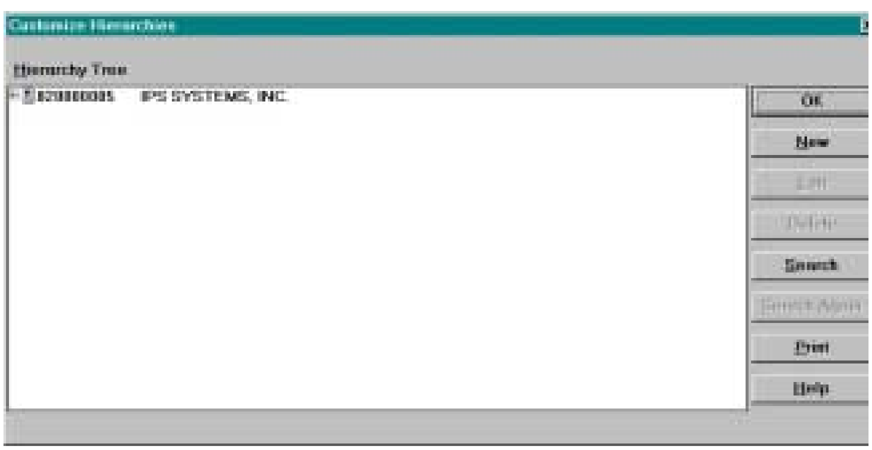


Figure 4-3 Customize Hierarchies

There are two ways to create a new hierarchy, using the New button to start from scratch, or to edit a current hierarchy. We'll edit the Sprint hierarchy to create a hierarchy, grouping IPS's California accounts.

You will notice that because the Sprint Hierarchy cannot be deleted, it will not be replaced by the edited hierarchy as would a custom hierarchy.

3.	Select the Sprint hierarchy, **820000005 IPS Systems**.	The Customize Menu opens. Note several grayed-out buttons became accessible including the Edit button
4.	Click on the **Edit** button. 	The **Hierarchy Information** dialog box opens.

Figure 4-4 Hierarchy Information dialog box

5.	Type: "*1*", and press tab on the keyboard.	The Hierarchy ID is now numbered 1 and the Description field is highlighted.
6.	Type: "*California Accounts*".	The information typed is in the Description field.
7.	Click once on all accounts <u>except</u> the ***CA SALES OFFICE*** and ***CA SALES CARDS*** accounts to de-select them.	Only the CA SALES OFFICE and CA SALES CARDS accounts are now selected and highlighted.

8.	Click **OK**. 	The **Hierarchy Information** dialog closes and reveals the **Customize Hierarchies** dialog which now includes hierarchy 1.
9.	Double-click on Hierarchy 1 California Accounts.	The California accounts selected descend below the hierarchy.
10.	Click **OK**. 	The Hierarchy Information dialog box closes and the workspace is clear. Note the icon for our new hierarchy is a "**U**", for *User-defined* hierarchy.

Based on our new hierarchy we will now generate a Summary Report showing Workload for this group.

Action Steps - Using a Customized Hierarchy in a Summary Report.

	What you type or do	What happens
1.	Using previous knowledge, access the **Hierarchy Selection** dialog box.	The Hierarchy Selection dialog box opens.
2.	Select hierarchy **1**, **California Accounts**.	The dialog box closes and the selected hierarchy shows in the object window of the toolbar.
3.	Using previous knowledge, open the **Call Summary Reports** dialog box from the **Reports** menu.	The Call Summary Reports dialog box opens.

4.	Scroll down the Sorting Options and select **Workload**.	The Sorting Option, Workload is highlighted.
5.	Click on **Preview**. 	The report generates on the screen.
6.	Maximize and look at the report.	Both California accounts are reported.

When you have finished looking at the report, close the report window.

Hierarchies can be edited and deleted in exactly the same way Filters were edited and deleted. Note that just as the Sprint Hierarchy cannot be edited or deleted neither can the Sprint defined filters be edited or deleted.

Customizing Accounts

Customizing an account is limited to editing the Account Description. We will edit the FL ADMINISTRATION account to FLORIDA ADMINISTRATION

.

Action Steps - Customizing an Account.

	What you type or do	What happens
1.	Click once on **Customize** in the FONVIEW menu.	The Customize Menu opens.
2.	Click once on the **Accounts**… command. 	The Customize Accounts dialog box opens.
3.	Click once on **FL ADMINISTRATION**.	The FL ADMINISTRATION account is highlighted.

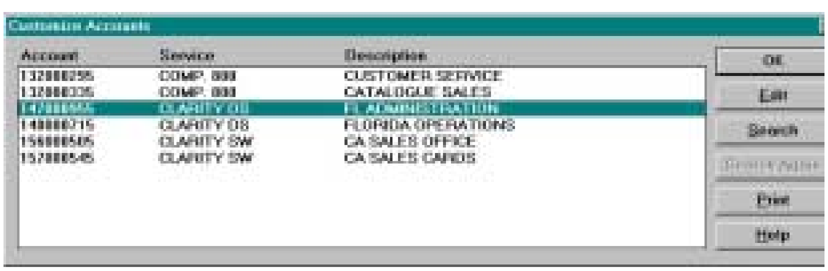
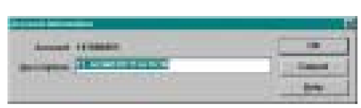


Figure 4-5 Customize Accounts dialog box

4.	Click on the **Edit** button. 	The Account Information dialog box opens. 

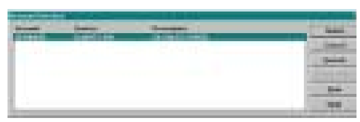
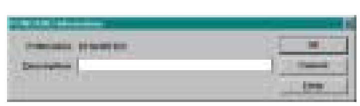
5.	Type: “*FLORIDA ADMINISTRATION*”. And click **OK**.  	The typed information replaces the previous information and the change is made in the description field of the account.
6.	Click **OK**.  	The Account Information dialog box closes and the workspace is clear.

Customizing FonCards

Customizing FONCARDS not only adds clarity to FONCARD reports, it protects FONCARD numbers in reports from piracy.

We’re going to edit some of the IPS FONCARDS to make them more easily identifiable in reports.

Action Steps - Customizing Foncards.

	What you type or do	What happens
1.	Click once on **Customize** in the FONVIEW menu.	The Customize Menu opens.
2.	Click once on the **FONCARDs**… command. 	The **Account Selection** dialog box opens. 
3.	Click once on the **Select** button in the **Account Selection** dialog box. 	The **Customize FONCARDs** dialog box opens. 
4.	Click on **Edit**. 	The **FONCARD Information** dialog box opens. 

5.	Type: "*Andy Abrams*" and click **OK**. 	The FONCARD Information dialog box closes and the typed information is in the description field for FONCARD 2216497322.
6.	Edit the next four FONCARD numbers for the following: "*Beth Benson*" "*Cindy Collier*" "*David Denton*" "*Eddie the Emu Project.*"	The names appear in the Description column of the FONCARD Information dialog box.
7.	Click **OK**.	The FONCARD Information dialog box closes and the workspace clears.

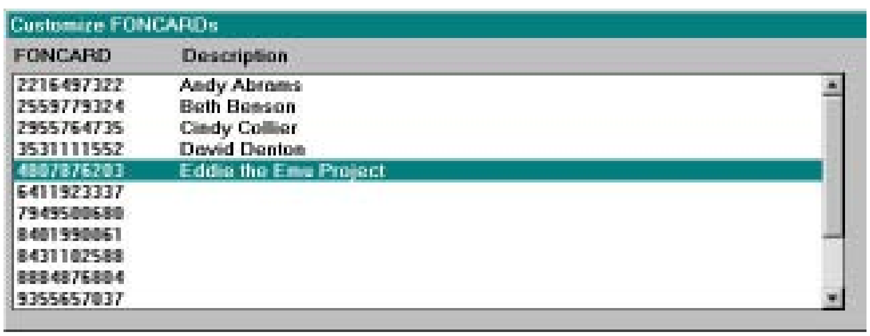


Figure 4-6 Customize FonCards dialog box

To see how much difference in clarity this editing makes we will create a Call Detail Report sorted by Origination. By using the Description field and <u>NOT</u> the FONCARD number, we will be providing security for these numbers which could be used without authorization by anyone accidentally seeing this report.

.

Action Steps - Seeing Customized Accounts in a Call Detail Report.

	What you type or do	What happens
1.	Using previous knowledge, access the **Hierarchy Selection** dialog box.	The Hierarchy Selection dialog box opens.
2.	Select **CA SALES CARDS** account as shown in Fig 4-7.	The dialog box closes and the selected hierarchy shows in the object window of the toolbar.

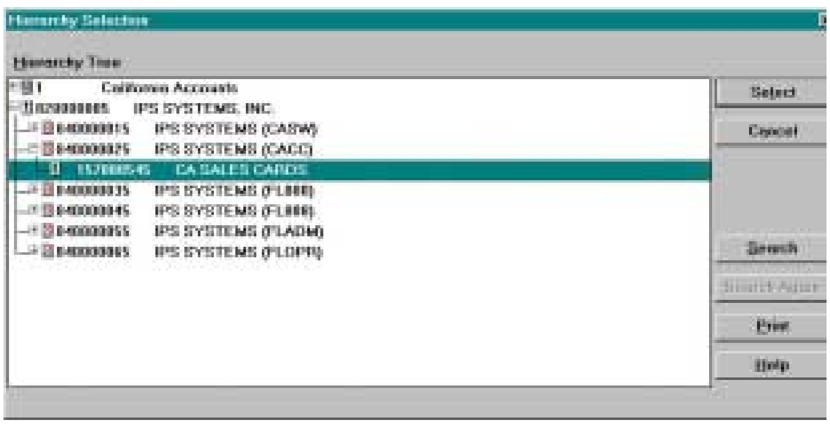


Figure 4-7 Hierarchy Selection dialog box

3.	Using previous knowledge, open the **Call Detail Report Options** dialog box.	The Call Detail Report Options dialog box opens.
4.	Select ***FONCARD Origination*** in the **Sorting Options:** list.	FONCARD Origination is highlighted in the Sorting Options list.
5.	Click once on the option button next to Description in the Display options.  	Now only the Description field will show in the report. FONCARD numbers are represented by asterisks to keep these numbers secure.

6.	click **Preview**. 	The report generates.
7.	Maximize the report and look at the totals for each code.	Totals are listed by names of the edited FONCARDs, not the numbers.

When you have finished looking at the report, close the report window to clear the workspace.

Now we will edit one of FONCARD descriptions.

Action Steps - Editing a Customized FONCARD.

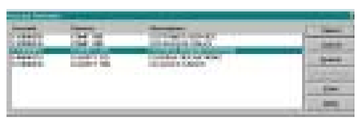
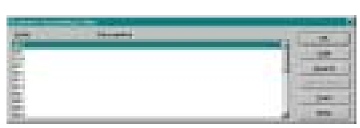
	What you type or do	What happens
1.	Using previous knowledge, access the **Account Selection** dialog box from the **Customize** menu and the **FONCARDs…** command.	The Account Selection dialog box opens.
2.	Click **Select**, and highlight the Cindy Collier FONCARD number.	FONCARD 2955764735 is highlighted in the **Customize FONCARDs** dialog box .
3.	Click **Edit** and type: "*Carla Cleghorn*", and click **OK**.	"Cindy Collier" is replaced by "Carla Cleghorn" in the Description column.
4.	Click **OK**.	The Customize FONCARDs dialog box closes and the workspace is clear.

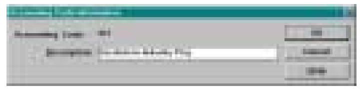
Accounting Codes Customization and Maintenance

Just as adding names to the description fields of FONCARDs adds clarity to reports concerning them, customizing the description fields of the accounting codes that certain accounts have does the same.

We will customize a couple of our accounting codes as an example.

Action Steps - Customizing Account Codes

	What you type or do	What happens
1.	Click once on **Customize** in the FONVIEW menu.	The Customize Menu opens.
2.	Click once on the **Accounting Codes**… command. 	The **Account Selection** dialog box opens. 
3.	Click once on the **FLORIDA ADMINISTRATION** account.	The account is highlighted.
4.	Click on **Select** in the **Account Selection** dialog box. 	The **Customize Accounting Codes** dialog box opens. 

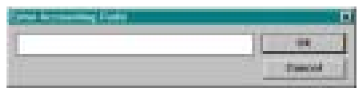
5.	With the first code, ***477*** highlighted, click once on **Edit**.  	The **Accounting Code Information** dialog box opens for 477. 
6.	Type: "*Zucchini in Industry Proj*." and click **OK**.	The Accounting Code Information dialog closes and the Customize Accounting Codes dialog shows the new information in the Description field of 477.
7.	Continue to Edit the next 6 codes with the following information: "*Yuen Yang*" *"Xeng Xi Xung"* *"William Woolicott"* *"Vivian Vincent"* *"Ulrich Underwood"* *"Trisha Tandiniko*"	The Description fields of the next 6 codes reflect the entries.

8.	Click **OK** in the Customize Accounting Codes dialog box.	The dialog closes and the workspace is clear.

Now that we have customized these Accounting Codes we will generate a report showing how this customization adds clarity to a report. We will generate a Call Detail Report, sorted by Accounting Code, using a Customized Filter for IPS' Zucchini In Industry Project.

Action Steps - Seeing Customized Accounting Codes in a Call Detail Report.

	What you type or do	What happens
1.	Using previous knowledge, access the **Hierarchy Selection** dialog box.	The Hierarchy Selection dialog box opens.
2.	Select the **FLORIDA ADMINISTRATION** account. 	The dialog box closes and the selected hierarchy shows in the object window of the toolbar.
3.	Using previous knowledge, open **the Call Detail Reports Option** dialog box using the **Reports** menu and the **Call Detail…** command.	The requested dialog box opens.
4.	Highlight ***Accounting Code*** in **the Sorting Options:** list and click on **Filters>>**. 	The **Customize Call Detail Filters** dialog box opens.

5.	Click on **New** and when the **Filter Information** dialog opens, type: "*ZIP*" and press tab on the keyboard.	The Filter Information dialog box opens and the information is entered into the Description field.
6.	Type: "*All calls for the Zucchini In Industry Project*."	The information typed shows in the Status Text field.
7.	Click on the **Accounting Code** page tab and click **New**. 	The **Enter Accounting Code** dialog box opens. 
8.	Type: "*477*" and click **OK**, and **OK** again in **the Filter Information** dialog and	All the dialog boxes close until the Call Detail Report Options dialog box is visible. Accounting Codes is still selected in the Sorting Options.
9.	Scroll down the **Filters:** list and select the new ***ZIP*** Filter.	The report is ready to generate. Note the Status bar information shows the Description text entered earlier.
10.	Click **Preview**,  and Maximize the Report.	Note the totals for the Zucchini In Industry Project for this billing period.

When you have finished looking at the report, Exit the report window

.

Knowledge Skills

Exercises:

A. Customize Filters - Create a Customized Filter which will define all calls to Florida. Steps to create a filter which will define all calls to Florida,

1. Click on **Customize** menu
2. Click on **Filters…**
3. Click on **New**
4. Type "*Florida Calls*"
5. Tab and type: "*All Florida Calls*"
6. Click on **Location** page tab
7. Click on **New**
8. Type: "*FL*"
9. Click on **OK**, 3 times

B. Create a Detail Call Report for ***CA SALES CARDS*** (157000545) using the new filter to find the total number of Florida calls for this account.

1. Click on **Select Hierarchy or Account** tool button
2. Select **CA SALES CARDS**
3. Click on **Reports** menu
4. Click on **Call Detail…**
5. Click on **Florida Calls** in **Filters:** list
6. Click on **Preview**
7. Click on last page of the report

Total Number of Calls? ____________________

C. **Edit** the custom Florida Calls Filter to define all calls to California.

1. Close any open Reports
2. Click on the **Customize** menu
3. Click on **Filters…**
4. Highlight **Florida Calls** in the **Filter:** list
5. Click **Edit**
6. Edit **Description** field to read: "*California Calls*"
7. Edit **Status Text** field to read: "*All California Calls*"
8. Click on the **Location** page tab
9. Click on **Edit**
10. Edit Location to read: "*CA*"
11. Click **OK**, 3 times

D. **Customize Hierarchy** - Create a new hierarchy which only includes all Florida Accounts.

1. Click on **Customize** menu
2. Click on **Hierarchies…**
3. Click on **New**
4. Type: "*2*"
5. Tab and type: "*Florida Accounts*"
6. Select **FLORIDA ADMINISTRATION** and **FLORIDA OPERATIONS**

7. Click **OK**, 2 times

E. Find the number called most from the Florida Accounts by creating a Summary Report sorted by Frequency of numbers called using the newly defined hierarchy

1. Click on the **Select Hierarchy or Account** tool button
2. Highlight hierarchy **2**
3. Click **Select**
4. Click on **Reports** menu
5. Click on **Call Summary…**
6. Highlight **Frequent #s** in the **Sorting Options:** list
7. Click on **Preview**
8. Change **Frequency Cut-off Value** to "*10*"
9. Click **OK**
10. Maximize Report

F. **Customize Accounts** - Change the Account names for Customer Service and Catalogue Sales so that the number "800" and "888" appears before them, respectively.

1. Close all open reports
2. Click on the **Customize** menu
3. Click on **Accounts…**
4. Click on **Edit**
5. Click cursor directly in front of "*Customer Service*" and type: "*800* "
6. Click **OK**
7. Select **Catalogue Sales**
8. Click on **Edit**

9. Click cursor directly in front of “*Catalogue Sales*” and type: “*888* ”

10. Click **OK** and then, **OK** again.

G. Customize Accounting Codes - Add “*Sindy Samuelson*”, “*Reggie Rivera*”, “*Quince Quality Query”, “Patricia Pennyworth*” and “*Oranges Optimization Proj*.”, in order, to the Accounting Codes for Florida Administration.

1. Click on **Customize** menu

2. Click on **Accounting Codes…**

3. Click on **Florida Administration**

4. Click on **Select**

5. Click on code **651**

6. Click on **Edit**

7. Type: “*Sindy Samuelson*”

8. Click **OK**

9. Continue editing, adding names above.

10. Click **OK** to clear workspace

Application Project

1. Senior Management has asked Reggie to find out how many calls were made that lasted more than 20 minutes. Reggie is shaking his head in consternation, worrying about how much time this will take manually. You can help him out by creating a filter which will report all calls longer than 20 minutes. Run a Detail Report by Date/Time for CA SALES CARDS (157000545) which will show these calls, for Reggie.

How many were made? __________

2. Since what Senior Management really wanted to know was how many calls cost more than $5, especially for the FONCARDs, edit the filter to show all calls which cost more

than $5.00. Create a Detail Report by Call Length for CA SALES CARDS (157000545).

How many calls over $5.00? ____________

3. Human Resources has asked Sindy to tell them how many man hours are needed to man the toll free lines. If she can get a report telling her which hours the toll free lines are busiest, she can give them the information they need. Create a New Hierarchy named "Toll Free Numbers" which includes all Toll Free accounts. Create a Management Analysis Report for Daily Usage.

Which hour were Toll Free numbers used most? __________

4. The IPS Board of Directors has changed the name of the CALIFORNIA SALES OFFICE to CALIFORNIA OPERATIONS. They would like to see it changed on all reports as well. Reggie asks you to make this change for him in FONVIEW.

5. Sindy asks that you add the following names to the FonCards that were just issued.
   - Frank Framingham
   - Ginny Gorganzola
   - Hilary Higgins
   - Imogene Inyoue

6. Reggie has just run downstairs from a big meeting on the 5th floor. He needs to know how much his personal Accounting Code was charged in the current month. Generate an Accounting Codes Summary Report for FLORIDA ADMINISTRATION and look for Reggie Rivera's charges.

5. Ad Hoc Reporting

I. Ad Hoc Report Options

A. Overview of the Ad Hoc reporting system
B. Looking at the Ad Hoc Reporting window
C. Understanding the tools
D. Looking at the Ad Hoc Report Options dialog box

II. The Ad Hoc Report Wizard

A. Naming Report
B. Choosing a table
C. Choosing Fields
D. Using the Design button
E. Viewing the SQL window
F. Testing the Query
G. Displaying the Report

III. Structured Query Language (SQL)

A. Understanding SQL for FONVIEW
B. Comparison Operators
C. Syntax of SQL
D. Writing a SQL Query
E. Testing the Query

IV. Ad Hoc Report Maintenance

A. Editing an SQL Report with the Design window
B. Editing an SQL Report in the SQL window.
C. Report Out-putting Options

V. Skill Reveiw

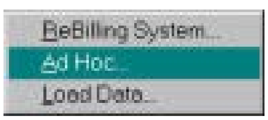
A. Exercise
B. Application Project

Ad Hoc Report Options

Sometimes even Custom Filters can't give you the exact report that you need. FONVIEW Ad Hoc Reporting opens an independent program to query the database directly through the use of the Structured Query Language, SQL. In a later topic in this lesson we will look at SQL a little more closely.

First we will look at this new program window.

Action Steps - Accessing Ad Hoc Reporting Options.

	What you type or do	**What happens**
1.	Click once on **Tools** in the FONVIEW menu.	The Tools Menu opens.
2.	Click once on the **Ad Hoc…** Command.  	The **Ad Hoc Report Options** dialog box opens. Note that FONVIEW has opened a stand-alone program window called **FONVIEW® Ad Hoc Reporting.** It will act the same as an <u>entirely separate program</u>.
3.	Look at the Ad Hoc Reporting program window.	Note, to access the main FONVIEW program, you must either exit Ad Hoc Reporting or move to it via the Windows 95 taskbar. Also, note that there is a different set of tool buttons in the toolbar for this program.

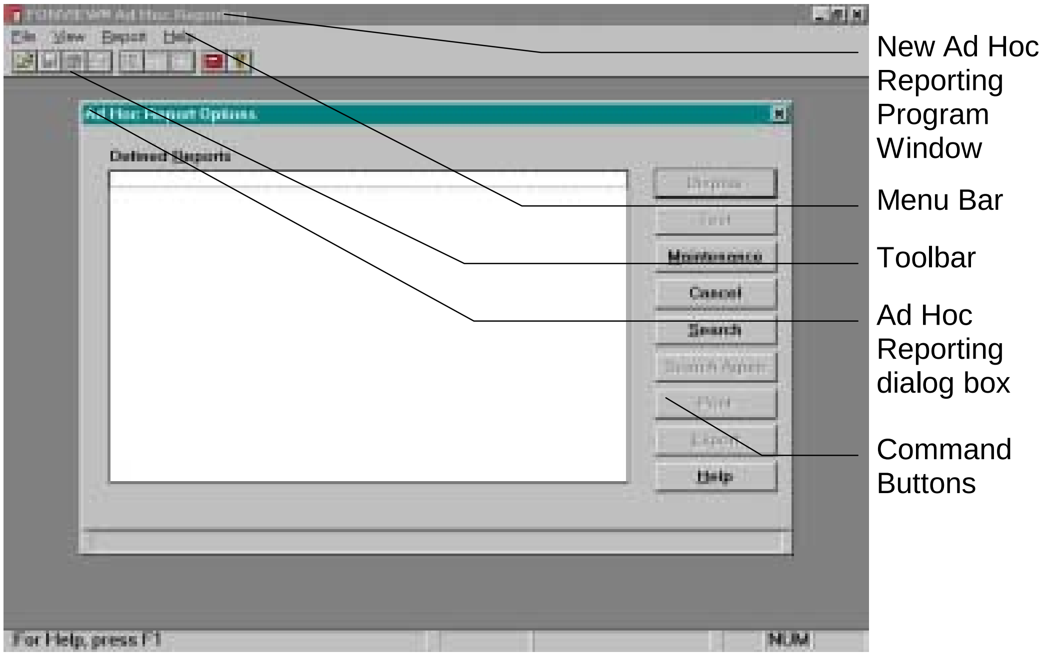


Figure 5-1 FONVIEW Ad Hoc Reporting Program

The Ad Hoc Report Wizard

New Term

Query	A Query is a request to a database for specific information in a language which it can understand. A Query language, such as SQL which FONVIEW understands, uses conditional statements and various operators for complex statements to frame the request.

The opening screens assume that we have stored queries for the database. However, since we do not yet have any queries created, we will access the Ad Hoc Report Wizard to create our first query. There are two ways to access this Wizard. One is through the Maintenance button of the Ad Hoc Report Options dialog box. We will use this one first. The other is through the Report menu of this program window which we will explore a little later.

Action Steps - Accessing the FONVIEW Report Wizard from the Maintenance button.

	What you type or do	What happens
1.	Click once on **Maintenance** in the Ad Hoc Report Options dialog box. 	The **Ad Hoc Report Maintenance** dialog box opens. This is the Window from which all Ad Hoc Reports may be edited.
2.	Click on **New**. 	The **Ad Hoc Report Wizard** opens.

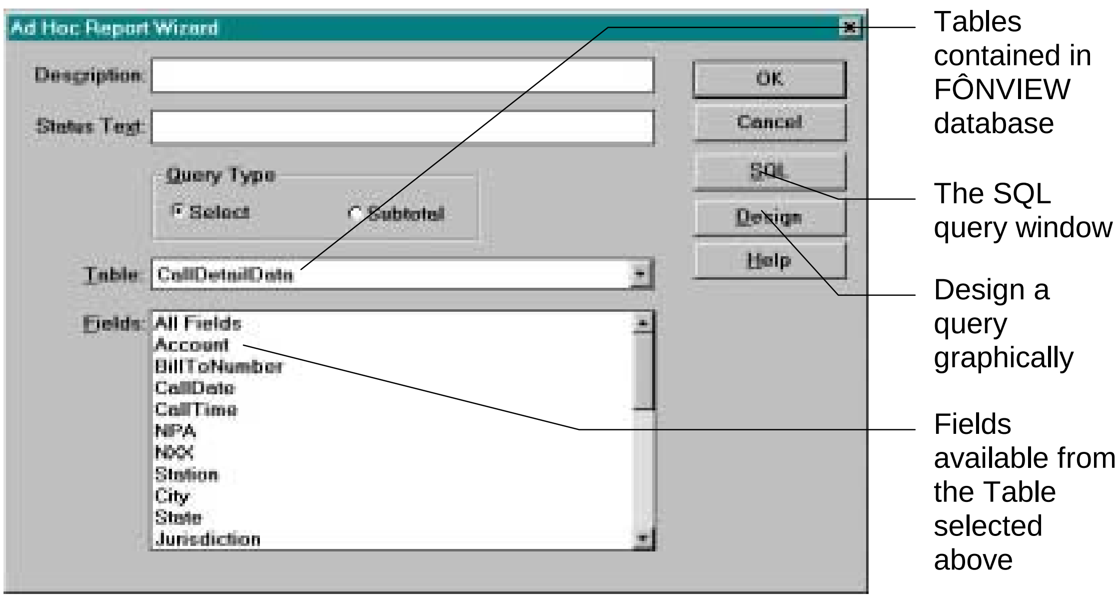


Figure 5-2 The Ad Hoc Report Wizard

Using the Ad Hoc Report Wizard, we will define the tables and fields we need for a query to find all calls to Indianapolis, Indiana that cost more than $1.50.

Action Steps - Defining a Query with the Ad Hoc Report Wizard.

	What you type or do	**What happens**
1.	Type: "*Indianapolis Calls, $1.50+*" and press tab on the keyboard.	The information is entered into the Description field.
2.	Type: "*All Calls to Indianapolis over $1.50*."	The information shows in the Status Text box.
3.	Make certain that in **Query Type, *Select*** has been chosen and that the ***CallDetailData*** table is chosen in the **Table:** list.	These are default settings that should be set when the Wizard opened.

4.	Click once on the following fields in the **Fields:** list:: ***Account*** ***BillToNumber*** ***CallDate*** ***City*** ***State*** ***DayPart*** ***CallDuration*** ***CallCost*** Scroll to fields as needed.	The fields are highlighted.

We can write a direct SQL statement using the SQL button or we can use the graphical option accessed by the Design button.

For our first query, we will use the Design option.

New Terms

Comparison Operators	Comparison Operators are specific symbols which combine statements in a query. They are related to mathematical symbols. In the next topic a table of these symbols is displayed.
Logical AND OR	These terms are connectives that allow for complex queries. The AND further defines a query by restricting with additional criteria while the logical OR widens the criteria by allowing additional criteria.
Conditions	In a Query, conditions are stated which the information requested must match or contain.

Action Steps - Using the Design Option to Create a Query.

	What you type or do	What happens
1.	Click once on the **Design** button. 	The Save Ad Hoc Query dialog box opens. 
2.	Click **Yes**. 	The graphical Design window opens titled “Indianapolis Calls, $1.50+”
3.	Maximize the window.	The Design window expands to cover the available workspace.

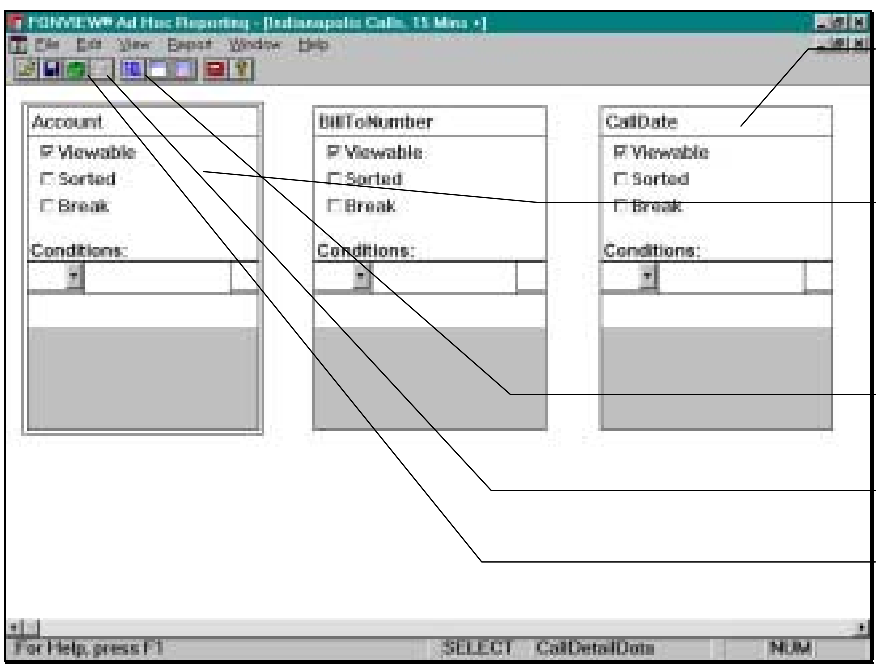
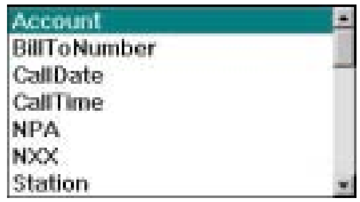
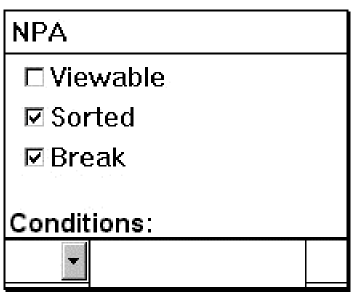
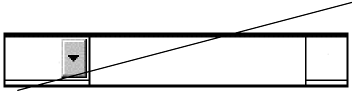
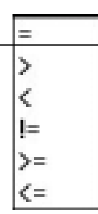
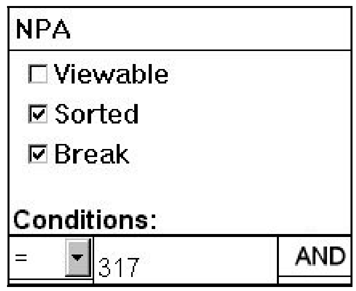
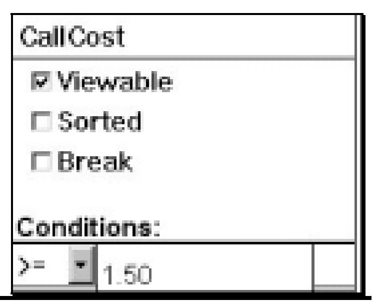


Figure 5-3 Design Window

4.	Click on **Edit** on the Menu Bar and click on **Insert Field.**	The cursor turns into a miniature Field Box with a “+” sign in front of it.

5.	Place the cursor to the left of the ***Account*** Field Box and click once.	A new Field Box is inserted, duplicating the Field Box to its right.
6.	Click once on ***Account*** in the new Field Box.	The Field Box Name drop-down list appears. 
7.	Click once on ***NPA***.	Account changes to NPA. This Field Box now represents the NPA field.
8.	Click to remove check mark next to *Viewable* and click to add check marks before *Sorted* and *Break*.  	The Query will report based on Area Code (NPA) and will create a page break (Break) as each Area Code changes. The field is marked as non-Viewable so there will be no NPA field in the report this query will generate.
9.	Click once on the drop-down box under ***Conditions*** in the NPA Field Box. 	A choice of Comparison Operators descends. 
10.	Click once on the **=** sign.	The = sign is now placed in the Comparison Operators box of the Conditions options.

Drop-down list of Comparison Operators.

11.	Click twice on the middle box under Conditions and type: "*317*".	The Conditions for this Field Box are now set to trap every Area Code (NPA) which equals 317, the Indianapolis Area Code.
12.	Click once on the third box under Conditions and choose **AND**.	The Logical AND is chosen to connect to another Condition to be set. 
13.	Scroll the window to the right to the final Field Box, ***CallCost.***	The CallCost Field Box shows on the screen.
14.	Click once on the drop-down box under Conditions and click once on **>=**.	The >= Logical Operator is set for >= (equal to or greater than).
15.	In the middle box under Conditions, type: "*1.50*" and press Enter on the keyboard. (note: cursor is not visible unless the box is double-clicked.)	The Conditions for this Field are now set for equal to or greater than $1.50. 

We have just designed a query for the database. This query has also been translated into SQL and we can view it by clicking on the SQL button and test the results of the query using the Test button.

We will use the ***Test*** button to retrieve the first ten records matching the Query's criteria because in a large FONVIEW database, fully Displaying the report could take several minutes.

Action Steps - Testing a Query and Viewing an SQL statement.

	What you type or do	What happens
1.	Click once on the **SQL** button. 	The Save Ad Hoc Query dialog box opens. 
2.	Click on **Yes**. 	The **Ad Hoc SQL Statement** dialog box opens with the query statement written.
3.	Look at the SQL Statement.	**A quick glimpse at SQL.** Note the flow of the statement and the position of the capitalized words. This is SQL syntax which we will look at later.

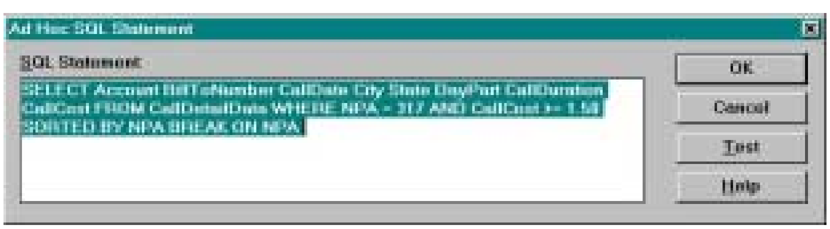


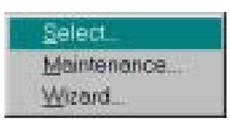
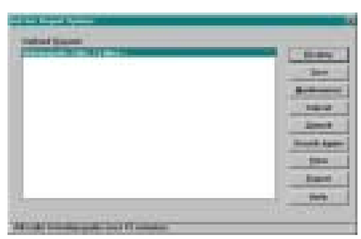
Figure 5-4 Ad Hoc SQL Statement

4.	Click once on the **Test** button in the **Ad Hoc SQL Statement** dialog box. 	A **Save Query** dialog box opens. 

5.	Click on **OK**. 	FONVIEW processes the Query and returns the first ten records for that match the Query's SQL Statement.

We have tested our SQL statement and it retrieves the data we are looking for so now we will display the full report. Since there are only 7 records which match our SQL Statement, the full Display will not look much different than the Preview. However, Displaying the full report for some queries in a large database could find hundreds of thousands of records and take a long time to process. Preview allows to see that our report is working correctly before taking the Display step.

Action Steps - Displaying an Ad Hoc Report.

	What you type or do	What happens
1.	Exit all open windows until the Ad Hoc Reporting workspace is clear.	The workspace is clear.
2.	Click on **Report** in the **Ad Hoc Reporting** menu and click again on **Select….** 	The **Ad Hoc Report Options** dialog box opens with our new Query highlighted. 
3.	Click on **Display**. 	The report is displayed.
4.	Maximize the report.	The report window expands to fill the available workspace.

Note that all the output options available in the Standard and Customized report screens are available in the Toolbar here as well.

When you have finished looking at the report, Exit the report window and close the Design window.

Structured Query Language (SQL)

New Term - SQL (Structured Query Language)

SQL, pronounced “es-cue-ell” or sometimes “sequel”, is a language developed specifically for manipulating databases. SQL was developed at IBM in the 1970’s to allow non-programmers to access sophisticated databases with relatively simple text entry. It has its own very specific syntax, a combination of keyword verbs, generally capitalized, and arguments and conditions which follow them. SQL is still commonly used in most major database environments.

SQL comes in several flavors but there are basic commands common to all variations. While this course is not intended to be a SQL tutorial, we can look at a few of the basic SQL commands and syntax that FONVIEW recognizes.

New Terms -
A Table of Comparison Operators for SQL.

Logical Operator	Mathematical	SQL
Equal to:	=	EQ
Not Equal to:	!=	NE
Greater than:	>	GT
Greater than or equal to:	>=	GE
Less than:	<	LT
Less than or equal to:	<=	LE

LOOKING AT SQL SYNTAX FOR FONVIEW

SQL Syntax for FONVIEW

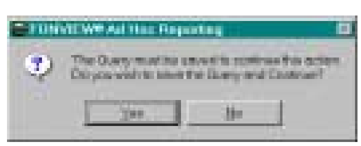
SELECT ***or*** *SUBTOTAL*

First we must decide whether we want to see detail, the SELECT command, or totals, the SUBTOTAL command, by each sorted field.

Term (Keyword verb)	What it means
SELECT {field(s)}	SELECT is the most common choice; use SELECT to filter the tables for detailed records which contain data defined in the SQL query.
SUBTOTAL {field(s)}	Use SUBTOTAL to choose totaled data from the requested tables that match the criteria. This produces a report without showing individual records.
FROM {table(s)}	This part of the SQL statement determines which Table(s) will be queried.
WHERE {selection criteria}	WHERE begins the Conditional part of the statement where the logical, comparison and mathematical operators are used to create a criteria the data must match or contain to be displayed.
SORTED BY {field(s)}	SORTED BY precedes a field name which the queried report will sort by.
BREAK ON {field}	BREAK ON subtotals a field when the SORTED BY field changes its value. Generally this is only applied to a field which is being SORTED BY.

We will write an SQL Query which will report to us all calls over an hour from FLORIDA ADMINISTRATION on <u>January 25 and January 29, 1996</u>.

Action Steps - Writing an SQL Query.

	What you type or do	What happens
1.	Click on **<u>R</u>eport** in the Ad Hoc Reporting window.	The Report menu opens.
2.	Click on **<u>W</u>izard**. 	The **Ad Hoc Report Wizard** opens. 
3.	Type: "*Jan 96 25,29 1Hr+ Fl Admin*" in the Description field and press tab on the keyboard.	The information is inserted in the Description field and the cursor moves to the Status Text field.
4.	Type: "*Calls over an hour from Florida Administration Jan 25, 29.*"	The information shows in the Status Text field.
5.	In the **Fields:** list, click on ***BillToNumber***.	The field is highlighted. We must choose one field to create a *legal* SQL statement. This will allow us to open the SQL window. BillToNumber is the first field we will use in the Query.
6.	Click on **<u>S</u>QL**. 	A Save Query dialog box opens. 

7.	Click on **Yes**. 	The **Ad Hoc SQL Statement** dialog box opens.

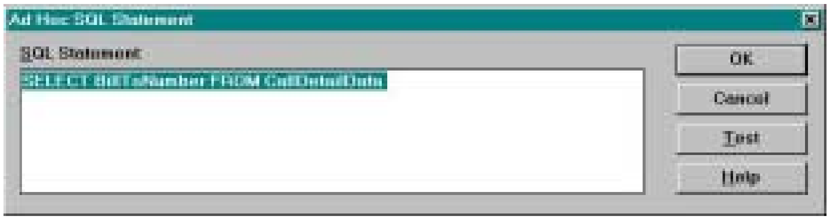


Figure 5-5

8.	Look at the current Statement.	There are two Keyword Verbs in the current SQL Statement, SELECT and FROM. This is a basic SQL statement.
9.	Edit the Statement without pressing enter to read: **“SELECT BillToNumber CallDate CallTime NPA NXX Station CallDuration CallCost FROM CallDetailData WHERE CallDuration > 60 AND BillToNumber = 5312283 AND CallDate = 1/25/96 OR CallDate = 1/29/96 SORTED BY NPA CallDuration BREAK ON NPA”**	This is the SQL Statement which will return a table of records in the correct form and with the information we want. Note the use of the Logical AND and OR.

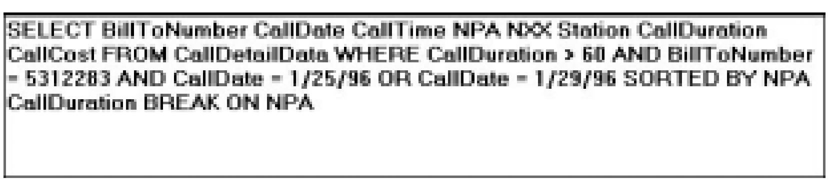
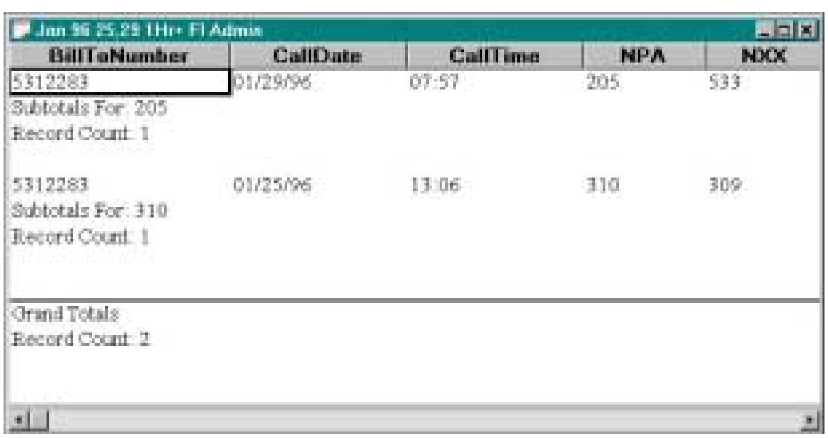


Figure 5-6 The Completed SQL Statement

Now we will test our SQL Statement and then Display the Report it generates.

Action Steps - Test and Display the SQL Statement.

	What you type or do	What happens
1.	Click on **Test** in the SQL Statement dialog box.  	A **Save Query** dialog box opens. 
2.	Click on **OK**.  	The Test Report finds two entries which match our Query.
3.	Exit the Test Report.	The Workspace clears.
4.	Click on **Report** in the menu, and the Select command.	The Ad Hoc Report Options window opens.
5.	Be certain the *Jan 96 25,29 1Hr+ Fl Admin* Report is highlighted and click on **Display**.  	The Report Displays on the screen.



When you have finished looking at the report, Exit the report window.

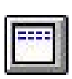
Ad Hoc Report Maintenance

Ad Hoc Report Maintenance allows us to edit and work with queries as well as create new ones.

First, we will edit our *Indianapolis Calls, $1.50 or more*, query to find all calls to the 904 NPA (area code) in Florida that were 10 minutes or longer using the Design window.

Action Steps - Editing a Query in the Design window.

	What you type or do	What happens
1.	Click on **Report** in the Ad Hoc Reporting window.	The Report menu opens.
2.	Click on the **Maintenance** command. 	The Ad Hoc Report Maintenance dialog box opens.
3.	Making certain that the <u>*Indianapolis calls, $1.50+*</u> Query is highlighted in the **Defined Reports** list, click on **Edit**. 	The **Ad Hoc Edit** dialog box opens. 
4.	Edit the description to: "*NPA 904, 10 Mins +*" and press the tab key on the keyboards.	The information is changed in the Description field.
5.	Edit the Status Text to: "*All calls to Area Code 904 over 10 minutes*."	The text is changed in the status field.
6.	Click **OK**.	The name of the report has changed in the Defined Reports list.

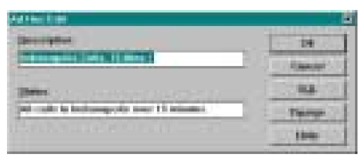
7.	Make certain the new report, “NPA 904, 10 Mins +” in the **Defined Reports** list is highlighted and click on the **Edit** Command button.	The **Ad Hoc Edit** dialog box opens once again with the new report highlighted.
8.	Click on **Design** in the Ad Hoc Edit dialog and Maximize the window. 	The Design Window opens
9.	Scroll all the way to the right and Select the NPA Field Box.	A double-outline appears around the selected Field Box.
10.	Edit the center Conditions box to: “***904***” and delete the “**AND”** in the last box.	The “*317*” entry changes to “*904*”, the **AND** is deleted
11.	Select the ***CallCost*** Field Box by clicking once on it.	The Field Box now has a double-outline, showing it has been selected.
12.	Click on **Edit** in the Design window menu and click on the **Delete Field** command.	The selected Field Box disappears.
13.	Locate the **CallDuration** Field Box by scrolling and edit the conditions to: “***>= 10 AND***”	The Conditions in *CallDuration* are entered.
14.	Click once on the **Test** Button tool in the Toolbar. 	A Save Query and Continue? Dialog box opens.
15.	Click **Yes** to save the edited query.	The query report screen processes and shows 10 entries.

16.	Exit all windows until Workspace is clear.	The Workspace is clear.
17.	Click on **Report** in the Menu and the **Select** command.	The Ad Hoc Report Options window opens.
18.	Making certain that the report is highlighted, click on **Display**. 	The report is generated.
19.	Maximize and look at the report.	Sub totals appear at the bottom of the report.

When you have finished looking at the report, close the report window.

We will now edit our other query "Jan 96 25, 29 1Hr+ Fl Admin" to show us all calls over an hour for FLORIDA ADMINISTRATION, using the SQL Window.

Action Steps - Editing a Query in the SQL window.

	What you type or do	What happens
1.	Click on **Report** in the Ad Hoc Reporting window.	The Report menu opens.
2.	Click on the **Maintenance** command. 	The **Ad Hoc Report Maintenance** dialog box opens.
3.	Click once on the "Jan 96 25,29 1Hr+ Fl Admin" Query.	The Query is highlighted.
4.	Click on **Edit**. 	The Ad Hoc Edit dialog box opens. 
5.	Type: "*Fl Admin 1 Hr+*" and press tab on the keyboard.	The information is changed in the Description field.
6.	Type: "*Calls over 1 hour for FLORIDA ADMINISTRATION*."	The information changes in the Status Text field.
7.	Click on **OK** in the Ad Hoc Edit dialog box. 	The name of the Query is changed in the Description field.

8.	Click on **Edit**. Edit	The Ad Hoc Edit dialog box re-opens.
9.	Click on the **SQL** button. SQL	The Save Query dialog box opens.
10.	Edit the statement by deleting: "*AND CallDate = 1/25/96 OR CallDate = 1/29/96*".	The statement reflects the changes.

```
SELECT BillToNumber CallDate CallTime NPA NXX Station CallDuration
CallCost FROM CallDetailData WHERE CallDuration > 60 AND BillToNumber
= 5312283 SORTED BY NPA CallDuration BREAK ON NPA
```

12.	Click on **Test**. Test	A Save Query dialog box opens.
13.	Click **OK**. OK	The Test Report opens..

STOP

We will not run a full Display of the report since it only contains 3 entries

When you have finished looking at the report, Exit the report window.

Note that all the output options available in the Standard and Customized report screens are available in the Toolbar here as well.

Skill Review

Exercises:

A. Create an Ad Hoc Report Using the Design Window - Create an Ad Hoc Report using the DESIGN window which will find all calls from Florida Operations to California over 10 minutes, sorted by City. *Hint*: we can find the bill-to-number for Florida Operations, 574-7111, in the Consolidated Invoice under Call Detail Usage and the Call Detail Report.

1. Open the **Ad Hoc Report** window, if necessary
2. Choose the **Maintenance** command in the dialog box.
3. Click on **New**
4. Type: "*FL OPS calls to CA 10 mins+*"
5. Press ***tab*** on the keyboard
6. Type: "*All Florida Operations calls to CA over 10 minutes, sorted by city*."
7. Make certain ***Select*** is chosen under **Query Type** and that ***CallDetailData*** is the selected **Table**.
8. Highlight Fields***: CallDate, CallTime, NPA, NXX, Station, CallDuration***, and ***CallCost***
9. Click on **Design**
10. Click on **Yes** to save the query
11. Maximize Design window
12. Use **Edit:Insert Field Box** in the menu to place a Field Box to the left of the ***CallDate*** Field Box
13. Edit the Field Box to ***BillToNumber***, <u>non-Viewable</u>, with the conditions: ***"= 5747111 AND***"
14. Use **Edit:Insert Field Box** in the menu to place a Field Box to the right of the ***BillToNumber*** Field Box
15. Edit the Field Box to ***State***, <u>non-Viewable</u>, with the conditions: ***"= CA AND***"
16. Use **Edit:Insert Field Box** in the menu to place a Field Box to the right of the ***State*** Field Box

17. Edit the Field Box to **City**, <u>Viewable</u>, <u>Sorted</u> and <u>Break</u> all selected.
18. Scroll to the ***CallDate*** Field Box and select <u>Sorted</u>
19. Scroll to the ***CallDuration*** Field Box and edit the conditions to: "**>= *10.00***"

B. Test and Display the Query

1. Click on the **Test Query** button tool
2. Click on **Yes** to save the query
3. Exit the Test window
4. Click on the **Display Query** button tool
5. Scroll to look at the defined report
6. Close report and Design window

C. Edit Using Design Window - Edit the Report to show all calls from Florida Administration to Indiana with the same conditions.

1. Click on **Report** menu and **Maintenance…** command
2. Select the ***FL OPS calls to CA 10 mins+*** Query
3. Click on the **Edit** button
4. Type: **"*FL OPS calls to IN 10 mins+*"**
5. Press ***tab*** on keyboard
6. Edit Status Text to replace **"*CA*"** with **"*IN*"**
7. Click **OK** to save edited Description and Status
8. If not already highlighted, select the ***FL OPS calls to IN 10 mins+*** query
9. Click on **Edit**
10. Click on the **Design** button and maximize the screen
11. Scroll to locate the ***State*** Field Box
12. Edit middle condition box from **"CA"** to **"IN"**
13. Click on **Display Query** tool button

14. After looking at the report, close the report and Design window

D. Create an Ad Hoc Report Using the SQL Window - Follow these steps to create an Ad Hoc Report using the SQL window which will find all calls over 1 hour from CA SALES CARDS (Account 157000545).

1. Open the **Ad Hoc Report** window, if necessary
2. Choose the **Maintenance** command in the dialog box.
3. Click on **New**
4. Type: ***"CA FONCARDS 15 Mins+"***
5. Press ***tab*** on the keyboard
6. Type: ***"All California FonCard calls over 15 minutes, sorted by Card."***
7. Make certain ***Select*** is chosen under **Query Type** and that ***CallDetailData*** is the selected **Table**.
8. Highlight ***BillToNumber*** Field
9. Click on the **SQL** button
10. Click on **Yes** to save query
11. Edit **SQL** window to read: "SELECT BillToNumber CallDate CallTime NPA NXX Station City State CallDuration CallCost FROM CallDetailData WHERE Account = 157000545 AND CallDuration >= 15.00 SORTED BY BillToNumber"

E. Test and Display the Query

1. Click on the **Test Query** button tool
2. Click on **Yes** to save the query
3. Exit the Test window
4. Click on the **Report** menu and **Select…** command
5. Highlight ***CA FONCARDS 10 Mins+***
6. Click on the **Display** command button
7. Scroll to look at the displayed report
8. Close displayed report

Application Project

6. Re-Billing

6.1 Exploring the FONVIEW Re-billing System (RBS) Window
- Who uses Re-billing
- Understanding Rate and Tax Packages
- Buttons
- Menus

6.2 Defining Re-billing Services (RBS) Accounts
- RBS Account Information form
- Creating a New RBS Account
- Editing Account Type Information
- Understanding how Tax and Rate packages are attached

6.3 Defining Tax Packages
- The Tax Packages screen
- Creating a New Tax Package

6.4 Defining Rate Packages
- The Set Up Rate Packages screen
- Creating a New Rate Package
- Attaching Minimums

6.5 Re-billing System Reporting (Linking) data
- Editing RBS account to attach Tax and Rate Packages
- Creating a Reporting Group
- RBS Detail, Summary and Account Summary Reports
- Examining the Orphan Log

6.6 Skill Review
- Exercises
- Application Project

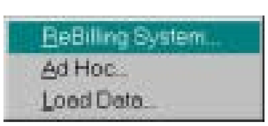
Exploring the FONVIEW ReBilling System (RBS)

In many cases, the charges represented by the Sprint Invoice will be charged to various departments, projects or even other customers. Sometimes this will just be an accounting figure, such as large corporations may need to define tele-communication costs for various projects or departments. Other times, it may begin an actual billing process to outside companies or individuals, such as a building which rents office suites with phone services or even a telecommunications services re-seller.

New Terms

Re-billing	Re-billing is the process of defining charges from the Sprint invoice which will be charged to other departments or entities.
Re-billing Accounts	A definition of the department or entity to which these charges will be re-billed.

Action Steps - Accessing the ReBilling System (RBS).

	What you type or do	What happens
1.	Click once on **Tools** in the FONVIEW menu.	The Tools Menu opens.
2.	Click once on the **ReBilling System…** Command. 	FONVIEW's **ReBilling System** window opens. Note that FONVIEW has opened a separate application window called **FONVIEW® ReBilling System (RBS).** It will act the same as an entirely separate program.

3.	Look at the ReBilling System program window.	Note that since this is a separate program it is now on the Windows 95 taskbar and may be accessed as a separate application, even if the main FONVIEW screen has been exited. Also, note that there are a new set of tool buttons in the toolbar for this program.

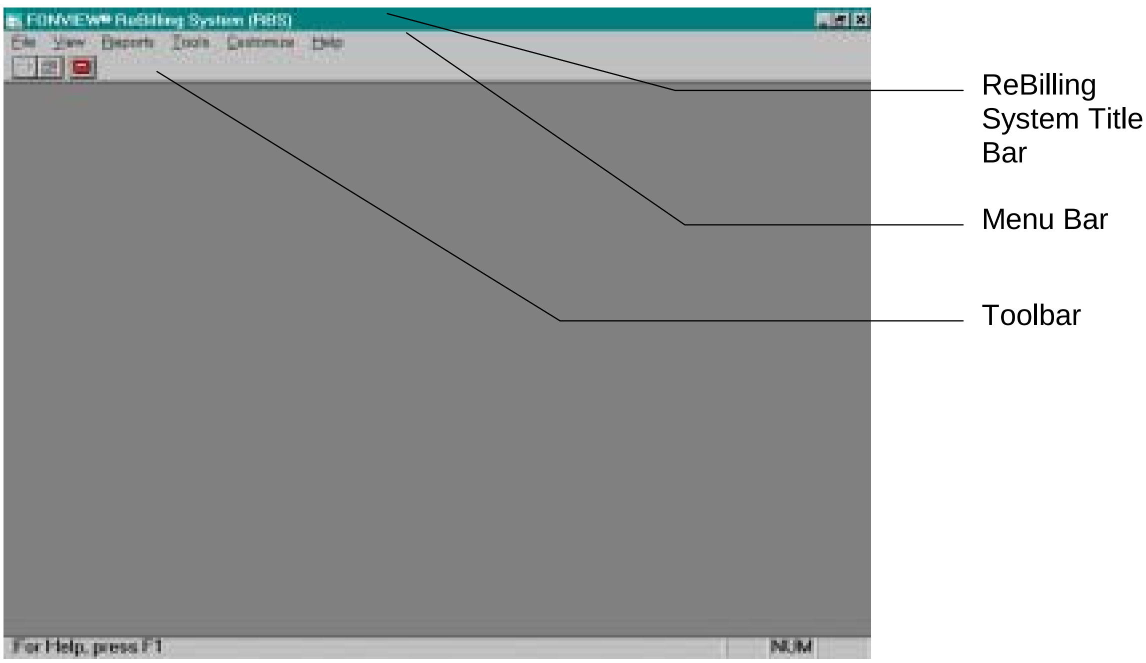
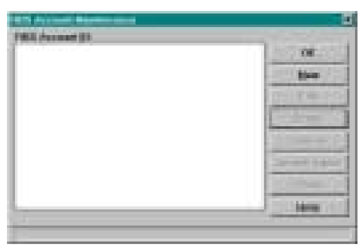


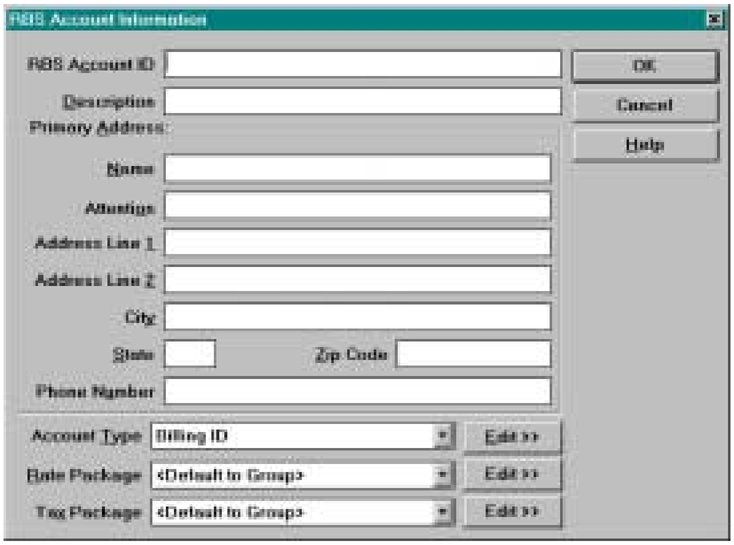
Figure 6-1

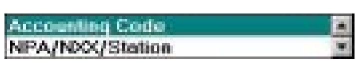
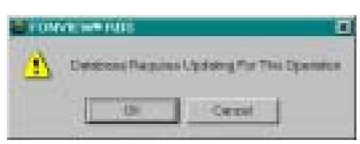
Defining ReBilling System (RBS) Accounts

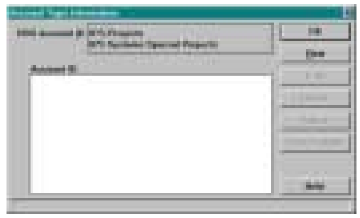
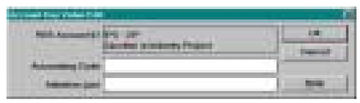
To begin using the FONVIEW ReBilling System, we will need to set up special RBS Accounts. We have two special projects which we will use for ReBilling. The first is the Zucchini in Industry Project (Account Code 477), a Joint Venture with the Italian Produce Growers Association and the second, Quince Quality Query (Account Code 653), is an in-house Quality Assurance program..

Action Steps - Setting up an RBS Account.

	What you type or do	What happens
1.	Click once on **Customize** in the **ReBilling System** menu.	The Customize menu opens.
2.	Click once on the **RBS Accounts…** command. 	The **RBS Accounts Maintenance** dialog box opens. 
3.	Click once on **New**. 	The **RBS Account Information** dialog box opens.

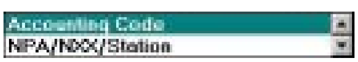


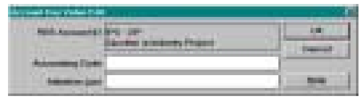
4.	Type: "*IPS - ZIP*", and press tab on the keyboard.	The information is entered into the **RBS Account ID** field.
5.	Type: "*Zucchini in Industry Project*".	The information is entered.
6.	Ignoring all the Primary Information fields, click into the Drop-down list next to **Account Type** and select ***Accounting Code*** 	*Accounting Codes* is displayed in the Account Type field.
7.	Click once on the **Edit>>** button next to Account Type. 	A *Database Requires Updating* message box appears. 

8.	Click **OK**. 	The Account Type Information dialog box opens. 
9.	Click on **New**. 	The **Account Key Value Edit** dialog opens. 
10.	Type: "*477*" and press tab on the keyboard.	The information is entered into the ***Accounting Code*** field.
11.	Type: "*Zucchini in Industry Project*".	The information is displayed in the ***Attention Line*** field.
12.	Click on **OK**. 	The *Account Key Value Edit* dialog closes.
13.	Click **OK** twice more.	The RBS Account Maintenance dialog is uncovered.

Okay, we've got one new RBS Account entered. Now we will enter our Quince Quality Query RBS account.

Action Steps - Setting up a 2nd RBS Account.

	What you type or do	What happens
1.	Be certain you are in the RBS Account Maintenance dialog box	This is where the last steps ended.
2.	Click **New** again to enter the 2nd Account. 	The **RBS Account Information** dialog box opens.
3.	Type: "*IPS - QQQ*" and press tab on the keyboard.	The information is entered into the *RBS Account ID* field.
4.	Type: "*Quince Quality Query*".	The information is entered.
5.	Ignoring all the Primary Information fields, click into the Drop-down list next to **Account Type** and select ***Accounting Codes.*** 	*Accounting Codes* is displayed in the *Account Type* field
6.	Click on **Edit>>.** 	A *Database Requires Updating* message box appears. 
7.	Click on **OK**. 	The **Account Type Information** dialog box opens.

8.	Click on **New**.  	The **Account Key Value Edit** dialog opens. 
9.	Type: "*653*" and press tab on the keyboard.	The information is entered into the *Accounting Code* field.
10.	Type: "*Quince Quality Query*" and click **OK**.  	The information is entered in the *Attention Line* field and the *Account Key Value Edit* dialog closes
11.	Click **OK** three times.	The *RBS Account Maintenance* dialog box is revealed. Note that both of our RBS Accounts have now been setup.

The FONVIEW RBS workspace should be clear. If any dialog boxes are left open, be certain to close them before proceeding.

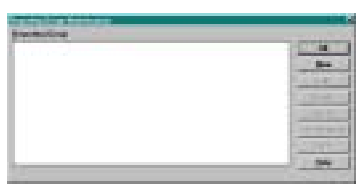
Defining RBS Reporting Groups

Not only must an RBS Account be setup for charges but this account must belong to a Reporting Group. In our case, we have two individual accounts setup but we will want to handle each account differently, since one is in-house and the other has its accounting done outside

First we will put our Quince Quality Query program into a Reporting Group called Quality Assurance Programs.

.

Action Steps - Setting up an RBS Reporting Group.

	What you type or do	What happens
1.	Click once on **Customize** in the **ReBilling System** menu.	The Customize menu opens.
2.	Click on **the Reporting Groups…** command 	The **Reporting Group Maintenance** dialog box opens. 
3.	Click on **New**. 	The **Reporting Group Information** dialog box opens.

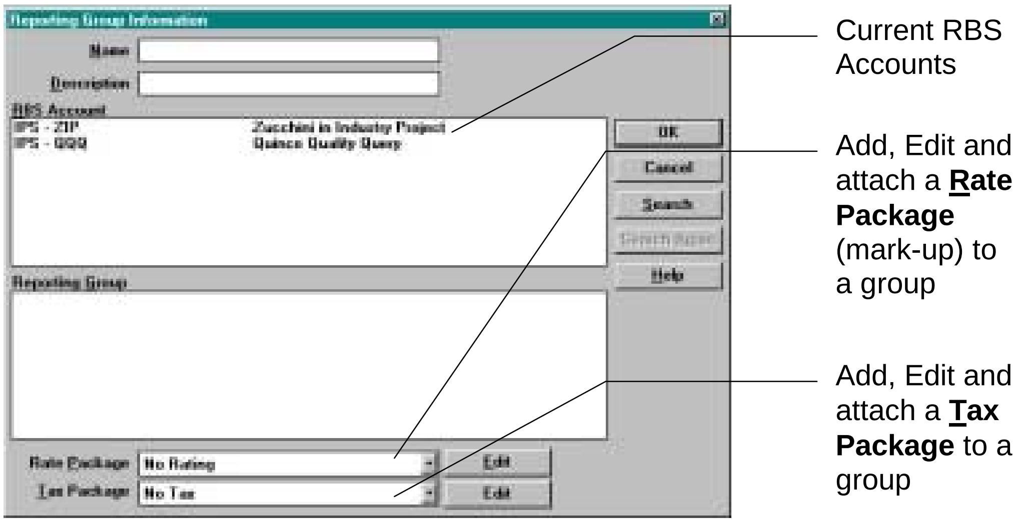


Figure 6-2 Reporting Group Information dialog

5.	Type: "*QA*" and press tab on the keyboard.	The information is inserted into the Name field.
6.	Type: "*Quality Assurance Program*."	The information is displayed in the Description field.
7.	Highlight ***IPS-QQQ***, the *Quince Quality Query* in the **RBS Accounts** pane.	The IPS-QQQ RBS Account is now selected into the new QA Reporting Group.
8.	Make certain that at the bottom of the page that **Rate Package** shows as *No Rating* and **that Tax Package** shows as *No Tax.*	This is our in-house account and we will simply pass through the charges to this account for accounting purposes.
9.	Click **OK**.  	The Reporting Group Maintenance dialog box opens and it shows the new group.

Now we will set up a Reporting Group which does use a Rate Package and a Tax Package - our Zucchini in Industry Project.

Action Steps - Setting up another RBS Reporting Group.

	What you type or do	What happens
1.	In the **Reporting Group Maintenance** dialog box, click **New**. 	The **Reporting Group Information** dialog box opens.
2.	Name the new Reporting Group: "*Promotions*" with a Description of "*Outside Promotions*."	The information is entered and displayed in the Name and Description fields.
3.	Highlight **ZIP**, the ***Zucchini in Industry Project.***	The Group now includes the RBS Account, Zucchini in Industry Project.

For accounting purposes IPS wants to add certain surcharges and a tax schedule, to recover costs from the partnership. If we had already determined these rates and taxes we would attach them now. Since we have never defined these surcharges we will define them in the next topic.

Defining Rate Packages

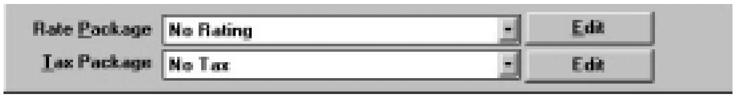
Both Rate and Tax Packages can be set up and attached from the FONVIEW ReBilling's **Customize** menu. We will use that method here, setting up these packages "on-the-fly", for two reasons.

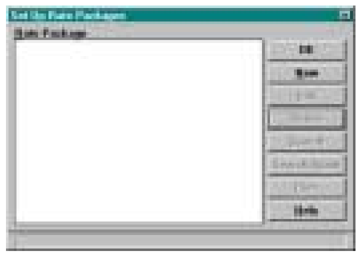
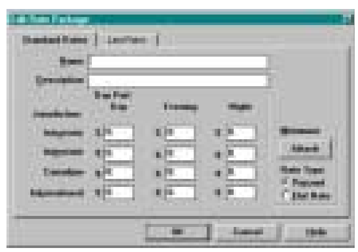
1. RBS Accounts are usually grouped together specifically so that certain Tax and Rate Packages can be attached to them as a group. While individual Tax and Rate Packages can be built and attached to each specific RBS Account, it is much more common for a number of RBS Accounts to share these markups.

2. For instruction purposes, it is more intuitive to set up these packages from the Reporting Group to which we want to apply it. In most cases, the Rate and Tax Packages will be set in exactly the way we will do it now.

When we stopped our ***Action Steps***, we were still in the **Reporting Group Information** dialog box. If you inadvertently pressed OK to setup this group, select it now and press Edit to return to the Reporting Group Information dialog.

Action Steps - Creating and Attaching a Rate Package to a Reporting Group.



	What you type or do	What happens
1.	Click on the **Edit** button next to the Rate Package Drop-down list. 	The **Setup Rate Package** dialog box opens. 
2.	Click on **New**. 	The **Edit Rate Package** dialog box opens. 
3.	Type: "*Standard Rate*" and press tab on the keyboard.	The information is entered into the ***Name*** field.
4.	Type: "*Standard Rate for Outside Projects*."	The information is displayed in the ***Description*** field.
5.	Edit, for all jurisdictions, 5% for Day calls, 3% for Evening calls, 2% for Night calls.	The dialog box should look like the picture below in Figure 6.3.

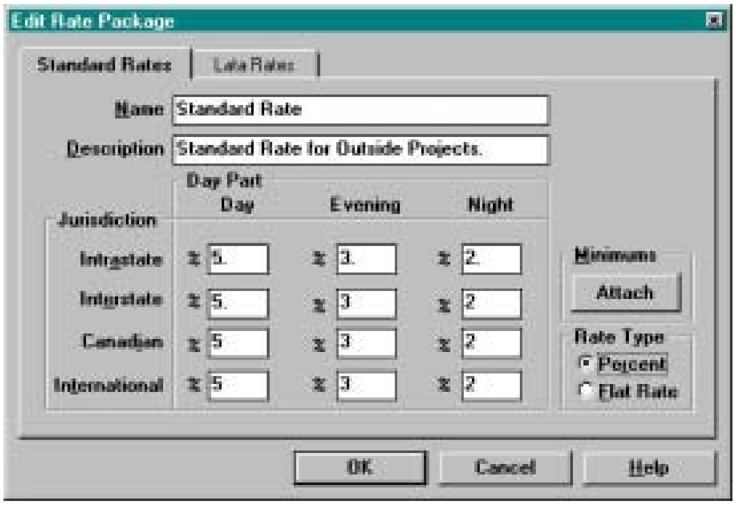
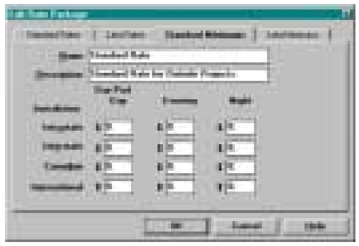


Figure 6-3 Edit Rate Package for Standard Rate.

For accounts in this Reporting Group, we also want to establish a minimum charge per call. FONVIEW ReBilling has an option to do this.

6.	Click once on the **Attach** button under **Minimums**. 	Two more page tabs, ***Standard Minimums*** and ***LATA Minimums***, appear. 

This happens pretty quick. If you want to be certain of these new tabs, you can toggle back and forth between the **Attach** and **Detach** buttons under Minimums to see these page tabs appear and disappear.

7.	Click on the new ***Standard Minimums*** page tab.	The Standard Minimums page appears. 
8.	Edit the fields for all Jurisdictions to: $1.00 Days, $.50 Evenings, $.25 Nights	The Standard Minimum rates should look like those below in Figure 6.4.

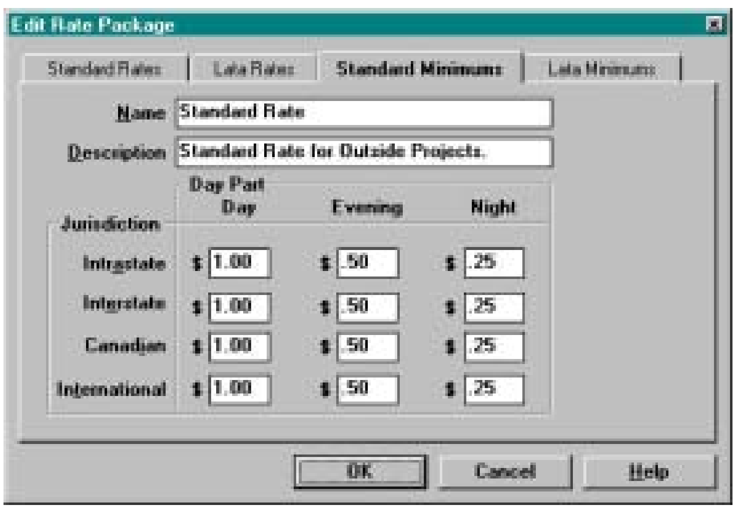


Figure 6-4 Edit Rate Package Standard Minimums

9.	Click **OK** to accept the Rates; click **OK** to accept the new Standard Rate Package.	The **Reporting Group Information** dialog box is revealed again.

10.	Click on the Drop-down list net to **Rate Package** and select the ***Standard Rate.*** 	Now the Standard Rate option shows as selected in the Rate Package drop-down list and is attached to this Reporting Group.

Before we close our Reporting Group Information dialog, we want to define and attach the Tax Package which we will cover in the next topic.

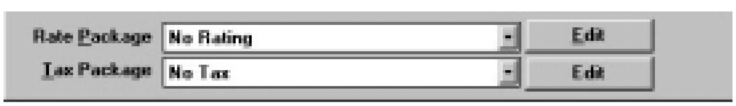
Defining Tax Packages

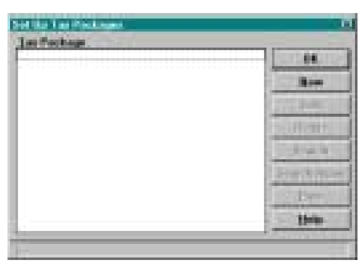
Now that we know how to set up a Rate Package, setting up a Tax Package should be easy. The actions are very similar.

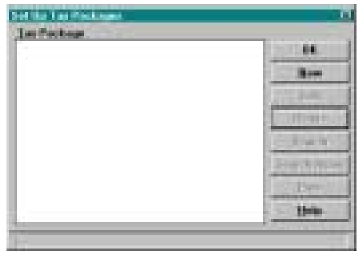
We will create a tax package to pass a percentage of the charges to our bill for the Zucchini in Industry Project.

When we paused in our ***Action Steps***, we were in the **Reporting Groups Information** dialog box. If you have inadvertently closed this screen, highlight Promotions in the Reporting Groups Maintenance dialog box and click on Edit to return to this screen.

Action Steps - Creating and Attaching a Tax Package to a Reporting Group.



	What you type or do	What happens
1.	Click on the **Edit** button next to the Tax Package Drop-down list. 	The **Setup Tax Package** dialog box opens. 

2.	Click on **New**. 	The **Edit Tax Package** dialog box opens. 
3.	Type: "*Standard Tax*" and press tab on the keyboard.	The information is entered into the **Name** field.
4.	Type: "*Standard Tax for Outside Projects*."	The information is displayed in the **Description** field.
5.	Edit, for all jurisdictions, 5% for Federal, 3% for State, 1% for Other.	The dialog box should look like the picture below.

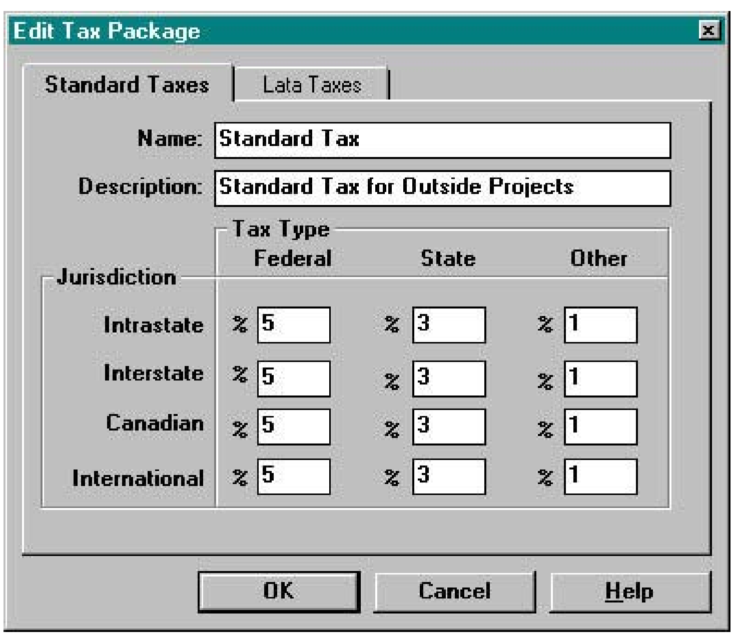


Figure 6-5 Edit Tax Package Standard Tax

6.	Click **OK** to accept the new Standard Tax percentages; click **OK** to accept the new Standard Tax Package.	We are back to the Reporting Group Information dialog.
7.	Click on the Drop-down list net to **Tax Package** and select the ***Standard Tax.*** 	Now the Standard Tax option shows as selected in the Tax Package drop-down list.

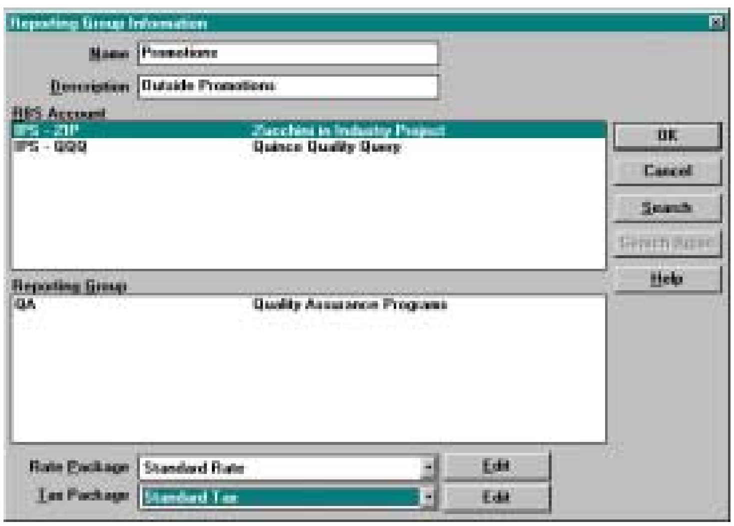


Figure 6-6 Reporting Group Information - Promotions

8.	Click **OK**. 	The Reporting Group Maintenance dialog shows the two Reporting Groups that have been set up. 
9.	Click **OK**.	The Reporting Group Maintenance dialog closes and the workspace is clear.

ReBilling System Reporting

We have defined our RBS Accounts and created Reporting Groups. Now reports can be generated for them. The ReBilling System, as an independent program, has its own reporting functions. They are found in the Report menu. There are three reporting options, Call Detail, Call Summary and Account Summary. Any of these reports can be run for either the whole Reporting Group or for an individual RBS Account by selecting it in the Report Options dialog boxes for each report.

We will run a quick Detail Report to see the result of our efforts. We will use Call Detail as it best illustrates our new Reporting Group.

Action Steps - Creating a ReBilling Call Detail Report.

	What you type or do	What happens
1.	Click once on **Reports** in the ReBilling System menu.	The Reports menu descends.
2.	Click on the **Call Detail…** command. 	The **RBS Call Detail Report Options** dialog box opens.

3.

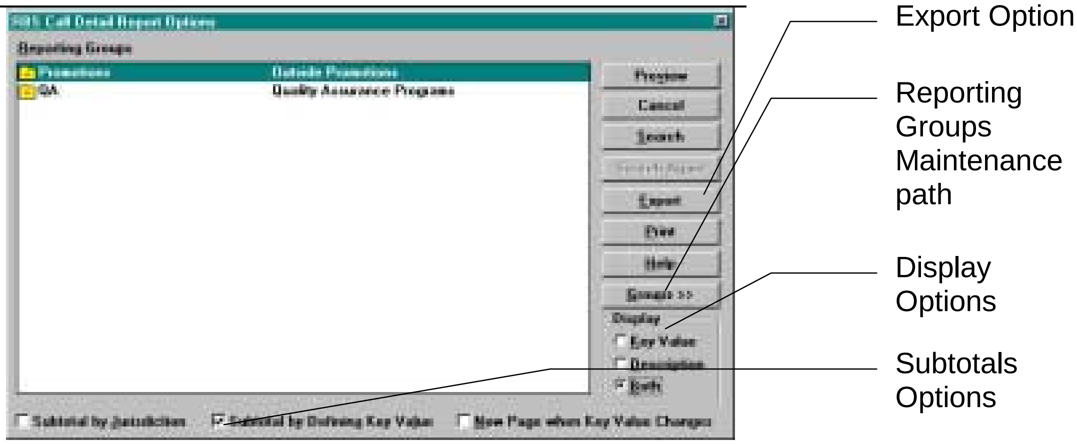
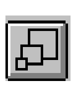


Figure 6-7 Call Detail Report Options

4.	Click to place a check mark next to ***Subtotal by Defining Key Value***.	The **Display** section in the lower right corner of the dialog box is now accessible.
5.	Click on ***Both*** in the Display section.	The Radio Button moves to the Both field.
6.	Be sure the ***Outside Promotions*** Reporting Group is highlighted.	It should have highlighted when this screen was accessed.
7.	Click on **Preview.** 	The requested report generates.
8.	Maximize the Report screen.	The Report expands to fill the Workspace.
9.	Use the **Zoom** button as needed to examine the report. 	Note the minimums for *Day*, *Evening* and *Night* calls. Note that *Taxes* are added in a table at the bottom of the report.

STOP When you have finished examining the report, exit the window and clear the Workspace

.

Other ReBilling Features

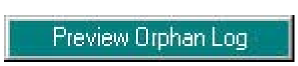
As a complete program, the FONVIEW ReBilling System provides menu items for printing, exporting and a separate Help system as well as the features we have explored. Most of these features are similar to those in the main FONVIEW program. However, one feature specific to the RBS is the Orphan Log.

THE ORPHAN LOG

For companies who re-bill all charges, or nearly all charges, the Orphan Log identifies charges which have NOT been attached to a RBS Account by four categories. This tool can help you easily check for items which were not re-billed.

We will take a quick look at the current Orphan Log and note that the two Accounting Codes which we used to create RBS Accounts, 477 and 653, are <u>not</u> listed in this report.

Action Steps - Creating an Orphan Log Report.

	What you type or do	What happens
1.	Click once on **Tools** in the ReBilling System menu.	The Tools menu descends.
2.	Click on the single choice, **Preview Orphan Log**. 	The **Orphan Type Selection** dialog box opens.

3.	Make certain that only the box in front of ***Accounting Code*** is checked. 	The Orphan Log report will show all Accounting Codes which have <u>not</u> been attached to an RBS Account.
4.	Click **OK**. 	The requested report generates.
5.	Maximize the Report.	The report expands to cover the Workspace.
6.	Look at the Orphan column in the Orphan Report	Note that Accounting Codes *477* and *653* do not appear on this report. We used them in our RBS Accounts.

STOP

When you have finished examining the report, exit the report screen and clear the Workspace.

Skill Review

Exercises:

A. Create a new RBS Account - for Oranges Optimization Project (Accounting Code 655)

1. In the ReBilling System window, click on **Customize** menu and choose **RBS Accounts**… command
2. Click on **New**
3. Type: ***"IPS-OOP"*** and press tab on keyboard
4. Type: ***"Oranges Optimization Project"***
5. In the **Account Type** drop-down list, select ***Accounting Code***
6. Click on the **Edit>>** button next to ***Accounting Code***
7. Click on **Edit>>**
8. Click on **New**
9. Type: ***"655",*** and press Tab on the keyboard
10. Type: ***"Oranges Optimization Project"***
11. Click **OK**, four times to clear Workspace.

B. Add the IPS-OOP Account to the Promotions Reporting Group

1. Click on **Customize** menu and **Reporting Groups**… command
2. Make sure ***Promotions*** is highlighted and click on **Edit**
3. Click on ***IPS-OOP***, the Oranges Optimization Project to highlight it.
4. Click on **OK**

5. Double-click on ***+Promotions*** in the **Reporting Group Maintenance** dialog to see that the new RBS Account has been added to this group

6. Click on **OK**

C. Edit the Standard Rate Package - Because we created our Rate Package from the Group Reporting Maintenance dialog previously, this time we will edit the Rate Package from the menu path.

1. Click on the **Customize** menu and choose the **Rate Packages…** command

2. Making certain ***Standard Rate*** is highlighted, click **Edit**

3. In the **Rate Type** section, in the lower right of this dialog, change to **Flat Rate**

4. Change all Jurisdictions to:
   $2.00 Day, $1.00 Evening, and $.75 Night

5. Click on **Detach** button to remove minimums page tabs

6. Click **OK**, twice

D. Delete the Standard Tax Package and create a new Tax Package called **Outside Promotions**

1. Click on **Customize** menu and choose **Tax Packages…** command

2. Making certain ***Standard Tax*** is highlighted, click **Delete**

3. Click **Yes** to confirm deletion

4. Click **New**

5. Type: ***"Outside Promotions"*** and press Tab on keyboard

6. Type: ***"Tax Rate for Outside Promotions."***

7. Change percentages for all Jurisdictions to:
   6% for Day, 4% for Evening, and 2% for Night

8. Click **OK**, twice

E. Attach new Tax Package to Promotions Reporting Group

1. Click on **Customize** menu and choose **Reporting Groups…** command
2. Making certain that ***Promotions*** is highlighted, click **Edit**
3. In the **Tax Rate** drop-down list, select ***Outside Promotions***
4. Click **OK**, twice

F. Preview Report for Promotions

1. Click on **Reports** menu and choose **Call Detail…** command
2. Click to put check mark in box next to **Subtotal by Defining Key Value**
3. In the **Display** section, click on **Both** to move option button
4. Making certain that ***Promotions*** is highlighted, click on **Preview**
5. Maximize the screen and examine the report
6. Exit the Report when finished

Application Project

1. Accounting has decided that internal projects like *Quality Assurance* need to account for their share of taxes. Sindy asks you to make new Tax Package called ***Internal Tax*** with percentages for Federal = 3%, State = 2%, and Other = 1% for all Jurisdictions. When you have made the new Tax Package, attach it to the ***QA*** Reporting Group.

2. Accounting has also decided it wants to pass additional costs along in internal department accounting as well as outside projects. Help Reggie by making a new Rate Package called

Internal Rate. Make the percentages: Day = 5%, Evening = 2.5%, and Night = 1.75% for all Jurisdictions. Attach a Minimums sheet and change the minimum rate for all Jurisdictions to: Day = $1.25, Evening = $.95, and Night = $.45.

Appendix 1 -
Installing FONVIEW

The following sections describe how to install the FONVIEW software on a local PC using Windows 3.1, on a local PC using Windows 95, and on a Novell Local Area Network.

Installing FONVIEW With Windows 3.1
Make Program Manager the active window. To install FONVIEW software on to your local PC, you must insert installation disk #1 in the appropriate 3.5 inch floppy drive (A: or B). Then, click the File item on the menu bar in the Program Manager window.

Clicking the Run… item from the drop-down menu causes the File Run dialog box to appear as shown in Figure A1.1.

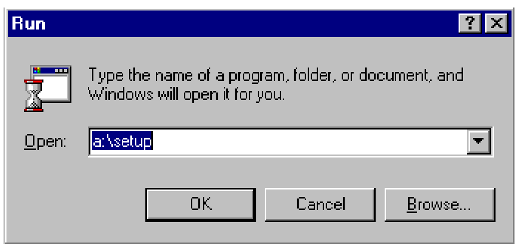


Figure A1. 1

Then type the following command line into the text box provided:

a:setup

Note: *Use drive b: if that is the drive containing the installation diskette.*

Click the OK command button.

The installation program is executed which causes the Welcome to FONVIEW window to appear. To install FONVIEW, click the Continue command button. (At this point, you also have the oprion of backing out of the installation process by click Cancel Setup).

Next, you must select the type of installation to e performed (see Figure A1.2)

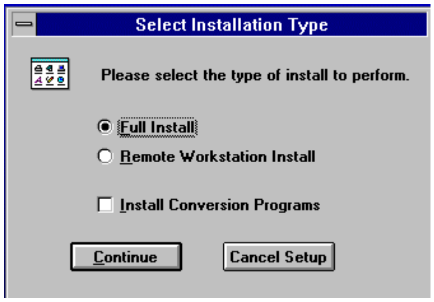


Figure A1. 2

Three types of installation can be performed. The Full Install option should be selected when installing the software locally onto a PC or when installing the software onto a file server. The Remote Workstation Install option should be selected on all client workstations that are going to be running FONVIEW off of the network. The Install Conversion Programs option should only be selected in the case of converting from DOS FONVIEW to Windows FONVIEW.

You are then given an opportunity to specify the pathname into which the application will be installed. By default, the drive and directory fo FONVIEW are set to C:\FVWIN. If you want to install FONVIEW somewhere else, type the drive and directory now and click on the OK command button. From this point on, the installation program does most of the work ofor you. An indicator window is provided so that you can monitor the progress of the installation. The system notifies you when it is time to insert the next disk.

If you have an active CD reader, you are prompted during the installation process whether or not data is to be received on CD-ROM. If that is the case, you must specify the drive ID for the CD-ROM drive when prompted.

Installing FONVIEW With Windows '95

To install FONVIEW software onto your local PC, you must insert installation disk #1 in the appropriate 3.5 inch floppy drive (A: or B☺. Then, click the Start button and select the Run… item from the Startup menu as shown in Figure A1.3

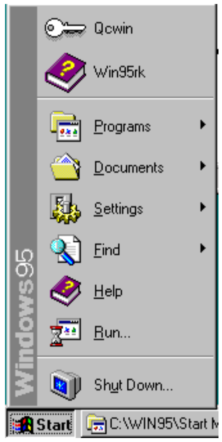


Figure A1. 3

These actions case the Run dialog box to appear as shown in Figure A1.4.

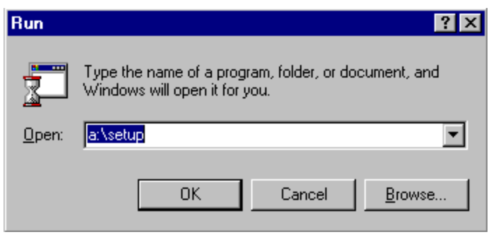


Figure A1. 4

Type the following command line into the text box provided:

a:\setup

Note: Use drive b: if that is the drive containing the installation diskette.

Click the OK command button.

The installation program is executed which causes the Welcome to FONVIEW window to appear. To install FONVIEW, click the Continue command button. (At this point, you also have the option of backing out of the installation process by clicking Cancel Setup).

Next, you must select the type of installation to be performed (see Figure A1.5).

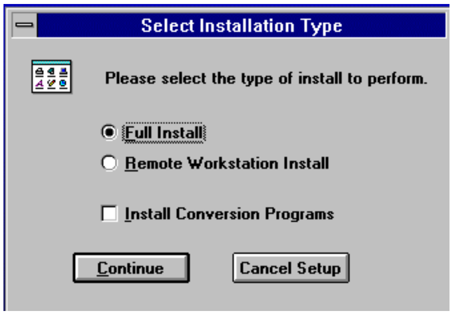


Figure A1. 5

Three types of installation can be performed. The Full Install option should be selected when installing the software locally onto a PC or when installing the software onto a file server. The Remote Workstation Install option should be selected on all client workstations that are going to be running FONVIEW off of the network. The Install Conversion Programs option should only be selected in the case of converting from DOS FONVIEW to Windows FONVIEW.

You are then given an opportunity to specify the pathname into which the application will be installed. By default, the drive and directory fo FONVIEW are set to C:\FVWIN. If you want to install FONVIEW somewhere else, type the drive and directory now and click on the OK command button. From this point on, the installation program does most of the work ofor you. An indicator window is provided so that you can monitor the progress of the installation. The system notifies you when it is time to insert the next disk.

If you have an active CD reader, you are prompted during the installation process whether or not data is to be received on CD-ROM. If that is the case, you must specify the drive ID for the CD-ROM drive when prompted.

Installing FONVIEW on a Novell Local Area Network
If FONVIEW is to be installed on the file server in such a way that multiple users are to access the application at the same time, the installation should be performed by the system administrator. First, install the application onto the server simply by selecting the *Full Install* option and using a pathname that points to a directory on the server. The appropriate files are installed to that location. The .DLL files needed for local (client) use of FONVIEW are installed onto the workstation during the network install. Then, repeat the installation process for each client workstation by selecting the *Remote Workstation Install* option and using a pathname that pints to the directory on the server.

Use the Windows Program Manager File/Options feature to ensure that the FONVIEW program icon references the appropriate pathname for the file server.

Appendix 2 -

Hierarchies in FONVIEW

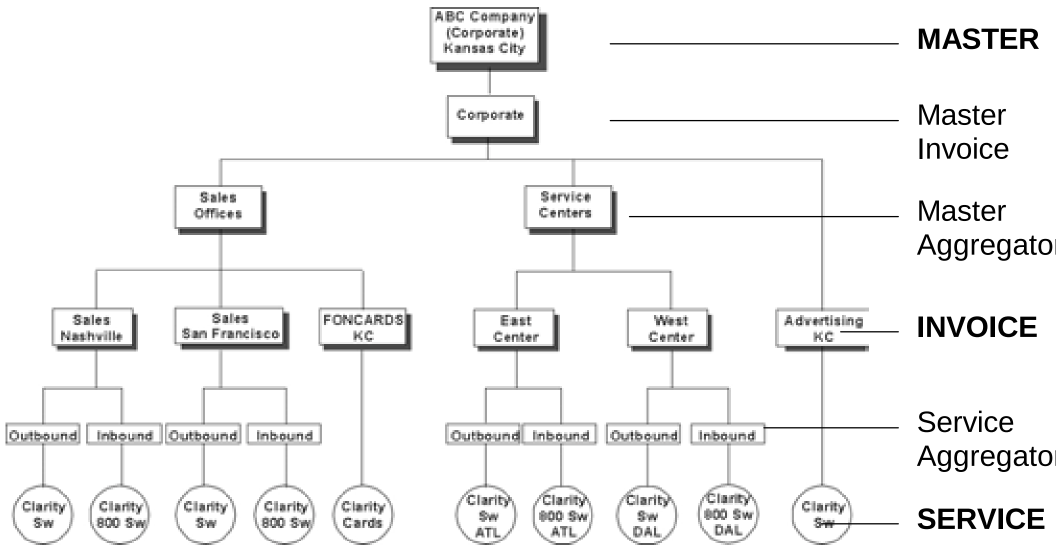
Sprint understands that all businesses are different, and each business has its own requirements for how billing information should appear on its invoice. Sprint can provide you the flexibility to make sure that your invoice presents the information the way you need to view it. This flexibility is made possible through a six level billing hierarchy structure.

The Sprint hierarchy consists of multiple tiers which are organized into ranks, each subordinate to the one above it. Through this hierarchy, Sprint can offer you multi-product, multi-location billing and reporting for your voice and data services with totals for each invoice point and subtotals for products and locations beneath that invoice point.

Using Sprint's Customer Service, you can tailor your bill to fit the unique structure of your organization and to meet your business needs. You can take advantage of maximum volume discounting, consolidated or decentralized invoicing, and structural flexibility. As your organization changes through mergers, re-organizations, etc., you can easily and quickly restructure your hierarchy to incorporate those changes.

As determined by its layout, your hierarchy can provide the resource for multiple reporting options. You will have the capability for reporting your telecommunications costs across locations for all voice services. You can also choose to receive reports by division, region, cost center, etc., regardless of the number of locations, services or products within those areas. This can be accomplished by grouping locations within your hierarchy.

Hierarchy Levels



Let's take a closer look at the structure of the Sprint billing hierarchy. There are three key levels within the hierarchy: Master, Invoice and Service. These levels must exist to complete a hierarchy.

- The Master level is the corporate entity of the hierarchy. It serves as a common point to which all other elements of the hierarchy are related. It associates all divisions and locations within your organization and enables all of your usage to be contributory for discounting.

- The Invoice level is the billing entity of the hierarchy. This is where all usage and non-usage charges for your Sprint services are consolidated and presented.

- The Service level is the physical location where your Sprint services are installed.

Three additional levels can be established within your hierarchy: Master Invoice, Master Aggregator and Service Aggregator. These levels can be utilized for grouping areas within your organization for purposes of rolling up subtotals and other reporting requirements.

- The Master Invoice level is a physical location where charges at the Master Invoice and/or Master

Aggregator are itemized. Reporting information across all invoice points is available by ordering optional Tele-management Reports at this level. In order to report across your entire hierarchy, you must have one Master Invoice level, as illustrated above.

- The Master Aggregator level provides a way to logically group your invoices together. If you have multiple divisions, subsidiaries, etc., you can utilize this level to provide subtotals across the invoice points that are grouped below it.

- The Service Aggregator level provides a way to logically group your outbound or Toll Free services. This level provides a subtotal on your invoice for the associated services and serves as another place for ordering additional reporting information specific to the group of services below it.

Appendix 3 -

Answers for Exercises and Application Projects

Chapter 1 - Meet FONVIEW	
Application Project	
To help Reggie and Sindy prepare an Accounts Payable report for Accounting, we agree to open the Consolidated Invoice and find the total and write it here.	**$8,984.05**

Chapter 2 - Reviewing the Invoice	
Skill Review	
Find the total charges for **Catalogue Sales.**	**$622.91**
Find the number of calls for **Florida Administration** on January 10th.	**284**
Find the total tiscount amount applied to the **FL ADMINISTRATION** Service account portion of the invoice	**$570.40**
Application Project	
Catalogue Sales has a phone charge which must be charged on an invoice to one of IPS' customers. Sindy has a note from her boss that when the invoice comes in, to find a call charged to 800-326-5611 on January 12th, between 8:15 and 8:30 AM from 805-987-4704, in Camarillo, California. Help Sindy find the detail on that call and the cost and duration of that call.	**Cost $4.79** **Duration 17.8**
Reggie needs to find out the total cost of all calls for all Service Level accounts for January 8th. Since you have been to a FONVIEW class, he has asked for your help in determining this total.	**$390.38**
FLORIDA ADMINISTRATION has a digital T1 line. Sindy has been asked by accounting to find how much IPS is charged on this invoice only for that access.	**$428.00**

Chapter 3 - Standard Reports

Exercises	
Detail Reports - For **Customer Service** (Account 132000295), how many night calls were made and what was the Total Call Duration of those calls?	**How Many** 33 **Total Call Duration** 443.6
Summary Reports - For **Customer Service** (Account 132000295), how many calls made in this billing period were between 15 and 30 minutes long and what was the total cost of those calls?	**How Many** 52 **Total Cost** $282
Management Analysis Reports - Across all Accounts, find which day of the current billing period the most calls were made.	**18th**
Graph Summary Report - Find the percentage of calls between $5.00 and $10.00 for Customer Service (Account 132000295).	**8.8%**
Application Project	
Sindy has asked you to create a Call Detail Report for Florida OPERATIONS (148000715) that shows all evening calls sorted by area code (NPA).	1. Click the **Select Hierarchy or Account** button. 2. Double click **IPS Systems, Inc.** 3. Double click **IPS Systems (FLOPR)** 4. Select **FLORIDA OPERATIONS**, and click the **Select** button. 5. Select **Reports** from the menu, and **Call Detail**. 6. In the **Sorting Options** section, select **NPA.** 7. In the **Filters** section, select **Evening Calls Only**. 8. Press the **Display** button and observe the report.
She needs it exported as an Excel 4.0 file named “acodes.xls.”	9. With the preview window still open, press the **Export** button, and the **Export** window displays. 10. Click the down arrow in the **Format Field**, and select **Excel 4.0 (XLS).** 11. Don't change anything in the **Destination Field.** 12. Press **OK**, and the **Choose Export File** window displays. 13. In the **File Name** field, type **acodes.xls** and press **OK.**

Sam requests a Summary Report across all accounts which shows the top twenty most in-bound telephone numbers to IPS Systems.	14. Click the **Select Hierarchy or Account** button. 15. Click on **IPS Systems, Inc.,** and press the **Select** button. 16. Click **Reports** from the menu, and select **Call Summary.** 17. The **Call Summary Reports** window displays. 18. From the **Sorting Options** section, select **Inbound NPA.** 19. In the **Detail Options** section, the default is **Across All Accounts.** 20. Select **Preview**, and then maximize the report.
He would like you to prepare it as a bar graph and export it in Crystal reports format named **frequent.rpt**	1. While the previous report is still in preview mode, click the **Display Graph** button. 2. The **Graph Data** window displays. 3. Select **Calls** and press **OK.** 4. The bar graph displays with a title of **"Inbound NPA."** 5. Click the **Export** button, and the **Export** window displays. 6. In the **Format** section, click the down arrow, and select **Crystal Reports (RPT).** 7. Don't change anything in the **Destination Field** section. 8. Click **OK,** and the **Choose Export File** window displays. 9. In the **File Name Field**, type **frequent.rpt,** and press **OK.**
Sindy has just gotten a request from accounting. Using **Hourly Usage** as a **Sorting Option**, create a Management Analysis Report for her which will show which hour of the day has the most call traffic.	10. From the menu, choose **Reports**, and select **Management Analysis.** 11. In the **Sorting Options** section, select **Hourly Usage.** 12. In the **Detail Options** section, select **Across All Accounts,** and click **Preview**. 13. **Answer: 10 AM** has **1,364 Calls.**

Chapter 4 - Customizing Standard Reports	
Exercises	
Create a Detail Call Report for **CA SALES CARDS** (157000545) using the new filter to find the total number of Florida calls for this account.	**57**

Application Project	
Senior Management has asked Reggie to find out how many calls were made that lasted more than 20 minutes. Reggie is shaking his head in consternation, worrying about how much time this will take manually. You can help him out by creating a filter which will report all calls longer than 20 minutes. Run a Detail Report by Date/Time for CA SALES CARDS (157000545) which will show these calls, for Reggie. **How many calls were made?**	**6**
Since what Senior Management really wanted to know was how many calls cost more than $5, especially for the FONCARD's, edit the filter to show all calls which cost more than $5.00. Create a Detail Report by Call Length for CA SALES CARDS (157000545). **How many calls over $5.00?**	**9**
Human Resources has asked Sindy to tell them how many man hours are needed to man the toll-free lines. If she can get a report telling her which hours the toll-free lines are busiest, she can give them the information they need. Create a New Hierarchy named "Toll-Free Numbers" which includes all Toll-Free accounts. Create a Management Analysis Report for Daily Usage. **Which day were Toll-Free numbers used most?**	**17th**
The IPS Board of Directors has changed the name of the **CALIFORNIA SALES OFFICE** to **CALIFORNIA OPERATIONS**. They would like to see it changed on all reports as well. Reggie asks you to make this change for him in FONVIEW.	1. Select **Customize** from the menu, and choose **Accounts,** and the **Customize Accounts** window displays. 2. Double click on **CA Sales Office**, and the **Account Information** window displays. 3. In the **Description Field,** type **CALIFORNIA OPERATIONS.** 4. Click **OK** to close the **Account Information** window. 5. Click **OK** to close the **Customize Accounts** window.

Sindy asks that you add the following names to the FonCards that were just issued. Frank Framingham, Ginny Gorganzola, Hilary Higgins, Imogene Inyoue.	6. Select **Customize** from the menu, and choose **FONCARD's**, and the **Account Selection** window displays. 7. Highlight **CA SALES CARDS,** and click **Select.** 8. The **Customize FONCARD's** window displays. 9. Double click on each account number and the **FONCARD Information** window displays. 10. In the **Description** field, type the name, and press **OK.** 11. Repeat steps 4 and 5 for each new name. 12. After completing all the names, press **OK** to close the **Customize FONCARD's** Window.
Reggie has just run downstairs from a big meeting on the 5th floor. He needs a report on all the Accounting Codes for FLORIDA ADMINISTRATION. Generate a Summary Report for Accounting Codes for FLORIDA ADMINISTRATION.	13. Click the **Select Account or Hierarchy** button. 14. Double click **IPS, SYSTEMS, INC.** 15. Double click **IPS Systems (FLADM).** 16. Click once on **FLORIDA ADMINISTRATION.** 17. Click the **Select** button. 18. Select **Reports**, from the menu, and then **Call Summary**. 19. In the**Sorting Options** section, select **Accounting Code (Act).** 20. In the **Display** section, ensure that **Both** is selected. 21. Click the **Preview** button. 22. **Results: Calls - 6,284; Minutes - 16,768.3; Charges - $3,315.20.**

Chapter 5 - Ad Hoc Reporting

Application Project

IPS Florida Operations is preparing a big report for the financial analysts. They have asked Sindy to give them a report showing all calls billed to Customer Service which were between 1/2 hour and 1 hour long, sorted by the length of the call. Test and display the Report. *Hint:* You will need 2 non-viewable CallDuration Field Boxes.	1. From the FONVIEW menu, select **Tools/Ad Hoc...** 2. The **Ad Hoc** window displays. 3. From the **Ad Hoc** menu, select **Report/Maintenance.** 4. The **Ad Hoc Report Maintenance** window displays. 5. Select **New**, and the **Ad Hoc Report Wizard** window displays. 6. In the **Description** field, type **Florida Operations Calls to California 10 Min. +** 7. In the **Status** field, type **All Florida Operations calls to CA over 10 minutes sorted by city** 8. In the **Table** section, ensure that **CallDetailData** is selected. 9. In the **Fields** section, select **Account** and **CallDuration.** 10. Click the **Design** button. 11. Respond **Yes** to the questions about saving the query. 12. The **Field Query** window displays. 13. In the **Conditions section** for the **Account** field, select the following parameters: **= 132000295 AND.** 14. In the **Conditions section** for the **CallDuration** field, select the following parameters: **>= 30.00 AND <= 60.00.** 15. Run the report.

Chapter 6 - Re-Billing

Application Project

Accounting has decided that internal projects like Quality Assurance need to account for their share of taxes. Sindy ask you to make a new Tax Package called **Internal Tax** with percentages for Fed. = 3%, State = 2%, and Other = 1% for all Jurisdictions. When you have made the new Tax Package, attach it to the **QA** Reporting Group.	1. From FONVIEW on the **Tools** menu, select the **Rebilling System**, and the Rebilling software will open. 2. Select **Customize/Tax Packages** 3. Select **New** and the **Edit Tax Package** window displays. 4. In the **Name** field, type **Internal Tax.** 5. Fill in the appropriate fields with the percentages, and press **OK** twice to close both windows. 6. Select **Customize/Reporting Group** from the menu. 7. Finish application project from previous knowledge.

Accounting has also decided it wants to pass additional costs along in internal department accounting as well as outside projects. Help Reggie by making a new Rate Package called **Internal Rate.** Make the percentages: Day = 5%, Evening = 2.5%, and Night = 1.75% for all Jurisdictions. Attach a Minimums sheet and change the minimum rate for all Jurisdictions to: Day = $1.25, Evening = $.95, and Night = $.45.	8. From FONVIEW on the **Tools** menu, select the **Rebilling System**, and the Rebilling software will open. 9. Select **Customize/Rate Packages**, and the **Set Up Rate Packages** window will display. 10. Click the **New** button, and the **Edit Tax Rate** window displays. 11. In the **Name** field, type **Internal Rate**. 12. Fill in the correct percentages. 13. Click the **Attach** button, and then click the **Standard Minimums** tab. 14. Type in the appropriate data. 15. Press **OK** twice to close both windows.
Sindy and Reggie have a planning meeting in the morning and they need to know the number of calls and the total ReBilling for each account in the Promotions Reporting Group. Preview a Call Detail Report for Promotions. Examine the report for the answers you need.	**IPS-ZIP Zucchini in Industry Project** Number of calls 25 Total Re-billing 148.63 **IPS-OOP Orange Optimization Project** Number of Calls 108 Total Re-billing $1,001.77