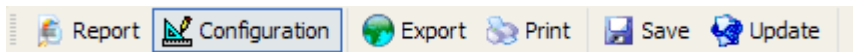# »SAMwin.CAS 4.5

User Manual

1   Introduction

SAMwin.CAS is the program within the SAMwin modules series which is concerned with the display and analysis of all calls made. You can create professional analyses for your company, conduct cost comparisons between a number of providers, use Microsoft Excel to edit existing reports, etc.

Furthermore, the new SAMwin.CAS reporting module enables you to show and hide all information relating to calls, extensions, costs, etc., as well as to display the representation and font, as well as the layout and company-specific headers and footers, including your company logo.

The manual will then go on to describe the individual functions of the SAMwin.CAS reporting software.

1.1   Structure and display

The SAMwin.CAS reporting user interface is divided into a number of sections. In addition to the menu bar, there is also a series of functions saved in the toolbar. Functions relating to the configuration and adaptation of reports are located in the toolbar underneath the reporting window.
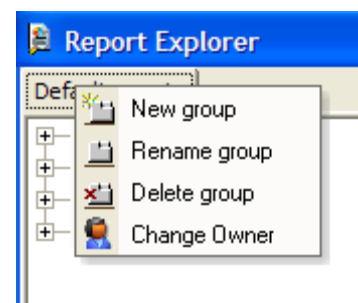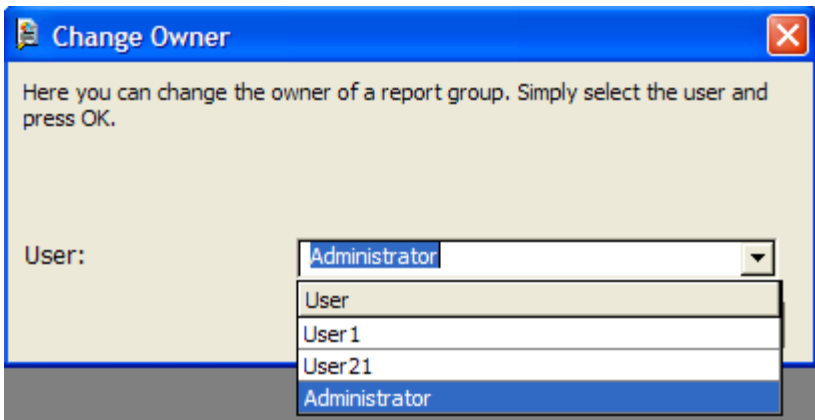

2   Creating reports

Start SAMwin.CAS under Start > All Programs. A window appears containing a tab for "Default Reports". All the reports are at your disposal in this menu, arranged in terms of organisational structures. Select the required report and double-click on it to open. The report which you have just activated is copied automatically and assigned to a new report group with the name of the user who is currently logged in to the computer.

2.1   Creating new report groups

You can create further report groups (tabs) in order to assign your reports more clearly. To do so, right-click the "**Default reports**" tab and select "**New group**". Then assign a name for the new group.
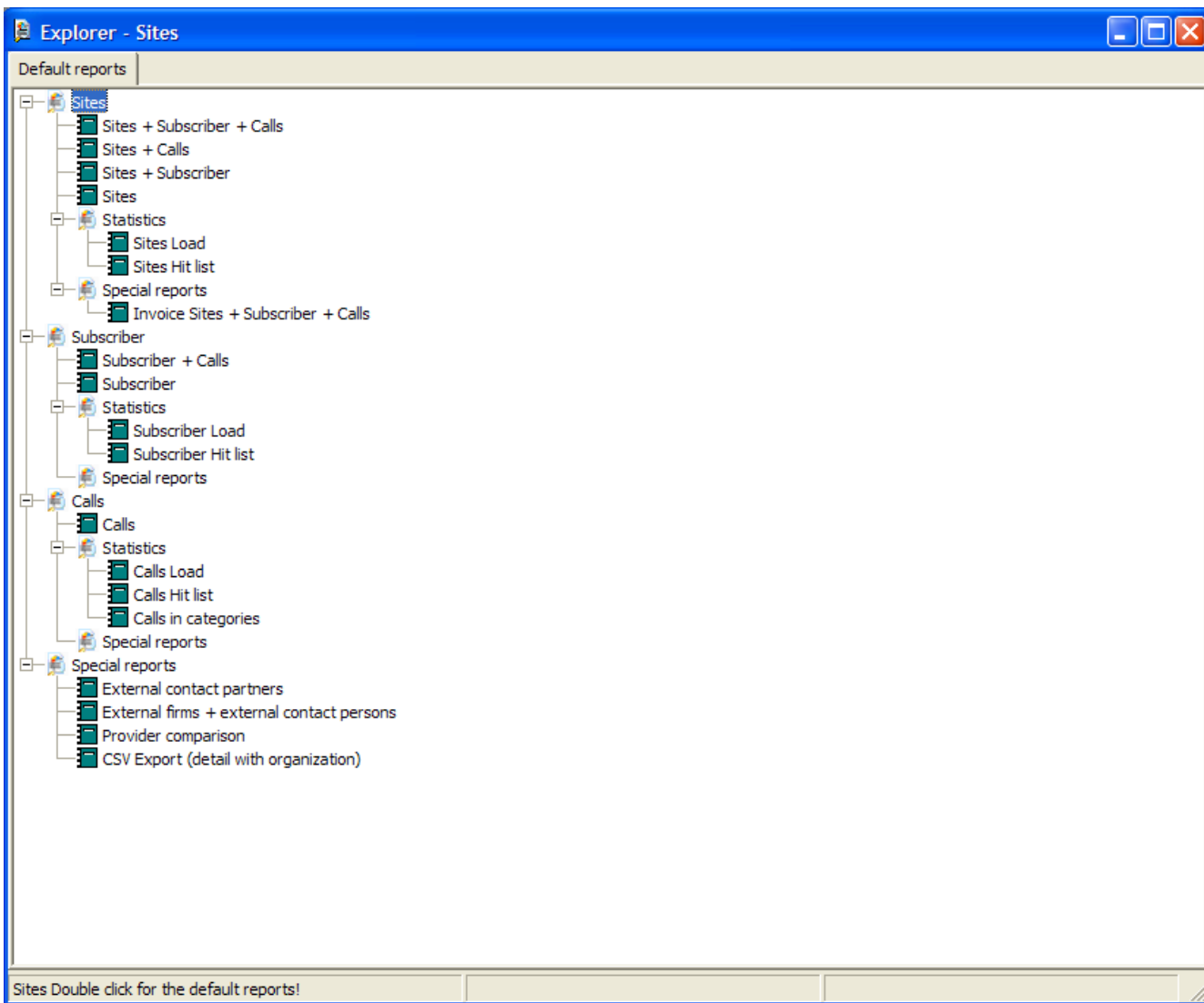
New groups are assigned to the user who is currently logged in. Should you wish to change a group's owner, right-click on the group you want to change and select "**Change owner**".

Once you have selected the new owner, click "*OK*" to confirm your selection.

2.2 Creating new reports

There are a number of options for copying a report:

- You can use the Windows copying function (shortcut for copying **Ctrl + C** and for pasting **Ctrl + V**)
  To do this, select the report you wish to copy using the mouse and press **"Ctrl + C"**.
- Click the group to which you wish to copy the report and then press **"Ctrl + V"**.
- Using the mouse
  Right-click on the report you wish to copy
  and select **"Copy report"** from the menu which then appears. Then click the group to which you wish to copy the report and right-click a free area within it.
- Now select **"insert report"** in the menu which appears.

2.3 Configuration of reports

Right-click on the required report and select "*Configure*" to go to the **Configuration menu**.

The following menu view appears:
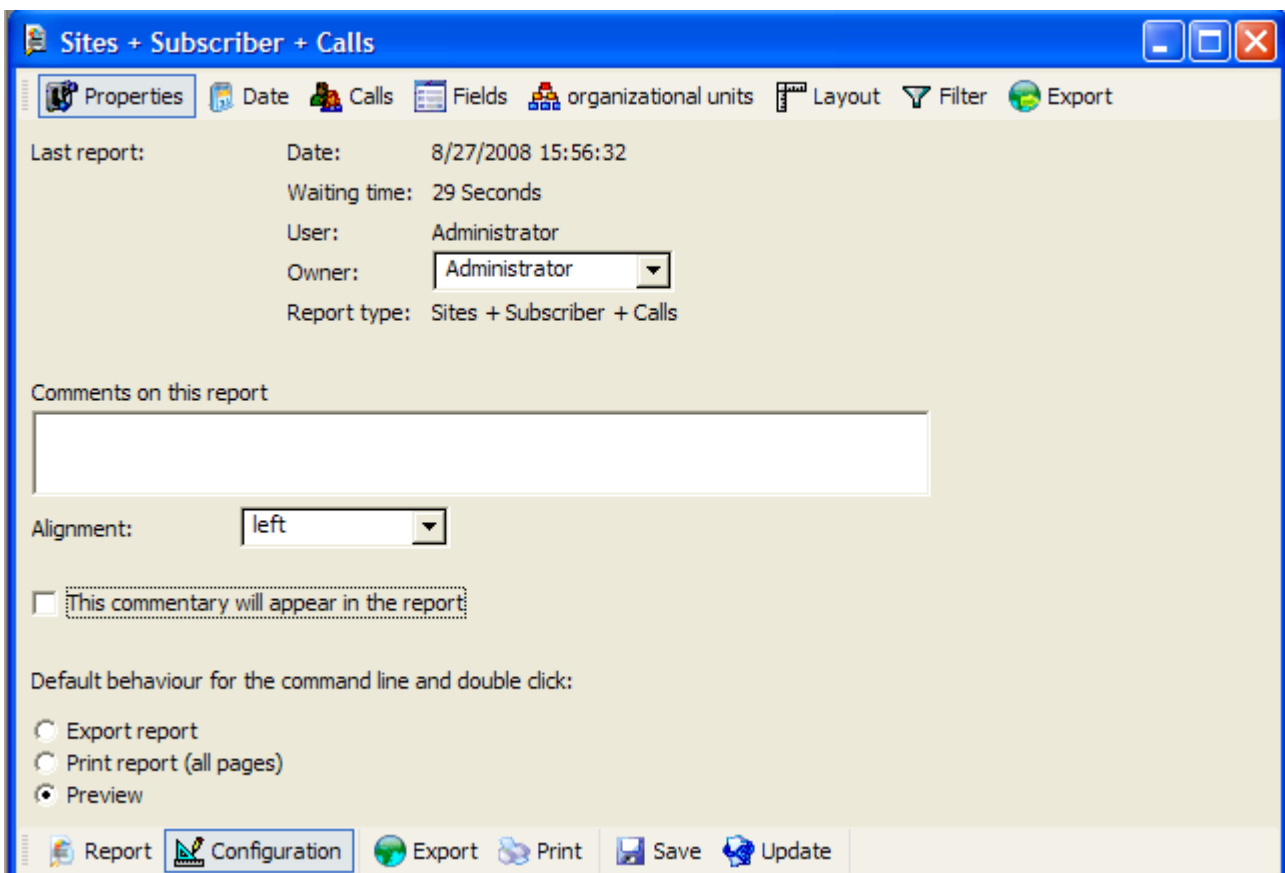
This menu contains numerous functions for customising the report as you wish. It contains changes, such as:

- Defining a specific **period of time** in the **date** menu option,
- **Showing and hiding** fields (optical filter) in the **Fields** menu
- **Limiting** the display to organisational units, such as locations, extensions, etc. in the **Organisational units** menu
- Defining the **report layout** such as page format, headers and footers, etc. in the Layout menu
- **Call number suppression** and a database filter based on various criteria in the **Filter** menu
- **Export options** to various formats in the **Export** menu

Once you have completed your configuration, click the Update button on the toolbar at the bottom to apply the changes and to show the report.

There are also other functions at your disposal here such as **export** the report, **print** , **save** and **update**.

Click **report** to switch directly to the report view.

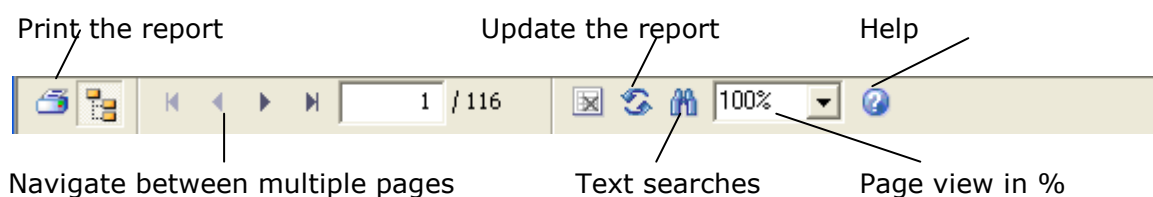Reports can be printed by clicking **print**.

Tip: The report can also be opened directly by double-clicking on it, although it may take longer to load this way. (This is due to the large volume of unfiltered data which is displayed). Therefore, it is advisable to carry out the configuration first.

### 2.3.1   Navigating within the report
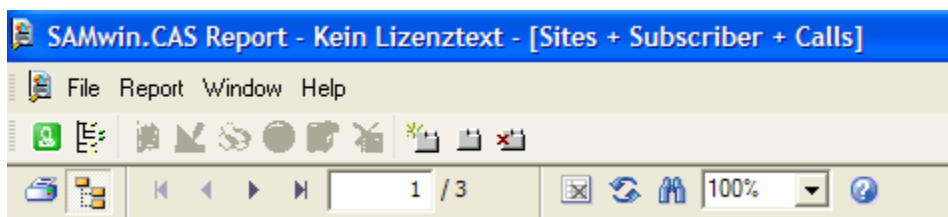
A toolbar appears in the top section of the report, enabling you to navigate within the active analysis. Use the right and left arrow buttons to navigate within a multi-page analysis.

Print the report   Update the report   Help

Navigate between multiple pages   Text searches   Page view in %

2.3.2 Filtering by time

In the list on the left select the entry to be shown on the report or enter a user-defined period of time in which you can select the entry "of your choice" and specify the analysis dates manually.
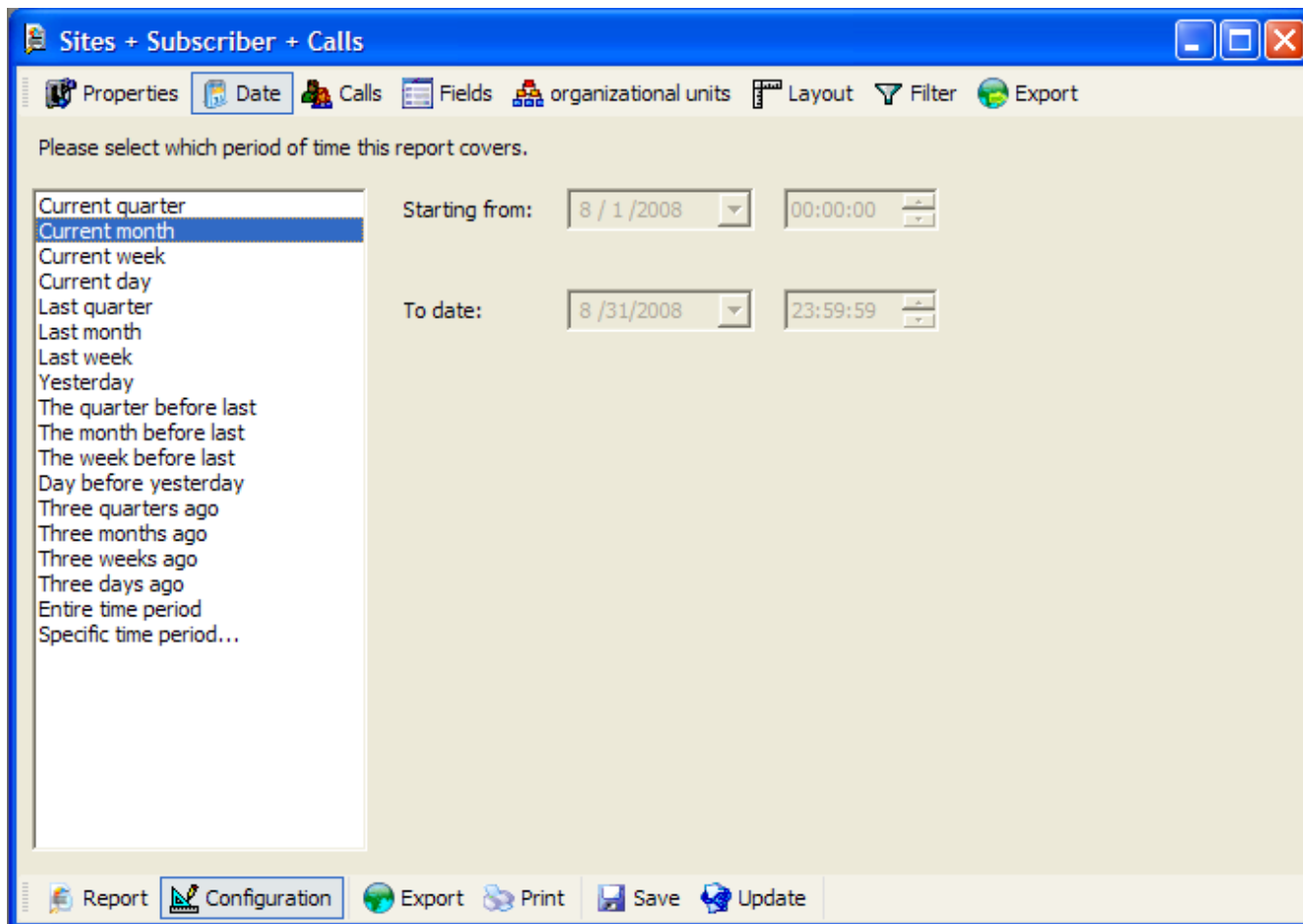
2.3.3 Filtering by call type

Select the call types here to be displayed on the report:
N.B. The options listed are linked by "or", and those listed on the left are linked by "and"!
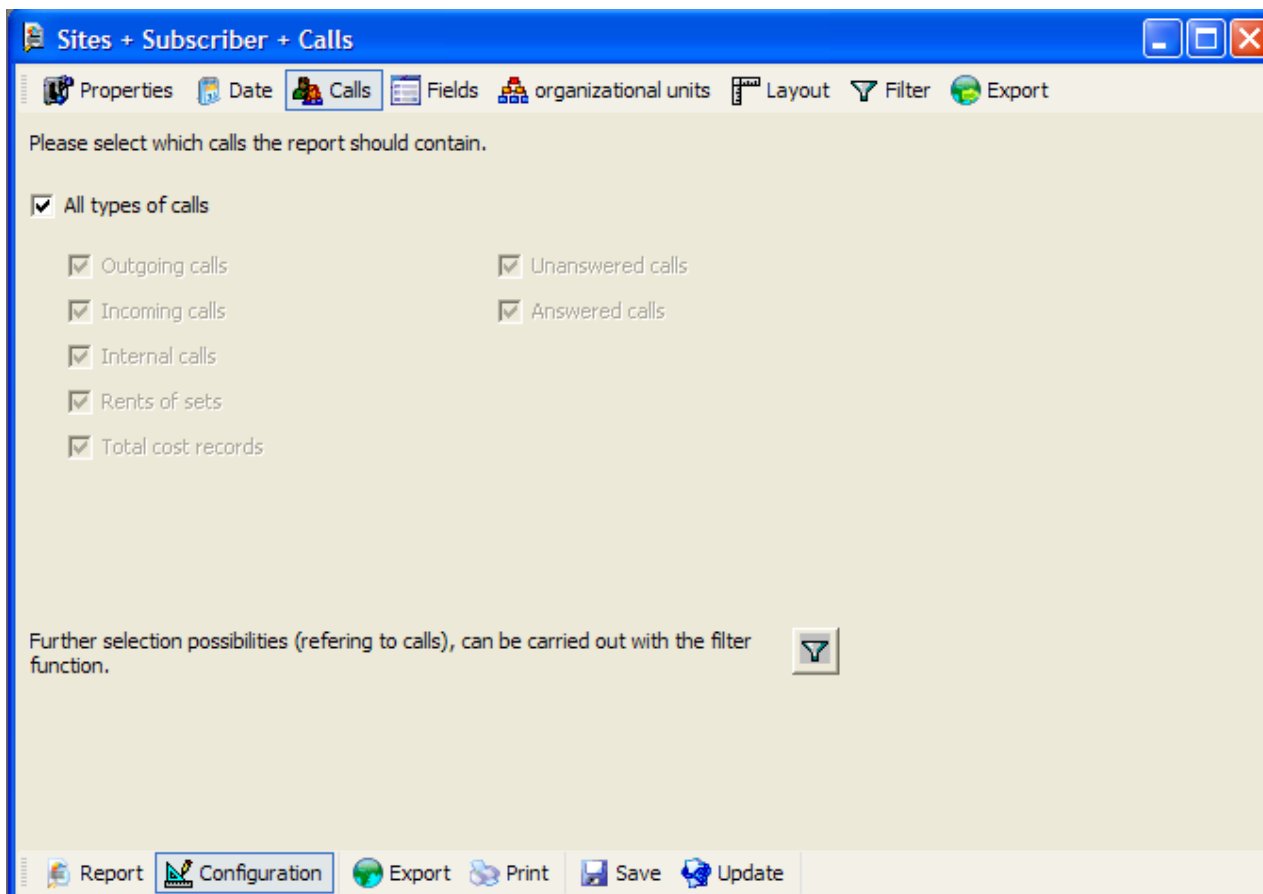
2.3.4   Showing and hiding information

In this menu you can specify which information you want to appear on your report and which you want to hide. This is a purely optical filter.

This contains the column headings for each of the fields that you want to appear in the report. Activate the required columns by enabling or disabling them using checkboxes. You can change the order in which they appear using the buttons on the right. (see figure)

Separate tabs are displayed for each of the organisational structures (e.g. sites, extensions, calls).
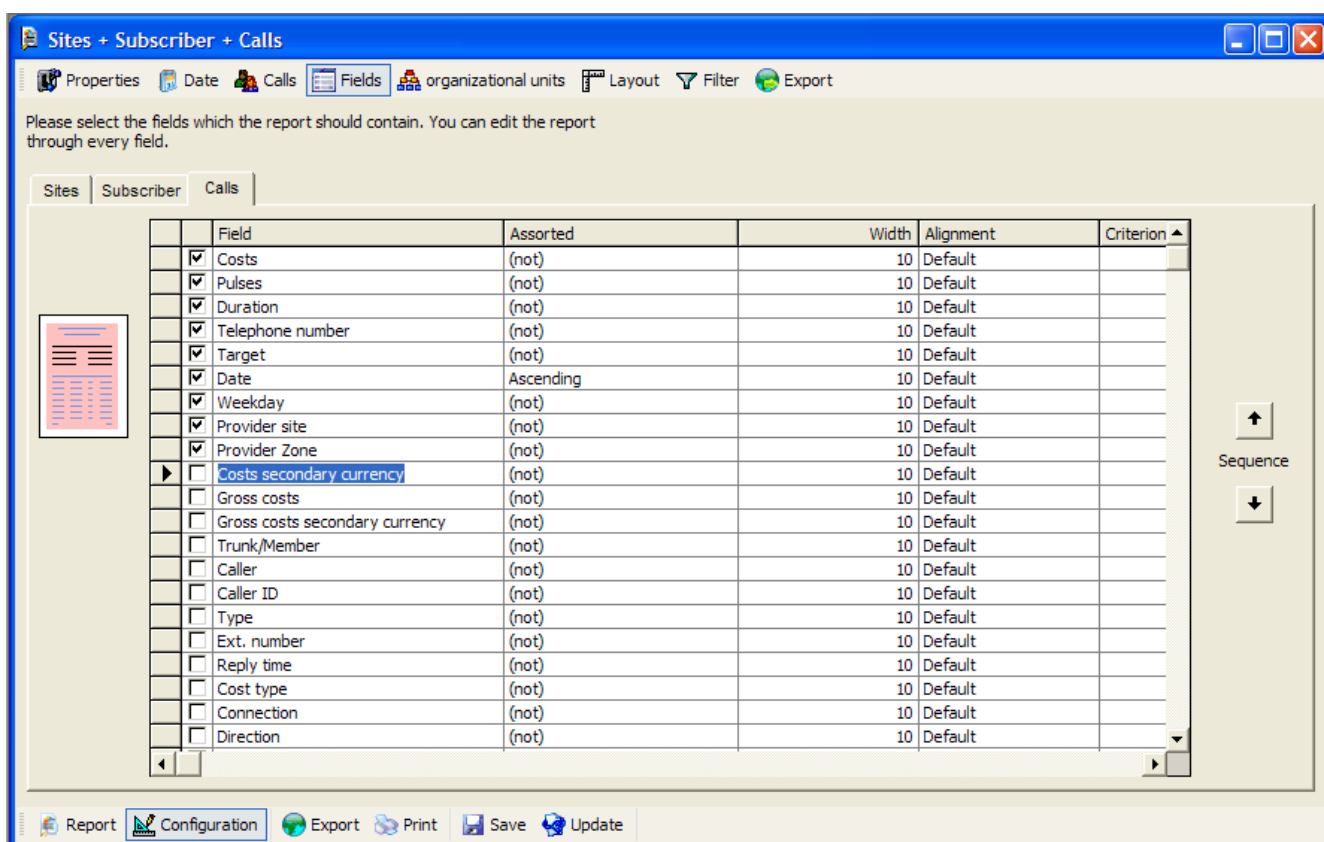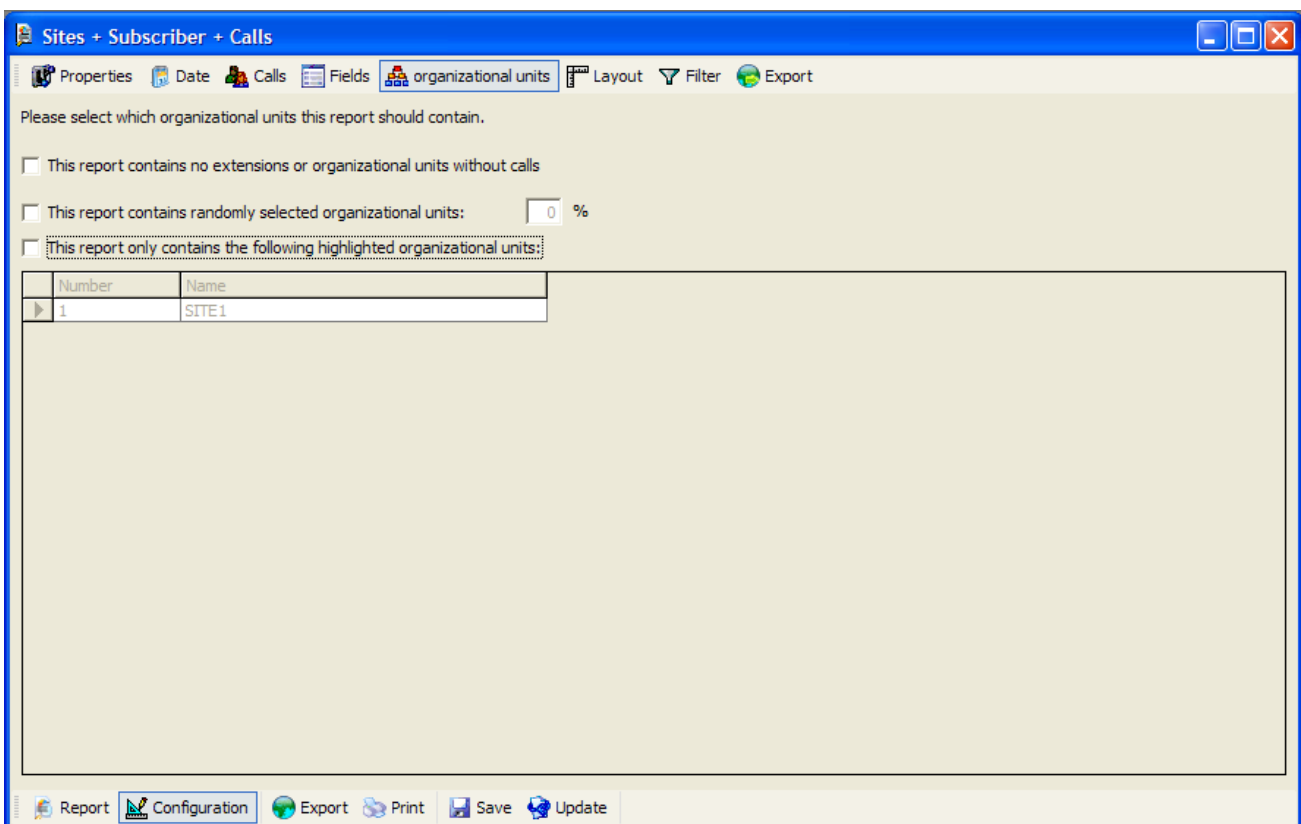
2.3.5   Filtering by organisational units

This filter relates to:

- Basis for organisational units selected at **random**,

- all organisational units, which **do not possess extensions or have not triggered any calls** can be hidden

- Filtering according to specific organisational units

Organisational units which do not possess extensions or which have not triggered calls can be hidden by enabling the checkbox on the report.

Where there are multiple organisational units, these can be filtered to individual units. Select "This report only contains the organisational units marked below" by enabling the relevant checkbox and click the relevant options on the list.

All changes can be applied and the updated report can be displayed by clicking the "*Update*" button on the toolbar below the configuration.

2.3.6 Changing and adapting the layout

You can adapt your report to suit your own needs and display it accordingly. Select the **Layout** tab and the following view appears:
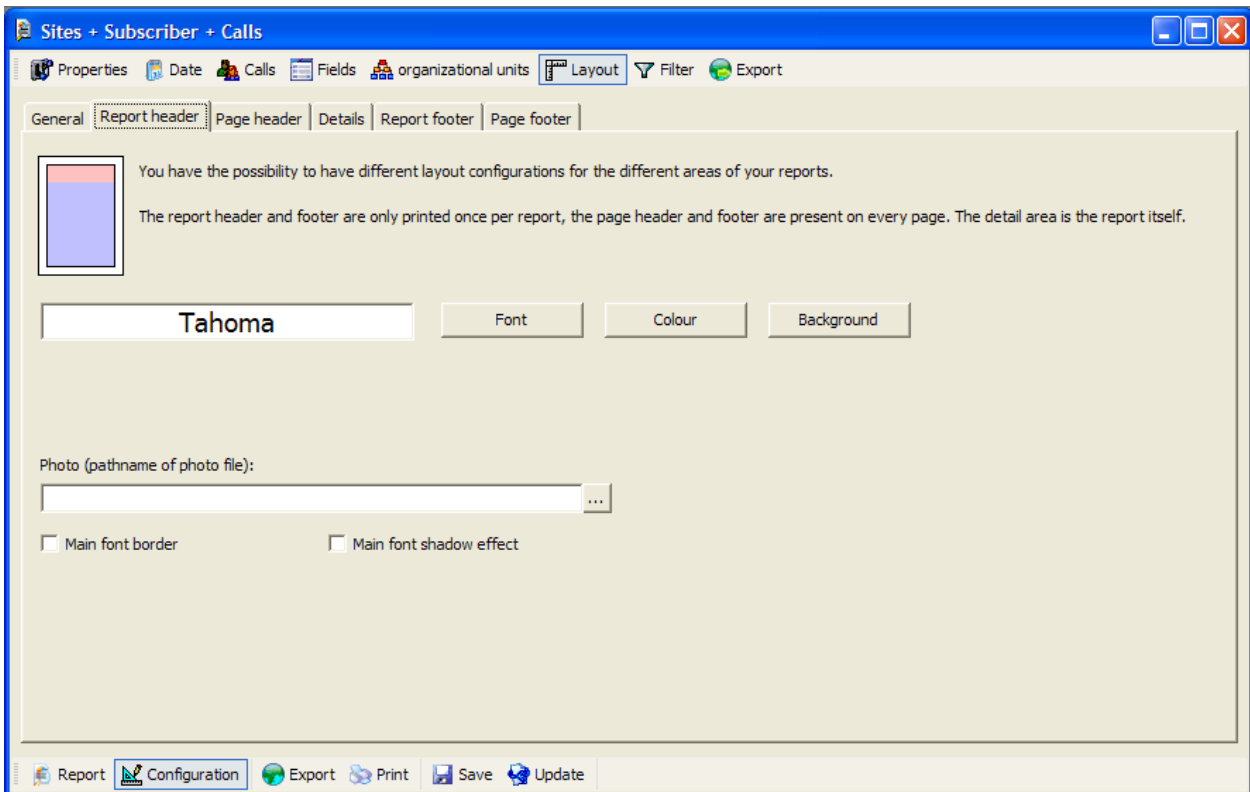
- Define settings such as the page format (portrait or landscape) in the **General** tab

- Define the font, colour, background and a logo in the **report header** and/or **page header** (the **report header** and the **report footer** are only printed once per report, whereas the **page header** and **page footer** appear on every page. The detail area is the actual report itself.)

2.3.7 Filter options

Use this function to define further filter criteria for your report:
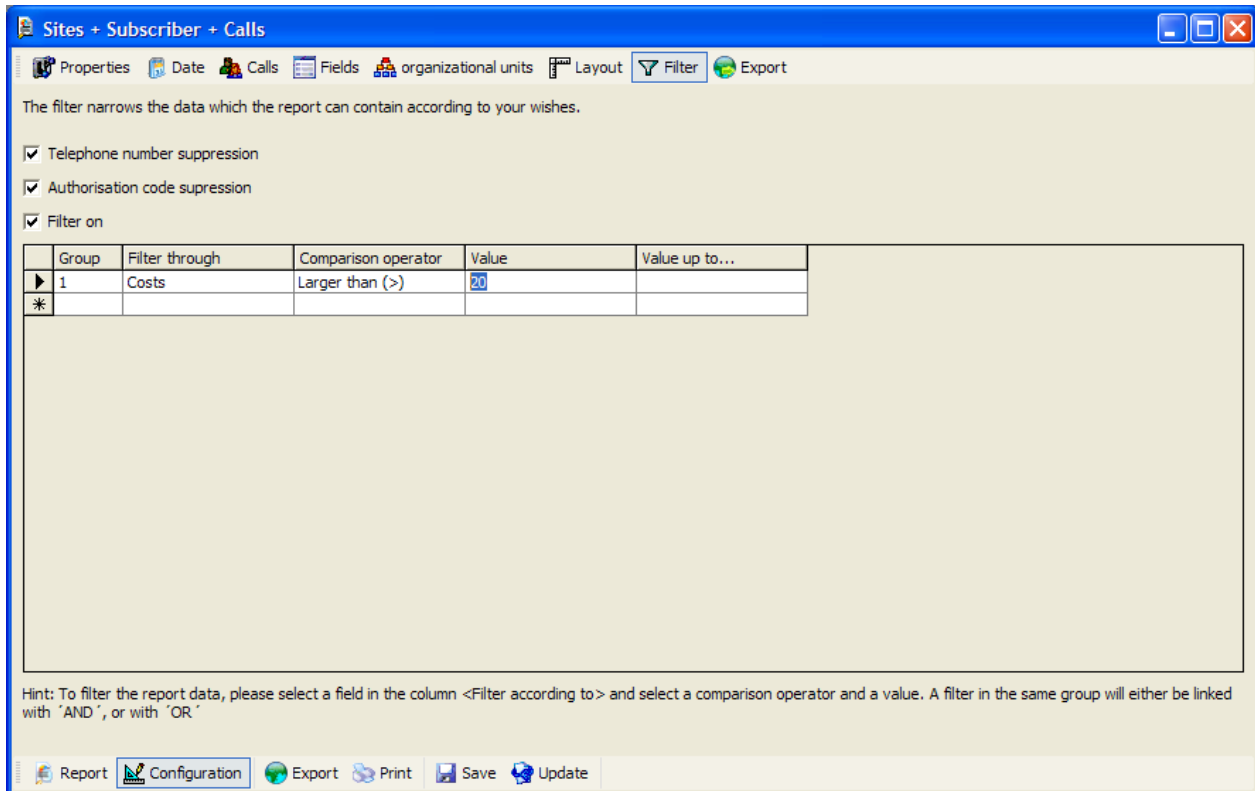
- Call number suppression hides the selected phone numbers on the report

- Authorisation code suppression
  Hides dialling codes and replaces them with the word "Code" in the report

- Filter activated
  Groups which possess the same name are linked by "and"
  Filter using criteria such as costs, duration, time, caller, etc. and set criteria for them

2.3.8   Exporting

There are extensive export options for your report here. By exporting your analysis, you can then subsequently edit the reports further in Microsoft Excel, for example.

It is also possible to export the report into a text file (.csv / .txt / .dif / .rtf / .html / .doc / .pdf). To do this, select the relevant export format from the "**Export format**" list. The third tab is adapted to reflect your selection and displays other (file type-dependent) options for export.

The "**export destination**" selection field indicates the type of object in which the file is output. Options here are:

- File
- Mail (SMTP and Mapi)
- Microsoft Exchange (database)
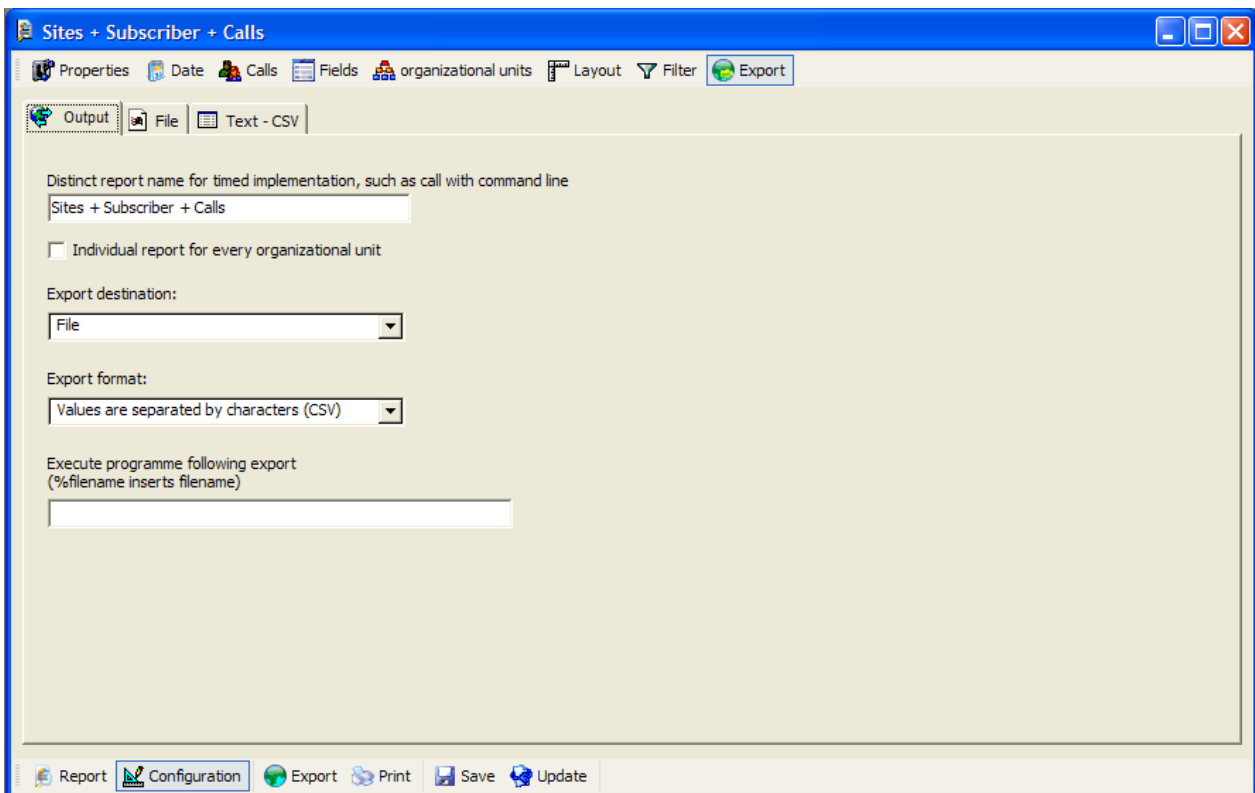
If you wish to receive separate reports for each of the units, enable the "Separate report for each organisational unit" checkbox!