

# CAIRS Admin Guide

Unique Communications



This manual was produced using *MadCap® Doc-To-Help*.



# Contents

- System Admin** **1**
- Security** **2**
  - Security - Profiles .....2
  - Adding a Profile.....3
  - Menu and Actions .....3
  - Switch Access .....6
  - Work Center Access .....8
  - Disabling a Profile .....9
  - Enabling a Profile .....9
  - Deleting a Profile.....9
  - Copy Profile.....10
  - Security – Users.....10
  - Users – Windows .....10
  - Users – Certificate .....18
  - Security - Logged in Users.....21
  - Refresh Status .....21
  - Viewing User Activity .....21
  - Security - Activity Log .....22
  - Refresh Status .....23
  - Viewing the Activity Log*.....23
  - Exporting the User Activity Log as XML .....23
  - Security - Open Record Management .....24
  - Delete Open Record Notifications.....24
- Data Sync Center** **25**
  - Switch Sync Project .....26
  - Synchronizing Your Data .....31
  - Sync Reports.....34
  - EWSD Switch Sync.....35
  - Sync Schedules .....36
  - EWSD Switch Sync Logs.....38
  - Set Device Sync.....39
  - Port Sync.....42
  - Feature Key Map Sync for EWSD only.....44
  - Hunt Group Sync .....46
  - 411 Interface .....48
  - 911 Interface .....52
  - Import External Data .....57
- Work Flow Setup** **58**
  - Work Center .....58
  - Work Order Custom Fields .....59
  - Work Flow .....60

Email Templates .....	64
<b>System Settings</b>	<b>66</b>
Settings .....	66
Changing a Setting .....	77
Manage File Attachment Types .....	77
Manage Default Account for Calls .....	78
Manage Default Account for Discrepancies.....	78
Site Levels.....	78
Adding a Site Level .....	78
Modifying a Site Level Name .....	79
Deleting a Site Level .....	79
Organization Levels .....	80
Adding an Organization Level.....	80
Deleting an Organization Level.....	80
Email Settings .....	81
Auto Number Setup .....	82
Adding a New Auto-Number Schema.....	82
Deleting an Auto Number Setup .....	85
Field Customization .....	85
Suggested Indexes .....	87
Software Information.....	87
<b>Subscriber Portal Settings</b>	<b>88</b>
Configuration Packages .....	88
Managing Package Categories.....	89
Creating a Configuration Package .....	90
Deleting a Configuration Package .....	91
Configuration Packages - Sites .....	92
Configuration Packages - Organizations .....	94
Configuration Packages – Related Inventory .....	97
Configuration Packages - Related Fields .....	99
Configuration Packages - History .....	101
Subscriber Portal General Settings .....	103
Subscriber Portal Security .....	103
<b>Call Record Settings</b>	<b>106</b>
Rate Type.....	106
Adding a Rate Type .....	107
Deleting a Rate Type .....	107
Zone Groups .....	108
Adding a Zone Group.....	108
Deleting a Zone Time.....	109
Deleing a Zone Group.....	109
Rate Groups.....	110
Adding a Rate Group .....	110
Deleting a Rate Group .....	110
Dial Code Groups.....	111
Adding a Dial Code Group .....	111
Deleting a Dial Code Group .....	112
Call Types .....	112
Adding a Call Type.....	112
Deleting a Call Type.....	114
Call Pricing Group.....	114

Adding a Call Pricing Group.....	114
Adding Dial Codes to a Group .....	115
Deleting a Call Pricing Group.....	116
Digits to Add.....	116
Adding Digits to Add .....	116
Deleting Digits to Add .....	117
Call Record General Settings .....	117
<b>Billing Settings</b>	<b>119</b>
Billing Report Setup .....	120
Important Considerations:.....	120
Creating a New Billing Report Configuration .....	121
Preview Actions .....	128
Deleting an Element.....	128
Moving an Header Element Up or Down .....	129
Moving an Body Element Up or Down .....	129
Deleting a Billing Report .....	130
Combined Report Setup .....	130
Generating a Report .....	132
Billing Information .....	132
Mailed Bill Elements.....	133
Billing General Settings.....	139
Default Accounts .....	143
Currency Exchange Rate.....	144
Add New Billing Currency .....	145
<b>Service Management</b>	<b>147</b>
General Error Log .....	147
Viewing the Service Exception Log .....	147
Delete an Error Log.....	147
Clear all errors.....	148
Email Error Log .....	148
Service Manager .....	149
Viewing the Service Log .....	152
Viewing Process History .....	152
Run Process Now .....	153
Scheduling a Process .....	153
Monitor CES Processes.....	153
Activity Log Conversion Task.....	154
<b>Number Plan</b>	<b>156</b>
Adding a Number Plan.....	156
Site Associations.....	157
Switch Access .....	159
Number Ranges .....	160
Numbers.....	162
Deleting a Number Plan.....	163
<b>Custom Report Template</b>	<b>164</b>
Understanding the Custom Report Template Window .....	164
Ribbon Groups .....	164
Template Panes .....	165
Creating your Report Template.....	165

Step One: Creating the Template .....	165
Step Two: Grid Size .....	166
Step Three: Template Goodies.....	167
Row and Column Management .....	170
Borders.....	174
Export/Copy/Delete .....	175
XML Editor .....	176
<b>Security</b> .....	<b>177</b>
Security - Profiles .....	177
Adding a Profile.....	177
Profile - Menu and Actions.....	178
Switch Access .....	181
Work Center Access .....	181
Disabling/Enabling a Profile .....	182
Deleting a Profile.....	183
Copy Profile.....	183
Security – Users.....	183
Users – Windows .....	184
Adding Users from Active Directory .....	186
Users – Site Access.....	187
Users – Certificate .....	191
Security - Logged in Users.....	194
Refresh Status .....	194
Viewing User Activity .....	194
Security - Activity Log .....	195
Refresh Status .....	196
Viewing the Activity Log .....	196
Exporting the User Activity Log as XML .....	196
Security - Open Record Management .....	197
Delete Open Record Notifications.....	197
<b>Data Sync Center</b> .....	<b>199</b>
Switch Sync Project .....	200
Adding a Switch Sync Project.....	200
Switch Sync Logs.....	203
Sync Reports.....	208
EWSD Switch Sync.....	211
Sync Schedules .....	211
EWSD Switch Sync Logs.....	213
Set Device Sync.....	215
Port Sync.....	217
Feature Key Map Sync for EWSD only.....	219
Hunt Group Sync .....	221
411 Interface .....	225
Creating a 411 Interface Template .....	225
911 Interface .....	229
Creating a 911 Interface Template .....	229
Deleting an Interface.....	234
911 Interface CES Process.....	234
Import External Data .....	234
<b>Work Flow Setup</b> .....	<b>235</b>
Work Center .....	235

Adding/Deleting a Work Center .....	235
Work Order Custom Fields .....	236
Adding a Work Order Custom Field .....	236
Deleting a Work Order Custom Field .....	237
Work Flow .....	237
Adding a New Work Flow .....	237
Disabling/Enabling a Work Flow .....	240
Email Templates .....	241
Enabling & Disabling a Template .....	242
Modifying a Template .....	242

**System Settings 245**

Settings .....	245
Changing a Setting .....	259
Manage File Attachment Types .....	260
Import System Metadata .....	260
Export System Metadata .....	261
Site Levels .....	263
Adding a Site Level .....	263
Deleting a Site Level .....	263
Organization Levels .....	264
Adding an Organization Level .....	264
Deleting an Organization Level .....	264
Email Settings .....	265

**Subscriber Portal Settings 267**

Configuration Packages .....	267
Managing Package Categories .....	268
Creating a Configuration Package .....	269
Deleting a Configuration Package .....	270
Configuration Packages - Sites .....	271
Configuration Packages - Organizations .....	273
Configuration Packages – Related Inventory .....	274
Configuration Packages - Related Fields .....	276
Configuration Packages – History .....	278
Subscriber Portal General Settings .....	278

**Call Record Settings 283**

Rate Type .....	283
Adding/Deleting a Rate Type .....	284
Zone Groups .....	284
Adding/Deleting a Zone Group .....	285
Rate Groups .....	286
Adding/Deleting a Rate Group .....	286
Dial Code Groups .....	287
Adding/Deleting a Dial Code Group .....	287
Call Types .....	289
Adding/Deleting a Call Type .....	289
Call Pricing Group .....	290
Adding a Call Pricing Group .....	291
Adding/Deleting Dial Codes to a Group .....	291
Digits to Add .....	292
Adding/Deleting Digits to Add .....	292
Call Record General Settings .....	293

<b>Billing Settings</b>	<b>295</b>
Billing Report Setup .....	295
Important Considerations: .....	296
Creating a New Billing Report Configuration .....	296
Preview Actions .....	303
Deleting an Element.....	303
Moving a Header Element Up or Down .....	304
Moving a Body Element Up or Down .....	305
Deleting a Billing Report .....	305
Combined Report Setup .....	306
Creating a Combined Report .....	306
Removing a Report from a Combined Report .....	306
Deleting a Combined Billing Report Setup .....	307
Generating a Report .....	308
Billing Information .....	308
Mailed Bill Elements.....	309
Billing General Settings.....	315
Default Accounts.....	315
Currency Exchange Rate.....	316
Add New Billing Currency .....	317
<b>Service Management</b>	<b>319</b>
General Error Log .....	319
Viewing the Service Exception Log .....	319
Delete an Error Log.....	320
Clear all errors.....	320
Email Error Log .....	320
Service Manager .....	321
Viewing the Service Log .....	323
Viewing Process History .....	324
Run Process Now .....	324
Scheduling a Process .....	324
Monitor CES Processes.....	324
Activity Log Conversion Task.....	325
<b>Number Plan</b>	<b>327</b>
Adding a Number Plan.....	327
Site Associations.....	328
Switch Access.....	330
Number Ranges .....	330
Numbers.....	332
<b>Custom Report Template</b>	<b>335</b>
Understanding the Custom Report Template Window .....	335
Ribbon Groups .....	335
Template Panes .....	336
Creating your Report Template.....	336
Step One: Creating the Template .....	337
Step Two: Grid Size .....	337
Step Three: Template Goodies.....	338
Row and Column Management .....	341
Borders.....	345
Export/Copy/Delete .....	346



XML Editor .....	347
Auto Number Setup .....	349
Adding a New Auto-Number Schema .....	349
Deleting an Auto Number Setup .....	352
Field Customization .....	353
Customizing Field Names .....	353
Adding a Drop-Down List to a Field .....	354
Suggested Indexes .....	354
Software Information .....	354
<b>Glossary of Terms</b>	<b>357</b>
<b>Index</b>	<b>359</b>



# System Admin

From System Admin, CAIRS administrator's setup universal program characteristics including the number plan, work flows, field customization to name a few. Often times, only the CAIRS system administrator has access to this menu option or you may have full access or read-only access depending on the rights granted to you.

The Security sub-menu allows administrators to define who has system access and their access type. Administrators create profiles allowing them to manage access rights and privileges for a group of users instead of dealing with each user individually. Within Security, administrators can view login information and user actions.

The Data Sync Center software component allows CAIRS to communicate with your different switches to compare the data within your database to that within the switch. Once compared, you can import the missing information into you CAIRS database. Within this menu option, you also utilize a 911 interface that exports necessary information from your CAIRS database into files used by certain 911 programs.

Work Flow Setup allows your CAIRS administrator to create the necessary workflows you will use to input information into the CAIRS database on a daily basis. Each workflow consists of work centers, time frames and data components. Once each are built into the database and depending upon your profile, you can use them to input telephone, circuit, subscriber, and other information into the database.

System Settings defines how your CAIRS operates in specific situations. You define the system backbone that includes organization levels, site levels, field customization, etc.

The Subscriber Portal submenu allows you to determine the configuration packages available on Subscriber Portal. A Configuration Package allows you to manage equipment, services, and other information needed to create a work order via Subscriber Portal. You can also determine how your Subscriber Portal operates in certain situations within Subscriber Portal Settings.

From Call Record Settings, you manage all call record facets, from call pricing groups, rate groups, rate types, etc.

Within Billing Settings, you configure your billing reports for both Official and Unofficial accounts. You will also define how CAIRS operates in certain situations in Billing General Settings.

Within Service Management, you view errors that have occurred within your system, whether they are general, email or service manager errors.

Number Plan contains different dialing plans or exchange information within your database. A number plan groups or catalogs all similar telephone numbers together. For example, a number plan may be 702-216-0000 to 702-216-5000.

Custom Report Templates allows you to create a customized report for printing your work order information.

The XML Editor allows you to select an XML file and edit the file before exporting or importing

# Security

The Security sub-menu allows administrators to define who has system access and their access type. Administrators create profiles allowing them to manage access rights and privileges for a group of users instead of dealing with each user individually. Within Security, administrators view login information and user actions.

This section of the manual is in the logical order of how you will enter items into your database. The orders as it appears here will not match that of the software.

---

## Security - Profiles

The profile system is the main method for establishing security levels for CAIRS users. CAIRS requires that every user have a profile assignment. A profile allows system administrators to design one set of access rights and privileges based on a group of people. There are three different access aspects for each profile: Menu and Actions, Switches, and Work Centers. When you create a profile, you limit the CAIRS database access each user has based on these three aspects.

First, you grant each profile access to certain menus and then actions it can perform within each menu. Let us take the Facilities menu for example. Within Facilities, there are three sub-menus: Buildings, Connections, and Sites and you may want to allow a profile to perform functions only within Buildings. To restrict profile functionality to Buildings you

would remove the Allow functions for Connections, and Sites, making those menu options read only.

Second, each profile can access one or more switches. When granting access within this option, you allow the profile members access to the switch records and can grant them an SMA switch connection. This access does not affect who can send information to the switch when completing work orders.

Finally, you can grant each profile access to specific work centers allowing people to be responsible for only their portion of the work order and the work order to flow electronically from one job center to the next.

## Adding a Profile

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Security** to access the sub-menus.
3. Click **Profiles**.
4. There are two ways to add a new profile:
  - Within the tool bar directly above the **Navigation** pane, click the dropdown arrow next to **New**. From the list, select **Profile**.
  - Within the **Actions** pane, click the **Add New Profile** link.
5. With either option, the General-Profile window opens. Enter in the following information for the profile (required fields are marked with an asterisk (\*)):
  - **Profile Name\*** – type-in the alphanumeric profile name, we recommend keeping profile names easy to identify when adding a user, for example administrator, site user, TCO, etc.
  - **Description** – type-in a brief profile description
  - **Disabled \*** – click the box to insert a checkmark to disable the profile. We recommend administrators disable profiles instead of deleting them. This saves time by allowing you to activate a profile instead of re-adding.
6. Within the **Actions** ribbon group, click the **Save** (to save and stay) button to continue working with the profile, or click the **Save & Close** (to save and exit) button to return to the Profiles list.

## Menu and Actions

### *Adding Menu and Action Access to a Profile*

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Security** to access the sub-menus.
3. Click **Profiles**.

4. In the **Profiles** list, double click the profile name.
5. The General-Profile window opens. Within the **Show** ribbon group, click the **Menus and Actions** button.
6. There are three panes of information within the **Menus and Actions** screen.
  - **Menu privileges** – displays a list of all the menu options within CAIRS. Next to each menu name, click the plus sign (+) to view the sub-menu options.

**!** When you highlight a menu name within the Menu Privileges pane, the information within the Action Privileges and Related Menus for Selected Action pane changes to reflect only the items associated to the selected menu.

- **Action privileges** – displays a list of available user actions within the selected menu option. There are five different actions: Allow List, Allow Select, Allow Update, Allow Add, and Allow Delete.
  - **Related menus for selected action** – displays a list of menu items related to the selected action. When you change an action within the Action privileges pane, you affect the options available within this pane. For example, if you choose to allow the profile to view the list for accounts, you also affect what the profile views in Configured Items.
7. We are going to break this into three sections based on the name of the panes

### **Section 1: Menu Privileges**

Within this pane, you will be determining if the profile can see and access menu options within the Navigation pane.

8. Next to each of the main menu items is a plus sign (+), click on the plus sign to view the sub-menu items, some menus have up to four sub-menus. When you click on the box to add or remove the checkmark, the sub-menu items are also affected. It is a good idea to expand the entire menu group before you start to ensure that you are adding and removing the correct privileges.
9. Within the **Menu privileges** pane, there are two options available:
  - **Enable** – this box remains unchecked, meaning that the profile cannot perform any functions within the menu. Click on the box to insert a checkmark, this allows the profile to some basic functionality. Please keep in mind you have only enabled the menu option you must still add in the functionality by selecting the appropriate actions.
  - **Visible** – this field remains checked, meaning that the profile can see the menu option within the Navigation pane. Click on the field to remove the checkmark to remove the menu option from the Navigation pane.

### **Section 2: Action Privileges**

Within this pane, you are determining what actions the profile can perform. Notice that some of the options are selected and grayed out, this means that those actions are not available for the action group.

At the top of this pane, there are two option buttons:

- **Actions for Selected Menu** – CAIRS defaults to this selection, when you have a menu item highlighted within the Menu privileges pane, only the actions associated to that menu appear within the Action privileges pane.
- **All Actions** – click the option button to list all the actions for the profile within the pane.

In addition to the options, there is an Edit All Records button. When you click on the double down arrow next to Edit All Records, the checkboxes for the allow columns become available. The checkmarks are grayed out, click the field to remove the mark. Click on the field again to re-add the checkmark, when you re-add, that the entire column now contains checkmarks. CAIRS requires you to perform a few extra clicks to make sure that you really want to change the entire column, please do not get frustrated, we meant to do it that way!

Within this pane, there are seven columns of information:

- **Action Group Name** – displays the name of the menu item that will be affected when you change any of the allow options
- **Group Type** – displays the type of action that you are affecting when you change any of the allow actions, for example, File Attachment Actions, when you allow add, list and delete you are allowing the profile to attach, view and delete file attachments from the menu item (specifically the item listed within the action group name column)
- **Allow List** – a checkmark in the field indicates that the profile is allowed to view a list of the action group, for example if the action group is Site, you are allowing the profile to view a list of the selected sites. Leave the field blank to prohibit the profile from viewing the list of information.
- **Allow Select** – a checkmark in the field indicates that the profile is allowed to double click on any item within the list to view the complete details. Leave the field blank to prohibit the profiles from access any record within the menu item.
- **Allow Update** – a checkmark indicates that the profile can modify any record associated to the menu item. Leave the field blank to prohibit the profiles from making any changes to the record.

---

**!** When you add permissions for the following items, you are enabling links within the Actions pane, dropdown lists and buttons within the toolbar. As well as actions within the records Action ribbon group.

---

- **Allow Add** – a checkmark indicates that the profile can add new records into the database. Leave the field blank to prohibit the profile from adding new items into the database.
- **Allow Delete** – a checkmark indicates that the profile can delete existing records from the database. Leave the field blank to prohibit the user from delete items from the database.

- To add or prohibit privileges click on the box to add or remove the checkmark.

### **Section 3: Related menus for selected action**

When you start to change the privileges within the Action Privileges pane, you may be affecting other areas of the software. This pane displays the other areas that are effected by your selections. For example, if you allow a profile to add within Configured Items -> Set Management -> Configured Sets, you are also allowing the profile to perform the same action within Directory, Published Directory, etc.

It is good to pay close attention to the items that appear within this pane to make sure you are not granting the profile permission to an area that you do not want them to access.

- When you finish adding the appropriate privileges, click **Save** (to save and stay), or click **Save & Close** (to save and exit) from within the **Actions** ribbon group.

### ***Modifying Menu and Action Access from a Profile***

- Click the **System Admin** menu.
- In the **Navigation** pane, click the plus sign (+) next to **Security** to access the sub-menus.
- Click **Profiles**.
- In the **Profiles** list, double click the profile name.
- The General-Profile window opens. Within the **Show** ribbon group, click the **Menus and Actions** button.
- Within the **Menu privileges** pane, click the box in the **Enabled** or **Visible** column; removing the check mark and thus the privilege from the profile. Alternatively, click the box to insert a checkmark to add the privilege.
- Within the **Action privileges** pane, click the box in any column to remove the check mark, thus removing the privilege for this profile to perform the action. Alternatively, click on the box to insert a checkmark to add the privilege.

When you manipulate profile actions, pay close attention to the related menus for selected action pane. This pane displays the other areas that are affected by your selections. For example, if you allow a profile to add within Configured Items→ Set Management→ Configured Sets, you are also allowing the profile to perform the same action within Directory, Published Directory, etc.

- Click **Save** (to save and stay), or click **Save & Close** (to save and exit).

### **Switch Access**

When you grant the profile access to a particular switch, you allow them to view the switch records and its related CAIRS database information. You can also grant the profile access to SMA connection, allowing you to securely interface with the switch. To learn more about this connection see Switches.



### ***Adding Switch Access to a Profile***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Security** to access the sub-menus.
3. Click **Profiles**.
4. In the **Profiles** list, double click the profile name.
5. The General-Profile window opens. Within the **Show** ribbon group, click the **Switches** button.
6. The details pane displays all switch records with three columns of information:
  - **Switch Name** – displays the switch name, click the plus sign (+) next to the switch name to view the sites the switch is associated to.
  - **Selected** – a check mark in the column indicates the profile has access to view related switch information.
  - **Grant SMA Permission** – a check mark in the column indicates the profile can create a SMA switch connection. Within the **Selected** column, check mark and grant the profile switch access.
7. Find the switch name within the list and click the box under the **Selected** column to insert a checkmark granting the profile access to the switch.
8. Within the **Grant SMA Permission** column, insert a checkmark to grant the profile SMA access to the switch.
9. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with the profile, or click **Save & Close** (to save and exit) to return to the profile list.

### ***Deleting Switch Access from a Profile***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Security** to access the sub-menus.
3. Click **Profiles**.
4. In the **Profiles** list, double click the profile name.
5. The General-Profile window opens. Within the **Show** ribbon group, click the **Switches** button.
6. The details pane displays all switch records within three columns of information:
  - **Switch Name** – displays the switch name, click the plus sign (+) next to the switch name to view the sites the switch is associated to.
  - **Selected** – a check mark indicates the profile can access information relating to this switch.
  - **Grant SMA Permission** – a check mark indicates the profile can remotely access the switch through Secure Maintenance Access.

7. Find the switch name within the list. Click the box under either column to remove the checkmark to prohibit the profile from accessing the switch.
8. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with the Profile, or click **Save & Close** (to save and exit) to return to the Profile list.

## Work Center Access

After you create a work center, you have to grant the appropriate profiles access to the center. Each profile is granted access to the work centers directly relating to their daily job function. This allows the users to be responsible for only the information pertaining to their job.

### *Adding Work Center Access to a Profile*

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Security** to access the sub-menus.
3. Click **Profiles**.
4. In the **Profiles** list, double click the profile name.
5. The General-Profile window opens. Within the **Show** ribbon group, click the **Work Centers** button.
6. A details pane displays the following three columns. Click on a column, as necessary:
  - **Work Center Name** – displays the work center name.
  - **Selected** – a check-marked column indicates the profile has access to view the work center information.
7. Within the **Selected** column, click the box to insert a checkmark granting the profile access to the work center.
8. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with the profile, or click **Save & Close** (to save and exit) to return to the profile list.

### *Deleting Work Center Access from a Profile*

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Security** to access the sub-menus.
3. Click **Profiles**.
4. In the **Profiles** list, double click the profile name.
5. The General-Profile window opens. Within the **Show** ribbon group, click the **Work Centers** button.
6. Within the **Selected** column, click the box to remove the checkmark to remove the profile's access to the work center.

7. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with the profile, or click **Save & Close** (to save and exit) to return to the profile list.

## Disabling a Profile

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Security** to access the sub-menus.
3. Click **Profiles**.
4. In the **Profiles** list, double click the profile name.
5. The General-Profile window opens. Within the **Disabled** field, click on the box to insert a checkmark, this removes the profiles access.
6. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with the profile, or click **Save & Close** (to save and exit) to return to the profile list.

## Enabling a Profile

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Security** to access the sub-menus.
3. Click **Profiles**.
4. In the **Profiles** list, double click the profile name.
5. The General-Profile window opens. Within the **Disabled** field, click the box to remove the checkmark, granting the profiles access.
6. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with the profile, or click **Save & Close** (to save and exit) to return to the profile list.

## Deleting a Profile

It is recommended administrators disable profiles instead of deleting them. This saves time by allowing profiles to be re-activated rather than re-added. Before deleting the profile, you must first reassign all users to another profile.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Security** to access the sub-menus.
3. Click **Profiles**.
4. There are two ways to delete a profile:
  - Within the list, highlight the profile name. In the **Actions** pane, click the **Delete** button.

- Double click the profile name within the list. The **Profile** window opens. Within the **Actions** ribbon group, click the **Delete** button.
5. Once you click Delete, a message box appears verifying that you really want to delete the profile. Click **Yes** to continue or **No** to cancel the operation.
  6. If the profile is currently associated to any users, you must reassign the users before deleting the profile. If there are still user associations, a message appears saying the profile is currently in use. Click the **Close** button to return to the profile list.

## Copy Profile

Within each profile, you can create an identical copy of the profile by clicking the Copy Profile button within the Profile Actions ribbon group. This opens a new window allowing you to rename and modify the privileges for the new profile. This action is useful if you want to create profiles and limit by site.

---

## Security – Users

Within Users, an administrator creates CAIRS database users. An administrator can add a user manually or by connecting to your sites Active Directory. After adding a user, you must assign them a profile, granting them access to certain portions of the software based on their job description. To learn more about profiles, see Profiles.

There are three different types of users: mixed; windows authenticated or certificate authentication. Your System Administrator determines which authentication type you are using from the Security Type system setting.

With Windows authentication, CAIRS will use your windows credentials as your username and password when logging in.

With Certificate Authentication, there are couple of behind the scenes settings that need to be configured for this to work properly. Before selecting this option, please contact our technical support staff to configure it properly. With certificates, CAIRS will authenticate a user based on their CAC. A user will login with their CAC, they will then need to be assigned a profile to access the software.

Finally, the Mixed type, this allows authentication for both Windows and Certificates. This security type allows for both users with CAC authentication and Windows authentication. CAIRS will first look for a certificate and use those credentials, however if a certificate is never used then CAIRS will use the window authentication.

## Users – Windows

These types of users will use their Windows credentials to log into CAIRS each time. There are two ways to add a user, you can add them manually with your domain name\user name, the password associated to their account will be used to login. Alternatively, you can connect to your Active Directory, find and select their name. CAIRS populates the fields based on their active directory account.

### ***Adding a User - Windows***

This allows you to add a user manually without connecting to your Active Directory.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click on **Security** then on Users - Windows
3. There are two ways to add a user:
  - Within the tool bar directly above the **Navigation** pane, click the dropdown arrow next to **New**. From the list select. **Users**.
  - Within the **Actions** pane, click the **Add New Users** link.
4. With either option, the General - User window opens. Enter the following user information (required fields are designated with an asterisk (\*)):
  - **Supervisor Name** – click the dropdown arrow to access a list and from the list, select the supervisor name.
  - **User Name\*** – type-in the login name for the user.
  - **First Name** – type-in the first name.
  - **Last Name** – type-in the last name.
  - **Email Address** – type-in the email address.
  - **Phone Number** – type-in the telephone number.
  - **Alt Phone Number** – type-in an alternate phone number.
  - **Fax Phone Number** – type-in the fax number.
  - **TCO** – click the dropdown arrow to access a list and from the list, select the TCO (Telephone Control Officer).
  - **Resource Manager** – click the dropdown arrow to access a list and from the list select the resource manager name.
  - **Last Login Date** – displays the date the user last logged into CAIRS.
  - **Last Login Location** – displays the computer IP address last used to log into CAIRS.
  - **Last Password Change Date** – displays the date the user changed their password.
  - **Disabled** – a checkmark in the box indicates that the username has been disabled.
  - **New Authorized User** – this field applies to users who access CAIRS via their CAC
  - **Operator Number** – type-in the operator number for the user.
  - **User Job Title** – type-in the job description for the user.

- **Is System Administrator** – click the box to insert a checkmark to indicate that this user is a System Administrator. This selection overrides any other and allows the user complete system access.
- **Limit by Site** - click the box to insert a checkmark limiting this user to only see the sites selected within the Sites window.
- **Window Service Account** - click the box to insert a checkmark enabling single sign-on. Meaning, when you login to Windows you also login to CAIRS, eliminating the need for a separate username and password

**!** In order for single sign to work properly, the Windows login and the Active Directory login must be the same.

- **UCE Notifications** – click the dropdown arrow to access a list and from the list, select one of the following options to determine if the user receives information when there is an event or error in UCE:
  - **None** - Don't notify of any events
  - **Debug** - Notify all events (This is only recommended when you are troubleshooting UCE from CAIRS UCE Monitor)
  - **Errors** - Notify error and critical events from UCE
  - **Only** - Only notify when UCE is down or not collecting calls

**!** Once you have added the user, you now need to associate the user to a profile. You can associate more than one profile to a user, but beware that CAIRS will use the highest level of permission. For example, if one profile has permission to a switch and the other does not, CAIRS allows the user to access the switch based on the higher profile.

5. To assign a profile to a user, highlight the profile within the **Available Profiles** and click the right arrow button. The profile name moves from the Available Profiles pane to the Assigned Profiles pane.
6. To remove an assigned profile, highlight the profile within the **Assigned Profiles** and click the left arrow button. The profile name moves back to the Available Profiles pane.
7. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with this user, click on the Save & New button to add another user, or click **Save & Close** (to save and exit) to return to the User list.

### ***Adding Users from Active Directory***

This allows you to add a user from your Active Directory. You are required to login to the Active Directory so make sure you have an administrator name, password, and the domain name.

1. Click the **System Admin** menu.

2. In the **Navigation** pane, click on **Security** then on Users - Windows
3. In the **Actions** pane, click the **Add User from Active Directory** link.
4. The Provide Active Directory Credentials window opens. Login with your **Administrator Name, Administrator Password, and Domain**.
5. Click the **OK** button.
6. The Active Directory list displays. Within the **Active Directory** list:
  - Search for a Subscriber by typing the subscriber name or portion of the subscriber name in the text box in the upper right-hand corner. The list displays all subscribers that contain the portion of the search characters and the highlighted fields display the search characters. For example, if the search parameter typed in is 'Len', anywhere 'Len' appears in any active directory listings is displayed and highlighted within a new list. To return to the full list of users after a search, click the red **X** within the search parameters box.
  - Sort the list by clicking any column header. For example, click the **Username** column header to sort the list alphabetically by user name.
7. Within the list, double click the user name to add. The User Details window opens with the User Name, First Name, Last Name, and Email Address automatically populated with the Active Directory information.
8. Enter the remaining user details.

---

**!** Once you have added the user, you now need to associate the user to a profile. You can associate more than one profile to a user, but beware that CAIRS will use the highest level of permission. For example, if one profile has permission to a switch and the other does not, CAIRS allows the user to access the switch based on the higher profile.

---

9. To assign a profile to a user, highlight the profile within the **Available Profiles** and click the right arrow button. The profile name moves from the Available Profiles pane to the Assigned Profiles pane.
10. To remove an assigned profile, highlight the profile within the **Assigned Profiles** and click the left arrow button. The profile name moves back to the Available Profiles pane.
11. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with this user, click the **Save & New** button to add another user, or click **Save & Close** (to save and exit) to return to the User list.
12. The Active Directory list continues to stay open until closed allowing administrators to add multiple users without having to login each time. To close the Active Directory list, click the red **X** in the upper right-hand corner.

### **Users – Site Access**

You can limit a user to view certain sites within the database. For this to work properly, on the **Detail** screen, place a check mark in the **Limit By Site** field. This limits the user to only

the sites selected within the Sites button. Keep in mind that if you select a high-level site, you need to select the children as well. Therefore, if you want the user to access several different levels, you need to select each level.

### ***Adding Site Access to a Profile***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click on **Security** then on Users - Windows
3. Depending on the amount of users you have within your database, the list may not readily populate. To populate the list of users perform one of the following actions:
  - Within the search box, type any portion of the record and then click the magnifying glass
  - Click the Show All button
4. The General-User window opens.
5. Within the **Show** ribbon group, click the **Sites** button. The window displays two panes of information; the top pane displays the sites associated to the user. The lower pane displays a list of all the sites within your database, the following read-only information is available for each site:
  - **Site Name** – displays the name of the site, this is the lowest level of the site tree.
  - **Site Path** – displays the complete path to the site. Each level is separated by a >.
  - **Site Level** – displays the site level name or number.
  - **Site Code** – displays the three-digit alphanumeric site code.
6. To add a site to the user, find the site within the **Available Sites** pane, and double click on the record. The site name now appears within the upper pane.

---

**!** Be aware that sites do not inherit the associations of their parents. You must associate each level to the user. For example, if you associate a parent and want all the children associated you must associate all children sites.

---

7. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with the user, or click **Save & Close** (to save and exit) to return to the Users list.

### ***Deleting Site Access from a Profile***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click on **Security** then on Users - Windows
3. Depending on the amount of users you have within your database, the list may not readily populate. To populate the list of users perform one of the following actions:
  - Within the search box, type any portion of the record and then click the magnifying glass



- Click the Show All button
- 4. The General-User window opens.
- 5. Within the **Show** ribbon group, click the **Sites** button.
- 6. Within the top pane, right-click the record selector box just to the left of the site name to access a pop-up menu, from the menu select **Delete**.
- 7. Once you click Delete, a message box appears verifying that you really want to delete the site. Click **Yes** within the box to continue or **No** to cancel the operation.
- 8. Once selected, CAIRS draws a line through the site; allowing you to delete multiple items at once.
- 9. If you do not want to delete the site, right-click the record to access a pop-up menu and from the pop-up, click **Undelete**.
- 10. Once you select Undelete, a message box appears verifying that you really want to keep the site. Click **Yes** within the box to continue or **No** to cancel the operation.
- 11. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with the user, or click **Save & Close** (to save and exit) to return to the User list.

### ***Disabling a User Account***

When you disable a user's account, their privileges are revoked immediately. If they are active in CAIRS when you disable the account, they will not be able to perform any further actions.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click on **Security** then on Users - Windows
3. Depending on the amount of users you have within your database, the list may not readily populate. To populate the list of users perform one of the following actions:
  - Within the search box, type any portion of the record and then click the magnifying glass
  - Click the Show All button
4. The General-User window opens.
5. There are two ways to disable an account.
  - Click on the box within the **Disabled** field to add a checkmark
  - Within the **Security** ribbon group, click the **Disable User** button. This adds a checkmark to the Disabled field
6. Click **Save & Close** (to save and exit).
7. Within the User list, a checkmark appears in the Disabled column.
8. If you re-access the user, you will notice that the button within the **Security** ribbon group now read **Enable User**.

### ***Enabling a User Account***

To enable a currently disabled account:

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click on **Security** then on Users - Windows.
3. Depending on the amount of users you have within your database, the list may not readily populate. To populate the list of users perform one of the following actions:
  - Within the search box, type any portion of the record and then click the magnifying glass
  - Click the Show All button
4. The General-User window opens.
5. There are two ways to enable an account.
  - Uncheck the box in the **Disabled** field.
  - Click the **Enable** button in the **Security** ribbon group.
6. Click **Save & Close** (to save and exit).
7. If you re-access the user, you will notice that the button within the **Security** ribbon group now read **Disable User**.

### ***Deleting a User***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click on **Security** then on Users - Windows
3. Depending on the amount of users you have within your database, the list may not readily populate. To populate the list of users perform one of the following actions:
  - Within the search box, type any portion of the record and then click the magnifying glass
  - Click the Show All button
4. The **Users** list opens to the right, there are two ways to delete a user:
  - Highlight the user within the list. Within the tool bar directly above the **Navigation** pane, click the red **X**
  - Highlight the user within the list. Within the **Actions** pane, click the **Delete Users** link.
  - Double click on the user name within the list. The User window opens. Within the **Actions** ribbon group, click the **Delete** button.
5. Once you click Delete, a message box appears verifying that you really want to delete the user. Click **Yes** within the box to continue or **No** to cancel the operation

### ***Viewing User Activity***

1. Click the **System Admin** menu.

2. In the **Navigation** pane, click on **Security** then on Users - Windows
3. Depending on the amount of users you have within your database, the list may not readily populate. To populate the list of users perform one of the following actions:
  - Within the search box, type any portion of the record and then click the magnifying glass
  - Click the Show All button
4. The General-User window opens.
5. Within the Activity ribbon group, click the User Activity button. The User Activity window opens displaying the following information:
  - **Action Name\*** – displays the completed action name. Some action examples are Delete Profile, Add New Terminal, etc.
  - **Activity Date\*** – displays the action date and time.
  - **User Name\*** – displays the username.
  - **Last Name** – displays the user's last name.
  - **First Name** – displays the user's first name.
  - **Name or Number** - displays the number or name of the information that the action influenced, for example, the primary telephone number, circuit name, subscriber name, etc appears in the field.
  - **Source\*** – displays the IP address.
  - **Work Order Number** – displays the work order number, if any.
  - **Security Check Successful** – a checkmark in the field indicates that the completed action was within the scope of the user's profile.
6. To return to the User, click the 'x' in the upper right hand corner of the window.

### ***Viewing User Accounts***

To sort the list based on a common element there are a few different options you can choose from within the **Views** pane. By clicking the options button next to an alternate sort option, the list automatically resorts.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click on **Security** then on Users - Windows
3. Within the **Views** pane, click one of the following options:
  - **Simple List** – this is the default list, the users appear alphabetically by user name.
  - **Users with Profiles** – displays list of each user and their assigned profiles, if a user is assigned to more than one profile their name will appear multiple times in the list

- **Users with Sites** - displays list of each user and their assigned sites, if a user is assigned to more than one site their name will appear multiple times in the list
  - **Users with Sites & Profiles** - displays list of each user and their assigned profiles & sites, if a user is assigned to more than one their name will appear multiple times in the list
  - **New Users** – displays a list of the user who have accessed the system that are not authorized yet
  - **Disabled Users** – displays a list of the user who are disabled
4. Double click a record to see its details.

## Users – Certificate

Once a user logs in with their CAC cards, a few things need to happen from an administrator standpoint. As an administrator, you will need to perform the following actions after the user has accessed CAIRS for the first time:

When a user opens CAIRS for the first time, they will get a message saying they do not have access, they will need to contact an administrator to be granted access. If they do not contact you, you can change the viewing option to view 'New Users' (Security → Users – Certificate → Views pane) this view displays a list of the users that are not authorized to use the system yet.

Access the user from Security → Users – Certificate, within the user make the following changes:

- New Authorized User – remove the checkbox
- Profile – assign them a profile by double clicking the profile name in the Available Profiles pane, it will move into the Assigned Profiles pane
- Sites – if the 'Limit By Site' field is checked, you will need to assign the user a site(s). Within the Sites button, double click on the site name in the lower to pane to move to the upper pane. Once in the upper pane the site is associated to the user.

Click on the Save & Close button within the Actions ribbon group.

The last step is to contact the user and verify they can login and see the menu options you designated for the assigned profile.

For each user you can view and edit the following information, most of the information will populate from their CAC information:

The first four fields display information that is associated to the user's CAC, these fields are read only

- User Name
- Email Address
- Serial Number

- EDIPI

The remaining fields are specific to CAIRS and are editable. Required fields are marked with an asterisk (\*).

- **User Status** – there are three statuses available for the user:
  - **New User** – this will be the status of the user the first time they login into CAIRS. All new users need to be authorized before they can login and see any menu option.
  - **Authorized** – this is the status that you will need to give each user so they can access CAIRS, their menu access depends on access rights associated to their profile(s)
  - **Revoked** – you can revoke a user’s access by switching their status to revoked. This is immediate, once you click Save their access rights are removed.

To change the status, click on the dropdown arrow to access a menu, and from the menu select one of the above statuses.

- **TCO** – click the dropdown arrow to access a list and from the list, select the TCO (Telephone Control Officer).
- **Resource Manager** – click the dropdown arrow to access a list and from the list select the resource manager name.
- **Last Login Date** – displays the date the user last logged into CAIRS.
- **Last Login Location** – displays the computer IP address last used to log into CAIRS.
- **Is System Administrator** – click the box to insert a checkmark to indicate that this user is a System Administrator. This selection overrides any other and allows the user complete system access.
- **Limit by Site** - click the box to insert a checkmark limiting this user to see only the sites selected within the Sites window.
- **Window Service Account** - click the box to insert a checkmark enabling single sign-on. Meaning, when you login to Windows you also login to CAIRS, eliminating the need to re-enter your username and password

---

**!** In order for single sign to work properly, the Windows login and the Active Directory login must be the same.

---

- **UCE Notifications** – click the dropdown arrow to access a list and from the list, select one of the following options to determine if the user receives information when there is an event or error in UCE:
  - **None** - Don’t notify of any events

- **Debug** - Notify all events (This is only recommended when you are troubleshooting UCE from CAIRS UCE Monitor)
- **Errors** - Notify error and critical events from UCE
- **Only** - Only notify when UCE us down or not collecting calls

**!** Once you have added the user, you now need to associate the user to a profile. You can associate more than one profile to a user, but beware that CAIRS will use the highest level of permission. For example, if one profile has permission to a switch and the other does not, CAIRS allows the user to access the switch based on the higher profile.

5. To assign a profile to a user, highlight the profile within the **Available Profiles** and click the right arrow button. The profile name moves from the Available Profiles pane to the Assigned Profiles pane.
6. To remove an assigned profile, highlight the profile within the **Assigned Profiles** and click the left arrow button. The profile name moves back to the Available Profiles pane.
7. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with this user, click on the Save & New button to ass another user, or click **Save & Close** (to save and exit) to return to the User list.

Now that your users is added into the system, you can filter the sites that they have access to. To learn more about Site Access please see the Users- Site Access portion under Users – Windows.

If you are keeping track of user activity, then you can view all the action the user has performed in the system. Within the Activity ribbon group, click on the User Activity button. If the list of actions does not readily populate, click on the Show All link in the upper right hand corner of the pane.

### ***Viewing User Accounts***

To sort the list based on a common element there are a few different options you can choose from within the **Views** pane. By clicking the options button next to an alternate sort option, the list automatically resorts.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click on **Security** then Users – Certificate.
3. Within the **Views** pane, click one of the following options:
  - **Simple List** – this is the default list, the users appear alphabetically by user name.
  - **Users with Profiles** – displays list of each user and their assigned profiles, if a user is assigned to more than one profile their name will appear multiple times in the list
  - **Users with Sites** - displays list of each user and their assigned sites, if a user is assigned to more than one site their name will appear multiple times in the list

- **Users with Sites & Profiles** - displays list of each user and their assigned profiles & sites, if a user is assigned to more than one their name will appear multiple times in the list
  - **New Users** – displays a list of the user who have accessed the system that are not authorized yet
  - **Revoked Users** – displays a list of the user whose access has been revoked
4. Double click a record to see its details.

---

## Security - Logged in Users

The Logged in Users displays a list of the users that are currently logged into CAIRS. The list displays the following information:

- **User Name** – displays the user’s login name.
- **Computer Name** – displays the computer name
- **IP Address** – displays the computer’s network address.
- **Last Name** – displays the user’s last name.
- **First Name** – displays the user’s first name.
- **Log In Time** – displays the date and time the user started their CAIRS session.

Each of these six columns can sort the list information alphabetically or numerically. For example, click the **Last Name** column to sort the list alphabetically based on the user’s last name. Once clicked, a triangle appears in the column header. An upward pointing triangle indicates the list is in alphabetical order, while a downward pointing triangle indicates the list is in reverse-alphabetical order.

### Refresh Status

Within the Actions pane, click on the Refresh Status link to refresh the Logged in Users list, this updates the list to the most current users logged into CAIRS.

### Viewing User Activity

As an administrator, you can view user activities by double clicking the user name within the list. A complete activities list displays.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Security** to access the sub-menus.
3. Click **Logged in Users**.
4. A list of the users currently logged into CAIRS displays, within the list double click on any record. The Security Monitor window opens.

5. The fields in the **Security Monitor** window are as follows:
  - **Action Name\*** – displays the action that took place: Add, Update, or Delete. This keeps track of any database changes.
  - **Activity Date\*** – displays the date and time the action occurred.
  - **User Name\*** – displays the username.
  - **First Name** – displays the user’s first name.
  - **Last Name** – displays the user’s last name.
  - **Name or Number** - displays the number or name of the information that the action influenced, for example, the primary telephone number, circuit name, subscriber name, etc appears in the field.
  - **Source\*** – displays the computer’s IP address.
  - **Work Order Number** – displays the work order number.
  - **Security Check Successful** – a checkmark in the field indicates the completed action was within the scope of the user’s profile.
6. Within the Actions ribbon group, click on the X to close the Security Monitor and return to the Logged In Users list.

---

## Security - Activity Log

The **Activity Log** displays detailed information of all database additions, updates, and deletions. The **Activity Log** displays the following columns of information:

- **Action Name\*** – displays the action completed.
- **Activity Date\*** – displays the action date and time.
- **User Name** – displays the username.
- **First Name** – displays the user’s first name.
- **Last Name** – displays the user’s last name.
- **Name or Number** – displays the number or name of the information that the action influenced, for example, the primary telephone number, circuit name, subscriber name, etc. appears in the field.
- **Source\*** – displays the computer’s IP address.
- **Work Order Number** – displays the work order number.
- **Security Check Successful** – a checkmark in the field indicates that the completed action was within the scope of the user’s profile.

Each of these columns can sort the list information alphabetically or numerically. For example, click the **Last Name** column to sort the list alphabetically based on the user’s last



name. Once clicked, a triangle appears in the column header. An upward pointing triangle indicates the list is in alphabetical order, while a downward pointing triangle indicates the list is in reverse-alphabetical order.

## Refresh Status

Within the Actions pane, click on the Refresh Status link to refresh the Activity Log, this updates the list to the most current activities completed in CAIRS.

## Viewing the Activity Log

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Security** to access the sub-menus.
3. Click **Activity Log**. The Activity Log list opens to the right displaying the following six columns:
  - **Action Name\*** – displays the completed action name. Some action examples are Delete Profile, Add New Terminal, etc.
  - **Activity Date\*** – displays the action date and time.
  - **User Name\*** – displays the username.
  - **Last Name** – displays the user's last name.
  - **First Name** – displays the user's first name.
  - **Name or Number** - displays the number or name of the information that the action influenced, for example, the primary telephone number, circuit name, subscriber name, etc appears in the field.
  - **Source\*** – displays the IP address.
  - **Work Order Number** – displays the work order number, if any.
  - **Security Check Successful** – a checkmark in the field indicates that the completed action was within the scope of the user's profile.
4. Each of these six columns can sort the list information alphabetically or numerically. For example, click the **Last Name** column to sort the list alphabetically based on the user's last name. Once clicked, a triangle appears in the column header. An upward pointing triangle indicates the list is in alphabetical order, while a downward pointing triangle indicates the list is in reverse-alphabetical order. To view a detailed description of the activity, double click the individual record. The Activity Log window opens displaying more details.

## Exporting the User Activity Log as XML

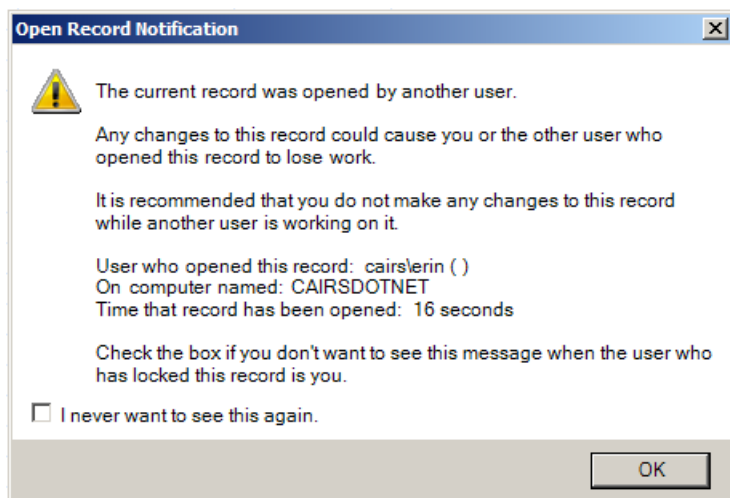
1. Click the **System Admin** menu.

2. In the **Navigation** pane, click the plus sign (+) next to **Security** to access the sub-menus.
3. Click **Activity Log**.
4. Within the **Actions** pane, click the **Export to XML** link.
5. Within the **Save As** window, select the location. CAIRS auto-populates the Save as type: field with the XML file type.
6. Type the file name into the text box and click the **Save** button.
7. To stop the save process, click the **Cancel** button.
8. To view the file that you just saved, go to the saved file location and double click the file name. The file opens as a window within Internet Explorer.

---

## Security - Open Record Management

When a user opens a record that is currently open by someone else, the following message appears:



This message explains that if either user makes any changes the work may be lost. Within the message, we notify you of the user name and computer, so in the event that you need the record immediately you can contact the user.

As an administrator, you can view a list of locked records by user. This allows you to view and possibly release the record for use by another user.

### Delete Open Record Notifications

As an administrator, you can delete one or all of the open record notifications. This releases the record and allows other users to make changes and possibly overwrite previous changes made. Within the actions pane there are two options, the first is Delete

All Open Record Notifications, this deletes everything within the list and release the records.

The second option, Delete Open Record Notification, only becomes available when you highlight a record within the list to the right. This option allows you to delete single records to release the items associated. Within the list, find the record to release, click to highlight the record and within the Actions pane click the Delete Open Record Notification. You are asked to verify that you really want to delete the open record management, click yes to continue or no to cancel the operation.

# Data Sync Center

The Data Sync Center compares the data in CAIRS with the data on each switch it's monitoring. The Unique installation team and the System Administrator will work in conjunction to perform a Switch Sync. The initial Switch Sync pulls data from the switch to create the foundation for your database.

System Administrators use subsequent syncs to synchronize the CAIRS database and the switch database. Unique Communications follows the industry standard that the "Switch is the Bible." Additionally, CAIRS provides the functionality of sync exceptions reporting ('out of sync') giving administrators the option of reviewing the database discrepancies.

Administrators can run subsequent syncs manually or schedule daily, weekly, or monthly syncs. Additionally, the Data Sync Center gives you switch syncs results by displaying the in-sync and out-of-sync data. You can configure the Data Sync to resolve exceptions (out-of-sync data) automatically or to generate a report (log) of exceptions for manual review. This is a great tool in maintaining database integrity.

The seven switch syncs CAIRS offers are:

- **Port** – compares the port numbers in your CAIRS database to the switch data.
- **Number Plan** – (CS2100/SL100 only) shows area and office codes based off the TOFC Name Report.

- **Number Plan Listing** – (CS2100/SL100 only) pulls in all the non-published listings, just the DNs not the configured set, from the switch.
- **Feature Key Maps (FKM) Syncs** (for EWSD switches) – compares the features key maps for the sets in the CAIRS database to the switch data.
- **Configured Sets** – compares the set device data in your CAIRS database to the switch data.
- **Hunt Group Syncs** – compares the hunt group data in your CAIRS database to the switch data.
- **Switch Speed Dial (EWSD Switches)** – compares the Speed Dial Groups data in your CAIRS database to the switch data.
- **Switch Hunt Group Members (EWSD Switches)** – compares the hunt group members data in your CAIRS database to the switch data.
- **Run Script Only**– this project allows you to run a switch script only; there will be no syncing once the script is run. This project provides more switch communication options for CAIRS.
- **Call Pickup** – compares the call pickup data from your switch to the call pickup groups within CAIRS

Administrators have additional functions within the Data Sync Center. The first is the 911 Interface. This allows you to create a template to gather information from within your CAIRS database to send to an external 911 program.

The final function allows a Unique Communications representative the ability to import information into your database from an external source such as an Access Database.

## Switch Sync Project

Creating a Switch Sync Project allows administrators to compare the database residing within the switch to the database within CAIRS. For each switch sync type, an administrator creates a new project and for each switch, you will have up to six projects. Each project allows you to schedule and perform syncs, view sync logs, etc. In order for you to create a switch sync project, you must have created and established a connection with each switch from within CAIRS. To learn more about how to do this, please see the Switches section.

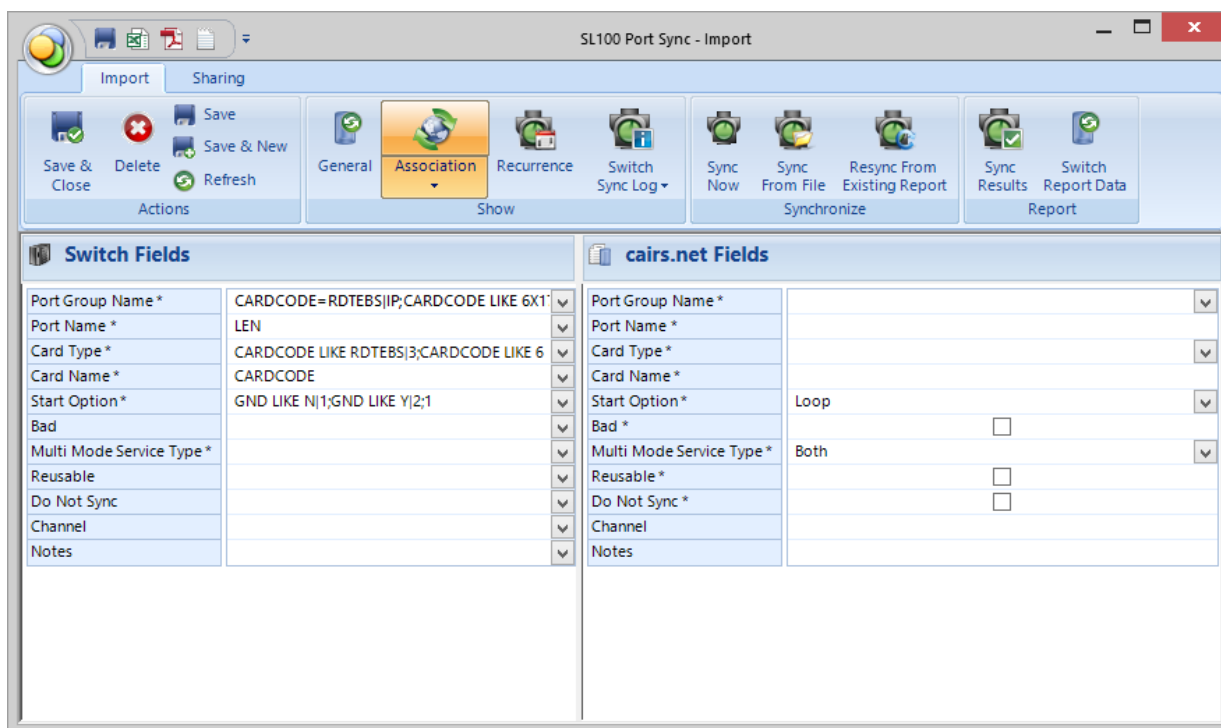
### *Adding a Switch Sync Project*

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **Switch Sync Project**. There are two ways to add a project:
  - Within the tool bar directly above the **Navigation** pane, click the dropdown arrow next to **New**. From the list select **Switch Sync Project**.
  - Within the **Actions** pane, click the **Add New Switch Sync Project** link.

4. With either option, the General-Import screen opens. Complete the following fields. Required fields are marked with an asterisk (\*):
  - **Project Name\*** – type-in the project name.
  - **Switch Name\*** – click on the dropdown arrow to access a list and from the list select the switch you wish to sync with.
  - **Script Name\*** – click the dropdown arrow to access a list and from the list, select the script needed to perform the sync.
  - **Action\*** – click the dropdown arrow to access a list and from the list, select one of the sync types: Port, Number Plan, Number Plan Listing, Feature Key Maps, Configured Sets, Hunt Group Members, Switch Speed Dial, Switch Hunt Group Members, Run Script Only or Call Pickup Group.
  - **Auto Update** – click the field to insert a checkmark in the box allowing auto-update. If this is checked, any discrepancies that are found from the switch data to your CAIRS data will be automatically updated to match the switch. If you select this, it is a good idea to change the comparison type to 'Ignore Not In Switch', this will leave any records that exist in CAIRS but not in the switch in place. This is helpful if you have virtual numbers in your CAIRS database.
  - **Single Record Sync** – this allows you to perform a sync for a single record in your switch.
  - **Description** – type-in a project description.
  - **Comparison Type** – click the dropdown arrow to access a list and from the list, select one of the following options:
    - **Compare All** – compares everything in/out of the database.
    - **Ignore Not In Switch** – ignores records in CAIRS that are not in the switch.
  - **Use Advanced Sync Options** – this option is available to use with the direct supervision of a Unique Communications Representative.
5. After completing the required information, within the **Actions** ribbon group, click **Save** (save and stay) button, **Save & Close** (save and return to the project list) or **Save & New** (save and refresh) to add a new project.

### **Association**

The Association button is used to specify the data used to compile the Switch Sync Project. There are 2 panes in the section: Switch Fields and CAIRS fields. In each field used for the project, you must specify where you are getting the data. If the field information is coming from the switch database, use the dropdowns within the Switch Fields pane. If the field information is coming from your CAIRS database, use the dropdowns within the CAIRS pane. In the example below, you will see that a majority of the information for this port sync will be coming from the switch, CAIRS will populate the start option and service type for each record. Please contact a Unique Communications Representative for assistance in making changes to this section.



## Recurrence

Each sync project can be set to run automatically on a daily, weekly, or monthly basis. Within the Recurrence button you will be determining when your syncs will run.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **Switch Sync Project**.
4. The Switch Sync Project list opens to the right. Within the list double click the project to schedule.
5. The General-Import screen opens. Within the **Show** ribbon group, click the **Recurrence** button.
6. The **Data Sync Recurrence** pop-up opens.
7. Within the **Data Sync start time** pane (top), click the dropdown arrow to select the sync start hour. The clock is on military time, so this will be a number between 0 and 23.
8. Within the **Recurrence pattern** pane, select how often to perform the sync. There are three choices:
  - **Daily** – once you select the option button next to **Daily**, two additional selections become available. You can choose to run the sync every 1-7 days by selecting the first option and typing in the number of weekdays or run the sync every weekday, skipping Saturday and Sunday.

- **Weekly** – once you select the option button next to **Weekly**, two additional selections become available allowing you to select the day of the week to perform the sync. Additionally, you are required to type in the number of weeks in-between syncs. For example, if you type in 2 and select Sunday, CAIRS performs a sync every other Sunday
  - **Monthly** – once you select the option button next to **Monthly**, an additional selection becomes available allowing you to choose what day of every month to perform the sync. To perform the sync on the 1<sup>st</sup> of every month, you would type-in a 1 in both fields
9. Within the **Range of recurrence** pane, enter the switch sync Start date using the drop-down calendar. To change the date, click the field to access a dropdown calendar. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.
  10. After you have selected your start date, decide if you want the sync to run continuously on this schedule or have an end date. To have CAIRS run this sync continuously on this schedule, click the radio button next to **No end date** otherwise click the radio button next to **End by:** and select the desired end date.
  11. Click the **Ok** button when finished or click **Cancel** to exit the pop-up without saving your changes.

### **Viewing Sync Schedules**

You can view existing sync schedules.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **Switch Sync Project**.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to schedule.
5. The General-Import screen opens. Within the **Show** ribbon group, click the **Recurrence** button.
6. The Data Sync Recurrence pop-up opens. At the top of the pop-up, CAIRS tells you the recurrence pattern.
7. To exit, click the **Ok** button or the red **X** in the upper right hand corner of the pop-up window.

### **Switch Sync Logs**

The Switch Sync Logs displays a list of the syncs that have occurred, the list included a few details for each sync such as date, time, status, parameters, etc. There are two additional options within this button, you can 'Cancel the last submitted Sync' and 'Clear the Sync Log'.

### **Viewing Switch Sync Project Log**

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **Switch Sync Project**.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to schedule.
5. The General-Import screen opens. Within the Show ribbon group, click on the upper portion of the Switch Sync Log button.
6. The screen changes to displays a list of the syncs completed. The list displays the following read-only information:
  - **Request ID** – this is an internal code used by CAIRS to identify the sync request
  - **Sync Status** – displays the status of the sync, whether in progress, cancelled, etc.
  - **Sync Details** – displays any details for the sync
  - **Date Time** - displays the date and time the sync started
  - **Sync Parameters** - displays any unique parameters used for the sync
7. Click the plus sign (+) next to the request id to view the complete sync log details.

### **Switch Sync Log - Cancel Last Submitted Sync**

You can cancel the last submitted sync. This will only cancel syncs that have a status of not started or in progress.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **Switch Sync Project**.
4. The Switch Sync Project list opens to the right. Within the list, double click the name of the sync project.
5. The General-Import screen opens. Within the **Show** ribbon group, click the lower portion of the **Switch Sync Log** button to access a drop-down menu and from the menu select, **Cancel Last Submitted Sync**.
6. A message box appears verifying the last sync was cancelled successfully.

### **Clearing the Sync Log**

Clearing the sync log removes all the information from the log.

1. Click the **System Admin** menu.



2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **Switch Sync Project**.
4. The Switch Sync Project list opens to the right. Within the list, double click the name of the sync project.
5. The General-Import screen opens. Within the **Show** ribbon group, click the lower portion of the **Switch Sync Log** button to access a drop-down menu and from the menu select, **Clear Sync Log**.
6. A message box appears verifying that you really want to clear the log. Keep in mind that if a sync is in progress it clears that log as well and there will be no way to know if the sync was successfully.
7. Within the box, click **Yes** to continue clearing the log or **No** to cancel.

## Synchronizing Your Data

After building the Switch Sync Project, it is time to perform a switch sync. You can perform three different syncs

- **Sync Now** – compares data from within the switch to data within the CAIRS database.
- **Sync from File** – compares data you have within a file to data within the CAIRS database.
- **Resync from an existing report** – compares the data generated in a report to data within the CAIRS database.

When you created your switch sync project, you chose a comparison type and determined how the sync deals with certain records. If you choose the 'Compare all' type, the sync compares all data from both databases. Once complete, CAIRS generates reports with the out-of-sync data for both the CAIRS database and the switch.

The alternate comparison type, 'Ignore Not in Switch' compares both databases but generates a report showing records that are in CAIRS but not in the switch.

After any of the syncs run, you will get four reports, each displaying a different group of data from your switch or from CAIRS:

- **In Sync** – displays a list of the records found in both databases.
- **Out of Sync** – displays a list of out of sync records, that are either not in the switch database or not in the CAIRS database.
- **Unable to Sync** – displays a list of records CAIRS was unable to sync from either database.
- **Not In Switch** – displays a list of the records that are in your CAIRS database that are not in your switch database.

## Sync Now

This type of sync compares your existing CAIRS database to the switch database.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **Switch Sync Project**.
4. The Switch Sync Project list opens to the right. Within the list, double click the name of the sync project.
5. The General-Import screen opens. Within the **Synchronize** ribbon group, click the **Sync Now** button.
6. The Scripts window opens displaying the list of switch scripts that commit the information to the switch.
7. Click the plus sign (+) next to the script name to view a list of parameters and values that are required for the script to run successfully, complete all parameters (fields marked with an asterisk (\*) are required).
8. By clicking the appropriate button at the bottom of the pop-up you perform one of the following actions:
  - **Run Unattended** – click this button if you have scheduled the sync to occur in the future. This allows CAIRS to run the sync at the scheduled time. If there is no schedule in place, the sync runs immediately.
  - **Cancel** – click this button to cancel the sync and close the pop-up.
9. As the Sync is progressing, you will see a small popup in the lower right hand corner of your main monitor. This box displays the progress of the sync, there are a few statuses you should pay close attention to:
  - **Not Executed** – this status means that the sync is in the process of executing, CAIRS is still trying to contact CES to start the process.
  - **Script In Progress** – this means that WOPR has connected to the switch and it is in the process of running the script to get sync your data
  - **Script Failed** – if the script failed it is no big deal, check all your parameters and try to run the sync again, if it continues to fail please contact our technical support team
  - **Script Cancelled** – you have requested that the sync be cancelled, once you submit the request to cancel the script/sync should be completed in 10 seconds
  - **Sync in Progress** – this is good! CAIRS is communicating with your switch and bringing back the information to compare to the CAIRS database. Don't be alarmed this could take a while to complete.

- Sync Failed – don't panic! Check your parameters, script association and connections and try the sync again. If it fails again please contact our technical support team.
  - Sync Cancelled – you have requested that the sync be cancelled, once you submit the request to cancel the script/sync should be completed in 10 seconds
  - Setup Not Complete – there are a few more steps in the setup that not to be completed before the sync can run. Please check all your properties and make sure that they scripts are associated to the switch and try the sync again.
  - Waiting for Compare – the comparison process has not started yet, please make sure that the CES process has been enabled
  - Cancellation Requested – if you have requested to cancel the script or sync this status appears, it will be brief as the cancellation takes less than 10 seconds.
  - Completed – You are successful!! The sync ran properly and now you can view the Sync Results.
10. Once the sync is complete, you can view the report by clicking the **Sync Results** button within the **Report** ribbon group.

### ***Sync from a File***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **Switch Sync Project**.
4. The Switch Sync Project list opens to the right. Within the list, double click the name of the sync project.
5. The General-Import screen opens. Within the **Synchronize** ribbon group, click the **Sync From File** button.
6. The Open box opens allowing you to browse to and select the file to synchronize. Once you find the file, double click the file name.
7. A message box opens verifying that you really want to continue with the sync. Please be aware the sync may take significant time to complete. Click **Yes** to continue or **No** to cancel the operation.
8. As your sync progresses, you will see a small popup in the lower right hand of your main monitor. This box displays the progress of the sync,
9. Once your sync is complete, you can view the report by clicking the **Sync Results** button within the **Report** ribbon group.

### ***ReSync from an Existing Report***

1. Click the **System Admin** menu.

2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **Switch Sync Project**.
4. The Switch Sync Project list opens to the right. Within the list, double click the name of the sync project.
5. The General-Import screen opens. Within the **Synchronize** ribbon group, click the **Resync From Existing Report** button
6. A message box opens verifying that you really want to continue with the sync. Click **Yes** to continue or **No** to cancel the operation. Please be aware the sync may take significant time to complete.
7. Once your sync is complete, you can view the report by clicking the **Sync Results** button within the **Report** ribbon group.

## Sync Reports

Once you perform a switch sync, CAIRS creates a report for all data synced between the switch and the CAIRS database. Each report displays three pieces of information:

- **Out of Sync** – displays a list of out of sync records, that are either not in the switch database or not in the CAIRS database.
- **Not In Switch** – displays a list of the records that are in your CAIRS database that are not in your switch database.
- **Unable to Sync** – displays a list of records CAIRS was unable to sync from either database.
- **In Sync** – displays a list of the records found in both databases.

You can modified the records within the report and then perform a sync directly from the report.

### *Viewing a Report*

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **Switch Sync Project**.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to schedule.
5. The General-Import screen opens. Within the **Report** ribbon group, click the **Sync Results** button.
6. The Sync results display. There are four tabs of information:
  - **Out of Sync** – displays a list of out of sync records, meaning they are either not in the switch database or not in the CAIRS database.

- **Not In Switch** – displays a list of the records that are in your CAIRS database that are not in your switch database.
  - **Unable to Sync** – displays a list of records that CAIRS was unable to sync from either database.
  - **In Sync** – displays a list of the records appearing the same in both databases.
7. To view all the records within a pane, click the **Show All** link in the pane header.
  8. CAIRS allows only 500 records to display in a batch. To view more or less than 500 records, click in the textbox next to **Max Records to Send in Batch** and type-in a new number.
  9. By clicking the appropriate icon in the toolbar along the top of the window, you can export the information seen on your screen in either an Excel or PDF format.
  10. Once you have the file exported, you can save or print the information.
  11. To exit, click **Close**.

### **Out of Sync**

You may have records that are out of sync, meaning that they are in your switch database but they are not in CAIRS. These records are going to always be placed in the Out of Sync tab so you can determine what you want to do with them. Whether you want to sync the records into your CAIRS database or leave them out. For each record, each field is going to be represented in two columns, the first column displays the information from the switch the second column displays the information from the CAIRS database. The first three columns of the report are the most important:

- **Processing State** – if a record appears in this report the state is always going to say 'Waiting Evaluation', this lets you know the ball is in your court
- **Record State** – this column is always going to state 'Not in CAIRS' these records reside in your switch but not in CAIRS
- **Status** – this column is going to give the reason why record did not sync, this could be anything from a duplicate record to telephone number not in switch.

There are a few choices you have when dealing with the records. At the top of the pane are two buttons:

- **Sync Out of Sync Records** – after you have resolved any discrepancies or issues with the records you can try to sync the entire report again.
- **Sync Single Number or Port** – this allows you to sync individual records within the report. After you have resolved the discrepancy, click on the row to highlight and then click the button.

---

## **EWSD Switch Sync**

The four EWSD switch syncs are:

- **Set Device Syncs** – compares the set device data in your CAIRS database to the switch data.
- **Port Syncs** – compares the port numbers in your CAIRS database to the switch data.
- **Feature Key Map (FKM) Syncs** (for EWSD switches) – compares the features key maps for the sets in the CAIRS database to the data in the switch.
- **Hunt Group Syncs** – compares the hunt group data in your CAIRS database to the switch data.

## Sync Schedules

Switch syncs can be set up to run at a set time by creating a sync schedule. Existing sync schedules can also be modified or deleted.

### *Creating a Sync Schedule*

Switch syncs can be scheduled to run automatically on a daily, weekly, or monthly basis.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **EWSD Switch Sync**.
4. The Switch Sync list opens to the right, displaying switch name and types. Double click the switch name to synchronize.
5. The Switch Sync – [Switch Recurrence] window opens. The top pane displays two columns: the Sync Type and the Next Date Time column. This pane displays the four available sync types.
6. Click the sync type you want to schedule.
7. Once you have highlighted the sync type, type the sync start time in the **Appointment** time box. Use the arrow keys to increase or decrease the time.
8. Within the **Recurrence** pattern pane, select how often to perform the sync. There are three choices:
  - **Daily** – you can schedule the sync to occur every day, every 1 -7 days, or every weekday.
  - **Weekly** – you can schedule the sync to occur every week, every other week, etc. You will also provide the day of the week to perform the sync.
  - **Monthly** – you can schedule the sync on a monthly basis and choose within that month when you want the sync performed. For example, you can schedule the sync on the 1<sup>st</sup> of every month (or every other month, etc.) or; you can schedule the sync on the 3<sup>rd</sup> Saturday of every month (or every other month, etc.).
9. Within the **Range of recurrence** pane, enter the Start date using the drop-down calendar. From the calendar, select the date to start the switch sync. To change the

year, click the current year to access a set of up and down arrows. Click the appropriate arrow to select the year. To change the month, click the right or left arrow. Once at the appropriate month, click the number to select the date. The date populates in the box

10. To save this schedule, go to the **Schedule** ribbon group, and click the **Save Schedule** button.
11. The top pane will display the date and the time of your scheduled sync in the **Next Date Time** column.
12. To exit, click **Close**.

### ***Viewing Sync Schedules***

You can view existing sync schedules.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign next to **Data Sync Center** to expand the menu items.
3. Click **EWSD Switch Sync**.
4. The Switch Sync list opens to the right displaying the switch names. Double click a switch name.
5. The Switch Sync – [Switch Recurrence] window opens. The top pane displays two columns: Sync Type and Next Date Time. This table displays all scheduled syncs including their date and times.
6. To view the sync schedule in more detail, click a sync type. Its start time, recurrence, and date range displays below.
7. To exit, click **Close**.

### ***Modifying a Sync Schedule***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign next to **Data Sync Center** to expand the menu items.
3. Click on **EWSD Switch Sync**.
4. The **Switch Sync** list opens to the right displaying switch names. Double click a switch name.
5. The **Switch Sync** – [Switch Recurrence] window opens. The top pane displays two columns: **the Sync Type and the Next Date Time** columns. This table displays all scheduled syncs along with the date and the time.
6. Click the sync schedule to modify. Its start time, recurrence, and date range displays below.
7. Modify fields as necessary.

8. To save changes, go to the **Schedule** ribbon group and click the **Save Schedule** button.
9. To exit, click **Close**.

### ***Deleting a Sync Schedule***

You can delete the synch schedule if you no longer need a scheduled sync.

1. Click the **System Admin** menu.
2. In the Navigation pane, click the plus sign next to **Data Sync Center** to expand the menu items.
3. Click **EWSD Switch Sync**.
4. The Switch Sync list opens to the right displaying switch names. Double click a switch name.
5. The Switch Sync – [Switch Recurrence] window opens. The top pane displays two columns: the Sync Type and the Next Date Time columns. This table displays all scheduled syncs, along with their date and time.
6. Click on the sync schedule to delete. Its start time, recurrence, and date range displays below.
7. Go to the **Schedule** ribbon group and click the **Delete Schedule** button.
8. The scheduled date and time is removed from the Next Date Time column indicating the schedule has been deleted.
9. To exit, click **Close**.

### **EWSD Switch Sync Logs**

CAIRS keeps a record of all syncs and sync details in a log. The sync status, sync date and time, the person who performed the sync, and the total number of out-of-sync records are displayed in the log.

#### ***Viewing Sync Log***

The **Sync Logs** display the types of syncs performed, the date and time of the syncs, and the results of those syncs (the number of out-of-sync records).

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **Switch Sync Project**.
4. The Switch Sync Project list opens to the right. Within the list, double click the project.
5. The Switch Sync – [Switch Recurrence] window opens. Within the **Sync Log** ribbon group, click the **Sync Log** button.



6. The Sync Details pane opens displaying the details of all syncs. CAIRS displays the following information in the sync log:
  - **Sync Type** – displays the performed sync type.
  - **Sync Status** – displays the sync status: completed or failed.
  - **Sync Details** – displays a brief sync description.
  - **Notification Message** – displays messages received during the sync.
  - **Error Message** – displays error messages received during the sync.
  - **Sync Parameters** – displays the sync parameters. For example, if the sync was run on a range of numbers or the entire switch database.
  - **Date & Time** – displays the sync date and time.
  - **Records Out of Sync** – displays how many records were out of sync.
7. To exit, click **Close**.

### ***Clearing the Sync Log***

Clearing the sync log removes all log information.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **EWSD Switch Sync Project**.
4. The Switch Sync Project list opens to the right. Within the list double click the project to view.
5. The Switch Sync – [Switch Recurrence] window opens. Within the **Sync Log** ribbon group, click the **Sync Log** button.
6. The Sync Details pane opens displaying the details of all syncs. Within the list, highlight the sync you want to clear.

---

**!** Be aware there is no undo button so once you click delete the log is gone.

---

7. Within the **Sync Log** ribbon group, click the **Delete Sync Log** button.
8. To exit, click **Close**.

### **Set Device Sync**

To compare the set device data in your CAIRS database to the set device data in your switch you can perform a **Set Device** sync. The purpose of the sync is to see if the CAIRS database correctly reflects the switch database.

Set Device syncs also check for the Line Class Code, Call Pickup and Intercom Group features. (Note: Multiline Hunt Group synchronization is done through the Hunt Group Syncs.)

Run Set Device syncs anytime manually or schedule them at set time(s). (Please refer to the 'Creating a Sync Schedule' section to setup a Set Device sync schedule.)

### ***Performing a Set Device Sync***

To run a Set Device Sync manually, complete the following steps:

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **EWSD Switch Sync Project**.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to view.
5. The Switch Sync – [Switch Recurrence] window opens. Within the **Set Device Sync** ribbon group, click the **Get Switch Set Device** button.
6. To send the script to the switch, click **Yes** to the message. CAIRS performs the set device sync.

### ***Viewing Set Device Sync Results***

After performing the Set Device sync, you can see what records are in-sync (in CAIRS and the switch) and which ones are out-of-sync (missing in CAIRS or in the switch).

Skip steps #1 through #5 if you have just completed a manual sync and/or you are already in the **Switch Sync** window.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **EWSD Switch Sync Project**.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to view.
5. The Switch Sync – [Switch Recurrence] window opens.
6. To view in-sync set device data (data in the CAIRS database and the switch), within the **Set Device Sync** ribbon group, click the **In Sync** button.
7. To view out-of-sync set device data (data in the CAIRS database but not in the switch database or data within the switch but not in the CAIRS database), within the **Set Device Sync** ribbon group, click the **Out of Sync** button. The Sync Details pane opens displaying the out-of-sync data.
8. To view the out-of-sync port numbers (numbers missing in CAIRS), click the upper portion of the **Out of Sync** button within the **Port Sync** ribbon group
9. The Sync Details pane opens displaying the out-of-sync data. To resolve the out-of-sync port numbers, refer to the 'Resolving Ports Sync Discrepancies' section.
10. To exit, click **Close**.

## ***Resolving Set Device Sync Discrepancies***

CAIRS offers an import function that resolves out-of-sync set device records by bringing the switch records into the CAIRS database.

To minimize errors and speed up the import process, resolve all analog sets first followed by all main listed numbers of digital sets (#1 button). Lastly, resolve any other appearances of those main digital sets.

Skip steps #1 through #5 if you have just completed a manual Set Device Sync and/or you are already in the Switch Sync window.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **EWSD Switch Sync Project**.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to view.
5. The Switch Sync – [Switch Recurrence] window opens.
6. To view and resolve the out-of-sync set device records (data within the CAIRS database, but not in the switch, or data within the switch but not in the CAIRS database), click the upper portion of the **Out of Sync** button within the **Set Device Sync** ribbon group.
7. The Sync Details pane opens displaying the out-of-sync data.
8. To resolve all discrepancies at once and import all out-of-sync set devices into CAIRS, click the lower portion of the **Out of Sync** button to access a dropdown list. From the list select **Import All**
9. To resolve an individual record, double-click a record to review. The Switch Sync window opens displaying two panes.
  - **CAIRS Data pane** – displays the set device details if the record is in the CAIRS database and not in the switch.
  - **Switch Data pane** – displays the set device details if the record is in the switch database and not in CAIRS.
10. If the information within the CAIRS pane is populated, the set exists within the CAIRS database and not in the switch. You can delete the set from CAIRS by clicking the **Delete** button within the **Switch Sync Import** pop-up. Be aware there is no undo button so once you click Delete the set is gone.
11. If the information within the switch pane is populated, the set exists within the switch but not in the CAIRS database. You can import the individual sets by clicking the **Import** button within the **Switch Sync Import** pop-up.
12. You can import all records appearing in the switch database but not in the CAIRS database by clicking the lower portion of the **Out of Sync** button within the **Set Device Sync** ribbon group. From the dropdown list, select **Import All**.

13. A pop-up message appears stating the sync process may take at least 1 second per record. Also, the import sync from the switch to the CAIRS database only works for sets already assigned in the database and with identical port types. Click **O** to continue.
14. Once the import is complete, another message pop-up appears stating the process is complete.
15. Click **OK** to continue.

## Port Sync

Initially a port sync goes to the switch and brings all port numbers (EQN for EWSD) from the switch into the CAIRS database. Subsequent syncs compare the port numbers in the CAIRS database with the ones in the switch. If CAIRS is missing any port numbers, those numbers show up as 'out-of-sync' numbers. Those 'out-of-sync' port numbers can then be imported into the CAIRS database.

### *Performing a Port Sync*

Run a Port Sync automatically by setting up a Sync Schedule. (Please refer to the 'Creating a Sync Schedule' section.) To run a Port Sync manually, complete the following steps:

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **EWSD Switch Sync Project**.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to view.
5. The Switch Sync – [Switch Recurrence] window opens. Within the **Port Sync** ribbon group, click the **Get Switch Ports** button.
6. To send the script to the switch click **Yes** to the message. CAIRS then executes the port sync.

### *Viewing Ports Sync Results*

After a port sync, you can view all 'in-sync' (records in both CAIRS and in the switch) and 'out-of-sync' port numbers (records that are missing in CAIRS but are in the switch).

Skip steps #1 through #5 if you have just completed a manual sync and/or you are already in the **Switch Sync** window.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **EWSD Switch Sync Project**.

4. The Switch Sync Project list opens to the right. Within the list double click the project to view.
5. The Switch Sync – [Switch Recurrence] window opens.
6. To view the in-sync port data (data in the CAIRS database and in the switch), click the **In Sync** button within the **Port Sync** ribbon group. The Sync Details pane opens displaying the set device records.
7. To view out-of-sync port data (data in the CAIRS but not in the switch database or data within the switch but not in the CAIRS database), click the upper portion of the **Out of Sync** button within the **Port Sync** ribbon group. The Sync Details pane opens displaying the out-of-sync data.
8. To resolve the out-of-sync port numbers, refer to the 'Resolving Ports Sync Discrepancies' section.
9. To exit, click **Close**.

### ***Resolving Port Sync Discrepancies***

To resolve out-of-sync port number records, CAIRS offers an import function that brings the switch port numbers into the CAIRS database.

Skip steps #1 through #5 if you have just completed a manual sync and/or you are already in the **Switch Sync** window.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **EWSD Switch Sync Project**.
4. The Switch Sync Project list opens to the right. Within the list double click the project to view.
5. The Switch Sync – [Switch Recurrence] window opens. Double click the sync project
6. To view and resolve the out-of-sync port data (data within the CAIRS database, but not the switch, or data within the switch but not in the CAIRS database), click the upper portion of the **Out of Sync** button within the **Set Device Sync** ribbon group.
7. The Sync Details pane displays all port numbers in the switch and not in the CAIRS database.
8. To resolve all discrepancies at once and import all out-of-sync ports into CAIRS, click the lower portion of the **Out of Sync** button to access a dropdown list. From the list, select **Import All**.
9. To resolve an individual record, double-click a record to review. The Switch Sync window opens displaying two panes.
  - **CAIRS Data pane** – displays the port number details if the record is in the CAIRS database and not in the switch.

- **Switch Data pane** – displays the port number details if the record is in the switch and not in CAIRS.
10. If the information within the CAIRS Data pane is populated, the port exists within the CAIRS database and not in the switch. You can delete the set from CAIRS by clicking the **Delete** button within the **Switch Sync Import** pop-up. There is no undo button so once you click Delete the set is gone.
  11. If the information within the switch pane is populated, the port exists within the switch but not in the CAIRS database. Import the individual ports by clicking the **Import** button within the **Switch Sync Import** pop-up.
  12. To exit, click **Close**.

## Feature Key Map Sync for EWSD only

Feature Key Map syncs bring the Feature Key Maps (FKM) pre-programmed into the EWSD switches by the switch technicians into the CAIRS database. The initial sync brings in all FKM's and the subsequent syncs checks for FKM's not within the CAIRS database. We classify the missing FKM's as 'out of sync' since they are on the switch but not in the CAIRS database. CAIRS offers you the option to view the 'out of sync' data and import it into you CAIRS database synchronizing the two databases. (Note: If you want to add additional Feature Key Maps into the switch, you must add those directly into the switch. Please refer to your switch technicians as CAIRS only imports what is already in the switch.)

### *Performing a Feature Key Map Sync*

You can get the switch Feature Key Map (FKM) for EWSD switch types by performing a FKM sync. A FKM sync can be run automatically by setting up a Sync Schedule (refer to the 'Creating a Sync Schedule' section) or run manually. To run a FKM Sync manually, complete the following steps:

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **EWSD Switch Sync Project**.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to view.
5. The Switch Sync – [Switch Recurrence] window opens. Within the **FKM Sync** ribbon group, click the **Get Switch FKM** button.
6. Click **Yes** to the **Send Script to Switch** message. CAIRS executes the FKM sync.

### *Viewing FKM Sync Results*

After a **FKM sync**, you can view all 'in-sync' FKMs (records in both CAIRS and the switch) and 'out-of-sync' (records missing in CAIRS but in the switch).

Skip steps #1 through #5 if you have just completed a manual sync and/or you are already in the **Switch Sync** window.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **EWSD Switch Sync Project**.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to view.
5. The Switch Sync – [Switch Recurrence] window opens.
6. To view the in-sync FKM data (data in the CAIRS database and the switch), click the **In Sync** button within the **FKM Sync** ribbon group. The Sync Details pane opens displaying the set device records.
7. To view the out-of-sync FKM data (data in CAIRS but not in the switch database or data within the switch but not in the CAIRS database), click the upper portion of the **Out of Sync** button within the **Port Sync** ribbon group. The Sync Details pane opens displaying the out-of-sync data.
8. To resolve these discrepancies refer to the 'Resolving FKM Sync Discrepancies' section.
9. To exit, click **Close**.

### ***Resolving FKM Sync Discrepancies***

To resolve out-of-sync FKM data, CAIRS offers an import function that brings in the FKMs from the switch into the CAIRS database.

Skip steps #1 through #5 if you have just completed a manual sync and/or you are already in the **Switch Sync** window.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click on **EWSD Switch Sync Project**.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to view.
5. The Switch Sync – [Switch Recurrence] window opens. Double click the sync project
6. To view the out-of-sync data (data in the switch but not in CAIRS), within the **FKM Sync** ribbon group, click the **Out of Sync** button.
7. The Sync Details pane opens displaying the out-of-sync FKM data.
8. To resolve all discrepancies at once and import all out-of-sync ports into CAIRS, click the lower portion of the **Out of Sync** button (within the **FKM Sync** ribbon group) to access a dropdown list. From the list, select **Import All**.

9. To resolve individual records one by one, double-click a record to review.  
The Switch Sync window opens displaying two panes:
  - **CAIRS Data pane** – displays the FKM details if the record is in the CAIRS database and not in the switch.
  - **Switch Data pane** – displays the FKM details if the record is in the switch and not in CAIRS.
10. If the information within the CAIRS pane is populated, the FKM exists within the CAIRS database and not in the switch. You can delete the set from CAIRS by clicking the **Delete** button within the **Switch Sync Import** pop-up. There is no undo button so once you click delete the set is gone.
11. If the information within the switch pane is populated, the FKM exists within the switch but not in the CAIRS database. You can import the individual FKM by clicking the **Import** button within the **Switch Sync Import** pop-up.
12. To exit, click **Close**.

## Hunt Group Sync

Hunt Group syncs check the Multiline Hunt Group records in the CAIRS database against the switch. After a Hunt Group sync, CAIRS displays any discrepancies. An import function brings any missing data into CAIRS..

### *Performing a Hunt Group Sync*

Run a Hunt Group Sync automatically by setting up a Sync Schedule. (Please refer to the 'Creating a Sync Schedule' section.) To run a Set Device Sync manually, complete the following steps:

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click on the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **EWSD Switch Sync Project**.
4. The Switch Sync Project list opens to the right. Within the list, double click on the project to view.
5. The Switch Sync – [Switch Recurrence] window opens. Within the **Hunt Group Sync** ribbon group, click the **Get Switch Hunt Group** button.
6. Click **Yes** to the **Send Script** message. CAIRS executes the Hunt Group sync.

### *Viewing Hunt Group Sync Results*

After performing a Hunt Group sync, you can see if the sync was successful and if any data is out of sync.

Skip steps #1 through #5 if you have just completed a manual sync and/or you are already in the Switch Sync window.



1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **EWSD Switch Sync Project**.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to view.
5. The Switch Sync – [Switch Recurrence] window opens. Double click the sync project.
6. Click the upper portion of the **Out of Sync** button within the **Port Sync** ribbon group
7. To view the in-sync Hunt Group data (data in CAIRS but not the switch database or data within the switch but not in the CAIRS database), click the **In Sync** button within the **Hunt Group Sync** ribbon group. The Sync Details pane opens displaying the out-of-sync data.
8. To view the out-of-sync Hunt Group data (data in CAIRS but not the switch database or data within the switch but not in the CAIRS database), click the upper portion of the **Out of Sync** button within the **Port Sync** ribbon group.
9. The **Sync Details** pane opens displaying the out-of-sync data.
10. To resolve the out-of-sync port numbers, refer to the '**Resolving Ports Sync Discrepancies**' section.
11. To exit, click **Close**.

### ***Resolving Hunt Group Sync Discrepancies***

To resolve out-of-sync Hunt Group data, CAIRS offers an import function that brings in the hunt group records from the switch into the CAIRS database.

Skip steps #1 through #5 if you have just completed a manual Hunt Group Sync and/or you are already in the Switch Sync window.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **EWSD Switch Sync Project**.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to view.
5. The Switch Sync – [Switch Recurrence] window opens. Double click the sync project
6. To view and resolve the out-of-sync Hunt Group data (data within the CAIRS database, but not the switch, or data within the switch but not the CAIRS database), click the upper portion of the **Out of Sync** button within the **Hunt Group Sync** ribbon group.
7. The Sync Details pane opens displaying the out-of-sync data.

8. To resolve all discrepancies at once and import all out-of-sync set devices into CAIRS, click the lower portion of the **Out of Sync** button to access a dropdown list. From the list select **Import All**.
9. To resolve an individual record, double-click a record to review. The Switch Sync window opens displaying two panes.
  - **CAIRS Data pane** – displays the multiline hunt group details if the record is in the CAIRS database and not in the switch.
  - **Switch Data pane** – displays the multiline hunt group details if the record is in the switch and not in cair.net.
10. If the information populates within the CAIRS pane, the group exists within the CAIRS database and not the switch. You can delete the group from CAIRS by clicking the **Delete** button within the **Switch Sync Import** pop-up. There is no undo button so once you click **Delete** the information is gone.
11. If the information populates within the switch pane, the group exists within the switch but not the CAIRS database. You can import the individual groups by clicking the **Import** button within the **Switch Sync Import** pop-up.
12. To exit, click **Close**.

## 411 Interface

The 411 Interface allows you to export directory information from the CAIRS database to send to another program. This is a two-step process, first you create the template, this defines file format, path, file name, etc. The second step is to create the actual file that you send to the other program.

There are two views available for sorting the 411 Interface list, Simple and Format 411. The Simple list is the default and displays the interfaces in alphabetical order. The Format 411 list, sorts the list based on the file type that you are creating whether, Fixed Width, Tab or XML.

### *Creating a 411 Interface Template*

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **411 Interface**.
4. Within the **Actions** pane, click the **Add New Interface 411** link.
5. The General-411 Interface window opens. Within the window, complete the following fields, required fields are marked with an asterisk:
  - **Template Name \*** – type-in the template name.
  - **Format 411 \*** - click the drop-down arrow to access a format list. From the list, select one of the following file formats:

- Fixed Width
  - Tab
  - XML
  - CSV
- **Path \*** - type-in the path of where you want to save, whether on a network drive or locally
  - **Field Name** – type-in the name of the file, if you leave this field blank CAIRS automatically names the file with date generated.
  - **Use Phone Book** – click the box to insert a checkmark to indicate that the directory information for the interface will come from the Phone Book and not Configured Items
  - **Show Header** – click the box to insert a checkmark to indicate that the file generated contains a header
  - **Run On Schedule** – check mark the box to indicate you want the interface to run on the schedule you set within Service Manager. Leave the field blank to indicate you will run the interface manually.
6. At this point, you should save your progress, within the Actions ribbon group click Save to save your changes and continue working with the template.
  7. Next, you can determine what sites to include in the interface. Within the **Show** ribbon group, click the **Sites** button. The window displays two panes of information; the top pane displays the sites associated to the interface. The lower pane displays a list of all the sites within your database, the following read-only information is available for each site:
    - **Site Name** – displays the name of the site, this is the lowest level of the site tree.
    - **Site Path** – displays the complete path to the site. Each level is separated by a >.
    - **Site Level** – displays the site level name or number.
    - **Site Code** – displays the three-digit alphanumeric site code.
  8. To add a site to the interface, find the site within the **Available Sites** pane, and double click on the record. The site name now appears within the upper pane.
  9. You can associate all sites to the interface by clicking the lower portion of the sites button and selecting Select All Sites. Alternatively, you can unselect all sites by clicking the lower portion of the sites button and selecting Unselect All Sites.

---

**!** Be aware that sites do not inherit the associations of their parents. You must associate each level to the account. For example, if you associate a parent and want all the children associated you must associate all children site as well.

---

10. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue adding information for the interface, or click **Save & Close** (to save and exit) to return to the 411 Interface list.

### **Column Mapping**

Within Column Mapping you can take fields from the CAIRS database and associate a custom field name. For example, in CAIRS the field is called Directory Building Name, however in your 411 system it is called Common Building Name. Within Column Mapping, you can have CAIRS change the field name when the interface is completed.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **411 Interface**.
4. The list of existing template populates to the right, within the list, click on the template to modify.
5. Within the Show ribbon group, click on the Column Mapping button. Within the window complete the following fields, required fields are marked with an asterisk:
  - **Sort Index \*** - this is the position of the where the field appears in the file, a sort position of 1 means the field will be listed first. Type-in the numeric sort position
  - **Table Name \*** - click the field to access a dropdown arrow, click the arrow to access a list of the following tables that are in your CAIRS database:
    - Configured Directory Line
    - Number Plan Main
    - Number Plan Listing – Directory Number
    - Set Device
    - Subscriber
    - Building
    - Connectivity
    - Switch – Specific Class of Service
    - Class of Service Name
    - Organization Path
    - Directory Line Multiple Listing
    - Listing Subscriber

Once you select the table, the field name column displays only the fields that pertain to the table. For example, if you select the Subscriber Main table, the

- field names will pertain to only the information for a subscriber, such as first name, last name, rank, grade, etc.
- **Field Name** \* - click the field to access a dropdown arrow, click the arrow to access a list of the fields that pertain to the table selected.
  - **Custom Name** – type-in the custom field name, for example, if the CAIRS field name is connection, you can use this field to change the name to cable when the file generates.
6. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue adding information for the interface, or click **Save & Close** (to save and exit) to return to the 411 Interface list.

### ***Creating Files***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **411 Interface**.
4. The list of existing template populates to the right, within the list, click on the template to use to create your 411 files.
5. Within the **Interface** ribbon group, click the **Create Files** button.
6. A textbox displays indicating the interface is complete. Click the **Ok** button.
7. CAIRS creates a file to the location indicated in the Path field in the General Settings. Depending on your format type selected the file extension changes for example, if you chose Tab the file extension is .asc.

### ***Deleting an Interface***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **411 Interface**.
4. In the **411 Interface** list, click the interface you want to delete.
5. There are two ways to delete a interface:
  - Within the list, highlight the interface name. In the **Actions** pane, click the **Delete Interface411** link.
  - Double click the interface name within the list. The 411 Interface window opens. Within the **Actions** ribbon group, click the **Delete** button.
6. Once you click Delete, a message box appears verifying that you really want to delete the interface. Click **Yes** to continue or **No** to cancel the operation.

---

## 911 Interface

From the 911 Interface, you create a template that gathers directory information from the CAIRS database to send to another 911 program. This is a two-step process, first you create the template, this defines file format, extension length, etc. If you are creating a NENA file, the second step requires you to map or associate the fields within the NENA file to field within CAIRS.

### *Creating a 911 Interface Template*

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **911 Interface**.
4. Within the **Actions** pane, click the **Add New Interface 911** link.
5. The General-911 Interface window opens. There are two panes of information; the top pane contains the general template information and the bottom pane displays the number plans included in the interface.
6. Within the top pane, configure the following fields. Required fields are indicated by an asterisk:
  - Template Name\* – type-in the template name.
  - Format 911\* – click the drop-down arrow to access a format list. From the list, select one of the following file formats:
    - NENA
    - UCID
    - XML
    - CSV

---

**!** Depending on the format that you choose, the fields may be different. For the purposes of this document, we will define all fields.

---

- Path\* – double-click the field to access the Browse For Folder pop-up. Within the pop-up, browse to the location you want to create the files.
- File Name – you are creating a file to send to another system, this will be the name of the file.
- Extension Length\* – from the drop-down list select the extension length, 3 to 10 digits.
- Last Date Time – populates with the date and time of the last 911 file created.
- NENA Format – when you select the NENA format, this field auto-populates to the NENA 2 format.

- Initialize or Change – type-in I for initial, meaning you are creating a brand new file to send or type-in C for change meaning you only want to send the changes made within the database to the 911 system.
  - Email Address – if CAIRS has the capability to email notification, when a 911 interface creates the file this email address will receive a notification
  - Company Name – type-in the company name.
  - State – type-in your state code.
  - Extract Date – this field populates with the current date.
  - Country ID – type-in your country id.
  - Cycle Counter – type-in the cycle counter.
  - Modify Termination – check mark the field to indicate you want to modify the termination.
  - No Header Footer –check mark the field to indicate the created file will not have a header or footer.
  - Include All Number – checkmark the field to indicate that all numbers are included in the interface
  - Include Duplicate Number – checkmark the field to indicate that duplicate numbers are included in the interface
  - Run on Schedule – check mark the box to indicate you want the interface to run on the schedule you set within Service Manager. Leave the field blank to indicate you will run the interface manually.
7. The lower pane displays a list of the Number Plans within your database. This pane allows you to select which number plans to include in the interface file. To include a number plan, click on the box in the Include column.

---

**!** The numbers, if any, within the Interface 911 Prefix column append to each number transferred in the interface. For example, if you have an extension length of 7 and the prefix of 702, each number transferred starts with the 702 and then the 7-digit number. This allows you to send more digits through the interface than what you track within your CAIRS database. You add the 911 Prefix within the Number Plan.

---

8. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue adding information for the interface, or click **Save & Close** (to save and exit) to return to the 911 Interface list.

### ***NENA Column Mapping***

Once you have created the basic information for the interface, you can connect the fields together. This means that you are associating the fields within NENA to the field within CAIRS. There are ten columns of information:

- **NENA Field** – displays the field name within the NENA field

- **NENA Size** – displays the maximum character limit for the NENA field
- **Default Mapping** – displays the default CAIRS field that is associated with the NENA field
- **Custom Mapping Table and Custom Mapping Field** – for fields that do not appear in the default mapping, you can use these two columns to pull fields from different tables within your database. Once you select the table, the associated fields populate with the mapping field column allowing you to select any field that appears in that table.
- **Cisco Custom Mapping Table and Custom Mapping Field** – these columns pull fields from the tables that are specific to a Cisco Call Manager
- **AS5300 Custom Mapping Table and Custom Mapping Field** – these columns pull fields from the tables that are specific to a Avaya AS5300 switch
- **Custom Value** – displays the static field value, for example, you may want to pre-define your state id for all numbers included in the file. Within this field, you would type-in your state abbreviation.

---

**!** You cannot have a value in both the custom mapping field and the custom value. If you try to enter information into the custom value field, it will delete your selection in the custom mapping table and field columns and vice versa.

---

### ***Modifying the Field Mapping***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **911 Interface**. The list of existing template populates to the right, within the list, click on the template to modify.
4. Within the Show ribbon group, click on the Column Mapping button.
5. The screen changes to display the five columns listed above. You will notice that we have pre-determined some fields for you. However, you can change those values at any time.
6. In the list, find the field to modify, within the Column Mapping Table column click on the field to access a dropdown list. From the list select the appropriate table, for example, if you were mapping Building Name you would select Building. There are several different tables to choose from, each having its own set of custom fields, you may have to try a few selections before you find the appropriate table/field combination.
7. Next, you select the field to associate. Within the Column Mapping Field column, click on the field to access a dropdown list, from the list select the CAIRS field name.



8. Continue mapping fields together. Once complete, within the **Actions** ribbon group, click **Save** (to save and stay) to continue adding information for the interface, or click **Save & Close** (to save and exit) to return to the 911 Interface list.

### **CSV Column Mapping**

Once you have created the basic information for the interface, you can connect the fields together. This means that you are associating the fields within your CSV file to the field within CAIRS. There are nine columns of information:

- **CSV Field** – displays the field name within the NENA field
- **CSV Size** – displays the maximum character limit, most fields are defaulted to 60 characters
- **Custom Mapping Table and Custom Mapping Field** – you can use these two columns to pull fields from different tables within your database. Once you select the table, the associated fields populate with the mapping field column allowing you to select any field that appears in that table.
- **Cisco Custom Mapping Table and Custom Mapping Field** – these columns pull fields from the tables that are specific to a Cisco Call Manager
- **AS5300 Custom Mapping Table and Custom Mapping Field** – these columns pull fields from the tables that are specific to a Avaya AS5300 switch
- **Custom Value** – displays the static field value, for example, you may want to pre-define your state id for all numbers included in the file. Within this field, you would type-in your state abbreviation.

---

**!** You cannot have a value in both the custom mapping field and the custom value. If you try to enter information into the custom value field, it will delete your selection in the custom mapping table and field columns and vice versa.

---

### **Modifying the Field Mapping**

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **911 Interface**. The list of existing template populates to the right, within the list, click on the template to modify.
4. Within the Show ribbon group, click on the Column Mapping button.
5. The screen changes to display the nine columns listed above.
6. There are 21 miscellaneous fields that you will need to map for information to appear within the interface files. For each field select the Custom Mapping Table first. This will populate the fields within the dropdown for the Custom Mapping Field column.
7. Within the Custom Mapping Field column, select the field that you want to appear in the interface file. There are several different tables to choose from, each having its

own set of custom fields, you may have to try a few selections before you find the appropriate table/field combination.

8. Please note that if you do not put anything in each field, a column will still appear in the interface file. If you do not want the field to appear select 'NONE' in both columns.
9. Once complete, within the Actions ribbon group, click Save (to save and stay) to continue adding information for the interface, or click Save & Close (to save and exit) to return to the 911 Interface list.

### ***Creating Files***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **911 Interface**.
4. In the **911 Interface** list, double click the interface to modify. The General-911 Interface window opens.
5. Within the **Interface** ribbon group, click the **Create Files** button.
6. A textbox displays indicating the interface is complete. Click the **Ok** button.
7. CAIRS creates a file to the location indicated in the Path field in the General Settings. Depending on your format type, selected the file extension changes for example, if you chose UCID the file extension is .INX.

### ***Deleting an Interface***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Data Sync Center** to expand the menu items.
3. Click **911 Interface**.
4. In the **911 Interface** list, click the interface you want to delete.
5. There are two ways to delete a interface:
  - Within the list, highlight the interface name. In the **Actions** pane click the **Delete Interface911** link.
  - Double click the interface name within the list. The 911 Interface window opens. Within the **Actions** ribbon group, click the **Delete** button.
6. Once you click Delete, a message box appears verifying that you really want to delete the interface. Click **Yes** to continue or **No** to cancel the operation.

---

## Import External Data

These tools are used during the initial installation of CAIRS by Unique Communications installers and database experts to import customer data into the CAIRS database. Please contact Unique Communication Solutions technical support for further details.

# Work Flow Setup

Within Work Flow Setup, your CAIRS administrator customizes each workflow to mirror the actual way you do business. There are two parts to each workflow: work centers and time frames. Each workflow contains one or more work centers and each work center is responsible for completing fields within a Data Component. When fields are required to be completed in a time sequence, work centers are placed into Time Frames. The Time Frame allows one work center to complete its fields before sending the work order onto the next time frame.

The CAIRS administrator defines each step in a work order including where each step fits into the required time sequence (Time Frame) and how many time frames each work order requires. The CAIRS administrator works hand-in-hand with a Unique Communications representative to design your sites work centers and work flows.

## Work Center

Work Center defines each stop a workflow needs to make to be completed. A work center can be an individual, an organization, an outside recourse, etc. Some Work Flows require only one Work Center, while others require several Work Centers.

When more than one Work Center is required, there may be a required sequential order for the workflow. This requires the use of multiple Time Frames in the CAIRS software. The Time Frames sequence the workflow follows is established when the Work Flow is established.

When creating a new work or trouble ticket you need to select the work order required for that specific order type. This allows the CAIRS software to recognize all the required steps for all Work Centers involved to complete the order.

### *Adding a Work Center*

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Work Flow Setup** to access the sub-menus.
3. Click **Work Center**.
4. There are two ways to add a work center:
  - Within the tool bar directly above the **Navigation** pane, click the dropdown arrow next to **New**. From the list, select **Work Center**.
  - Within the **Actions** pane, click the **Add New Work Center** link.

5. The Work Center window opens. In the **Work Center Name** field, type-in the new name.
6. Within the Actions ribbon group, click on the **Save** (to save and stay) button, click on the **Save & Close** (to save and exit) button, or click on the **Save & New** (to save and refresh the screen) button to continue adding in additional work centers.

### ***Deleting a Work Center***

Before deleting a work center, please ensure all work orders containing the work center are closed.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Work Flow Setup** to access the sub-menus.
3. Click **Work Center**.
4. The Work Center list opens to the right. Within the list, highlight the work center to delete. There are two ways to delete a work center:
  - Within the tool bar directly above the **Navigation** pane, click the red X.
  - Double click the work center name within the list. The Work Center window opens. Within the **Actions** ribbon group, click the **Delete** button.
5. Once you click on Delete, a message box appears verifying that you really want to delete the work center, click **Yes** to continue or **No** to cancel the operation.

### **Work Order Custom Fields**

Custom Fields allow you to add necessary information, measures of progress, specific details, etc. to work orders.

#### ***Adding a Work Order Custom Field***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Work Flow Setup** to access the sub-menus.
3. Click **Work Flow Custom Fields**.
4. There are two ways to add a custom field:
  - Within the tool bar directly above the **Navigation** pane, click the dropdown arrow next to **New**. From the list select **Work Flow Custom Fields**.
  - Within the **Actions** pane, click the **Add New Work Flow Custom** link.
5. With either option, the General - Custom Fields window opens. Complete the following fields for the custom field:
  - **Group Name** – click on the dropdown arrow to access a list and from the list, select the group name the custom field will belong to.

- **Field Name** – type-in the custom field’s new name.
- **Field Type** – click the dropdown arrow to access a list from the list, select whether the field is a Yes/No, Text, Entry Date, or Drop Down.

**!** If you selected the Dropdown field type, a lower pane becomes available to allow you to create the dropdown values. Within the lower pane, complete the following information to populate the dropdown list:

**Data Value \*** - type-in the information that will appear in the list

**Data Description \*** - type-in a description of the data value

**Sort Order \*** - this determines the position the field appears within the list, each new field is numbered sequentially. To change the order, click on the field you want to appear at the top of the list and type a 1 in the field. If two fields are numbered the same, they appear in the list as they appear within this pane.

6. Within the **Actions** ribbon group, click the **Save** (to save and stay) button, click on the **Save & Close** (to save and exit) button, or click on the **Save & New** (to save and refresh the screen) button to continue adding in custom fields.

### ***Deleting a Work Order Custom Field***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Work Flow Setup** to access the sub-menus.
3. Click **Work Flow Custom Fields**.
4. The Work Flow Custom Field list opens to the right. Within the list, highlight the custom field to delete. There are two ways to delete a custom field:
  - Within the **Actions** pane, click the **Delete Work Flow Custom Field** link.
  - Within the tool bar directly above the **Navigation** pane, click the red **X**.
5. Once you click **Delete**, a message box appears verifying that you really want to delete the custom field. Click **Yes** to continue or **No** to cancel the operation.

## **Work Flow**

Please note that if you make any changes to a work flow and want to see them appear, you must logout and log back in to see the changes within Orders/Troubles.

### ***Adding a New Work Flow***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Work Flow Setup** to access the sub-menus.
3. Click **Work Flows**.

4. There are two ways to add a work flow:
  - Within the tool bar directly above the **Navigation** pane, click the dropdown arrow next to **New**. From the list, select **Work Flows**.
  - Within the **Actions** pane, click the **Add Work Flow** link.
5. The General – Work Flow window opens. There are 5 information panes:
  - **Work Flow Information** – allows you to enter in basic workflow information, for example, whether it is for trouble tickets, workflow name, etc.
  - **Custom Fields** – lists the custom field(s) created within your database. Associate these fields to any portion of the workflow.
  - **Work Centers** – lists the work centers created within your database.
  - **Work Templates** – create and associate templates with various workflows. For example, you can create a template for a new telephone install that includes the Subscriber and Set Device components. You can then use the template for workflows at different sites within your database.
  - **Work Flow Setup** – within this pane you create the actual workflow by dragging and dropping information from the other panes.
6. In the **Work Flow Information** pane, complete the following fields (required fields are marked with an asterisk (\*)):
  - **Work Flow Name\*** – type-in the workflow name. The name should be as specific as possible, for example, Add Analog Set.
  - **Disabled** – this field remains empty until you click the field to insert a checkmark indicating the workflow is disabled and cannot be used throughout the system.
  - **Is Trouble Work Flow** – this field remains empty until you click the field to insert a checkmark indicating the workflow is for Trouble Tickets use only.
  - **Days to Completion\*** – type-in the number of days required for a user to complete this work order.

---

**!** The only difference between a work flow for a work order and a trouble ticket, is checking the above box. This separates your work flow, so when you access work orders you will only see the work flows that are indicated as work orders. Alternately, when you access trouble tickets, you will only see the work flows indicated as trouble tickets.

---

7. Within the **Actions** ribbon group, click the **Save** button. This saves your changes and leaves you on the General – Work Flow window.
8. The next step is to add a Work Center into the Work Flow. Within the **Work Centers** pane, click on the record selector box next to the name to highlight the work center, while holding down the button on your mouse, drag and drop the work center into the **Work Flow Setup** pane.

9. Once you have added the work center at least one work center, a 1 populates within the time frame field and a new time frame position is created within the grid.
10. Click on the plus sign (+) next to the timeframe to view the work center you just added.

**!** A timeframe provides a sequence of work center completion. For instance, if you have 3 time frames, the work centers in time frame 1 need to be completed before the work flow can be sent to time frame 2, and so on.

11. At this point, you can continue to drag and drop work centers. If you want to add a work center to time frame 2, click on the record selector box next to the name to highlight the work center, while holding down the button on your mouse, drag and drop the work center to directly below the solid gray line. Once you add the work center, a 2 populates in the field and a new frame position is created within the grid.
12. For each work center, there is the Optional Step column, this field remains empty until you click on the field to insert a checkmark in the box. A checkmark indicates the work center is optional and does not need a user to complete any fields before sending the work order to the next work center.
13. At this point it is a good idea to save your progress, within the **Actions** ribbon group, click the **Save** button to save your changes and allow you to continue working with the workflow.
14. Next to each **Work Center Name** is a plus sign (+), click on the plus to start to add your data components. A data component is Defines what you are adding, moving or changing for this work flow, There are seven data components:
  - **Set Device** – manipulates analog or digital set device information
  - **Circuit** – manipulates circuit information
  - **Subscriber** – manipulates subscriber information
  - **Account** – manipulates both official and/or unofficial account information
  - **Cell Phone** – manipulates cell phone information
  - **Auth Code** – manipulates authorization code information
  - **General** – allows you to perform general tasks that do not apply to any other data component.

**!** It is possible for one work order to contain all the data components; however, it is less confusing if you assign only the components relevant to the work flow you're designing. For example, if you are creating a circuit installation workflow, the circuit, billing account, and physical work completed components should be the only components assigned to a work center.

15. To add a data component to a work center, click the dropdown arrow within the data component field to access a list and from the list, select one of the above



components. Once you click the arrow, a new row becomes available allowing you to add more components.

16. For each data component, there is the Required column, this field remains empty until you click on the field to insert a checkmark in the box. A checkmark indicates the user must complete the required data component fields before sending the work order to the next work center.
17. Continue to add data components by clicking the dropdown arrow in the new row.
18. Again, it is a good idea to save your progress, within the **Actions** ribbon group, click the **Save** button to save your changes and allow you to continue working with the work flow.
19. Next, you can add custom fields to each work center. There are two ways to add custom fields to a work center:
  - Within the **Custom Field** pane click on the record selector box next to the name to highlight the Custom Field, while holding down the button on your mouse, drag and drop it into the correct position within the **Work Flow Setup** pane.
  - (Recommended) Click the dropdown arrow in the **Field Name** column and select the custom field. Once selected the field appears in the column and a new blank line appears allowing you to add multiple fields.
20. Next to each Custom Field, there is the Required column that remains empty until you click the field to insert a checkmark in the box. A checkmark indicates that the user must complete the field before sending the work order to the next work center.
21. Once you have added your work centers, data components and custom field, you have completed the work flow. Within the **Actions** ribbon group, click **Save** (to save and stay) or click **Save & Close** (to save and exit).
22. Within the **Work Flows** list, your new work order appears, to view the complete click the each plus sign (+) next to the name.

### ***Disabling a Work Flow***

CAIRS requires that you disable a work order before deleting it. This ensures all open work orders are closed before you delete the workflow from your database.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Work Flow Setup** to access the sub-menus.
3. Click **Work Flows**.
4. Within the **Work Flow** list, click the name of the work flow to disable.
5. There are two ways to disable a work flow:
  - Within the **Actions** pane, click the **Disable Work Flow** link. A message appears verifying that you really want to disable the workflow. Click **Yes** to continue or **No** to cancel.

- Double click the **Work Flow** within the list. The **Work Flow** window opens. Within the **Work Flow** Information pane, checkmark the box in the **Disabled** field.
6. Within the **Actions** ribbon group, click the **Save & Close** button to return to the Work Flow list.
  7. A message appears verifying that you really want to disable the workflow. Click **Yes** to the message.

### ***Enable a Work Flow***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Work Flow Setup** to access the sub-menus.
3. Click the **Disabled Work Flow** list.
4. Within the **Work Flow** list, click the name of the workflow to enable.
5. There are two ways to enable a work flow:
  - Within the **Actions Pane**, click the **Enable Work Flow** link.
  - Double click the **Work Flow** within the list. The Work Flow window opens. From within the **Work Flow Information** pane, uncheck the box in the **Disabled** field.
6. The workflow is removed from this list and returned to the active workflows.

### ***Viewing Existing Work Flows***

When you click on System Admin → Work Flow Setup → Work Flows, a list of existing workflows appears on the right hand side of the main menu. By clicking the plus sign (+) next to the workflow name the time frames within the work order appear. You can go one-step further by clicking the plus sign (+) next to the time frame to see the work centers within that time frame. The last step is clicking the plus sign (+) next to the work center name and displaying the data component assigned to the work center.

## **Email Templates**

The work order system can email subscribers updates during the work order process. In order for this to happen, you will have to have credentials to access the SMTP server. You will also need to make sure you setup your Email Setting within System Settings → Email Settings.

For each action that occurs during the work order process an email can be sent to the TCO and/or subscriber. We have created pre-defined templates that are sent when a work order is approved or rejected or moved to a new center, etc. The following templates are created:

- Work Order Approval – this email is sent to Subscribers when their work order has been approved by a TCO, Resource Manager and/or Commanding Officer

- Portal Registration Authorized – after a subscriber has registered on the portal, they need to be authorized within CAIRS, once that action is complete they will receive this email
- New Work Order from Portal – this email will be sent to CAIRS users once a new work order has been added through Subscriber Portal
- Pending Work Orders – this email will be sent if a work order is received from the portal that is missing information.
- Work Order Rejected – if your work order is rejected by a TCO, Resource Manager or Commanding Officer, you will receive this email
- Work Order – Order Status – if the status of your work order changes during the process, you will receive this email
- Work Center Change Notification – as the work order moves along the work flow, subscribers will receive this email when the work order enters a new work center
- Work Order Assigned to You – if someone sends a work directly to a CAIRS user, the user will receive this email

### ***Enabling & Disabling a Template***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Work Flow Setup** to access the sub-menus.
3. Click on **Email Template**
4. Double click the Template within the list. The template window opens.
5. In the lower portion of the window, click on the checkbox next to Enable this notification.
6. To Disable the notification, click on the box to remove the checkmark.
7. Click on the Save and Close button to continue working with the template or click on the Save button to close the window and return to the list.

### ***Modifying a Template***

You can modify the text of each of the above templates. When you access a template, there are two pane the left-hand pane is the text of the email that will be sent to the subscriber. The pane to the right, displays a list of variables that can be associated to the template. These variables can be used to pull information from the work order and place it in the email text. For example, if you use the variable `_UserFirstName_` CAIRS will replace that text with the first name of the subscriber/TCO associated to the work order.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Work Flow Setup** to access the sub-menus.
3. Click **Email Template**

4. Within the list, click on the template to modify. A popup opens with the message details.
5. The top line is the Subject field, this is the action that is associated to the work order for example, Work Order Approved. To change the field, click on the field and type in the new information.
6. The body of the email is in the main pane, to change the text click into the pane and type the new information.
7. The variables that can be associated to the email are to the right. To place a variable into the email text, place your cursor where the variable should be placed and click on the field within the Variables pane. The variable text will be placed into the body of the email.
8. When you have finished modifying the email template, click on the Save button to return to the list.

# System Settings

Within System Settings, your CAIRS administrator defines how CAIRS operates in certain situations. Administrators also define the universal characteristics of how users view information within the database. For example, the administrator defines the site levels, meaning that they determine the hierarchical relationship of your sites (Country, State, etc.)

---

## Settings

Use System Settings to configure how your CAIRS operates. When you install CAIRS, a Unique Communication Representative and your CAIRS administrators determine these settings. There are four columns of information for each setting:

1. **Setting Name\*** – the setting name.
2. **Category\*** – the portion of the software this setting is for or the software name. For example, Billing, Orders/Trouble, Subscriber Portal, etc.

3. **Setting Value\*** – displays the actual setting, for example, True, False, etc. If you are using the True or False setting, make sure the capitalize the word or it will not accept the setting.
4. **Description\*** – displays a brief setting description.

The following settings are available (the list below is sorted by category, to match this list click on the Category column header once):

#### Category – Activity Log

The Activity Log setting determine whether you if you are going to keep track of all the changes that occur within your database. If you choose to keep track you will need to set all the settings. If you choose to not keep track, you can ignore these settings.

- **Activity Log Directory Path** – displays the path to the location of your activity log.
- **Disable All Activity Logging** – determines whether you want to create the log. A value of False indicates that you want to create the activity log. A value of True indicates that you do not want to create the activity log.
- **Log New Record Field Details** – determines whether you want to see the field data for changed or new information, when set to true, the Activity Log → Detailed List displays an Old Value column and a New Value column. If set to False, those columns do not appear.
- **Max Activity Log Size MB** – displays the log file's maximum size in megabytes. After reaching the maximum size, the file archives to a location designated by CAIRS. Once archived, you no longer see the records within your active database.
- **Max Days to Keep Activity Log** – displays the maximum number of days to keep the activity log within the database. Once the allotted days have passed, CAIRS saves the file and creates a new log.
- **Min Days to Keep Activity Log** – displays the minimum number of days to keep the activity log active within the CAIRS database

#### Category – Billing

These settings deal with all things needed to generate a bill for unofficial and/or official accounts. If you choose not to run official or unofficial bills, you can ignore these settings.

- **Allow Negative Funding Amounts for Official** – a value of True allows you to enter in a negative amount in the Amount Submitted when applying funds. This is helpful if you have made any clerical errors on funding entries. If set to False, only positive amounts can be entered into the amount submitted.
- **Auto Fill Install Date for new Assigned Equipment and Services** – a value of True will automatically populate the install date of all newly installed equipment and/or service. A value of False requires the user to enter in the install date.
- **Auto set Delete Date to Installed Date for One-time charges on Equipment/Services** – a value of True indicates that when you add an equipment/service with a one-time charge the delete auto-populates with the same

date as the installed date. A value of False indicates that you must enter a date in the Delete Date field.

- **Bill Distribution Folder for SP** – If the “Distribute Bills Folder’ setting is set to True, you need to enter the name of the folder that Subscriber Portal will look for to access your bills. This is only the folder name.
- **Bill Distribution Folder Path from CES** – this is the complete path of where CES will distribute the bills to, this is the combination of both the ‘Bill Distribution Folder for SP’ and the Bill Distribution Folder Path from SP’ settings.
- **Bill Distribution Folder Path from SP** – this is the path to the folder name where Subscriber Portal will look for your bills, this works with the folder you listed in the ‘Bill Distribution Folder for SP’ setting, do not include the name of the folder. This setting is designed for an enterprise system to allow for CAIRS to support multiple sites within Subscriber Portal.
- **Bill Official Calls from Prior Fiscal Years** – determines if call records from the previous fiscal year will be included in the current years bills. If set to true, the call are included; if set to false, the calls are not included.
- **Distribute Bills to Email** – If set to true then CES distributes bills via email, each account assigned an email address gets a bill, if set to false no emails are sent.
- **Distribute Bills to Folder** – determines if you want to send bills generated to a folder you designate in another setting (Bill Distribution Folder Path). If set to True then CES delivers the bills to the folder.
- **Distribute Bills to Printer** – determines whether you want to send the bill generated to a printer. If set to True then CES delivers the bills to the designated printer. This setting is useful if you want to print and mail the bills to your customers.
- **Enable Automatic Official Billing** – determines whether you want CAIRS to generate your bills automatically based on your billing cycle, a value of True turns this on for official billing.
- **Enable Automatic Unofficial Billing** – determines whether you want CAIRS to generate your bills automatically based on your billing cycle, a value of True turns this on for unofficial billing.

The next three settings determine how you want CAIRS to fill your organization information; you must set one of the three to true and the other two to false.

- **Fill Organization from Call Accounts** – this setting determines where the organization information comes from for call records. If set to True the organization information associated within the Accounts for Calls tab is the one used to update the call records. If set to False, the organization associated within the Accounts for Equipment and Services is used.
- **Fill Organization from Equipment and Service Accounts** – this setting determines where the organization information comes from for call records. If set to True the organization information associated within the Accounts for Equipment and

Services tab is used to update the call records. If set to False, the organization associated within the Accounts for Calls is used.

- **Filter Organizations By Account** – this setting determines whether you want to filter the organization dropdown box by account number, this means that if you select an account (anywhere in the system), the orgs within the list are only those associated to the account. A true setting filters the list while a false displays the entire list of orgs.
- **First Official Billing Date** – this is the start billing date for all of your official accounts, any charges occurring before this date are not billed.
- **First Unofficial Billing Date** - this is the start billing date for all of your unofficial accounts, any charges occurring before this date are not billed.
- **Log All Unbilled Account in Billing Cycle** – determines whether the accounts that did not generate a bill during the cycle are placed into a log for your review. A value of true generates a log with the accounts that have not bill and a value of false does not generate a log. The log can be viewed after you run the bill in Accounts – Official/Unofficial – Run Bill Requests, double click on any bill to open the General – Billing Cycle window. In the lower right hand corner is the Unbilled pane, any account that are unbilled appear there.
- **Months to Keep Official Bill Files** – this setting works in conjunction with the Distribute Bills to Folder setting, if that setting is set to true, then this setting determines how many months to keep the official bill files before deleting. This defaults to 60 months.
- **Months to Keep Unofficial Bill Files** – this setting works in conjunction with the Distribute Bills to Folder setting, if that setting is set to true, then this setting determines how many months to keep the unofficial bill files before deleting. This defaults to 60 months.
- **Official Billing System** – there are two billing systems that you can choose from: Classic or Dynamic. The Classic is the current billing system and the setting default, where all billing cycles are run progressively from month to month. Meaning you must run April's bill before you can run May's bill and so on. The Dynamic billing system allows for billing periods to be run together, amongst several other advantages, to learn more please see the chapter on Dynamic Billing. There is also a Hybrid setting, this allows for you to transition from the classic to the dynamic seamlessly.
- **Operator Assisted Call Text** – allows you to determine the Call Type that you want to use for operator assisted calls. This defaults to 'Operator Assisted'.
- **Precision for Minutes Summary in Billing Reports** – determines that number of decimal places for the minutes and seconds in your billing reports. The setting can have a value of 0 to 4, the corresponding settings are:
  - 0 – displays minutes only, no second value (1)
  - 1 – displays the minutes and rounds the seconds to a tenth of a second (1:4)

- 2 – displays the minutes and rounds the seconds to a hundredth of a second
- 3 – displays the minutes and rounds the seconds to a thousandth of a second
- 4 – displays the minutes and rounds the seconds to a ten-thousandth of a second
- **Reset Official Bill Balance Every Bill** – determines if you want to carry any balances forward for each billing cycle. If set to True, for each new billing cycle the account balance is set to \$0.00. If set to false, any unpaid balances carry to the next cycle.
- **Reset Official Bill Balance Every Fiscal Year** – determines if you want to carry any balances forward for each new Fiscal year. If set to True, for each new fiscal year the account balance is set to \$0.00. If set to false, any unpaid balances carry to the new fiscal year.
- **Return Top Phone Number for Account** – when you are viewing an account, there is a yellow status bar directly below the ribbon; this bar contains important account information, including a number field. This setting determines whether the number field is present in the status bar. If set to True, the first telephone found relating to the account populates the field, this may slow down the loading of the complete account details. If set to False, the telephone field is removed from the status bar, this may load the account details quicker.
- **Update Call Records from Directory Line** – as a default, CAIRS updates the call records through the account number. If this setting is set to True, then CAIRS updates the call record information through Set Management. If there are multiple listings, the primary number is used for billing the call records.
- **Use Funded Program** – if set to true the new funded program will become available for use within CAIRS and Subscriber Portal. Please do not turn this setting on without consulting with a Unique Representative first.
- **Validate New Equipment to Account** – determines whether CAIRS will validate the account prior to saving when new equipment or services are added. When a user adds equipment or services, CAIRS will verify that the account that is associated to the record has the appropriate charge type associated. If the charge type is not associated the user will not be able to save the record.

#### Category – Call Records

- **Archive Bulk Size** – allows you to determine the number of call records that you want to copy when archiving or restoring. The default is set to 10,000 calls in each file. You can increase or decrease the value by entering a different number.
- **Billing Interval** – indicates your billing interval; every second, every 6 seconds or every minute. This defaults to 0 meaning that every second is billed.
- **Current Currency Symbol** – displays the currency symbol you are using for all billing, for example the \$ sign.



- **Days Till Expiration Warning** – this setting determines the number of days before you receive an expiration warning for foreign currency. The default is 355 days, meaning that you must update the exchange rate every 355 days.
- **Do Not Round to Two Decimals** - if you are using the re-pricing option, CAIRS automatically rounds the call price to two decimal points. This defaults to false which rounds the call pricing to 2 decimals (\$10.55). Set this to True to round to 4 decimals places (\$10.3405).
- **Foreign Currency Expiration Warning** – this setting works in conjunction with the 'Days Till Expiration Warning', if set to true than the administrator receives the warning, if set to false no warning is given.
- **Foreign Currency Symbol** – displays the foreign currency symbol if you are billing in a foreign currency
- **Round First Minute** – determines whether to round the first minute of billing up, if set to true, if the call is 30 seconds long the customer is charged for the full minute. If set to false, the customer is charged for 30 seconds. This defaults to false.
- **Round to Next Period** – determines whether to round up to the next whole number, if set to false, if a call was 3 min 15 sec long, the customer would be billed for 4 min. If set to true, the customer is charged for exactly 3 min 15 sec.
- **Unit Value** – displays the number of units for each value. For example, 100 units (cents) in \$1 or 100 pence in 1 pound.
- **Update Auth Code Calls by Extension if Missing** - in the event that an authorization code does not exist within your database, you can use this setting to have the calling extension billed for the call. This defaults to False meaning that the call record will not be billed to any number until you create the authorization code and run the CES process to Change Call Ownership. However, if you set this to True, CAIRS will automatically bills the calling extension for the call record.
- **Update Missing Billing Subscriber From Directory Line** – ideally call records are updated with the subscriber information associated to authorization codes, if you do not use authorization codes the update comes from the billing account number. If there is no subscriber information on either one of those, CAIRS uses the subscriber information related to the directory line (aka configured set). If this is set to true, CAIRS tries the authorization code then the billing account then the configured set for the subscriber information. If set to false, CAIRS tries, only the authorization code and billing account for subscriber information, if there is no subscriber within either of those then the field is left blank for the call record.
- **Use Primary Billing Site in Number Plan for Call Record Update** – allows you to bill two matching numbers in different number plans to different accounts. When your calls are brought into your active calls, they go through a matching process that associates important information such as site, account number, organization, etc. If this setting is set to True, the matching process looks first at the site associated to the call record and matches that up with the Primary Billing Site within the Number Plan, thus determining the proper extension to associate with the call record.

- **Use Site Specific Unit Interval Settings** – determines whether you use site-specific call pricing, databases that have multiple sites associated use this setting. If set to true, each site contains a Call Pricing Group, Unit Value, Billing Interval, Round to First Period and Round to Next Period fields that will now be used for call pricing. If there is no Call Pricing Group associated with the site, CAIRS will use the default Call Pricing Group. If this setting is set to false all calls are priced based on the default call pricing groups.
- **Use Foreign Currency** – when set to True, all billing is in the foreign currency determined within your rate tables.

#### Category – Configured Items

- **Clear Buttons when Changing Set Type** – if you need to change the set type for a digital set device and don't want to have to clear all the button data first, set this to true and CAIRS will automatically clear the buttons except for the primary listed number. This is useful for sites that use the switch syncs.
- **Default Published Option** – this setting determines the default publishing option when you are creating a new configured set. Enter one of the following numbers to choose your option:
  - **0** – Published (if you do not change this setting, it will default to 0 meaning all new sets are published)
  - **1** - Non-Published
  - **2** - Classified
  - **3** - Temporary
  - **4** - Alternate
- **Group Terminals By Room** – a value of true indicates that the terminal for a building are grouped together based on room number, a value of false displays the list based on the order in which they were added to the building
- **SL100 and CS2100 Call Pickup Group Use Link LEN** – a value of True indicates that when you delete the Pilot number of a Call Pickup Group, CAIRS automatically takes the lowest LEN in the group and makes that the Pilot for the Call Pickup Group. If set to False, when you delete the Pilot the next position in the Call Pickup Groups is made the Pilot.

#### Category – Dropdown

- **Exclude Organization Path from Organization Name** – determines whether the organization name and path appear within one or separate columns. A value of True separates the organization name and path into two separate columns, while a value of False combines the organization name and path within the same column.
- **Exclude Site Path from Site Name** – If True then the Site Path when you access the site dropdown list there will be two columns, the first with the site name and the second with the complete path to the site. If set to False, the site name appears first followed by ~~ and then the path.

- **Include Account Number in Organization Dropdown** – determines if the account numbers associated with an organization appears in the Organization dropdown. If set to true, the account numbers appear in the dropdown, if set to false the account number do not appear in the dropdown.
- **Include Misc Fields In Organization Drop-down** – determines whether miscellaneous organization fields are included next to the organization name and path in the organization dropdown. A value of true displays all misc fields within the dropdown, while a value of False hides these columns.
- **Include Organization Code with name in Organization Dropdown** – determines whether the code and the name appear in the organization dropdown list. If set to true then the code appears before the name followed by a dash (-) and then the organization name, in the first column of the dropdown. If you have not associated a code to the organization, a dash will appear before the organization name. If set to false then just the organization path appears in the dropdown in the first column of the dropdown.

#### Category – Export

- **Default PDF to Landscape** – determines the orientation of your export in PDF format. If set to True then the PDF format defaults to a landscape orientation, if set to False (the default) the orientation remains as portrait.
- **PDF Landscape Width** – If you have set the Default PDF to Landscape setting to true, this setting is required to determine the width of the columns on the page. This number references the column width of each item in the header, the higher the number the smaller the column width. If you choose a small number, your information may appear on two rows. This defaults to 150.
- **PDF Portrait Width** - If you have, set the Default PDF to Landscape setting to False, this setting is determines the width of the columns on the page when using the portrait setting. This number references the column width of each item in the header, the higher the number the smaller the column width. If you choose a small number, your information may appear on two rows. This defaults to 100.
- **Prompt for PDF Page Orientation** –when set to True the user is prompted to select whether they want to print the report in portrait or landscape. If set the False, no prompt is given and the default setting is used.

#### Category – Facilities

- **Prevent Duplicate Binding Posts in Terminal** – determines if you can have binding posts with the same number appear in a terminal. This setting defaults to False meaning that you cannot have binding posts with the same number in a terminal.
- **Show Nearest Building Button in Facilities** – when set to True a Nearest Building button displays in Facilities to show the building closet based on the latitude, longitude and elevation coordinates. The default is set to False meaning the button will not display.

### Category – Form Layout

- **Default Form Layout to Admin Layout** – determines whether the default form layout for all users will be the administrator’s layout. A value of true changes all form layouts to the administrators. A value of False allows each user, based on permissions, to customize their form layout.
- **Require Permissions for Form Layout** – determines whether you want to allow your users the ability to customize form layouts. A value of false allows any user to change the layout; a value of true requires permissions.

### Category – Solr

- **Use Internal Importer** – CAIRS uses Solr to search for information within your database, there are two way that Solr can access the data either through its own Data Import Handler or through HTTP. This setting determines which method Solr uses to pull the data, a value of False means it will use the Data Import Handler. A value of True means that will use HTTP. The default is True.

### Category – Startup

- **Check for Software Updates** – determines whether to check for software updates when starting the software. A value of False does not check for updates whereas a value of True checks.
- **Disable Toll Ticket Notifications at startup** – determines whether you are notified of toll ticket statuses when you first start CAIRS. A value of true allows the notifications to appear.
- **Disable Trouble Ticket Notifications at startup** – determines whether you are notified of trouble ticket status when you first start CAIRS. A value of true allows notifications to appear.
- **Disable Work Order Notifications at startup** - determines whether you are notified of work order status when you first start CAIRS. A value of true allows notifications to appear.
- **Display Warning Message** – when set to True the user must accept the DOD warning message before they can access CAIRS, if set to False the warning message does not appear.
- **Instance Count** – displays the maximum number of CAIRS client instances a single user can open. The default is 5, meaning you can have 5 instances of CAIRS open at the same time on the same computer.
- **Software Update Service URL** – displays the software update site URL location. This is the location of where CAIRS will look for a new version of software.

### Category – Subscriber Portal

- **Default Subscriber Portal Password** – when a subscriber forgets their password to Subscriber Portal, you can have a default password setup or you can have CAIRS randomly generate a password. If you type in a password here, when a subscriber need a reset you the Reset Password button and this is the password.

- **SP Web Site URL** – displays the URL to your Subscriber Portal

#### Category - Switch

- **Days to Keep Switch Sync Log** – determines the number of days to keep the Switch Sync Log on file. After the allotted days the log is deleted.
- **Enable RAX and CXGRP on site** – if set to true then a RAX and CXGRP are added to the General – Sites window and you associate each one. This is specific to the EWSD.
- **Max Days To Store UCE Events** – determines the maximum number of days to keep the acknowledged UCE events. This defaults to 30.
- **Max Idle Minutes for SMA Sessions** – displays the maximum number of minutes a SMA session can remain open while inactive. Once those minutes have passed, the session automatically ends.
- **Switch API Location** – determines your Switch API location.
- **Sync Options On Features**
- **Use Wopr** – uses WOPR (Work Order Processing Real-Time) when set to true.

#### Category - System

- **Alarm and Traffic System URL** – displays the Alarm and Traffic System URL.
- **Allow SQL Command Window** – If set to true then a menu option will be added to System Settings that allows for running of SQL from within your client. This is an advance function, so as a default it is set to False.
- **Alternate User File Location** – this setting allows you to change the location of the folder that saves all your user configurations, as a default we save the file in the c:\Users\Username\Documents\CAIRS. If your network restricts access to that location, put the alternate location here.
- **Always Reset Search** – a value of False tells the system to use the previous search parameters when refreshing a menu list or navigating back to a menu. A value of True tells the system to remove any search parameters when refreshing a menu list.
- **Always Show Database Utilities Menu** – this setting determines whether the Database Utilities menu is visible under System Admin. A value of True shows the menu option and a value of False means the menu is not shown. Keep in mind that the tools within the Database Utilities menu are powerful and could damage your database if not used properly. Do not perform any function with the menu option unless directed by a Unique Communication's Representative.
- **CAIRS CEDC Domain** – displays the domain name where the CEDC is installed.
- **Client Web Service Timeout (in Minutes)** – this setting determine how long a CAIRS client waits for a response from the CEDC before returning an error. This setting is set to a minimum value of 10 minutes.

- **Maximum File Attachment Size in MB** – displays the maximum file attachment size allowed within your system. This defaults to 2.9 mb. If you allow file attachments within Subscriber Portal you need to increase this amount in connection with the MaxRequestLength in the web.config file to allow for large attachments.
- **MoraleMinder System Path** – displays MoraleMinder’s installation path.
- **Remember Form Size** – when you resize a form CAIRS can remember the size so your wont have to resize anymore. Set this to True to have CAIRS remember your form size. This defaults to True.
- **Save Column Sort Order** – When set to True, the sort order the user has chosen remains in place for future searches. If set to False the sort order returns to the default.
- **Security Type** – there are three different options within Security you can choose either Windows, Certificate or Mixed. With Window authentication, CAIRS will use your windows credentials to login. With Certificate, CAIRS will use your CAC credentials to login. Mixed allows for all types of authentication. To learn more about the different security types please see the section of Security. To change the security type, type in the appropriate type.
- **Server to Client Messaging** – When a new order is created or changes are made to an existing work order, emails can be sent to users. The emails contain a link that when clicked can open the order within CAIRS. If this is set to True then CAIRS will open the order, if set to False CAIRS will not open the order.
- **Use Public Organizations** - when set to True, a new menu option appears within Directory/Organization called Public Organizations. The true value also allows you to generate bills for the organizations for any charges incurred. A value of False leaves the menu option hidden.
- **Vendor Media Import Menu Option** – There are four options available for VMI they are Standard, Advance, Basic and All. To learn more about each of these options please see Vendor Media Imports. The default setting is Standard.

#### Category – Toll Tickets

- **Control Number Mask** – determines the mask of the toll ticket control number, this default to T=TTCN-;D=yyyy;T=-;D=MM;T=-;I\_M=00000;T=-;I\_N=000. Your control number will look like TTCN-2015-09-00000-356465730241718240
- **Use Toll Ticket Option** – a value of true indicates that you will use the control ticket option in available in Directory/Organizations. If set to False, the menu item is disabled.
- **VIP Control Number Mask** - determines the mask of the toll ticket control number for VIP’s, the default is T=VIP-TTCN-;D=yyyy;T=-;D=MM;T=-;I\_M=00000;T=-;I\_N=000. Your control number will look like VIP-TTCN-2015-09-00000-356465730241718240

#### Category – Work Order

- **Don't Close General Orders Until Sub-Orders are Closed** – determines whether you can close the general work order before all sub-orders are closed. A value of True prevents you from setting a close date on the general work order until all the related sub-orders are closed. A value of False allows you to close the general work order, even if sub-orders are still open.

## Changing a Setting

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) System Setting to access the sub-menus
3. Click **Settings**.
4. The list of the system settings displays to the right, within the list double click the setting to change.
5. Click the **Setting Value** and type in the new value.
6. If the value is true or false, you must capitalize the first letter for CAIRS to recognize it.
7. Within the **Actions** ribbon group, click the **Save & Close** button to return to the settings list.

## Manage File Attachment Types

Within System Settings, you can determine what types of files your users can attach to records within your database. These file types are restricted to size based on the Maximum File Attachment Size in MB System Setting.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) System Setting to access the sub-menus
3. Click **Settings**.
4. There are two ways to manage your file types:
  - Within the toolbar directly above the **Navigation** pane, click the **Manage Attachment File Types** button.
  - Within the **Actions** pane, click the **Manage Attachment File Types** link.
5. Within either option, the Manage Attachment File Types window opens. Within the window, there are two columns: Extension and Description.
6. Click on the row with an asterisk (\*) to add a new file type, within the Extension column type-in the allowed file attachment extension (the extension is anything after the period, for example, if the file name is picture.png, the extension is png).
7. Once you start typing the file extension, a new row appears at the top of the list allowing you to add multiple types at one time.

8. To delete a file type, right-click the record selector box next to the Extension to access a popup menu, from the menu select Delete. A message box appears verifying that you really want to delete the file type, click Yes to continue or No to cancel the operation.

Once selected, CAIRS draws a line through the type allowing you to delete multiple items at once.

9. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with the file types, or click **Save & Close** (to save and exit) to return to System Settings.

## Manage Default Account for Calls

During a call record update, there may be extensions that do not exist within your CAIRS database or that do not have an account assigned. By choosing an account here, the call records that could not update are assigned to the default account. To assign the default account, click on the 'Manage Default Account for Calls' link either in the Actions pane or in the toolbar. The Update Setting popup opens, click on the dropdown arrow in the Default Account Number field. From the dropdown, select the account number that will be used for all call records that do not have a previously assigned account. Click on the Update button.

## Manage Default Account for Discrepancies

When you are importing invoice through Vendor Media Imports, there may be times when you have a discrepancies between your invoice and the details files within CAIRS. Any cost discrepancy can be transferred to this default account. This account can also be used for the Funded Program, when an account has a negative balance any charges for that account can be transferred to this account for billing. To assign the default account, click on the 'Manage Default Account for Discrepancies' link in either in the Actions pane or in the toolbar. The Update Setting popup opens, click on the dropdown arrow in the Default Account Number field. From the dropdown, select the account number. Click on the Update button.

---

## Site Levels

Site Levels defines your site's hierarchal relationship and name basis. For example, Country, State, County, and City; Division, Brigade, Regiment, and Squadron; 1, 2, 3, and so on. Site Levels must be determined before a user can enter sites into your database. When a user enters a site into the database, they determine the level where it belongs.

### Adding a Site Level

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **System Settings**. Click **Site Levels**.
3. There are three ways to add a **Site Level**:



- Within the tool bar directly above the **Navigation** pane, click the dropdown arrow next to **New**. From the list, select **Site Levels**.
  - Within the toolbar directly above the **Navigation** pane, click the **Add Level** button.
  - Within the **Actions** pane, click the **Add Level** link.
4. With either option, the General-Site Level window opens and the Level Number field automatically populates with the next number in sequence.
  5. Type-in the level name.
  6. Within the **Actions** ribbon group, click **Save & Close** (to save and exit).

## Modifying a Site Level Name

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **System Settings**. Click **Site Levels**.
3. The Site Levels list opens and displays all existing site levels. Double-click a Site Level name.
4. The Site Level window opens. Click the **Level Name** field and type-in the new name.
5. Click **Save & Close**.

## Deleting a Site Level

Two scenarios will prevent you from deleting a site level. First, if the site level is associated to any record within your database, you must move the records to another site level. Second, the level must be at the bottom of the hierarchy, you cannot delete level 2 without first deleting level 3.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **System Setting**. Click **Site Levels**.
3. The Site Levels list opens to the right.
4. Within the list, highlight the level to delete. There are three ways to delete a level:
  - Within the tool bar directly above the **Navigation** pane, click the red **X**.
  - Within the **Actions** pane, click the **Delete Site Level** link.
  - Double click the level name within the list. The Site Level window opens. Within the **Actions** ribbon group, click the **Delete** button.
5. Once you click Delete, a message box appears verifying that you really want to delete the site level. Click **Yes** within the box to continue or **No** to cancel the operation.

6. If the site level is associated to a record or is not at the bottom of the hierarchy a warning message appears, this means that you still have assignments that need to be reassigned.

---

## Organization Levels

Organization Levels define your associated organization's hierarchal relationship and naming conventions for example, Org, Sub-Org, Department and Unit; Division, Wing, Group and Squadron; 1, 2, 3 and so on. The organizational levels must first be determined before adding organizational records into CAIRS. Organization levels must be determined before users can enter information into the organizational tree. When users enter an organization into the database, they determine the level where it belongs.

### Adding an Organization Level

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **System Settings**. Click **Organization Levels**.
3. There are three ways to add an Organization Level:
  - Within the tool bar directly above the **Navigation** pane, click the dropdown arrow next to **New**. From the list, select **Org Levels**.
  - Within the toolbar directly above the **Navigation** pane, click the **Add Level** button.
  - Within the **Actions** pane, click the **Add Level** link.
4. The General – Org Level window opens.
5. Type-in the level name. The level appears at the bottom of the list. At this time, there is no way to add a level within the list, CAIRS only allows you to add it at the bottom of the list.
6. Click **Save & Close** (to save and exit).

### Deleting an Organization Level

Two scenarios will prevent you from deleting an org level. First, if the org level is associated to any record within your database, you must move the records to another level. Second, the level must be at the bottom of the hierarchy, you cannot delete level 2 without first deleting level 3.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **System Settings**. Click **Organization Levels**.
3. The Organization Levels list opens to the right.
4. Within the list, highlight the level to delete. There are three ways to delete a level:

- Within the tool bar directly above the **Navigation** pane, click the red **X**.
  - Within the **Actions** pane, click the **Delete Org Level** link.
  - Double click the level name within the list. The Org Level window opens. Within the **Actions** ribbon group, click the **Delete** button.
5. Once you click Delete, a message box appears verifying that you really want to organization level, click **Yes** within the box to continue or **No** to cancel the operation.
  6. If the site level is associated to a record or is not at the bottom of the hierarchy a warning message appears, this means that you still have assignments that need to be reassigned

---

## Email Settings

Email Settings allow Administrators to setup emailing capabilities in CAIRS. When the correct settings are entered into the required fields, CAIRS can send email notifications for Work Orders, Trouble Tickets, Subscriber Portal Requests, and auto generated Bills.

---

**!** An SMTP server is required in order for CAIRS to send email notifications.

---

To allow CAIRS to authenticate and access the SMTP server, the following fields must be completed:

- **Domain Name** – displays the name of the Fully Qualified Domain name (FQDN) or IP address of the SMTP server.
- **Enable Email** – a value of true allows CAIRS to send emails, a value of false prevents CAIRS from sending emails,
- **Server Port** – the port the SMTP server uses to send email. Typically port 25.
- **SMTP\_Admin\_Address** – email address CAIRS email notifications originate from.
- **SMTP\_Admin\_Name** – name from which CAIRS email notifications originate.
- **Use\_SSL**– set to True if the SMTP server requires SSL authentication.
- **User\_AUTH\_Required** – set to True if the SMTP server requires a Username and Password.
- **User\_Name** – the SMTP Authentication Username.

**User\_Password** – the SMTP Authentication password. This password is encrypted and securely stored in the CAIRS system.

Once you defined the above settings, within the lower portion of the screen you can test the settings. Within the textbox, type-in an email address and click the **Test** button. If the user receives the email your settings are correct.

---

## Auto Number Setup

Within Auto Number Setup, administrators define how CAIRS numbers work orders, trouble tickets, authorizations etc. There are seven columns of information for each numbering setup:

1. **Component\*** – defines the component: work order, trouble ticket, official or unofficial account, authorization code, etc.
2. **Mask** – defines the mask that will be used, whether the numbering will be date based or random.
3. **Enabled\*** – defines whether you will use the auto-numbering feature within CAIRS.
4. **Current Increment** – The current counter used to hold the value for the most recently used number. For example if the work orders auto number schema is ‘Two digit day, two digit month, two digit year, three digit number incrementing by day (010109001)’ and there have been 3 work orders today, the current increment would be 3. When there is another work order that day the increment would be 4.
5. **Last Increment Update** – This date is the last date the current increment was updated. This lets the system know if it needs to set the current increment back to zero or keep it going. For example if the Trouble Ticket auto number schema is ‘Two digit day, two digit month, two digit year, six digit number incrementing by month (010109000001)’ and the Last Increment Date was the last day of December 2010 and today is January 1<sup>st</sup> 2011 the system would set the Current Increment to 0 because it is a new month.
6. **Reset Increment Value** – this determines what the first number will be when the auto-number schema is reset
7. **Use Fiscal Year** – defines whether the auto-number resets on the start of your fiscal year or the regular year

Once each auto-number component is defined, when you access the component the word “Auto” appears in the field. After you complete the required fields for the component and click the ‘Save’ or ‘Save & Close’ button CAIRS generates the number based on your selections. You can overwrite the auto number by deleting the word auto and typing in the appropriate information.

### Adding a New Auto-Number Schema

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **System Settings**, click **Auto Number Setup**.
3. There are two ways to start to add a new auto-number scheme
  - Within the tool bar directly above the **Navigation** pane, click the dropdown arrow next to **New**. From the list, select **Auto Number Setup**.
  - Within the **Actions** pane, click the **Add New Auto Number Schema** link.

4. With either option, the General – Auto Number window opens. There are 3 panes of information:
  - Mask Properties – within this pane you will determine how the auto number setup will work
  - Mask Elements – when you add an element to the schema it will appear in this pane
  - Example – this pane displays an example of what your auto number setup will look like when used.
5. Within the Mask Properties, complete the following fields for the auto number setup:
  - Component \* – click the dropdown arrow to access a list of the components that are available for auto numbering, the following options are available:
 

<ul style="list-style-type: none"> <li>• Work Orders</li> <li>• Trouble Tickets</li> <li>• Official Accounts</li> <li>• Unofficial Accounts</li> <li>• Auth Code</li> <li>• Payment Deposit Number</li> <li>• Portal Work Order</li> </ul>	<ul style="list-style-type: none"> <li>• Portal Trouble Ticket</li> <li>• Default Mask</li> <li>• Toll Ticket Control Number</li> <li>• VIP Toll Ticket Control Number</li> <li>• Toll Ticket ID Number</li> <li>• General Task</li> </ul>
--	--
  - Mask – as you add mask parts, this field will populate with the mask of the auto number
  - Enabled – this defaults to a null value which means that it is not being used, click on the box to enter a checkmark to enable the auto numbering
  - Current Increment – this determines the numerical increase for each new number used
  - Last Increment Update – displays the last increment value that was used
  - Reset Increment Value \* – determines what the first number will be when you reset the auto numbering sequence
  - Use Fiscal Year – when checked the auto numbering scheme will reset every fiscal as determined by the year set in Accounting (the start date can be January 1<sup>st</sup>, October 1<sup>st</sup>, or a date that you determine). When left unchecked, the auto number reset will occur as determined by your selection in the 'Add Incrementing Mask Part' ribbon group.
6. Once you have completed the fields, you can start to add elements into the mask. Within the Add Standard Mask Parts you will need to determine what elements to add. We will discuss each one in detail

7. **Add Date Part** – when selected a popup opens allowing you to select which date you want in the mask, to select an option click the radio button next to your option. You have the following options available
  - 2 Digit year. Set the Use Fiscal Year as checked to use the fiscal year start date from the official billing fiscal year start date
  - 4 Digit year. Set the Use Fiscal Year as checked to use the fiscal year start date from the official billing fiscal year start date
  - 2 Digit Month
  - 2 Digit day of the month
  - Day of the week abbreviation
  - Full day of the week name
  - 2 digit hour using a 12 hour clock
  - 2 digit hour using a 24 hour clock
  - 2 digit minute
  - Month name abbreviation
  - Full month name
  - 2 digit second
  - AM/PM designator
  - Milliseconds
  - Advanced – Input a mask using a custom data and time format string
8. **Add Julian Date** – if none of the above date options work you can simply add the Julian to the mask, click on this button to add it to the elements pane
9. **Add a Random Number** – when selected a popup opens allowing you to choose the number of digits your number will be, you have the option of 2 through 9 digits. Please keep in mind this a randomly generated number it does not reset and duplicate numbers have appeared so use this wisely. Actually, it is a good idea to not use this, you should use the Incrementing Mask Part instead!
10. **Add Text** – when select a popup opens allowing you to enter in text that will be a part of the mask, once entered click on the OK button to add the part to the elements pane
11. **Add Organization Name** – when selected the Organization Name will appear in the mask
12. After you have made your selections, you will notice that each element you have chosen appears in the Mask Elements pane. There are a couple of actions you have for each element, next to each element is and up and down arrow. When you click on either one, it will move the element up or down in the order of the mask. On

the right hand side, is an 'X' when you click on it the element is removed from the mask.

13. The Example pane, you will see what your auto-number schema will look like when used for the component.
14. You aren't done yet! The last thing you need to determine is when your increment will reset, within the 'Add Incrementing Mask Part' ribbon group you must choose ONE of the following options:
  - Add Calendar Year Reset Increment – when selected a popup opens allowing you to select choose a 2 through 9 digit number that will reset every calendar year.
  - Add Daily Reset Increment - when selected a popup opens allowing you to select choose a 2 through 9 digit number that will reset every day.
  - Add Monthly Reset Increment - when selected a popup opens allowing you to select choose a 2 through 9 digit number that will reset every month.
  - Add Fiscal Year Reset Increment - when selected a popup opens allowing you to select choose a 2 through 9 digit number that will reset every Fiscal year. Your fiscal year is determined within Accounts – Official Accounts – Billing Cycle Plan.

Once you have made your selection, you will notice that the ribbon group is greyed out, to make a different selection remove the part from the Mask Elements pane.

15. One last step, within the Actions ribbon group, click on the Save button to continue working or click on the Save & Close button to return to the Auto Number Setup list.

## Deleting an Auto Number Setup

You can delete an auto-number, however it is a good idea to simply Disable it so it can be used again the future. To disable an auto number schema, open the record by double clicking on the record from the Auto Number Setup list. When the record opens, within the Mask Properties pane, remove the checkmark from the Enabled field. Click on the Save & Close button, the setup still appears in the list however it is no longer enabled.

To delete, you can simply highlight the setup with the list and click on the Delete Auto Number Schema link within the Actions pane. You are asked if you really want to delete the setup, click yes to continue or no to cancel the operation.

---

## Field Customization

Field Customization allows your site to use its own terminology to define components, locations, or other information within the CAIRS software.

There are two ways that you can customize your fields. First, you can access Field Customization within System Admin → System Settings. With this option, a list of all the tables within CAIRS appears, you can know find the table and make the appropriate modifications.

The second alternative allows you to access a small pop-up box for any list and make changes to a field name everywhere in the software or only in the current view. When you access this option, you can rename the field for yourself, your profile or for every user. To learn more about this option, please see User Interface → Navigating the Main Form → Modifying the List Line Display → Renaming Fields.

Within this section, we will cover how to customizing your fields within System Admin.

### ***Customizing Field Names***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **System Settings**. Click **Field Customization**.
3. The Field Customization list appears, displaying the names of all the database tables. Double click the table name.
4. The Field Customization window opens displaying the selected table's field names. The following columns of information display with read only columns italicized:
  - **Original Field Name\*** – displays the default field name. This is a read only field.
  - **Custom Field Name** – type-in the new field name. If this field appears in multiple tables' CAIRS automatically changes each instance of this field.
  - **Mask** – type-in the mask for the field. A mask defines allowable character types within the field. For instance, if you entered in a group of pound (#) signs as the mask, only numbers would be allowed in the field.
  - **Minimum Length** – type-in the minimum number of characters allowed in the field.
  - **Maximum Length** – type-in the maximum number of characters allowed in the field.
  - **Data Type** – displays the type of data. This is a read only field.
  - **Is Drop Down** – click on the field to insert a checkmark in the box indicating this field will have a drop-down box associated within it.
  - **Is Currency** – click the field to insert a checkmark in the box indicating this field is for currency.
  - **Required By Admin** – click the field to insert a checkmark in the box indicating that your CAIRS administrator requires the field.
  - **Required by System** – if this field is a system requirement, the box contains a checkmark; these fields are required to maintain a consistent and relational database.
  - **Custom Field Help** – type-in a brief statement that appears when the customer scrolls over the field name.
5. Within the **Actions** ribbon group, click **Save** (to save and stay), or **Save & Close** (to save and exit).



### ***Adding a Drop-Down List to a Field***

For a field to have a custom drop-down list it must be a text only field and require no more than 255 characters.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **System Settings**. Click **Field Customization**.
3. The Field Customization list appears, displaying the names of all database tables. Double click the table name.
4. The Field Customization window opens displaying the selected table's field names. Click a field name to add a drop-down list.
5. In the **Is Drop-down** column, click the box to check mark it.
6. Within the **Show** ribbon group, click the **Field Dropdown** button.
7. Click the top line marked with an asterisk (\*) and type the first value for the drop-down list. Tab over to the **Notes** column and enter any necessary information. Notice that when you start typing in the field, CAIRS automatically creates a new field above the one you are currently working in.
8. Within the **Actions** ribbon group, click **Save** (to save and stay), or click **Save & Close** (to save and exit).

### **Suggested Indexes**

This is used by Unique Communication's Representatives to troubleshoot the performance of your system. This has no value until SQL Queries are run against your database.

### **Software Information**

Within software information you can view information regarding CAIRS, it associated components, computer information, database information, just to name a few. In the event that you have to contact our technical support department, they will ask you several questions about this page. The information is read-only.

# Subscriber Portal Settings

This menu option allows you to build the Configuration Packages available on Subscriber Portal. A Configuration Package is the equipment, services and related inventory associated to a work order submitted via Subscriber Portal.

In addition, you can determine the settings for your Subscriber Portal, for example, password requirements, URL, Phone Book, etc.

---

## Configuration Packages

A Configuration Package allows administrators to create a set of management rules for how equipment, services, and other pieces of information apply to Subscriber Portal submitted work orders. As an administrator, you can limit each configuration package to a site, organization, or subscriber type. You also determine whether the configuration package requires resource or manager approval.

When creating a configuration package, you determine the following:

- Is this for a Set Device, Cell Phone, Circuit, etc.?
  - If this is a set device, what template or set type is used?
- Is this for a New Service, Change in Service or Delete Service?
- Is this for one site or all database sites?
- Is this for one organization or all within the database?
- Does this package require resource or funding approval?
- Does this package require manager approval?
- Are there equipment/features required with the set device or circuit?
- Is there a service required with the set device or circuit?
- What fields does the customer need to complete before submitting the package?

Once you have determined the answers to these, you are ready to create your configuration package. Once created, the package becomes available in **Subscriber Portal** and accessible for customers to complete and send into CAIRS.

Once a customer submits a package, a CAIRS user can view the submitted packages within Orders/Troubles→ Projects/Portal Requests. The CAIRS user accepts the package and sends it into the proper work order flow within the CAIRS database. When the work order is complete, the submitting customer receives a completion notification.

The process to create a Configuration Package is identical for all components. Therefore, we will cover only how to create a Configuration Package for a Set Device.

## Managing Package Categories

### *Adding a Package Category*

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to Subscriber Portal to access the submenu
3. Click **Configuration Packages**.
4. There are two ways to manage your package categories:
  - Within the toolbar directly above the **Navigation** pane, click the **Manage Package Categories** button.
  - Within the **Action** pane, click the **Manage Package Categories** link.
5. With either option, the Manage Package Categories window opens. In the **Manage Package Categories** list pane, click the top row, marked with an asterisk (\*) to add a new record.
6. Type the new category name.
7. To add another type, click the **Save** button and repeat steps 4 and 5, as necessary.
8. Within the **Actions** ribbon group, click the **Save** (to save and stay) button or click the **Save & Close** (to save and exit) button.

### *Deleting a Package Category*

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to Subscriber Portal to access the submenu
3. Click **Configuration Packages**.
4. There are two ways to manage your package categories:
  - Within the toolbar directly above the **Navigation** pane, click the **Manage Package Categories** button.
  - Within the **Action** pane, click the **Manage Package Categories** link.
5. With either option, the Manage Package Categories window opens.
6. There are two ways to select the category to delete:
  - Right-click the record selector box (located just left of the name) and from the pop-up box, click **Delete**.
  - Highlight the name in the list and within the **Actions** ribbon group click the **Delete** button.

7. Once you click Delete, a message box displays verifying that you really want to delete the category. Click **Yes** within the box to continue or **No** to cancel the operation.
8. Once selected, CAIRS draws a line through the category allowing you to delete multiple items at once.
9. If you do not want to delete the category, right-click and click **Undelete**.
10. Once you select Undelete, a message box displays verifying that you really want to keep the item. Click **Yes** within the box to continue or **No** to cancel the operation.
11. Within the **Actions** ribbon group, click the **Save** (to save and stay) button or click the **Save & Close** (to save and exit) button.

## Creating a Configuration Package

Keep in mind when creating the package; you are creating something a customer (and, not necessarily a CAIRS user) can see. It is recommended you use terminology the layperson can understand.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to Subscriber Portal to access the submenu
3. Again, click the plus sign (+) next to **Configuration Packages** to access a submenu of the different configuration packages you can create, the following options are available:
  - Set Device Package
  - Circuit Package
  - Cell Phone Package
  - Authorization Code Package
  - General Task Package
4. From the list click on the package type that you want to create.
5. In the **Actions** pane, click the **Add New Configuration Package** link.
6. The General – Configuration Package window opens. Enter the following package information (required fields are indicted with an asterisk):
  - **Package Name\*** – type the package name, the name displayed on Subscriber Portal. The name should be general enough for the layperson to understand the purpose of the work order.
  - **Package Type\*** – this field auto-populates with the package type selected from the main menu, either Set Device or Circuit.
  - **Package Action\*** – from the drop-down box, select one of the following:
    - New Service

- Change Existing Service
  - Disconnect Service
  - **Configuration Package Category** – click the drop-down arrow to access a list and from the list select the package category
  - **WorkFlow Name\*** – click the drop-down arrow to access a list and from the list, select the name of the work flow within CAIRS that once submitted, this configuration package will associate with.
  - **Is Private** – click the field to insert a checkmark to indicate the package is visible only within CAIRS and not within Subscriber Portal.
  - **Limit By Site** – click the field to insert a checkmark limiting visibility to only those sites selected within the Sites Ribbon group.
  - **Limit By Organization** – click the field to insert a checkmark limiting visibility to only those Organizations selected within the Organizations Ribbon group.
  - **Limit By Subscriber Type\***– click the drop-down arrow to access a list. From the list, select **Official** or **Unofficial**. This limits the package to either official or unofficial subscribers.
  - **Required Resource Approval** – click the field to insert a checkmark indicating the Configuration Package needs the approval of a Resource Manager before submitting into CAIRS.
  - **Requires TCO Approval** – click the field to insert a checkmark indicating the Configuration Package needs TCO approval before submission into CAIRS.
  - **Description** – type a Configuration Package description.
  - **Sort Order** – this determines what position on the portal this configuration package appears. A value of 1 indicates the highest position.
7. If the Configuration Package you are creating is a Set Device Package, the lower pane displays the field Template Name. Click the field to access a drop-down list and from the list, select the type of phone to associate with this configuration package.
  8. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue adding information for the package, or click **Save & Close** (to save and exit) to return to the configuration package list.

## Deleting a Configuration Package

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to Subscriber Portal to access the submenu
3. Again, click the plus sign (+) next to **Configuration Packages** to access a submenu of the different configuration packages you can create, the following options are available:

- Set Device Package
  - Circuit Package
  - Cell Phone Package
  - Authorization Code Package
  - General Task Package
4. Within the list, click the package type. Depending on the amount of package you have within your database, the list may not readily populate. To populate the list, perform one of the following actions:
    - Within the search box, type any portion of the record and click the magnifying glass
    - Click the Show All button
  5. The Configuration Package list opens. Within the list, highlight the package you want to delete. There are two ways to delete a package:
    - Within the toolbar directly above the **Navigation** pane, click the red **X**.
    - Double-click the package name within the list. The Configuration Package window opens. Within the **Actions** ribbon group, click the **Delete** button.
  6. Once you click **Delete**, a message box displays verifying that you really want to package. Click **Yes** within the box to continue or **No** to cancel the operation.

## Configuration Packages - Sites

### *Adding Site Access to a Configuration Package*

Configuration Packages can be configured to only allow specific sites access. In order for this to work properly, you must check mark the Limit by Site field on the General screen granting site access on a non- inheritance, individual basis. Therefore, if you want the package to be available at several sites, place a check mark by each site name.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to Subscriber Portal to access the submenu
3. Again, click the plus sign (+) next to **Configuration Packages** to access a submenu of the different configuration packages you can create, the following options are available:
  - Set Device Package
  - Circuit Package
  - Cell Phone Package
  - Authorization Code Package
  - General Task Package

4. Within the list, click the package type. Depending on the amount of package you have within your database, the list may not readily populate. To populate the list, perform one of the following actions:
  - Within the search box, type any portion of the record and click the magnifying glass
  - Click the Show All button
5. The Configuration Package list opens. Within the list, double-click the package to open the General – Configuration Package window.
6. Within the **Show** ribbon group, click the **Sites** button. The window displays two panes of information; the top pane displays the sites associated to the package. The lower pane displays a list of all the sites within your database, the following read-only information is available for each site:
  - **Site Name** – displays the name of the site, this is the lowest level of the site tree.
  - **Site Path** – displays the complete path to the site. Each level is separated by a >.
  - **Site Level** – displays the site level name or number.
  - **Site Code** – displays the three-digit alphanumeric site code.

---

**!** You can search for a site within the Search All Sites pane by typing in the name or portion of the name within the Search text box, and then click the magnifying glass. Any record with the search characteristics displays within the pane.

---

7. To add a site to the package, find the site within the list, and double-click the record, the site name now displays within the upper pane.

---

**!** Be aware that sites do not inherit the associations of their parents. You must associate each level to the account. For example, if you associate a parent and want all the children associated you must associate all children site as well.

---

8. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with the package, or click **Save & Close** (to save and exit) to return to the Configuration Package list.

### ***Deleting Site Access from a Configuration Package***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to Subscriber Portal to access the submenu
3. Again, click the plus sign (+) next to **Configuration Packages** to access a submenu of the different configuration packages you can create, the following options are available:
  - Set Device Package

- Circuit Package
  - Cell Phone Package
  - Authorization Code Package
  - General Task Package
4. Within the list, click the package type. Depending on the amount of package you have within your database, the list may not readily populate. To populate the list, perform one of the following actions:
    - Within the search box, type any portion of the record and click the magnifying glass
    - Click the Show All button
  5. The Configuration Package list opens. Within the list, double-click the package to open the General – Configuration Package window.
  6. Within the **Show** ribbon group, click the **Sites** button.
  7. Within the top pane, right-click on the site name to access a pop-up menu, from the menu select **Delete**.
  8. Once you click Delete, a message box displays verifying that you really want to delete the site. Click **Yes** within the box to continue or **No** to cancel the operation.
  9. Once selected, CAIRS draws a line through the site; allowing you to delete multiple items at once.
  10. If you do not want to delete the site, right-click the record to access a pop-up menu, and click **Undelete**.
  11. Once you select Undelete, a message box displays verifying that you really want to keep the site. Click Yes within the box to continue or No to cancel the operation.
  12. Within the **Actions** ribbon group, click Save (to save and stay) or click Save & Close (to save and exit).

## Configuration Packages - Organizations

A package can be limited to allow only certain organizations access. To allow only certain organizations access, click the Limit by Organization checkbox from the General screen. When granting access in the Organization Tree, lower levels inherit the access when you select a higher-level, so you will want to be sure to click the checkbox next to each lower level that should have package access.

### ***Adding Organization Access to the Configuration Package***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to Subscriber Portal to access the submenu



3. Again, click the plus sign (+) next to **Configuration Packages** to access a submenu of the different configuration packages you can create, the following options are available:
  - Set Device Package
  - Circuit Package
  - Cell Phone Package
  - Authorization Code Package
  - General Task Package
4. Within the list, click the package type. Depending on the amount of package you have within your database, the list may not readily populate. To populate the list, perform one of the following actions:
  - Within the search box, type any portion of the record and click the magnifying glass
  - Click the Show All button
5. The Configuration Package list opens. Within the list, double-click the package to open the General – Configuration Package window.
6. Within the **Show** ribbon group, click the **Organizations** button. The screen display two panes of information; the top pane displays the organization associated to the package. The lower pane displays the complete list of organizations currently established within your database.
7. Within the Search Organization (lower pane), there are 6 columns of information:
  - **Organization Name** – displays the lowest level of the organization tree.
  - **Organization Path** – displays the complete path to the organization name. Each level is separated by >.
  - **Account Number** – displays the account number associated to the organization name.
  - **TCO** – displays the TCO Group associated to the organization
  - **Organization Code** – displays the organization code
  - **Organization Abbreviation** – displays the organization abbreviation
8. To add an organization to a package, find the name within the list and double-click the row. The organization name displays in the Selected Organizations pane. The lowest level of the organization is listed first, after the two ~~ the complete path to the organization is displayed, each level is separated by a >.

---

**!** You can search for an organization within the Search Organization pane by typing in the name or portion of the name within the Search text box, once entered click the magnifying glass. Any record with the search characteristics displays within the pane.

---

9. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue adding information for the package, or click **Save & Close** (to save and exit) to return to the configuration package list.

### ***Deleting Organization Access from a Configuration Package***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to Subscriber Portal to access the submenu
3. Again, click the plus sign (+) next to **Configuration Packages** to access a submenu of the different configuration packages you can create, the following options are available:
  - Set Device Package
  - Circuit Package
  - Cell Phone Package
  - Authorization Code Package
  - General Task Package
4. Within the list, click the package type. Depending on the amount of package you have within your database, the list may not readily populate. To populate the list, perform one of the following actions:
  - Within the search box, type any portion of the record and click the magnifying glass
  - Click the Show All button
5. The Configuration Package list opens. Within the list, double-click the package to open the General – Configuration Package window.
6. Within the **Show** ribbon group, click the **Organizations** button.
7. Within the **Selected Organizations** pane, right-click the Organization to delete. A small pop-up menu opens. Click **Delete**.
8. Once you click Delete, a message box displays verifying that you really want to delete the Organization. Click **Yes** within the box to continue or **No** to cancel the operation.
 

Once selected, CAIRS draws a line through the name allowing you to delete multiple items at once.
9. If you do not want to delete the Organization, right-click the record to access a pop-up menu, and click **Undelete**.
10. Once you select Undelete, a message box displays verifying that you really want to undelete the selection. Click **Yes** within the box to continue or **No** to cancel the operation.
11. Within the **Actions** ribbon group, click **Save** (to save and stay) or click **Save & Close** (to save and exit).

## Configuration Packages – Related Inventory

Adding equipment and services to a configuration package allows the customer to view the requested work order's requirements and costs.

### *Adding Related Inventory to a Configuration Package*

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to Subscriber Portal to access the submenu
3. Again, click the plus sign (+) next to **Configuration Packages** to access a submenu of the different configuration packages you can create, the following options are available:
  - Set Device Package
  - Circuit Package
  - Cell Phone Package
  - Authorization Code Package
  - General Task Package
4. Within the list, click the package type. Depending on the amount of package you have within your database, the list may not readily populate. To populate the list, perform one of the following actions:
  - Within the search box, type any portion of the record and click the magnifying glass
  - Click the Show All button
5. The Configuration Package list opens. Within the list, double-click the package to open the General – Configuration Package window.
6. Within the **Show** ribbon group, click the **Related Inventory** button.
7. This window is broken into two categories; Equipment (top pane) and Services (bottom pane). Anything added in this window is associated with the configuration package.
8. In the Equipment pane, click the field marked with an asterisk (\*) to enter a new piece of equipment for the package. Use the drop-down lists or type the appropriate information into each of the following columns (required fields are marked with an asterisk (\*)):
  - **Equipment Type\*** – click the drop-down arrow to access a list, from the list select the equipment type. For example, set devices, circuit type, telephone type, etc.
  - **Equipment Name\*** – click the drop-down arrow to access a list, from the list select the equipment name.

- **Part Name\*** – click on the drop-down arrow to access a list, from the list select the equipment part name.
  - **Site** – click the drop-down arrow to access a list and from the list, select the site. The site drop-down list displays the bottom-most site first. After the ~~ is the complete path to the site. In the example below, we selected the Henderson site, which is a child to Las Vegas. Each site level is separated by a >.
  - **Serial Number\*** – click on the drop-down arrow to access a list, from the list select the equipment's serial number.
  - **Quantity** – this field auto-populates with a pre-determined quantity amount. To change, click the field and type the new information.
  - **Sort Position** – indicates the position the equipment displays within the list.
  - **One Time Cost** – this field auto-populates with the equipment's one-time charge.
  - **Recurring Cost** – this field auto-populates with the equipment's recurring charge.
9. Follow the same procedure outlined above to enter in a Service.
  10. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue adding information for the package, or click **Save & Close** (to save and exit) to return to the configuration package list.

### ***Deleting Related Inventory from a Configuration Package***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to Subscriber Portal to access the submenu
3. Again, click the plus sign (+) next to **Configuration Packages** to access a submenu of the different configuration packages you can create, the following options are available:
  - Set Device Package
  - Circuit Package
  - Cell Phone Package
  - Authorization Code Package
  - General Task Package
4. Within the list, click the package type. Depending on the amount of package you have within your database, the list may not readily populate. To populate the list, perform one of the following actions:
  - Within the search box, type any portion of the record and click the magnifying glass
  - Click the Show All button

5. The Configuration Package list opens. Within the list, double-click the package to open the General – Configuration Package window.
6. Within the **Show** ribbon group, click the **Related Inventory** button.
7. Within either the **Equipment** or **Services** pane, right-click on the selector box next to the name, a small pop-up menu opens, within the box click **Delete**.
8. Once you click on Delete, a message box displays verifying that you really want to delete the equipment or service. Click **Yes** to continue or **No** to cancel the operation.
9. Once you click Yes, CAIRS places a solid line through the entire row. To complete the process and remove the equipment/service you must save before exiting.
10. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue modifying the package, or click **Save & Close** (to save and exit) to return to the configuration package list.

## Configuration Packages - Related Fields

### *Adding Related Fields to a Configuration Package*

Administrators can add fields to this ribbon group and require the Subscriber to complete them before submitting the package into CAIRS.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to Subscriber Portal to access the submenu
3. Again, click the plus sign (+) next to **Configuration Packages** to access a submenu of the different configuration packages you can create, the following options are available:
  - Set Device Package
  - Circuit Package
  - Cell Phone Package
  - Authorization Code Package
  - General Task Package
4. Within the list, click the package type. Depending on the amount of package you have within your database, the list may not readily populate. To populate the list, perform one of the following actions:
  - Within the search box, type any portion of the record and click the magnifying glass
  - Click the Show All button
5. The Configuration Package list opens. Within the list, double-click the package to open the General – Configuration Package window.
6. Within the **Show** ribbon group, click the **Related Fields** button.

7. Within this ribbon group, you add fields the Subscriber must complete before submitting the Configuration package into CAIRS. There are two panes of information; the left-hand pane displays any workflow custom fields that may need to be completed. The right-hand pane allows you to add your own custom fields, to add a field click the row marked with an asterisk (\*) and complete the following fields (required fields are marked with an asterisk (\*)):
  - **Sort Position** – indicates the order the Subscriber completes the fields. Click the field to enter a number starting with zero (0). Assign each added field the next number.
  - **Display Name\*** – click on the drop-down arrow to access a list. From the list, select the field type: **Location, Related Directory Line Data, Related Work Order Fields** or **Custom Field**.
  - **Field Name\*** – click on the drop-down arrow to access a list from the list select the name of the field the subscriber needs to complete. The fields change based on the information you selected in the Display Name column.
  - **Custom Field Name** – type the field name as it will appear on the Subscriber Portal page. For instance, if the CAIRS field name is Termination, you may want to change it to Building.
  - **Availability\*** – click the drop-down arrow to access a list and from the list, select when the field becomes available to the subscriber. The following options are available:
    - **At Creation** – select this option to have the field display the moment the order is created, then throughout the entire work order process.
    - **For Review** – this field displays after the creation of the work order and displays the status of the review process.
    - **After Close** – this field displays when the work order is completed.
    - **Not Available** – this field’s purpose is still in development.
  - **Textbox Lines** – this numeric value determines the amount of lines within the textbox used to enter in the information. The larger the number the bigger the textbox, it is best to start with a lower number and increase as needed.
  - **Required Field** – a checkmark in the field indicates that this is a required field, click the box to remove the checkmark to make the field optional.
8. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue adding information for the package, or click **Save & Close** (to save and exit) to return to the configuration package list.

### ***Deleting Related Fields from a Configuration Package***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to Subscriber Portal to access the submenu

3. Again, click the plus sign (+) next to **Configuration Packages** to access a submenu of the different configuration packages you can create, the following options are available:
  - Set Device Package
  - Circuit Package
  - Cell Phone Package
  - Authorization Code Package
  - General Task Package
4. Within the list, click the package type. Depending on the amount of package you have within your database, the list may not readily populate. To populate the list, perform one of the following actions:
  - Within the search box, type any portion of the record and click the magnifying glass
  - Click the Show All button
5. The Configuration Package list opens. Within the list, double-click the package to open the General – Configuration Package window.
6. Within the **Show** ribbon group, click the **Related Fields** button.
7. Within the list of fields, right-click the name to access a pop-up menu, click **Delete**.
8. Once you click Delete, a message box displays verifying that you really want to delete the field. Click **Yes** to continue or **No** to cancel the operation.
9. Once selected, CAIRS draws a line through the site; allowing you to delete multiple fields at once.
10. If you do not want to delete the field, right-click the record, and click **Undelete**.
11. Once you select Undelete, a message box displays verifying that you really want to keep the field. Click **Yes** within the box to continue or **No** to cancel the operation.
12. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue adding information for the package, or click **Save & Close** (to save and exit) to return to the configuration package list.

## Configuration Packages - History

### *Viewing the History of a Configuration Package*

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to Subscriber Portal to access the submenu
3. Again, click the plus sign (+) next to **Configuration Packages** to access a submenu of the different configuration packages you can create, the following options are available:

- Set Device Package
  - Circuit Package
  - Cell Phone Package
  - Authorization Code Package
  - General Task Package
4. Within the list, click the package type. Depending on the amount of package you have within your database, the list may not readily populate. To populate the list, perform one of the following actions:
    - Within the search box, type any portion of the record and click the magnifying glass
    - Click the Show All button
  5. The Configuration Package list opens. Within the list, double-click the package to open the General – Configuration Package window.
  6. Within the **Show** ribbon group, click the **History** button. The following read only information displays for each action performed on the set:
    - **Action Name\*** – describes the completed action. For example, Add New Configuration Package, Update Configuration Package, etc.
    - **Custom Field Name** – displays the field name of the modified information
    - **Old Value** – displays the old information
    - **New Value** – displays the new information
    - **User Name** - displays the username of the person who completed the changes
    - **Last Name/ First Name** – displays the first and last name of the user who completed the action.
    - **Activity Date\*** – displays the date the action was completed.
    - **Source\*** – lists the computer’s IP address.
    - **Work Order Number** – displays the work order number for the order completed to make the changes, if applicable.
  7. Alternatively, you can click on the lower portion of the History button to access a menu, from the menu select Old History. The screen changes to display a list of all action taken on the configuration package, to view more detail double click on the record.

A window opens with a more detailed description of the action.
  8. Within the **Action** ribbon group, click the **Close** button to return to the package



## Subscriber Portal General Settings

### Subscriber Portal Security

This section allows you to manage what information a subscriber sees within their portal. As an administrator, you determine the column visibility and order of what the subscriber sees within the portal. For example, if you have two sets of subscribers, one that uses authorization codes and one that does not, this allows you to create two profiles. One profile that has authorization codes visible and another that does not.

There is a three-step process. First, you need to create the different profiles for each subscriber type, you can have as many as you want or just one. Second, you need to associate each subscriber to the correct profile. Finally, you need to determine the column visibility and order within the portal.

#### **Step One: Profile**

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Security** to access the sub-menus.
3. Click **Profiles**.
4. There are two ways to add a new profile:
  - Within the tool bar directly above the **Navigation** pane, click the dropdown arrow next to **New**. From the list, select **Profile**.
  - Within the **Actions** pane, click the **Add New Profile** link.
5. With either option, the General-Profile window opens. The only field you need to add is the Profile Name, all other settings are determined within the portal.
6. Enter in the following information for the profile (required fields are marked with an asterisk (\*)):
  - **Profile Name\*** – type-in the alphanumeric profile name, we recommend keeping profile names easy to identify when adding a user, for example Subscriber – Auth, Subscriber – No Auth, etc.
7. Within the **Actions** ribbon group, click the **Save & Close** (to save and exit) button to continue to step two.

#### **Step Two: Profile Association**

When you are associating profiles to subscribers, there are two ways. First, you can associate all subscribers to the same profile to you can create a few different profiles and associated each one individually.

The following steps walk you through both.

1. From the main menu, click **System Admin**.

2. Within the Navigation pane, click Subscriber Portal Settings then Subscriber Portal Security.
3. There are two ways to manage your Subscriber Security:
  - From within the **Menu** toolbar, click the Manage Subscriber Security button.
  - Within the **Actions** pane, click the Manage Subscriber Security link.
4. With either option, the Subscriber Security pop-up opens, there are four columns of information:
  - Last and First Name – display the subscribers first and last name
  - User Name – displays the username the subscriber uses when logging into Subscriber Portal
  - Profile Name – this is the name of the profile that you created within the System Admin – Security – Profiles
5. Find the subscriber that you want to associate to a profile, if you can readily find the subscriber, you can perform a search. To search for a specific subscriber perform one of the following actions:
  - Within the search box, type any portion of the record and click the magnifying glass
  - Click the Show All button
6. Once the list populates, within the Profile Name field, click the dropdown arrow to access a list of the all profiles, within the list select the appropriate profile for the subscriber.
7. To associate all subscribers to the same profiles, associate one subscriber to the profile, then click the selector box next to the last name to highlight the complete row. Within the Edit ribbon group, click the 'Replace All With Current Profile' button. You are asked to confirm that you are replacing all subscribers with the profile, within the message box click yes to continue or no to cancel the operation.
8. When you are done associating, click the Save button to return to the Subscriber Security list.

### **Step Three: Column Visibility**

Within Subscriber Portal, you determine what columns each profile can see. The ability to change column visibility is only available to system administrators. After you login as an administrator, throughout Subscriber Portal, there are Customize Grid links. When you click on the link a list of the fields for the appropriate section appear along with the field position and a visibility checkbox.

At the top of the list, select the Profile that you want to effect by clicking the dropdown arrow and selecting the profile name. As a default, every field is visible, to remove the field click on the box to remove the checkmark.

In addition, you can adjust the position by clicking the Up or Down links to the right of the field name. Once you complete making your changes, click on the Save button.



# Call Record Settings

Within Call Record Settings, you are creating the structure that you can use to re-price your call records. Ideally, as UCE collects and formats the calls, they are priced with the UCE Rate Tables. However, calls may need to be re-priced once they are within the CAIRS active call database. The Call Pricing Groups combines the rates types, zones, rate groups, dial codes and call types together to form how the call is priced.

The following options are available within Call Record Settings:

- **Call Pricing Group** – ties all of the below information into one group to allow the call to be re-priced properly.
- **Call Types** – determines the call types that are allowed from your switches.
- **Dial Codes Group** – determines the various dial codes including area codes, country codes, etc.
- **Rate Group** – determines the period and cost for each rate type.
- **Zone Group** – determines the times for each rate type. For example, you can have one rate for calls made between the hours of 7:00 am to 7:00 pm and another rate for calls made between 7:01 and 11:59, and so on.
- **Rate Type** – ties the zone and the rate together.
- **Digits to Add** – allows you to add digits to the beginning of call record extensions
- **Call Record General Settings** – manage call record general settings.
- **Import UCE Data** – allows you to import your DSS or UPT files into CAIRS

Within this document, the order of the menu options does not match the order within the software. This is because when you are creating your Call Pricing Groups, you need to start with the basics and work your way up. Therefore, we will start at the bottom of the list and work our way up.

---

## Rate Type

A rate type is the basic building block for the call-pricing group. You are creating a rate type that eventually ties a zone group and the rate group together. For example, you can have three rate types; day, evening and night.

## Adding a Rate Type

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next Call Record Settings
3. Click **Rate Type**.
4. There are three ways to add a rate type:
  - Within the tool bar directly above the **Navigation** pane, click the dropdown arrow next to **New**. From the list, select **Rate Type**.
  - Within the toolbar directly above the **Navigation** pane, click on the **Add Rate Type** button.
  - Within the **Actions** pane, click the **Add Rate Type** link.
5. With either option, the General – Rate Type window opens.
6. Within the **Rate Type** field, type in the name of the type. When naming a rate type keep in mind that when you assign it to a zone, you are attaching hours. You might want to think about naming it daytime, evening, nighttime, etc.
7. Within the Actions ribbon group, click on the **Save** (to save and stay) button, click the **Save & Close** (to save and exit) button, or click the **Save & New** (to save and refresh the screen) button to continue adding in additional rate types.

## Deleting a Rate Type

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next **Call Record Settings**.
3. Click **Rate Type**.
4. The list of existing rate types populates to the right, click on the rate type to highlight. There are three ways to delete a rate type:
  - Within the tool bar directly above the **Navigation** pane, click the red 'X'.
  - Within the toolbar directly above the **Navigation** pane, click on the **Delete Rate Type** button
  - Within the **Actions** pane, click the **Delete Rate Type** link.
5. With either option, a warning message appears verifying that you really want to delete the rate type. In addition, if the rate type is associated to a rate or zone, the associate will also be deleted.
6. Once you click yes within the message box, the rate type is removed from the system.

---

## Zone Groups

A zone group determines the times the rate type is available. For example, in the same example as above, the zone times determine what time of day the rate type day starts and ends. Please keep mind that when creating your zone times, you cannot have overlapping times.

### Adding a Zone Group

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click on the plus sign (+) next **Call Record Settings**.
3. Click **Zone Group**.
4. There are three ways to add a zone group:
  - Within the tool bar directly above the **Navigation** pane, click the dropdown arrow next to **New**. From the list, select Zone Group.
  - Within the toolbar directly above the **Navigation** pane, click the **Add Zone Group** button.
  - Within the **Actions** pane, click the **Add Zone Group** link.
5. With either option, the General-Zone Group window opens. There are two panes of information, the top pane allows you to name the zone group, and the lower pane allows you create the time structure.
6. Within the top pane, click the field next to **Zone Group** and type in the name. This is a required field; you must enter something in this field.
7. Within the lower pane, complete the following fields, all fields are required:
  - **Rate Type** – click the dropdown arrow to access a list of the existing rate types and from the list select the rate type.

---

**!** When determining the times, click on the portion of the time (hour, minutes or AM/PM) to insert your cursor and then click on the up and down arrows. Alternatively, click on the portion of the time and type-in the new information.

---

- **Start Time** – the field defaults to 12:00 AM, click on the field to access a set of up and down arrow, click the appropriate arrow until you have reached the start time for the rate. If the time requires a PM, click to place your cursor within the AM and click on either arrow. The AM turns to PM and vice versa.

---

**!** Remember, when you entering in the times, you cannot overlap. We have designed CAIRS to stop a rate at 00:59 and start a new rate at 00:00.

---

- **End Time** – the field defaults to 11:59 PM, click on the field to access a set of up and down arrow, click on the appropriate arrow until you have reached the start

- time for the rate. If the time requires a PM, click to place your cursor within the AM and click on either arrow. The AM turns to PM and vice versa.
- **Monday – Sunday** – for each day the rate applies, click on the appropriate box to insert a checkmark. The day can appear in multiple rate types, just as long as there is no overlapping!
8. Within the **Actions** ribbon group, click the **Save** (to save and stay) button, click the **Save & Close** (to save and exit) button, or click on the **Save & New** (to save and refresh the screen) button to continue adding in additional Zone Groups.

## Deleting a Zone Time

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next Call Record Settings.
3. Click **Zone Group**. The list of existing rate types populates to the right, double click the zone group.
4. The General-Zone Group window opens.
5. Within the **Zone Times** pane, right click the record selector box next to the rate to access a pop-up menu. From the menu, select **Delete**.
6. A message box appears verifying that you really want to delete the time, within the box click **Yes** to continue or **No** to cancel the operation.
7. Within the **Actions** ribbon group, click the **Save** (to save and stay) button or click the **Save & Close** (to save and exit) to return to the Zone Group list.

## Deleing a Zone Group

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next **Call Record Settings**.
3. Click **Zone Group**. The list of existing rate types populates to the right, click the zone to highlight. There are three ways to delete a zone:
  - Within the tool bar directly above the **Navigation** pane, click the red 'X'.
  - Within the toolbar directly above the Navigation pane, click on the Delete Zone Group button.
  - Within the **Actions** pane, click the Delete **Rate Type** link.
4. With either option, a warning message appears verifying that you really want to delete the rate type. In addition, if the zone is associated to a call pricing groups or dial codes, the associate will also be deleted.
5. Once you click yes within the message box, the zone type is removed from the system.

---

## Rate Groups

A rate group allows you to determine how much each period of time costs for each rate type which already includes the zone group.

### Adding a Rate Group

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next **Call Record Settings**.
3. Click **Rate Group**.
4. There are three ways to add a rate group:
  - Within the tool bar directly above the **Navigation** pane, click the dropdown arrow next to **New**. From the list, select **Rate Group**.
  - Within the toolbar directly above the **Navigation** pane, click on the **Add Rate Group** button.
  - Within the **Actions** pane, click the **Add Rate Group** link.
5. With either option, the General-Rate Group window opens. There are two panes of information, the top pane allows you to name the rate group, and the lower pane allows you create the cost of each time period.
6. Within the top pane, click on the field and type-in the name of the rate group.
7. Within the lower pane, complete the following fields, all fields are required:
  - **Rate Type** – click the dropdown arrow to access a list of the existing rate types and from the list select the rate type.
  - **First Period** – type in the number of seconds for the first time period of billing. For example, the first 60 seconds of a call may cost more or less than the rest of the call.
  - **First Cost** – type-in the cost for the first period of billing.
  - **Other Period** – type-in the number of seconds for the other periods, for example, for each 180 seconds of a call you charge a different rate.
  - **Other Cost** – type in the cost for the other period.
8. Within the **Actions** ribbon group, click the **Save** (to save and stay) button, click the **Save & Close** (to save and exit) button, or click the **Save & New** (to save and refresh the screen) button to continue adding in additional Rate Groups.

### Deleting a Rate Group

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next **Call Record Settings**.



3. Click **Rate Group**. The list of existing rate groups populates to the right. Click the rate group to highlight. There are three ways to delete a rate group:
  - Within the tool bar directly above the **Navigation** pane, click the red 'X'.
  - Within the toolbar directly above the **Navigation** pane, click the **Delete Rate Group** button.
  - Within the **Actions** pane, click the **Delete Rate Group** link.
4. With either option, a warning message appears verifying that you really want to delete the rate group. In addition, if the group is associated to a call-pricing group or dial codes, the associate will also be deleted.
5. Once you click yes within the message box, the rate group is removed from the system.

---

## Dial Code Groups

Within dial codes, you are entering the various codes used when making calls. These can include country codes, area codes, DSN codes, etc. You can place each code into a group allows for correct billing, for example, CONUS vs OCONUS.

### Adding a Dial Code Group

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next **Call Record Settings**.
3. Click **Dial Code Groups**.
4. There are three ways to add a group:
  - Within the tool bar directly above the **Navigation** pane, click the dropdown arrow next to **New**. From the list, select **Dial Code Group**.
  - Within the toolbar directly above the **Navigation** pane, click on the **Add Dial Code Group** button.
  - Within the **Actions** pane, click the **Add Dial Code Group** link.
5. With either option, the General-Dial Code Group window opens. There are two panes of information, the top pane allows you to name the dial codes group, and the lower pane allows you to enter the specific codes.
6. Within the top pane, click the field next to **Dial Codes Group** and type in the name. This is a required field and you must enter something in this field.
7. Within the lower pane, click the top row, marked with an asterisk (\*) to add a new record, complete the following fields (required fields are marked with an asterisk (\*)):
  - **Code\*** – enter the numeric six digit dial code; this is the code that matches the call record to the call pricing group. For example, you would enter 702 for call made to Nevada. When the call records is matched, it matches from the most

specific to the least specific, for example, if I have a 7022 and a 702 code, my 7022160266 number matches on the 7022 dial code first.

- **Country** – type-in the country name, if applicable.
  - **State** – type-in the state name, if applicable.
  - **Abbv\*** – type-in the two-digit abbreviation for the dial code, for example, the abbreviation of Nevada would be NV.
  - **City** – type-in the name of the city the code applies to, if applicable.
8. Once you click the row marked with an asterisk to enter the code, a new row appears at the top of the list to allow you to add multiple items at one time.
  9. Within the **Actions** ribbon group, click the **Save** (to save and stay) button. Click the **Save & Close** (to save and exit) button, or click on the **Save & New** (to save and refresh the screen) button to continue adding in dial codes.

## Deleting a Dial Code Group

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next **Call Record Settings**.
3. Click **Dial Code Groups**. The list of existing groups populates to the right. Click the dial codes group to highlight. There are three ways to delete a group:
  - Within the tool bar directly above the **Navigation** pane, click the red 'X'.
  - Within the toolbar directly above the **Navigation** pane, click on the **Delete Dial Codes Group** button.
  - Within the **Actions** pane, click the Delete **Dial Codes Group** link.
4. With either option, a warning message appears verifying that you really want to delete the rate group. In addition, if the group is associated to a call pricing the associate will also be deleted.
5. Once you click yes within the message box, the dial codes group is removed from the system.

---

## Call Types

Within call types, you define which calls that you allow your customers to make through you switch(s).

### Adding a Call Type

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next **Call Record Settings**.
3. Click **Call Types**.

4. There are three ways to add a type:
  - Within the tool bar directly above the **Navigation** pane, click the dropdown arrow next to **New**. From the list, select **Call Types**.
  - Within the toolbar directly above the **Navigation** pane, click the **Add Call Types** button.
  - Within the **Actions** pane, click the **Add Call Types** link.
5. With either option, the General-Call Types window opens. Within the top pane complete the following fields (required fields are marked with an asterisk (\*)):
  - **Call Type\*** – type in the name of the call type, for example, INTNL, LDist, Local, Inhouse, etc.
  - **Type of Service Name** – click on the dropdown arrow to access a list and from the list, select the type of service name associated to the call type.
  - **Do Not Bill** – this field determines whether the call type is included in billing, the field defaults to no checkmark, meaning that the call type will be included in the bill. Click the field to insert a checkmark to indicate that the call type will not be included in the bill.

---

**!** For the next section to make sense, you need to add a Call Pricing Group into the database. Please refer to Call Pricing Group → Add a Call Pricing Group for more detail.

---

6. Within the lower portion complete the following fields (required fields are marked with an asterisk (\*)):
  - **Call Pricing Group\*** – click the dropdown arrow to access a list, and from the list, select the Call Pricing Group.

---

**!** In the event that the call record does not match any dial code group, the call will be priced using this pricing.

---

- **First Period** – type in the number of seconds for the first time period of billing. For example, the first 60 seconds of a call may cost more or less than the rest of the call.
- **First Cost** – type-in the cost for the first period of billing.
- **Other Period** – type-in the number of seconds for the other periods, for example, for each 180 seconds of a call you charge a different rate.
- **Other Cost** – type in the cost for the other period.
- **Grace Time** – the information in this field does not apply to re-pricing your calls, we will use this field in the future when UCE is integrated into CAIRS.
- **Adjustment** – the information in this field does not apply to re-pricing your calls, we will use this field in the future when UCE is integrated into CAIRS.

- **Dial Codes Group** – click the dropdown arrow to access a list and from the list, select the dial code group associated with the call type.
  - **Use Zone Billing** – this field works in conjunction with Dial Code Groups. Click the field to insert a checkmark indicating you want to use zone billing, which in turn prices your calls based on the dial code group. If a call record does not match any code within the dial code group, the default pricing goes into effect.
7. Within the **Actions** ribbon group, click the **Save** (to save and stay) button. Click the **Save & Close** (to save and exit) button, or click the **Save & New** (to save and refresh the screen) button to continue adding in call types.

## Deleting a Call Type

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click on the plus sign (+) next **Call Record Settings**.
3. Click **Call Types**. The list of existing call types populates to the right. Click the call type to highlight. There are three ways to delete a type:
  - Within the tool bar directly above the **Navigation** pane, click the red 'X'.
  - Within the toolbar directly above the **Navigation** pane, click the **Delete Call Types** button.
  - Within the **Actions** pane, click the **Delete Call Types** link.
4. With either option, a warning message appears verifying that you really want to delete the type. In addition, if the group is associated to a call pricing group the associate will also be deleted.

---

## Call Pricing Group

Finally, the section where we pull it all together, within Call Pricing Group you are associating the dial codes with a Rate Group and Zone Group. In addition, if you are using foreign currency, you can enter in an exchange rate.

Once you have added the call pricing group, you can associate the dial codes to the rate and zone groups. Often times, a site only needs one call pricing group to associate all the dial codes to the appropriate rates and zones.

## Adding a Call Pricing Group

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next **Call Record Settings**.
3. Click **Call Pricing Group**.
4. There are three ways to add a group:
  - Within the tool bar directly above the **Navigation** pane, click the dropdown arrow next to **New**. From the list, select **Call Pricing Group**.

- Within the toolbar directly above the **Navigation** pane, click the **Add Call Pricing Group** button.
  - Within the **Actions** pane, click the **Add Call Pricing Group** link.
5. With either option the General – Call Pricing Group window opens. There are two panes of information, the top pane allows you to name the group whereas the bottom pane allows you to assign an exchange rate.
  6. Within the top pane, click the field next to **Call Pricing Group** and type-in the name of the group. This is a required field.
  7. Within the lower pane, click the row marked with an asterisk (\*) to add a new record, complete the following fields (required fields are marked with an asterisk (\*)):
    - **Conversion Rate** – click the field to access a dropdown arrow, then click on the dropdown arrow to access a calendar, from the calendar select the effective date of the exchange rate. The calendar defaults to today's date to change the date, to change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.
    - **Conversion Rate\*** – type-in the multiplier of the conversion rate. The exchange rate is a multiplier to the dollar, for example, if the yen is worth twice the dollar, you would enter a 2 in the field.
  8. Within the **Actions** ribbon group, click the **Save** (to save and stay) button, click the **Save & Close** (to save and exit) button, or click on the **Save & New** (to save and refresh the screen) button to continue adding in call pricing groups.

## Adding Dial Codes to a Group

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click on the plus sign (+) next **Call Record Settings**.
3. Click **Call Pricing Group**. The list of existing call pricing group populates to the right. Double click the record to open the General – Call Pricing Group window.
4. Within the **Show** ribbon group, click on the **Dial Codes Group** button. The screen changes to display the Rate and Zone Associations. Next to each **Dial Code Group Name** click the plus sign (+) to access the codes. For each code complete the following information:
  - **Rate Group** – click the dropdown arrow to access a list and from the list, select the rate group. Remember that a rate group defines how much is charges for each period of a call, for example the first 60 seconds vs. the remaining increments.
  - **Zone Group** – click the dropdown arrow to access a list and from the list, select the zone group. Remember the zone group, determines the time the rates are available, they could be the daytime, evening or night hours.

5. Within the Actions ribbon group, click on the **Save** (to save and stay) button, click on the **Save & Close** (to save and exit) button, or click on the **Save & New** (to save and refresh the screen) button to continue adding in call pricing groups information.

## Deleting a Call Pricing Group

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next **Call Record Settings**.
3. Click **Call Pricing Group**. The list of existing call pricing group populates to the right. Click the group that you want to delete. There are three ways to delete a type:
  - Within the tool bar directly above the **Navigation** pane, click the red 'X'.
  - Within the toolbar directly above the **Navigation** pane, click on the **Delete Call Types** button.
  - Within the **Actions** pane, click the **Delete Call Types** link.
4. With either option, a warning message appears verifying that you really want to delete the type, within the box click **Yes** to continue or **No** to cancel the operation.

---

## Digits to Add

Within Digits to Add, you can add digits to the beginning of each call record extension collected. This allows different extension lengths within your CAIRS database and your call record data. For example, if you call record data only collects a four digits extension and your CAIRS database contains seven-digit extension you can use this option to append each call record with the additional three digits.

## Adding Digits to Add

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next **Call Record Settings**.
3. Click **Digits to Add**
4. There are two ways to manage your digits to add:
  - Within the toolbar directly above the **Navigation** pane, click the **Add Digits to Add** button.
  - Within the **Actions** pane, click the **Add Digits to Add** link.
5. With either option, the General – Digits to Add window opens. There are two panes of information the Digits to Add pane and the Digits to Add Details.
6. Within the Digits to Add pane, complete the following information (required fields are marked within an asterisk (\*)):
  - Switch Name \* - click the dropdown arrow to access a list and from the list, select the switch name of where the call records are coming from.

- **Disable** – this field defaults to be blank, to disable the digits to add, click on the checkbox to insert a checkmark. The checkmark disables the system from appending the call record extension with the digits.
7. Within the **Digits to Add Details** pane, complete the following information (required fields are marked within an asterisk (\*)):
    - **Starting With \*** - enter the digits that start the call records, this is sort of a search parameter to tell CAIRS what records to look for. For example, if you are collecting 45000 and you want to append the numbers with 21, you would enter a 4 in this field, each call record that started with a four and is 5 digits long, CAIRS would append with a 21.
    - **Ext Length \*** - type in the length of the extension as it is collected from your switch
    - **NNX Info to Add \*** - type-in the digits to append to the start of the extension.
  8. Within the **Actions** ribbon group, click on the **Save** (to save and stay) button, click on the **Save & Close** (to save and exit) button, or click on the **Save & New** (to save and refresh the screen) button to continue adding information

## Deleting Digits to Add

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next **Call Record Settings**.
3. Click **Digits to Add**. The list of existing digits to add populates to the right. Click the group that you want to delete. There are three ways to delete a type:
  - Within the tool bar directly above the **Navigation** pane, click the red 'X'.
  - Within the toolbar directly above the **Navigation** pane, click on the **Delete Digits to Add** button.
  - Within the **Actions** pane, click the **Delete Call Types** link.
4. With either option, a warning message appears verifying that you really want to delete the selection, within the box click **Yes** to continue or **No** to cancel the operation.

---

## Call Record General Settings

Use these settings to configure how CAIRS deals with your call records. When you install CAIRS, a Unique Communication Representative and your CAIRS administrators determine these settings. There are four columns of information for each setting:

1. **Setting Name\*** – the setting name.
2. **Category\*** – the category for these settings is Call Records
3. **Setting Value\*** – displays the actual setting, for example, true, false, etc.
4. **Description\*** – displays a brief setting description.

The following settings are available:

- **Archive Bulk Size** – allows you to determine the number of call records that you want to copy when archiving or restoring. The default is set to 10,000 calls in each file. You can increase or decrease the value by entering a different number.
- **Billing Interval** – indicates your billing interval; every second, every 6 seconds or every minute. This defaults to 0 meaning that every second is billed.
- **Current Currency Symbol** – displays the currency symbol you are using for all billing, for example the \$ sign.
- **Days Till Expiration Warning** – this setting determines the number of days before you receive an expiration warning for foreign currency. The default is 355 days, meaning that you must update the exchange rate every 355 days.
- **Do Not Round to Two Decimals** - if you are using the re-pricing option, CAIRS automatically rounds the call price to two decimal points. This defaults to false which rounds the call pricing to 2 decimals (\$10.55). Set this to True to round to 4 decimals places (\$10.3405).
- **Foreign Currency Expiration Warning** – this setting works in conjunction with the 'Days Till Expiration Warning', if set to true than the administrator receives the warning, if set to false no warning is given.
- **Foreign Currency Symbol** – displays the foreign currency symbol if you are billing in a foreign currency
- **Round First Minute** – determines whether to round the first minute of billing up, if set to true, if the call is 30 seconds long the customer is charged for the full minute. If set to false, the customer is charged for 30 seconds. This defaults to false.
- **Round to Next Period** – determines whether to round up to the next whole number, if set to false, if a call was 3 min 15 sec long, the customer would be billed for 4 min. If set to true, the customer is charged for exactly 3 min 15 sec.
- **Unit Value** – displays the number of units for each value. For example, 100 units (cents) in \$1 or 100 pence in 1 pound.
- **Update Auth Code Calls by Extension if Missing** - in the event that an authorization code does not exist within your database, you can use this setting to have the calling extension billed for the call. This defaults to False meaning that the call record will not be billed to any number until you create the authorization code and run the CES process to Change Call Ownership. However, if you set this to True, CAIRS will automatically bills the calling extension for the call record.



- **Update Missing Billing Subscriber From Directory Line** – ideally call records are updated with the subscriber information associated to authorization codes, if you do not use authorization codes the update comes from the billing account number. If there is no subscriber information on either one of those, CAIRS uses the subscriber information related to the directory line (aka configured set). If this is set to true, CAIRS tries the authorization code then the billing account then the configured set for the subscriber information. If set to false, CAIRS tries, only the authorization code and billing account for subscriber information, if there is no subscriber within either of those then the field is left blank for the call record.
- **Use Primary Billing Site in Number Plan for Call Record Update** – allows you to bill two matching numbers in different number plans to different accounts. When your calls are brought into your active calls, they go through a matching process that associates important information such as site, account number, organization, etc. If this setting is set to True, the matching process looks first at the site associated to the call record and matches that up with the Primary Billing Site within the Number Plan, thus determining the proper extension to associate with the call record.
- **Use Site Specific Unit Interval Settings** – determines whether you use site-specific call pricing, databases that have multiple sites associated use this setting. If set to true, each site contains a Call Pricing Group, Unit Value, Billing Interval, Round to First Period and Round to Next Period fields that will now be used for call pricing. If there is no Call Pricing Group associated with the site, CAIRS will use the default Call Pricing Group. If this setting is set to false all calls are priced based on the default call pricing groups.
- **Use Foreign Currency** – when set to True, all billing is in the foreign currency determined within your rate tables.

## Billing Settings

Within Billing Settings, you are configuring your billing reports for Official and Unofficial accounts in Billing Report Setup. Within Billing General Settings, you are defining how CAIRS bills your one-time, recurring and call charges.

---

## Billing Report Setup

This menu option allows you to design the appearance of your bills. The following menu options are available within Billing Reports:

- Official Report Setup
- Unofficial Report Setup
- Combined Official Report Setup
- Combined Unofficial Report Setup
- Billing Information
- Mailed Bill Elements

The first four options allow you to design the bills for the appropriate account type whether official or unofficial.

When you add a Billing Report Configuration, there are a few panes of information. The Report General Settings pane allows you to name the report, designate your report separation options, and indicate whether the report is generated to the Subscriber Portal. The second pane contains the element relating to the header rows of the report. These element types maybe lines, dates, etc.

The Report Body Sections allows you to create what information you want to see within the report. For example, if you want to see a report for call charges and one-time charges or a report for all charges. For each element type, you can determine the page location as well as font, font size and style.

In addition to determining the element types, you also place single fields from the account into the report. For example, if you want the account number to appear in the report, you would select Account Number from the Element Data Fields column. When you select an element data field, the element type auto-populates with Data Field Value.

### Important Considerations:

We will cover the process once within the manual, as the process to create a configuration for official accounts is the same as the process for unofficial accounts.

When working within the Report Header Rows pane and the Report Body Sections pane, the information you select works from the top of the page down.

The Report Preview pane will show a preview of the report every time you add a new element. Also, a new pdf window opens with the newly added element.

When you select a field from the Element Data Fields column, it is a good idea to enter in text, for example, if you select account number from the list and enter in nothing in the text field, only the account number prints on the report. However, if you type-in Account Number in the text field, the text Account Number appears before the actual number.

The Element Data Field is used to place single values into the report.

The Element Type is used to place large amount of data into the report.

## Creating a New Billing Report Configuration

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click **Billing Settings**.
3. Click **Billing Report Setup**.
4. Select either **Official Report Setup** or **Unofficial Report Setup**.
5. Within the Actions pane, click either **Add New Official Report Setup** (when creating an Official Report) or **Add New Unofficial Report Setup** (when creating an Unofficial Report).

The General – Alternate Billing Report Setup window opens.

6. Within the Report General Settings pane complete the following information (required fields are marked with an asterisk (\*)):
  - **Report Name\*** – within the field type-in the name of the report, this should be as specific as possible so the user knows what the report will generate
  - **Report Separation Option\*** – click on the dropdown arrow to access a list, from the list select whether to separate the report based on of the following options:
    - Entire Account – when you generate the report, the entire account is contained within one report
    - By Number – each telephone number associated to the account creates a new report.
  - **Generate For Portal** – click on the field to insert a checkmark in the field, this indicates that the report generates to your Subscriber Portal. Leave the field blank to generate the bill to email or mail.
7. At this point, it is a good idea to save your progress, within the Actions ribbon group click on the Save button.

### Report Header – Element Types

8. The next step is to build the header of your report, within the Report Header Rows pane you can start to add elements into the report. To start adding in items, click on the row marked with an asterisk (\*), this row is always used to add new items. There are two different ways to proceed
9. First, you can select an Element Type; these are items like page numbering, text, etc. To add an Element Type, click on the dropdown arrow to access the following list, make the appropriate selection:
  - **Data Field Value** – when you select Data Field Value, you must also select a option within the Element Data Field. This allows the report to pull information from the account to place into the report. For example, the account number, previous balance, etc. Please remember that you are still working in the header of your report, so you may want to add only basic elements and information.
  - **Date and Time Generated** – inserts the date and time of when you generated the report

- Empty Row – inserts an empty row
  - Horizontal Line – inserts a horizontal line
  - Page Numbering – inserts that page numbers
  - Text Only – when you select Text Only, you can type the text into the Text column or you can click on the Text Editor tab at the bottom of the Report Preview pane to type-in or edit the text.
10. If you selected the Data Field Value in the Element Type column you must make a selection within the Element Data Field, there are several selections available. Please keep in mind when making a selection that the information that will display is a single piece of information, there will be no details.
11. If you selected Text in the Element Type column, you must type-in the text within the column. If there is, a large amount of text to type-in you can click on the Text Editor tab, located at the bottom of the Report Preview pane, and type-in the complete text.
12. Once you have completed the first three columns, it is time to determine how you want the element to appear, complete the following information:
- Text And Data Output Option – click on the dropdown arrow to access a list of the following options:
    - Text Space Data – this options place a space after the text and then starts the next column of information
    - Text Tab Data – this option places a tab after the text, this allows the report to be formatted more evenly
    - Keep with Next Text – this option keeps the text and data information together, if selected, multiple items will print on one line, for example, if you have 3 data field value, they will appear on the same row
    - Left Justify Text Right Justify Data – this options left justifies the text and right justifies the data, for example, if you have the text of Account Number, the text 'Account Number' is justified to the left and the actual number is justified to the right.
    - Center – this options centers the information on the page
    - Right Justify – this options justifies the information to the right hand side of the page

---

**!** If you have multiple Data Field Values group together, you can decide whether to place them on the same line. If you select either the Text Space or Text Tab Data, each new data field appears on its own line. If you select Keep with Next Text for each of the values listed together, then they appear on the same line.

---

- Font Name, Size, and Style – click on the row to highlight. Within the Report Header Actions ribbon group, click on the Change Font button to access the Font pop-up opens. Make any necessary changes to the font, style or size, when

complete click on the OK button. The names of your selections appear in the fields. Alternatively, you can type in the font name and size into the fields. Within the Font Style field, click on the dropdown arrow to access a list, from the list select one of the following: Regular, Bold, Italic, Underline, Strikeout.

13. Within the Begin Include Date and End Include Date, you can determine what date ranges you want to include within the report. Click on the dropdown arrow to access a calendar, from the calendar select the first date to include in the report and/or the last date to include within the report. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.
14. You can also select a specific billing cycle to include in the report, within the Include On Billing Cycle field, click on the dropdown arrow to access a list of the billing cycles setup within your database, from the list select the cycle to include in the report.
15. Continue adding Element Types and/or Element Data Fields into the header of your report. When you are finished, click on the Save button within the Actions ribbon group.

#### Report Header – Element Data Fields

16. As stated earlier, the Element Data Field takes bits of information from the account to place into the report. An example would be, if you wanted the account number to appear somewhere within the report or the previous balance. To learn more about the Element Date Fields, please the next section. It is important to note that when make a Element Data Field selection, the field name that appears in the field does not print in the report, you must add your own text.

#### Report Body– Element Data Fields

17. Now that you have created the header of your report, it is time to determine what you want in the body. What information do you want to see within your report? It is best to start entering the single value before you start adding in a large group of information. This is where you will use the Element Data Field to place information into the report.
18. Within the Element Data Field, click on the dropdown arrow to access a list of the items that you can place into your report. These elements are fields from the account that contain a single value, for example, the account number, previous balance, etc. When you select the data field, Element Type auto-populates with Data Field Type. Below is a list of the values within the dropdown, if special circumstances are needed they are indicated next to the value:
  - Account Number
  - Account Previous Balance
  - Bill Cycle Period No Fiscal Year
  - Bill Cycle Period With Fiscal Year
  - Bill End Date

- Bill End Month and Year
  - \*\*Often times charges from Vendors arrive later than when you produce the bills, the following fields allow you to report on charges from previous months that may have arrived late.
- Bill End Month and Year 2 Months Previous
- Bill End Month and Year Next 2 Months
- Bill End Month and Year Next Month
- Bill End Month and Year Previous Month
- Bill Start and End Date
- Bill Start Date
- Configured Item Name or Number – displays the telephone number, cell phone number, circuit name, etc that is associated to the account
- Configured Item Type – displays the type of item whether a circuit, telephone number, etc
  - \*\*The Directory fields pertain to those accounts associated to a telephone number or cell phone number. If these fields are placed into a report you should always select the report separation by number, this allows the proper information to appear for each new number.
- Directory Building Name
- Directory Directory Building Name
- Directory Job Description
- Directory Office Symbol
- Directory Personnel
- Directory Site Name
- None
- Organization Name – this field displays the bottom most name of the associated organization hierarchy.
- Organization Path – this field displays the complete path the associated organization. If you want to display the organization this is, the better choose of the two fields.
  - \*\*If you select Report Separation by Number then you should select a total report based on report separation.
- Total Call Charges By Account
- Total Call Charges By Report Separation
- Total Charges by Account
- Total One Time Charges By Account

- Total One Time Charges By Report Separation
  - Total Payment and Adjustments By Account
  - Total Recurring Charges by Account
  - Total Recurring Charges by Report Separation
  - Total Reimbursable Call Charges By Account
  - Total Reimbursable Charges by Account
  - Total Reimbursable One Time Charges by Account
  - Total Reimbursable Recurring Charges by Account
19. Once you have selected the element to place in the report, it is time to determine how you want the element to appear, complete the following information:
- Text And Data Output Option – click on the dropdown arrow to access a list of the following options:
    - Text Space Data – this options place a space after the text and then starts the next column of information
    - Text Tab Data – this option places a tab after the text, this allows the report to be formatted more evenly
    - Keep with Next Text – this option keeps the text and data information together, if selected, multiple items will print on one line, for example, if you have 3 data field value, they will appear on the same row
    - Left Justify Text Right Justify Data – this options left justifies the text and right justifies the data, for example, if you have the text of Account Number, the text 'Account Number' is justified to the left and the actual number is justified to the right.
    - Center – this options centers the information on the page
    - Right Justify – this options justifies the information to the right hand side of the page

---

**!** If you have multiple Data Field Values group together, you can decide whether to place them on the same line. If you select either the Text Space or Text Tab Data, each new data field appears on its own line. If you select Keep with Next Text for each of the values listed together, then they appear on the same line.

---

- Font Name, Size, and Style – click on the row to highlight. Within the Report Header Actions ribbon group, click on the Change Font button to access the Font pop-up opens. Make any necessary changes to the font, style or size, when complete click on the OK button. The names of your selections appear in the fields. Alternatively, you can type in the font name and size into the fields. Within the Font Style field, click on the dropdown arrow to access a list, from the list select one of the following: Regular, Bold, Italic, Underline, Strikeout.

20. Within the Begin Include Date and End Include Date, you can determine what date ranges you want to include within the report. Click on the dropdown arrow to access a calendar, from the calendar select the first date to include in the report and/or the last date to include within the report. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.
21. You can also select a specific billing cycle to include in the report, within the Include On Billing Cycle field, click on the dropdown arrow to access a list of the billing cycles setup within your database, from the list select the cycle to include in the report.
22. Continue adding Element Data Fields into the body of your report. When you are finished, click on the Save button within the Actions ribbon group.

#### Report Body – Element Types

23. The element types within the report body are a little different than those within the heading, these element types represent a large amount of data that you want to place into your report. For example, the call record detail for an account, this selection is going to print all the call records associated to the account for the specified period.
24. Click the dropdown arrow to access a list, from the list select one of the following element types:
  - Call Record Detail
  - Call Record Detail Separated By Call Type
  - Call Record Summary By Call Type
  - Data Field Value
  - Empty Row
  - Horizontal Line
  - NonReimbursable Call Record Detail
  - NonReimbursable Call Record Detail Separated By Call Type
  - NonReimbursable One Time Charge Detail
  - NonReimbursable Recurring Charge Detail
  - One Time Charge Detail
  - Recurring Charge Detail
  - Reimbursable Call Record Detail
  - Reimbursable Call Record Detail Separated By Call Type
  - Reimbursable Recurring Charge Detail
  - Text Only



25. Once you have selected the element to place in the report, it is time to determine how you want the element to appear, complete the following information:

- Text And Data Output Option – click on the dropdown arrow to access a list of the following options:
  - Text Space Data – this options place a space after the text and then starts the next column of information
  - Text Tab Data – this option places a tab after the text, this allows the report to be formatted more evenly
  - Keep with Next Text – this option keeps the text and data information together, if selected, multiple items will print on one line, for example, if you have 3 data field value, they will appear on the same row
  - Left Justify Text Right Justify Data – this options left justifies the text and right justifies the data, for example, if you have the text of Account Number, the text 'Account Number' is justified to the left and the actual number is justified to the right.
  - Center – this options centers the information on the page
  - Right Justify – this options justifies the information to the right hand side of the page

---

**!** If you have multiple Data Field Values group together, you can decide whether to place them on the same line. If you select either the Text Space or Text Tab Data, each new data field appears on its own line. If you select Keep with Next Text for each of the values listed together, then they appear on the same line.

---

- Font Name, Size, and Style – click on the row to highlight. Within the Report Header Actions ribbon group, click on the Change Font button to access the Font pop-up opens. Make any necessary changes to the font, style or size, when complete click on the OK button. The names of your selections appear in the fields. Alternatively, you can type in the font name and size into the fields. Within the Font Style field, click on the dropdown arrow to access a list, from the list select one of the following: Regular, Bold, Italic, Underline, Strikeout.
26. Within the Begin Include Date and End Include Date, you can determine what date ranges you want to include within the report. Click on the dropdown arrow to access a calendar, from the calendar select the first date to include in the report and/or the last date to include within the report. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.
27. You can also select a specific billing cycle to include in the report, within the Include On Billing Cycle field, click on the dropdown arrow to access a list of the billing cycles setup within your database, from the list select the cycle to include in the report.

28. Continue adding Element Data Fields into the body of report. When you are finished, click on the Save & Close button within the Actions ribbon group to return to the Billing Report Setup list.

## Preview Actions

As you know, when you are configuring your billing report the preview window displays any changes as you make them. In some situations this may get very distracting, so you can disable the preview window.

Within the Preview Actions ribbon group, click the Disable Automatic Preview. This highlights the button and disables the preview, the last preview remains in the pane.

Even though you have disabled the preview, you can refresh the Report Preview pane by clicking the Generate Preview button within the Preview Actions ribbon group.

If you want to activate the preview pane again, simply click the Disable Automatic Preview button to remove the highlight.

## Deleting an Element

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **System Setting**.
3. Click on Billing Report Setup, within the right hand click on either Official Report Setup or Unofficial Report Setup.
4. Before the Billing Report Setup list populates, you must either:
  - Within the search box, type-in any portion of the record and then click the magnifying glass.
  - Click the **Show All** button.
5. Within the list, double click on the report name to access the General - Alternate Billing Report Setup window opens.
6. Within either the header or body panes, click on the element that you want to delete to highlight your selection. Right click the record selector box (located just left of the element name) and from the pop-up box, click **Delete**.
7. Once you click Delete, a message box appears verifying that you really want to delete the element. Click **Yes** within the box to continue or **No** to cancel the operation.
8. Once selected, CAIRS draws a line through the category allowing you to delete multiple elements at once.
9. If you do not want to delete the element, right-click the record to access a pop-up menu. From the pop-up, click **Undelete**.
10. Once you select Undelete, a message box appears verifying that you really want to keep the element. Click **Yes** within the box to continue or **No** to cancel the operation.

11. Within the **Actions** ribbon group, click the **Save** (to save and stay) button or click the **Save & Close** (to save and exit) button.

## Moving an Header Element Up or Down

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **System Setting**.
3. Click on Billing Report Setup, within the right hand click on either Official Report Setup or Unofficial Report Setup.
4. Before the Billing Report Setup list populates, you must either:
  - Within the search box, type-in any portion of the record and then click the magnifying glass.
  - Click the **Show All** button.
5. Within the list, double click on the report name to access the General - Alternate Billing Report Setup window opens.
6. Within the Report Header Rows pane, click on the element to move within the report, then click on the Move Element Up or Move Element down button within the Report Header Actions ribbon group.
7. The element move within the list, until you click on the Save button, the record selector box contains the outline of a pencil.
8. To finalize your moves, click on the Save button within the Actions ribbon group.

## Moving an Body Element Up or Down

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **System Setting**.
3. Click on Billing Report Setup, within the right hand click on either Official Report Setup or Unofficial Report Setup.
4. Before the Billing Report Setup list populates, you must either:
  - Within the search box, type-in any portion of the record and then click the magnifying glass.
  - Click the **Show All** button.
5. Within the list, double click on the report name to access the General - Alternate Billing Report Setup window opens.
6. Within the Report Body Sections pane, click on the element to move within the report, then click on the Move Element Up or Move Element down button within the Report Body Actions ribbon group.
7. The element move within the list, until you click on the Save button, the record selector box contains the outline of a pencil.

8. To finalize your moves, click on the Save button within the Actions ribbon group.

## Deleting a Billing Report

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **System Setting**.
3. Click on Billing Report Setup, within the right hand click on either Official Report Setup or Unofficial Report Setup.
4. Before the Billing Report Setup list populates, you must either:
  - Within the search box, type-in any portion of the record and then click the magnifying glass.
  - Click the **Show All** button.
5. Once the Alternate Billing Report Setup displays, complete one of the following actions to delete the report:
  - Highlight the report within the list. Within the tool bar directly above the **Navigation** pane, click the red **X**
  - Highlight the report within the list. Within the **Actions** pane, click the **Delete Billing Report Configuration** link.
6. Once you click Delete, a message box appears verifying that you really want to report, click **Yes** within the box to continue or **No** to cancel the operation.

## Combined Report Setup

The Combined Report allows you to combine two or more of your reports together into one. This allows you to print or view all the telephone numbers associated to an organization in one report. All the call records, one-time and recurring charges display on one bill.

We will cover the process once within the manual, as the process to create a combined report for official accounts is the same as the process for unofficial accounts.

### *Creating a Combined Report*

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **System Setting**.
3. Click on Billing Report Setup, within the right hand click on either Combined Official Report Setup or Combined Unofficial Report Setup.
4. Within the Actions pane, click the Add New Billing Report Configuration Main Combined link
5. The General – Combined Billing Report Setup window opens. Within the Combined Report General Settings pane, complete the following two fields (required fields are marked with an asterisk (\*)):

- Report Name \* - within the field type-in the name of the report, this should be as specific as possible so the user knows what the report will generate
  - Generate For Portal - click on the field to insert a checkmark in the field, this indicates that the report generates to your Subscriber Portal. Leave the field blank to generate the bill to email or mail.
6. At this point, you should have your progress; within the Actions pane click the Save button to continue working with this report.
  7. Within the Reports to Include pane, you determine what reports you want to combine into one. Click the dropdown arrow to access a list, from the list select the first report to insert into the report.
  8. Continue to select the report to combine into one.
  9. Within the Combined Report Preview pane, a preview of what the report will look like appears within the pane.
  10. Once you have completed the combining process, it is time to save your report, within the Actions pane click the Save & Close button to return to the Billing Report Setup list.

### ***Removing a Report from a Combined Report***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **System Setting**.
3. Click on Billing Report Setup, within the right hand click on either Combined Official Report Setup or Combined Unofficial Report Setup.
4. Before the Billing Report Setup list populates, you must either:
  - Within the search box, type-in any portion of the record and then click the magnifying glass.
  - Click the **Show All** button.
5. Within the Reports to Include pane, click the report that you want to remove to highlight the row. Right click the record selector box (located just left of the name) and from the pop-up box, click **Delete**.
6. Once you click Delete, a message box appears verifying that you really want to delete the report. Click **Yes** within the box to continue or **No** to cancel the operation.
7. Once selected, CAIRS draws a line through the category allowing you to delete multiple reports at once.
8. If you do not want to delete the report, right-click the record to access a pop-up menu. From the pop-up, click **Undelete**.
9. Once you select Undelete, a message box appears verifying that you really want to keep the report. Click **Yes** within the box to continue or **No** to cancel the operation.
10. Within the **Actions** ribbon group, click the **Save** (to save and stay) button or click the **Save & Close** (to save and exit) button.

### ***Deleting a Combined Billing Report Setup***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **System Setting**.
3. Click on Billing Report Setup, within the right hand click on either Combined Official Report Setup or Combined Unofficial Report Setup.
4. Before the Billing Report Setup list populates, you must either:
  - Within the search box, type-in any portion of the record and then click the magnifying glass.
  - Click the **Show All** button.
5. Once the Combined Alternate Billing Report Setup list displays, complete one of the following actions to delete the report:
  - Highlight the report within the list. Within the tool bar directly above the **Navigation** pane, click the red **X**
  - Highlight the report within the list. Within the **Actions** pane, click the **Delete Billing Report Configuration Main Combined** link.
6. Once you click Delete, a message box appears verifying that you really want to report, click **Yes** within the box to continue or **No** to cancel the operation.

### **Generating a Report**

To generate the reports, you access the account through Accounting → Accounts → Official or Unofficial. Once you have the account open, you can click on the Sharing Tab and select the PDF option. A small pop-up opens to allow you to determine how to export the report, click the option button next to the Export report for selected bill. Another pop-up opens allowing you to select one of the report configurations you have created. Once you click the Generate Report button, the report appears on screen for you to save, print or email.

### **Billing Information**

This information appears as the return address associated with the printed and mailed bill.

#### ***Adding a Global Billing Information***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **System Settings**. Click **Billing Report Setup** then Billing Information.
3. Within the **Actions** pane, click the **Add New Billing Global Info** link
4. The **Bill Setup** window opens. Complete the following information:
  - **Contact\*** – type-in the bill contact name.
  - **Street\*** – type-in the street address.

- **City\*** – type-in the city name.
  - **State Province** – type-in the province name.
  - **Zip Postal** – type-in the zip code.
  - **Country Region** – type in the country or the region.
  - **Contact Number** – type in your contact telephone number.
  - **Web Site** – type in the web site.
  - **Bill Icon** – type-in the icon description.
  - **Bill Notice Title** – type-in the notice title.
  - **Certify Notice Text** – certify the notice text to validate.
5. Within the **Actions** ribbon group, click **Save** (to save and stay), click **Save & New** (to save and open a new record), or click **Save & Close** (to save and exit).

### ***Deleting Global Billing Information***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **System Settings**. Click **Billing Report Setup** then **Billing Information**.
3. The Bill Setup list opens to the right. Within the list, highlight the contact to delete. There are two ways to delete a contact:
  - Within the tool bar directly above the **Navigation** pane, click the red **X**.
  - Double click the contact within the list. The Bill Setup window opens. Within the **Actions** ribbon group, click the **Delete** button.
4. Once you click Delete, a message box appears verifying you really want to delete the bill setup. Click **Yes** within the box to continue or **No** to cancel the operation.

### **Mailed Bill Elements**

The Mailed Bill Elements allows you to customize the appearance of the bills sent to your customers. You create an overlay for each item you want to appear on the bill. For example, if you want the billing address, barcode and a logo, you will create three different overlays. The process of building the overlay is simple and you can play with the positions of each item to get it to your liking.

When creating an overlay, you can apply several different elements to you bill. The following is a list of each element:

- **Billing Address** – displays the billing or mailing address associated with the account.
- **Horizontal Line** – allows you to create a solid line across your bill to divide the bill into parts.
- **Text** – allows you to enter in your own text message.

- **Image** – allows you to place an image within your bill, commonly used to insert your logo.
- **Statement Balance Summary** – allows you to display a brief summary of the account.
- **Account Bar Code** – allows you to place the account code printed as a barcode.
- **Account Overdue Status** – displays the current status of the account
- **Account Closed Text** – allows you to enter text for a closed account

Once you have decided which elements you want, you will need to decide where on the bill each item appears. The following is a list of element appearance options:

- **Page Range\*** – you can choose to have the element appear:
  - **Within First Section** – the element appears within the top section of the first page of the bill. This allows you to line up each element to appear in an envelope for mailing purposes.
  - **Within Header** – the element appears within the header of every page of the bill.
  - **Every Page** – the element appears on every page in the position you designate.
  - **First Page** – the element appears on the first page only.
  - **Last Page** – the element appears on the last page only.
  - **All But First Page** – the element appears on every page of the bill except the first page.
  - **All But Last Page** – the element appears on every page of the bill except the last page.

Once you decide on which page(s) the element appears on, you then designate the elements position on the page. CAIRS measures each of the positions in pixels allowing the appearance of the bill to be the same on different computer monitor sizes and screen resolutions. The following two positions choices are available:

- **Left Position\*** – designate the position where the element appears on the page from the left margin.
- **Top Position\*** – designate the position where the element appears on the page from the top margin.

You may have to try several different positions to get the correct page location.

As you, add elements into the report, the report auto-saves. At the same time, the preview window changes to display the elements that you just added.

### ***Creating a New Bill Overlay***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **System Setting**. Click **Billing Report Setup** then **Mailed Bill Elements**



3. There are two ways to add an **Billing Report Element**:
  - Within the tool bar directly above the **Navigation** pane, click the dropdown arrow next to **New**. From the list, select **Billing Report Element**.
  - Within the **Actions** pane, click the **Globally Manage Billing Report Elements** link.
4. With either option, the Billing Report Elements Global Management window opens. Within the top pane, complete the following overlay information (required fields are marked with an asterisk (\*)):
  - **Overlay Name** – type-in the new overlay name, for example, Address, Barcode, etc.
  - **Element Type\*** – click the dropdown arrow to access a list and from the list, select one of the following options:
    - **Billing Address** – enters the billing address associated with the account number.
    - **Horizontal Line** – depending on the position, length and thickness you designate, a horizontal line is drawn on the bill. Generally, you use this to separate bill sections.
    - **Text** – select to enter your own text into a portion of the bill.
    - **Image** – select to enter in an image, for example, a logo, map, etc.
    - **Statement Balance Summary** – select to display a brief summary of the bill charges.
    - **Account Bar Code** – select to display the account number printed in barcode.
  - **Page Range\*** – click the field to access a dropdown list and from the list, select one on the following options:
    - **Within First Section** – the element appears in the top section of the first page of the bill, allowing you to line the element up with an envelope for mailing purposes.
    - **Within Header** – the element appears within the header of every page of the bill.
    - **Every Page** – the element appears on every page in the designate position.
    - **First Page** – the element appears on the first page only.
    - **Last Page** – the element appears on the last page only.
    - **All But First Page** – the element appears on every page of the bill except the first page.
    - **All But Last Page** – the element appears on every page of the bill except the last page.

- **Left Position\*** – type-in a number to have CAIRS place the element that many pixels from left margin, start with a one in this field to gauge where on the page the information displays, you can always change it later.
- **Top Position\*** – type-in a number to have CAIRS place the element that many pixels from top margin, start with a one in this field to gauge where on the page the information displays, you can always change it later.
- **Line Length** – type-in a number to have CAIRS draw a solid line across the bill (try typing in 530, this should make the line go all the across the paper.).
- **Line Thickness** – type-in a number representing the line thickness (start with a 1 in this field and go up from there to gauge the thickness)

---

To learn more about the Text and Font Fields please see the Adding Text to a Bill Overlay section. To learn more about inserting an image, please see Adding an Image to a Bill.

---

- **Element Inclusion Start Date** – click the dropdown arrow to access a calendar, from the calendar select the first date to include the element within the report. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.
  - **Element Inclusion End Date** - click the dropdown arrow to access a calendar, from the calendar select the last date to include the element within the report. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.
5. As you add elements into the Billing Report Elements pane, the Preview pane changes to displays the elements added.
  6. Within the **Actions** ribbon group, click the Close button to return to the Billing Report Elements list.

### ***Adding Text to a Bill Overlay***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **System Setting**. Click **Billing Report Setup** then **Mailed Bill Elements**
3. There are two ways to add an **Billing Report Element**:
  - Within the tool bar directly above the **Navigation** pane, click the dropdown arrow next to **New**. From the list, select **Billing Report Element**.
  - Within the **Actions** pane, click the **Globally Manage Billing Report Elements** link.
4. With either option, the Billing Report Elements Global Management window opens. Within the top pane, select **Text** as the Element Type.

5. Within the **Text** (lower left hand corner) pane, type-in your text message as it will appear on the bill.
6. Complete the following fields to position the text on the bill.
  - **Page Range\*** – click the field to access a dropdown list and from the list select one on the following options:
    - **Within First Section** – the text appears in the top section of the first page of the bill.
    - **Within Header** – the text appears within the header of every page of the bill.
    - **Every Page** – the text appears on every page in the position that you designate.
    - **First Page** – the text appears on the first page only.
    - **Last Page** – the text appears on the last page only.
    - **All But First Page** – the text appears on every page of the bill except the first page.
    - **All But Last Page** – the text appears on every page of the bill except the last page.
    - **Left Position\*** – type-in a number to have CAIRS place the element that many pixels from left margin, start with a one in this field to gauge where on the page the information displays, you can always change it later.
    - **Top Position\*** – type-in a number to have CAIRS place the element that many pixels from top margin, start with a one in this field to gauge where on the page the information displays, you can always change it later.
    - **Text** – you can type-in your text here or in the Text pane.
  - **Font Name, Size and Style** – within the Billing Report Element Actions ribbon group, click on the Change Font button to access the Font pop-up opens. Make any necessary changes to the font, style or size, when complete click on the OK button. The names of your selections appear in the fields. Alternatively, you can type in the font name and size into the fields. Within the Font Style field, type-in one of the following styles: Regular, Bold, Italic, Underline, Strikeout.
  - **Element Inclusion Start Date** – click the dropdown arrow to access a calendar, from the calendar select the first date to include the element within the report. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.
  - **Element Inclusion End Date** - click the dropdown arrow to access a calendar, from the calendar select the last date to include the element within the report. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.

7. Within the **Actions** ribbon group, click the Close button to return to the Billing Report Elements list.

### ***Adding an Image to a Bill***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **System Setting**. Click **Billing Report Setup** then **Mailed Bill Elements**
3. There are two ways to add an **Billing Report Element**:
  - Within the tool bar directly above the **Navigation** pane, click the dropdown arrow next to **New**. From the list, select **Billing Report Element**.
  - Within the **Actions** pane, click the **Globally Manage Billing Report Elements** link.
4. With either option, the Billing Report Elements Global Management window opens. Within the top pane, select **Image** as the Element Type.
5. Within the **Image Attachment** ribbon group, click the **Attach Image** button.
6. The Select the image file to attach window opens. Browse to the location of the file and once found, highlight the file name. Click the **Open** button.
7. The image appears in the pane on the lower right hand corner.
8. Complete the following fields to position the image on the bill:
  - **Page Range** – click the field to access a dropdown list and from the list select one on the following options:
    - **Within First Section** – the image appears in the top section of the first bill page.
    - **Within Header** – the image appears within the header of every bill page.
    - **Every Page** – the image appears on every page in the designated position.
    - **First Page** – the image appears on the first page only.
    - **Last Page** – the image appears on the last page only.
    - **All But First Page** – the image appears on every page of the bill except the first page.
    - **All But Last Page** – the image appears on every page of the bill except the last page.
  - **Left Position** – type-in a number to have CAIRS place the image that many pixels from left margin.
  - **Top Position** – type-in a number to have CAIRS place the image that many pixels from top margin.
  - **Element Inclusion Start Date** – click the dropdown arrow to access a calendar, from the calendar select the first date to include the element within the report. To

change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.

- **Element Inclusion End Date** - click the dropdown arrow to access a calendar, from the calendar select the last date to include the element within the report. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.
9. Within the **Actions** ribbon group, click the Close button to return to the Billing Report Elements list.

### ***Deleting an Element***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **System Setting**. Click **Billing Report Setup** then **Mailed Bill Elements**
3. Within the Actions pane, click the **Globally Manage Billing Report Elements** link. This opens the Billing Report Elements Global Management window.
4. Within the Billing Reports Elements pane, right click on the record selector box (located just left of the Overlay name) and from the pop-up box, click **Delete**.
5. Once you click Delete, a message box appears verifying that you really want to delete the element. Click **Yes** within the box to continue or **No** to cancel the operation.
6. Once selected, CAIRS draws a line through the element allowing you to delete multiple elements at once.
7. If you do not want to delete the element, right-click the record to access a pop-up menu. From the pop-up, click **Undelete**.
8. Once you select Undelete, a message box appears verifying that you really want to keep the element. Click **Yes** within the box to continue or **No** to cancel the operation.

### ***Generating a Report***

To generate the reports, you access the account through Accounting → Accounts → Official or Unofficial. Once you have the account open, you can click on the Sharing Tab and select the PDF option. A small pop-up opens to allow you to determine how to export the report, click the option button next to the Export mailed report for selected bill. Once you click OK, the report appears on screen for you to save, print, or email.

---

## **Billing General Settings**

Use these settings to configure how CAIRS bills for your one-time, recurring and call charges. When you install CAIRS, a Unique Communication Representative and your CAIRS administrators determine these settings. There are four columns of information for each setting:

1. **Setting Name\*** – the setting name.
2. **Category\*** – the category for these settings is Billing
3. **Setting Value\*** – displays the actual setting, for example, true, false, etc.
4. **Description\*** – displays a brief setting description.

The following settings are available:

- **Allow Negative Funding Amounts for Official** – a value of True allows you to enter in a negative amount in the Amount Submitted when applying funds. This is helpful if you have made any clerical errors on funding entries. If set to False, only positive amounts can be entered into the amount submitted.
- **Auto Fill Install Date for new Assigned Equipment and Services** – a value of True will automatically populate the install date of all newly installed equipment and/or service. A value of False requires the user to enter in the install date.
- **Auto set Delete Date to Installed Date for One-time charges on Equipment/Services** – a value of True indicates that when you add an equipment/service with a one-time charge the delete auto-populates with the same date as the installed date. A value of False indicates that you must enter a date in the Delete Date field.
- **Bill Distribution Folder for SP** – If the “Distribute Bills Folder’ setting is set to True, you need to enter the name of the folder that Subscriber Portal will look for to access your bills. This is only the folder name.
- **Bill Distribution Folder Path from CES** – this is the complete path of where CES will distribute the bills to, this is the combination of both the ‘Bill Distribution Folder for SP’ and the Bill Distribution Folder Path from SP’ settings.
- **Bill Distribution Folder Path from SP** – this is the path to the folder name where Subscriber Portal will look for your bills, this works with the folder you listed in the ‘Bill Distribution Folder for SP’ setting, do not include the name of the folder. This setting is designed for an enterprise system to allow for CAIRS to support multiple sites within Subscriber Portal.
- **Bill Official Calls from Prior Fiscal Years** – determines if call records from the previous fiscal year will be included in the current years bills. If set to true, the call are included; if set to false, the calls are not included.
- **Distribute Bills to Email** – If set to true then CES distributes bills via email, each account assigned an email address gets a bill, if set to false no emails are sent.
- **Distribute Bills to Folder** – determines if you want to send bills generated to a folder you designate in another setting (Bill Distribution Folder Path). If set to True then CES delivers the bills to the folder.
- **Distribute Bills to Printer** – determines whether you want to send the bill generated to a printer. If set to True then CES delivers the bills to the designated printer. This setting is useful if you want to print and mail the bills to your customers.

- **Enable Automatic Official Billing** – determines whether you want CAIRS to generate your bills automatically based on your billing cycle, a value of True turns this on for official billing.
- **Enable Automatic Unofficial Billing** – determines whether you want CAIRS to generate your bills automatically based on your billing cycle, a value of True turns this on for unofficial billing.

The next three settings determine how you want CAIRS to fill your organization information; you must set one of the three to true and the other two to false.

- **Fill Organization from Call Accounts** – this setting determines where the organization information comes from for call records. If set to True the organization information associated within the Accounts for Calls tab is the one used to update the call records. If set to False, the organization associated within the Accounts for Equipment and Services is used.
- **Fill Organization from Equipment and Service Accounts** – this setting determines where the organization information comes from for call records. If set to True the organization information associated within the Accounts for Equipment and Services tab is used to update the call records. If set to False, the organization associated within the Accounts for Calls is used.
- **Filter Organizations By Account** – this setting determines whether you want to filter the organization dropdown box by account number, this means that if you select an account (anywhere in the system), the orgs within the list are only those associated to the account. A true setting filters the list while a false displays the entire list of orgs.
- **First Official Billing Date** – this is the start billing date for all of your official accounts, any charges occurring before this date are not billed.
- **First Unofficial Billing Date** - this is the start billing date for all of your unofficial accounts, any charges occurring before this date are not billed.
- **Log All Unbilled Account in Billing Cycle** – determines whether the accounts that did not generate a bill during the cycle are placed into a log for your review. A value of true generates a log with the accounts that have not bill and a value of false does not generate a log. The log can be viewed after you run the bill in Accounts – Official/Unofficial – Run Bill Requests, double click on any bill to open the General – Billing Cycle window. In the lower right hand corner is the Unbilled pane, any account that are unbilled appear there.
- **Months to Keep Official Bill Files** – this setting works in conjunction with the Distribute Bills to Folder setting, if that setting is set to true, then this setting determines how many months to keep the official bill files before deleting. This defaults to 60 months.
- **Months to Keep Unofficial Bill Files** – this setting works in conjunction with the Distribute Bills to Folder setting, if that setting is set to true, then this setting determines how many months to keep the unofficial bill files before deleting. This defaults to 60 months.

- **Official Billing System** – there are two billing systems that you can choose from: Classic or Dynamic. The Classic is the current billing system and the setting default, where all billing cycles are run progressively from month to month. Meaning you must run April's bill before you can run May's bill and so on. The Dynamic billing system allows for billing periods to be run together, amongst several other advantages, to learn more please see the chapter on Dynamic Billing. There is also a Hybrid setting, this allows for you to transition from the classic to the dynamic seamlessly.
- **Operator Assisted Call Text** – allows you to determine the Call Type that you want to use for operator assisted calls. This defaults to 'Operator Assisted'.
- **Precision for Minutes Summary in Billing Reports** – determines that number of decimal places for the minutes and seconds in your billing reports. The setting can have a value of 0 to 4, the corresponding settings are:
  - 0 – displays minutes only, no second value (1)
  - 1 – displays the minutes and rounds the seconds to a tenth of a second (1:4)
  - 2 – displays the minutes and rounds the seconds to a hundredth of a second
  - 3 – displays the minutes and rounds the seconds to a thousandth of a second
  - 4 – displays the minutes and rounds the seconds to a ten-thousandth of a second
- **Reset Official Bill Balance Every Bill** – determines if you want to carry any balances forward for each billing cycle. If set to True, for each new billing cycle the account balance is set to \$0.00. If set to false, any unpaid balances carry to the next cycle.
- **Reset Official Bill Balance Every Fiscal Year** – determines if you want to carry any balances forward for each new Fiscal year. If set to True, for each new fiscal year the account balance is set to \$0.00. If set to false, any unpaid balances carry to the new fiscal year.
- **Return Top Phone Number for Account** – when you are viewing an account, there is a yellow status bar directly below the ribbon; this bar contains important account information, including a number field. This setting determines whether the number field is present in the status bar. If set to True, the first telephone found relating to the account populates the field, this may slow down the loading of the complete account details. If set to False, the telephone field is removed from the status bar, this may load the account details quicker.
- **Update Call Records from Directory Line** – as a default, CAIRS updates the call records through the account number. If this setting is set to True, then CAIRS updates the call record information through Set Management. If there are multiple listings, the primary number is used for billing the call records.
- **Use Funded Program** – if set to true the new funded program will become available for use within CAIRS and Subscriber Portal. Please do not turn this setting on without consulting with a Unique Representative first.



- **Validate New Equipment to Account** – determines whether CAIRS will validate the account prior to saving when new equipment or services are added. When a user adds equipment or services, CAIRS will verify that the account that is associated to the record has the appropriate charge type associated. If the charge type is not associated the user will not be able to save the record.

## Default Accounts

Default Accounts provides a way for charges that are not already associated to an account or that cannot be assigned to an account to still be billed. There are two different default accounts, one for call charges and one for discrepancies.

The Default Account for Calls will be responsible for call charges that are associated to an extension that is not associated to an account. The call charges can be collected through UCE or can be imported through Vendor Media.

The Default Account for Discrepancies will be responsible for the difference between the invoice amount and the imported charges. These charges will only be seen when you import charges through Vendor Media Imports.

If you are using the Funded Program, negative balances for accounts can also be transferred to the default account. When funds become available the negative account balances will be transferred back to the original account.

### ***Default Account for Calls***

1. Click **System Admin**
2. In the **Navigation** pane, click **Billing Settings** then **Billing General Settings**
3. There are two ways to add an default account for calls:
  - Within the toolbar directly above the **Navigation** pane, click the **Manage Default Account for Calls** button.
  - Within the **Actions** pane, click **Manage Default Account for Calls** link.
4. With either of the above options, the Update Settings popup opens.
5. Click on the dropdown arrow in the Default Account Number textbox, this brings up a list of all the account numbers within your database.
6. From the list, select the default account. Once the account is populated in the field, click the Update button.
7. As calls are processed or during the Update Call Record process the call records that do not have an associated account are associated to this account number.

### **Changing the Account**

8. If you want to change the default account number, select a new one from the list and click on the Update button.

### **Removing the Account**

9. If you want to remove the default account number, select the blank space at the top of the list and click the Update button.

### ***Default Account for Discrepancies***

1. Click **System Admin**
2. In the **Navigation** pane, click **Billing Settings** then **Billing General Settings**
3. There are two ways to add an default account for calls:
  - Within the toolbar directly above the **Navigation** pane, click the **Manage Default Account for Discrepancies** button.
  - Within the **Actions** pane, click Manage Default Account for Calls link.
4. With either of the above options, the Update Settings popup opens.
5. Click on the dropdown arrow in the Default Account Number textbox, this brings up a list of all the account numbers within your database.
6. From the list, select the default account. Once the account is populated in the field, click the Update button.
7. After you have imported charges through the Vendor Media Import, any discrepancies between the invoice and the detail files can be transferred to this account.

### **Changing the Account**

8. If you want to change the default account number, select a new one from the list and click on the Update button.

### **Removing the Account**

9. If you want to remove the default account number, select the blank space at the top of the list and click the Update button.

---

## **Currency Exchange Rate**

In CAIRS you can bill either with the dollar or foreign currency. In order to bill in a foreign currency and use the vendor media import, you will need to keep the exchange rate up-to-date. You need to change a few settings in order for you to bill in a foreign currency. To access the setting go to System Admin – Call Record Settings, you will need to adjust the following settings:

- **Current Currency Symbol** – displays the currency symbol you are using for all billing, for example the \$ sign.
- **Days Till Expiration Warning** – this setting determines the number of days before you receive an expiration warning for foreign currency. The default is 355 days, meaning that you must update the exchange rate every 355 days.

- **Foreign Currency Expiration Warning** – this setting works in conjunction with the 'Days Till Expiration Warning', if set to true than the administrator receives the warning, if set to false no warning is given.
- **Foreign Currency Symbol** – displays the foreign currency symbol if you are billing in a foreign currency
- **Unit Value** – displays the number of units for each value. For example, 100 units (cents) in \$1 or 100 pence in 1 pound.
- **Use Foreign Currency** – when set to True, all billing is in the foreign currency determined within your rate tables.

CAIRS will not be able to support the use of more than one form of currency. For example if you bill some accounts in dollars and some is yen, CAIRS will not be able to differentiate which account need yen and which need dollar. The currency that will be billed and used is the one you designate in the System Setting → Foreign Currency Symbol.

## Add New Billing Currency

1. Click **System Admin**
2. In the **Navigation** pane, click **Billing Settings** and then **Currency Exchange Rate**.
3. There are two ways you can start to add an exchange rate with either of the following methods,
  - Within the toolbar directly above the **Navigation** pane, click the drop-down arrow next to **New**, then select **Currency Exchange Rate**.
  - Within the **Actions** pane, click **Currency Exchange Rate**.
4. With either of the above options once selected the General – Currency Exchange Rate window opens. There are two panes of information the Billing Currency pane allows you to define the details of the rate such as symbol, culture, etc. The Exchange Rate pane allows you to determine the rate and direction.
5. Within the Billing Currency pane, complete the following fields, all fields are required to be completed before continuing:
  - Billing Currency \* - type-in the name of the currency for example: Euro, Yen, etc
  - Currency Culture \* - click on the dropdown arrow to access a menu and from the menu select the culture of the currency for example if you are using the Yen the culture would Japanese (Japan). You can search for the culture by typing in any portion of the country name into the text box in the upper right hand corner of the dropdown. Once selected the culture name appears in the field.
  - Currency Symbol – Once you have selected a culture this field will automatically populate with the corresponding symbol
  - Default Conversion Direction – click on the dropdown arrow to access a menu from the menu select one of the following options:

- To (system to foreign) – this is the default direction and will change imported invoices from the dollar to the foreign currency
  - To (foreign to system) – this does the opposite and will change the imported invoices from the foreign currency to the dollar
6. Once you have completed the fields, it is a good idea to save your progress, within the Actions ribbon group click on the Save button.
7. Within the Exchange Rate pane, complete the following fields, all fields are required to be completed before continuing:
- Exchange Rate – type in the current rate of exchange to the dollar, for example 1.25 means that \$1.2500 is equal to 1,0000 Euro. The complete exchange rate will appear in the Example pane so you can verify the rate.
  - Starting Date – click on the field to access drop-down arrow, once clicked a calendar displays. From the calendar, select the starting date for the rate. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.
  - Conversion Direction - click on the dropdown arrow to access a menu from the menu select one of the following options:
    - To (system to foreign) – this is the default direction and will change imported invoices from the dollar to the foreign currency
    - To (foreign to system) – this does the opposite and will change the imported invoices from the foreign currency to the dollar
8. Once all the fields are complete you can save the exchange rate, within the Actions ribbon group click on the Save button to continue working or the Save & Close button to return to the list.

# Service Management

---

## General Error Log

General Error Log is where an administrator views certain system errors and exceptions. The log is designed to only collect errors Unique Communications has programmed to catch within the system.

### Viewing the Service Exception Log

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Service Management**. Click **General Error Log**.
3. Before the General Error Log populates, you must either:
  - Within the search box, type-in any portion of the record and then click the magnifying glass.
  - Click the **Show All** button.
4. The log opens to the right, displaying all errors that have occurred within your system.
5. Double click any to view the Service Exception Log.
6. A window opens displaying the following read only information:
  - **Date Time** – displays the exception occurrence date.
  - **System** – displays the menu option name where the exception occurred.
  - **Action** – displays the name of the action taking place when the exception occurred.
  - **Message** – displays the message received by the user when the error occurred.
  - **Description** – display how many times this error was received.
  - **Full Exception** – displays the entire message received by the user when the error occurred.
7. Within the **Actions** ribbon group, click **Close**.

### Delete an Error Log

1. Click the **System Admin** menu.

2. In the **Navigation** pane, click the plus sign (+) next to **Service Management**. Click **General Error Log**.
3. Before the General Error Log populates, you must either:
  - Within the search box, type-in any portion of the record and then click the magnifying glass.
  - Click the **Show All** button.
4. The log opens to the right, displaying all errors that have occurred within your system, within the list, click on the log to delete.
5. Within the **Actions** pane, click the **Delete Log** button.
6. A warning message appears verifying that you really want to delete the log, within the box click **Yes** to continue or **No** to cancel the operation.

### Clear all errors

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Service Management**. Click **General Error Log**.
3. Before the General Error Log populates, you must either:
  - Within the search box, type-in any portion of the record and then click the magnifying glass.
  - Click the **Show All** button.
4. The log opens to the right, displaying all errors that have occurred within your system.
5. Within the **Actions** pane, click the **Clear all errors** link.
6. A warning message appears verifying that you really want to delete the entire log, within the box click **Yes** to continue or **No** to cancel the operation.

---

## Email Error Log

The Email Error Log lists the errors generated when CAIRS tries to authenticate or communicate with the SMTP server or SMTP recipient. The Email Error Log details the following:

**Error Date** – displays the date the error occurred.

**Subject** – attempted email's subject line.

**Error Message\*** – error returned by SMTP server.

**Attachment Count**- number of email attachments.

To view the details of a specific error:

1. Double click the error message. The Email Log Detail window opens.

2. The email error details display.

---

## Service Manager

The CAIRS Enterprise Services (CES) component is a windows service, which does background processing for CAIRS activities such as scheduling, summarizing data for reports, and WOPR server data collection and maintenance. Below is a list of the threads available:

- **411 Interface** – Exports directory information to a 3<sup>rd</sup> party 411 system
- **911 Interface** – Exports directory information to a 3<sup>rd</sup> party 911 system
- **Ali File Transfer** – transfers the updated Ali file to the desired location
- **AS5300 Switch Sync** – performs the sync between your CAIRS database and your AS5300 switch
- **Call Record Auto Archive** – automatically archives calls, these calls remain in your database
- **Call Record Old Archive to Flat File Migration** - – when enabled this process automatically removes call records from your database and into a zipped tab delimited text file
- **Change Call Ownership** – when you make a change to call ownership, this process starts automatically to update the call records with the new billing information for the proper date ranges. This will only update call records that have not been billed.
- **Check UCE Status** - Verifies that the data is being received from each UCE program
- **Cisco Switch Sync** - performs the sync between your CAIRS database and your Cisco Call Manager switch
- **Clean Up Users Not Logged in** - This process finds users within the System Admin --> Security --> Logged In Users list that have not been updated and removes the record from the list.
- **Clear Old UCE Events** - UCE send info to the CAIRS db, this clears out old events as new ones come in
- **Create Payment Distribution** - This should be removed as we have removed payment distribution from Accounting.
- **Custom Report Distribution** – if you are using global reporting this process needs to be enabled to run reports
- **Data Sync** - Performs any automatically scheduled Switch Data Syncs
- **Delete old activity log records** - Deletes any activity log records that are older than age specified to keep
- **Deliver Bills** - Creates the bill files specified for each account

- **Directory Transfer Manager** - Creates new Phonebook records for any new numbers in use on a set device
- **Dynamic Billing Manager** – generates new bills for accounts if you are using the Dynamic Billing System
- **EWSD Data Sync** - Performs any automatically scheduled EWSD Switch Data Syncs
- **Execute Billing** - Generates the new bills for accounts
- **Find Overdue Accounts** - Finds accounts in the database that are overdue
- **Fix Billed Assignment Extension Out of Sync with Call Record Extension** - This process looks at the child extensions and updates them to include the area code from the parent.
- **Manage Preventive Maintenance Jobs – allows you to run PMJ on a schedule**
- **Metadata Import Manager** – in order to use global reporting, metadata needs to be imported into your database. This process imports the metadata when needed.
- **Net Tools Client** – this process is for a future release
- **Reassign Accounts** - When you create a Bulk Accounts Change, this process runs to reassign one or more accounts with a Subscriber, org, billing start date, etc.
- **Remove Duplicate Account Management Records** - Searches Accounts for Equipment and Service for duplicate entries on the same record
- **Reprice Calls** - Processes any Reprice Calls requests
- **Rollback Billing** – this process must be enabled to allow you to roll back the bills that you have generated for multiple accounts. This does not effect the roll back process for an individual account.
- **Schedule a Recurrence Pattern for the Data Sync** - This process runs data and switch syncs that are set on a recurrence pattern.
- **Search Engine Reindexing** – reindexes SOLR search on a schedule
- **Standard Reports (In Development)** – this process will email standard pre-defined reports based on a schedule.
- **Sync Accounts with Customer Code** – syncs your accounts with their associated customer codes
- **Toll Ticket Call Match Manager** - This process matches the call records with the toll tickets.
- **Toll Ticket Control Numbers Creator** - The process creates the toll ticket control numbers.



- **Transfer Imported Cross Connects** - Attaches imported cable & pair records to the specified set or circuit segment
- **UCE Collection Monitoring** - This monitors UCE and provides a message when an error occurs.
- **Update Account Status** - When you update an account status this process runs to perform the action as indicated in Status Change Configuration.
- **Update call record data** - Appends the Account and Organization information to the call records
- **Vendor Media Import Manager** - Once you have selected a file to import this process runs to bring the file into the database as call records, equipment records, etc.

For each thread, the following information displays:

- Service Action Name
- Start Wait Time Sec
- Cycle Period Sec
- Startup Type
- Notification Level
- Disabled
- Date Last Started
- Date Last Completed
- Last Reported Status
- Status Last Updated Date
- Process Current Record
- Total Records To Process
- Additional Process Information
- Next Expected Run Time for Process

You can double click on any records to view and modify the complete thread details. There are three panes of information within the Service Manager Details window, they are:

- **Service Information** – display basic process information such as name, startup type (by cycle time or manual), notification level, etc.
- **Status** – this pane displays status updates on the process, for example the date last started and completed, total records processed, next run time, etc.
- **Pending Runtimes** – if you choose to schedule a process to run at a future time, this pane display the expected run time of the process

## Viewing the Service Log

When you access a process, you can view the Service Log. Within the Log ribbon group, click on the Service Log button. The following information displays:

- Date Time
- System
- Action
- Message
- Description
- Full Exception

## Viewing Process History

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Service Management**.
3. Click **Service Manager**
4. Within the list, find the process to view and double click on the name
5. The Service Manager Detail window opens.
6. Within the **Show** ribbon group, click the **History** button. The following read only information displays for each action performed on the process:
  - **Action Name\*** – describes the completed action. For example, Add New Service Manager Runtime, Update Service Manager Configuration, etc.
  - **Custom Field Name** – displays the field name of the modified information
  - **Old Value** – displays the old information
  - **New Value** – displays the new information
  - **User Name** - displays the username of the person who completed the changes
  - **Last Name/ First Name** – displays the first and last name of the user who completed the action.
  - **Activity Date\*** – displays the date the action was completed.
  - **Source\*** – lists the computer's IP address.
  - **Work Order Number** – displays the work order number for the order completed to make the changes, if applicable.
7. Alternatively, you can click on the lower portion of the History button to access a menu, from the menu select Old History. The screen changes to display a list of all action taken on the process, to view more detail double click on the record.

A window opens with a more detailed description of the action.

8. Within the **Action** ribbon group, click the **Close** button to return to the Service Manager Detail.

## Run Process Now

At any time you can run a CES process, double click on the process to access the Service Manager Details. Within the Special Actions ribbon group, click on the Run Process Now button. CES will run the current process; you will see the Monitoring CAIRS Remote Service Process popup. As the process runs, the status displays within the popup. If the process fails, you can click on the Error Details button within the popup to view the error details. If the process completes the status displays within the Status pane.

## Scheduling a Process

Double click on any process to open the Service Manager Detail window. Within the Special Actions ribbon group, click on the Schedule Process button, the Choose Date popup opens. The popup displays the current date and time to change the time, click on the dropdown arrow to access a calendar. From the calendar, select the date to run the process. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box. To change the time, click on the hour, minute or AM/PM field and type in the new time.

Once you have the new date and time selected, click on the OK button. The scheduled time appears in the Pending Runtimes pane.

In the Special Actions ribbon group is the Refresh Status Automatically button, click on this button to have CAIRS automatically refresh the screen.

## Monitor CES Processes

You can monitor all CES processes as they work through your data to complete the specific action. Within the Actions pane, click the Monitor CES Processes link, the CES Monitor window opens. There are two panes of information within this window, the Remote CES Instances and CES Processes.

The Remote CES Instances pane displays a list of all the CES instances and its status, computer name, version, last response date and time, some additional information (like IP address). The following statuses are available:

**Active** – An active status means you CES is running and its version number matches that of your CAIRS. All active statuses are marked in a solid green line. Green is good!

**Initializing** – This status is associated with a pulsing yellow line. This means that you CES is working to determine whether it is Active or Offline. This is important to monitor until it changes to Green or Red.

**Offline** – The status is marked in a solid red line. This means that you CES is offline. There are a couple of causes, first your version numbers do not match, update either CES or your CAIRS. Second, the instance of CES is no longer valid, meaning you may have changed servers, if this happens you can delete all offline instances of CES.

**Duplicate** – This status is marked in a solid purple line. This is status needs immediate attention. This means that there are duplicate instances of CES running; this can cause damage to your CAIRS. You need to stop the duplicate instance and uninstall.

**Obsolete** – An obsolete status means that your CES is out-of-date. If your CES is actively running, the status will remain in obsolete, you need to update you version immediately. If the instance of CES is offline, the status changes to obsolete after the initiation is complete, you can delete this instance of CES.

The CES process pane displays an individual status of all the different CES processes available. For each process there are three-color options, they are as follows:

**Green** – this means the process is completed or has not yet been initialized

**Red** – this means that you have disabled the process. You can enable the process by closing out of the monitor, open the process from the Service Manager list and remove the checkmark from the disabled field.

**Maroon** – this means the process is currently running, when completed the color will change to green.

To view further details of the process, you can close out of the CES Monitor and open the individual process through the Service Manager list.

## Activity Log Conversion Task

This allows administrators to convert the activity log into the new format to include a few fields that we recently added to the history section. Currently, CAIRS places all activity in an old SQL table that requires you to convert them into the new format to see a few fields that we recently added. This conversion task specifically applies to the Detailed List when viewing the Activity Log within System Admin → Security → Activity Log.

### **Add New User Activity Log Conversion**

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Service Management**. Click **Activity Log Conversion Task**.
3. Within the Actions pane, click the Add New User Activity Log Conversion link.
4. The General – User Activity Log Conversion Task window opens.
5. Complete the following fields to start a task request (required fields are marked with an asterisk (\*)):
  - **Task Name \*** - type-in the name of the task
  - **Activity Start Date** – click the field to access drop-down arrow, once clicked a calendar displays. From the calendar, select the activity start date. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.
  - **Activity End Date** - click the field to access drop-down arrow, once clicked a calendar displays. From the calendar, select the activity end date. To change the

month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.

---

**!** If you want to run this conversion on a frequent basis to convert new activities to the updated format, leave the dates blank and insert a checkmark in the **Is Recurring Task** field. This tells CES to complete this process every time a cycle runs.

---

- **Records to Process Per Iteration** – type-in the number of records to process during the current CES cycle
  - **Is Recurring Task** – click the box to insert a checkmark to indicate that every time a CES cycle runs, this task runs. This allows new activity to convert to the new format.
  - **Description** – type-in a description of the task if necessary
  - **Status** – when you first create the task, the status is pending. Once the task runs, this field changes to Completed.
6. Once you have completed the necessary information, within the Actions ribbon group, click the Save button to continue working with the task or the Save & Close button to return to the User Activity Conversion Task list.

### **Delete User Activity Log Conversion**

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **Service Management**. Click **Activity Log Conversion Task**.
3. Before the task list populates, you must either:
  - Within the search box, type-in any portion of the record and then click the magnifying glass.
  - Click the **Show All** button.
4. Once the list populates, find the task to delete and click to highlight.
5. Within the Actions pane, click the Delete User Activity Log Conversion link.
6. You are asked if you really want to delete the task, click yes to continue the operation or no to cancel.
7. Once clicked you are returned to the User Activity Log Conversion Task list.

# Number Plan

Number Plan contains information regarding the different dialing plans or exchanges within your database. A number plan is a way to group or catalog all similar telephone numbers together. For example, a number plan may be 702-216-0000 to 702-216-5000.

## Adding a Number Plan

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click **Number Plan**.
3. There are two ways to add a Number Plan:
  - Within the tool bar directly above the **Navigation** pane, click the dropdown arrow next to **New**. From the list, select **Directory Number Management – NNX**.
  - Within the **Actions** pane, click the **Add New Number Plan** link.
4. With either option, the Number Plan window opens. Complete the following information (fields with an asterisk (\*) are required):
  - **Number Plan Name\*** – the number plan name as it should appear when viewing, reporting on, etc. When naming the number plan, be as specific as possible to ensure users can identify it in the future.
  - **Number Plan Type\*** – click the dropdown arrow to access a list and from the list, select one of the following number plan types:
    - **Commercial** – numbers appearing outside the sites standard dialing plan but important for the site to track, for example, pay phones, restaurants, etc. These numbers appear in the directory.
    - **Standard** – telephone numbers used for official and unofficial business.
    - **Special** –telephone numbers not restricted to the standard dialing plan's rules, for example 411 and 911. These have to be created as a dialing plan to be added within the Work Order System.
  - **Primary Billing Site** – click the dropdown arrow to access a list of sites from the list select the primary billing site. This allows call records to be matched to the appropriate number plan based on site information, thus allowing the call records to be associated to the correct extension. This is helpful if you have the same telephone number on two different sites.
  - **Dial Length\*** – type in a number from 3 to 10 indicating the length of the digits dialed.

- **Country Code\*** – type in the country code, up to 4 numeric digits.
- **Area Code** – type in the area code, up to 3 numeric digits.
- **Directory Number Mask** – type in the mask for the directory numbers within this number plan.

An example of a mask would be 216-####. This means every number within this number plan requires that 216 be dialed before the 4 digit extension. Another mask example would be ###-####, meaning that any seven digit combination of numbers can be used for an extension.

- **DSN Exchange** – type in the DSN exchange, up to 3 numeric 6 digits.
- **Months Before Reuse\*** – type in a number to indicate the number of months before reissuing directory numbers within this number plan. Use a zero to reissue the number immediately.
- **Official** – check mark the box to indicate the numbers within this number plan are for official use only.

---

**!** The following fields are used, is your switch uses a different prefix than CAIRS. This is currently used for HiPath only.

---

- **CAIRS Prefix** – type-in the prefix for the telephone numbers within your CAIRS database.
  - **Switch Prefix** –type-in the prefix for the telephone numbers as they appear within your switch database.
  - **Base Digits** – type-in the number of digits that follow the prefix.
  - **Interface 911 Prefix** – type the prefix that you want to append to all numbers within this dial plan when you generate a 911 file within the 911 Interface.
5. Within the **Actions** ribbon group, click **Save** (to save and stay), click **Save & Close** (to save and exit), or click **Save & New** (to save and refresh the screen).

## Site Associations

### *Adding a Site to a Number Plan*

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click **Number Plan**.
3. Within the **Directory Number Management-NNX** list, double click the number plan to open.
4. The Number Plan window opens. Within the **Show** ribbon group, click the **Sites** button. The window displays two panes of information; the top pane displays the sites associated to the number plan. The lower pane displays a list of all the sites within your database, the following read-only information is available for each site:

- **Site Name** – displays the name of the site, this is the lowest level of the site tree.
- **Site Path** – displays the complete path to the site. Each level is separated by a >.
- **Site Level** – displays the site level name or number.
- **Site Code** – displays the three-digit alphanumeric site code.

**!** You can search for a site within the Search All Sites pane by typing in the name or portion of the name within the Search text box, and then click the magnifying glass. Any record with the search characteristics displays within the pane.

5. To add a site to the number plan, find the site within the list, and double-click the record, the site name now displays within the upper pane.

**!** Be aware that sites do not inherit the associations of their parents. You must associate each level to the account. For example, if you associate a parent and want all the children associated you must associate all children site as well.

6. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue adding information for the number plan, or click **Save & Close** (to save and exit) to return to the number plan list.

### ***Deleting Site Access***

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click **Number Plan**.
3. Within the **Directory Number Management-NNX** list, double click the number plan to open.
4. Within the **Show** ribbon group, click the **Sites** button.
5. Within the **Show** ribbon group, click the **Sites** button.
6. Within the top pane, right-click on the site name to access a pop-up menu, from the menu select **Delete**.
7. Once you click Delete, a message box displays verifying that you really want to delete the site. Click **Yes** within the box to continue or **No** to cancel the operation.
8. Once selected, CAIRS draws a line through the site; allowing you to delete multiple items at once.
9. If you do not want to delete the site, right-click the record to access a pop-up menu, and click **Undelete**.
10. Once you select Undelete, a message box displays verifying that you really want to keep the site. Click Yes within the box to continue or No to cancel the operation.
11. Within the **Actions** ribbon group, click Save (to save and stay) or click Save & Close (to save and exit).



12. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue adding information for the number plan, or click **Save & Close** (to save and exit) to return to the number plan list.

## Switch Access

### *Adding a Switch to a Number Plan*

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click **Number Plan**.
3. Within the **Directory Number Management-NNX** list, double click the number plan to open.
4. The Number Plan window opens. Within the **Show** ribbon group, click the **Switches** button.
5. The details pane displays the following information for all switch records:
  - **Switch Name** –displays the switch name, click the plus sign (+) next to the switch name to view the sites the switch is associated to.
  - **Selected** – a check mark in the column indicates the profile has access to view related switch information.
6. Find the switch name within the list, and click the box under the **Selected** column to insert a checkmark granting the profile access to the switch.
7. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue adding information for the number plan, or click on **Save & Close** (to save and exit) to return to the number plan list.

### *Deleting a Switch from a Number Plan*

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click **Number Plan**.
3. Within the **Directory Number Management-NNX** list, double click the number plan to open.
4. The Number Plan window opens. Within the **Show** ribbon group, click the **Switches** button.
5. The details pane displays the following information for all switch records:
  - **Switch Name** – displays the switch name, click the plus sign (+) next to the switch name to view the sites the switch is associated to.
  - **Selected** – a check mark indicates the profile can access information relating to this switch.
6. Find the switch name within the list, and click the box under either column to remove the checkmark to prohibit the profile from accessing the switch.

7. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue adding information for the number plan, or click on **Save & Close** (to save and exit) to return to the number plan list.

## Number Ranges

### *Adding a Number Range*

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click **Number Plan**.
3. Within the **Directory Number Management-NNX** list, double click the number plan to open.
4. The Number Plan window opens. Within the **Numbers** ribbon group, click the **Add Number Range** button.
5. The Add Range pop-up window opens. Complete the following fields:
  - **Start Number** – click the field to type-in the first number of the range. Notice the directory mask appears in the field to aid in entering the number correctly.
  - **End Number** – click the field to type-in the last number in the range. Notice the directory mask appears in the field to aid in entering the number correctly.
  - **Number Type** – click the dropdown arrow to access a list and from the list, select whether the numbers within this range are DID (Direct Inward Dial), Non-DID (Non-Direct Inward Dial) or Reserved.
  - **Switch Name** – click the dropdown arrow to access a list and from the list, select the switch associated with the number range.
6. Within the pop-up window, click the **Save** button.
7. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue adding information for the number plan, or click **Save & Close** (to save and exit) to return to the number plan list.

### *Modifying a Number Range*

A number range's type and the switch it is associated to can be modified.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click **Number Plan**.
3. Within the **Directory Number Management-NNX** list, double click the number plan to open.
4. The Number Plan window opens. Within the **Show** ribbon group, click the **Numbers** button to access a drop-down. From the list, click **All Numbers**.
5. A complete list of number ranges appears. For the next step, use the list as a reference point.
6. Within the **Numbers** ribbon group, click the **Modify Number Range** button.

7. The Modify Range pop-up window opens. Complete the following fields:
  - **Start Number** – click the field to type-in the first number of the range. Notice the directory mask appears in the field to aid in entering the number correctly.
  - **End Number** – click the field to type-in the last number in the range. Notice the directory mask appears in the field to aid in entering the number correctly.
  - **Number Type** – click on the dropdown arrow to access a list, from the list select whether the numbers within this range are DID (Direct Inward Dial), Non-DID (Non-Direct Inward Dial) or Reserved.
  - **Switch Name** – click on the dropdown arrow to access a list, from the list select the switch associated with the number range.
8. Within the pop-up window, click the **Save** button.
9. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue adding information for the number plan, or click **Save & Close** (to save and exit) to return to the number plan list.

### ***Deleting a Number Range***

An administrator can delete a range of numbers no longer in use. In order to delete the range, all assignments within the range need to be reassigned before you can delete the range.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click **Number Plan**.
3. Within the **Directory Number Management-NNX** list, double click the number plan to open.
4. The Number Plan window opens. Within the **Numbers** ribbon group, click the **Delete Number Range** button.
5. The Delete Range pop-up box opens. Complete the following fields:
  - **Start Number** – type the first number of the range to delete. Notice the directory mask appears in the field to aid in entering the number correctly. You must enter in a number currently within the number plan.
  - **End Number** – type in the last number in the range to delete. Notice the directory mask appears in the field to aid in entering the number correctly. You must enter in a number currently within the number plan.
6. Within the pop-up window, click the **Save** button.
7. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue adding information for the number plan, or click **Save & Close** (to save and exit) to return to the number plan list.

## Numbers

### *Viewing All Numbers within a Number Plan*

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click **Number Plan**.
3. Within the **Directory Number Management-NNX** list, double click the number plan to open.
4. The Number Plan window opens. Within the **Show** ribbon group, click the lower portion of the **Numbers** button to access a drop-down.
5. From the drop-down, click **All Numbers**.
6. The All Numbers list pane opens displaying all existing number ranges within this number plan. Click the plus sign (+) next to a number range to view all numbers within the range.

### *Viewing Available Number within a Number Plan*

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click **Number Plan**.
3. Within the **Directory Number Management-NNX** list, double click the number plan to open.
4. The Number Plan window opens. Within the **Show** ribbon group, click the lower portion of the **Numbers** button to access a drop-down box.
5. From the drop-down, click **Available Numbers**.
6. The Available Numbers pane opens displaying all number ranges within this number plan. Click the plus sign (+) next to a number range to view all numbers within the range.

### *Viewing Assigned Numbers within a Number Plan*

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click **Number Plan**.
3. Within the **Directory Number Management-NNX** list, double click the number plan to open.
4. The Number Plan window opens. Within the **Show** ribbon group, click the lower portion of the **Numbers** button to access a drop-down box.
5. From the drop-down, click **Assigned Numbers**.
6. The Assigned Number pane opens displaying all number s within the range assigned to a set. Click the plus sign (+) next to the number range to view all assigned numbers within the range.

7. When viewing the assigned number, CAIRS provides some basic directory information regarding the set, such as; button position, trouble priority, yearly audit date, etc.

## Deleting a Number Plan

Please keep in mind that to delete a number plan, all telephone assignments must first be re-assigned or deleted. There are two ways to delete a number plan:

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click **Number Plan**.
3. Within the **Directory Number Management-NNX** list, highlight the plan to delete. There are two ways to delete a plan:
  - Within the tool bar directly above the **Navigation** pane, click the red **X**.
  - Highlight the plan number within the list and within the **Actions** pane click the **Delete Number Plan** link.
4. Once you click Delete, a message box appears verifying that you really want to delete the number plan, click **Yes** within the box to continue or **No** to cancel the operation.
5. If telephone numbers are still associated with this number plan, a message box will say, "There are Dial Plan Numbers associated with this Dial Plan it cannot be deleted as this time." Click **OK** to continue.

# Custom Report Template

The Custom Report Template allows you to create a customized report for printing your work order information. In the creating process, you first design a template, which includes rows, columns, borders, etc. Then you can add in fields from the work order, what this does is when you generate the report if you have the field Building, the building name/number from the work order populates in the field. You can further customize your report by adding in shrinking rows, leaving out spaces, etc. The process to create the template may be a little time consuming but well worth the payoff!

---

## Understanding the Custom Report Template Window

### Ribbon Groups

Each ribbon group allows you to perform a set of functions relating to you template, for example, setting your grid lines, adding borders, copying the template, etc.

### *Actions*

Within the Actions ribbon group, you can perform the following:

- **Save & Close** – click this button to save the completed information and to return to the Custom Report Template list.
- **Delete** – click this button to delete the template
- **Save** – click this button to save the completed information and continue working with the template.
- **Save & New** – click this button to save the template and to start adding a new template.
- **Refresh** – click this button to refresh the screen and apply recently changed items.

### *Grid Lines and Update Border*

The following three selections determine the lines for the border of the selected cell(s) within the grid in the Template Setup pane:

- **Single Line** – this selection creates a single line border for the selected cell within the grid

- Double Line – this selection creates a double line border for selected cell within the grid
- None – no border is created for the selected cell, or the border in place are removed

### ***Template Actions***

Within this ribbon group you can copy or export your template.

## **Template Panes**

There are four panes of information within the Custom Report Template window, they are:

- Template Setup
- General Information
- Grid Size
- Properties – Selected Cells

### ***Template Setup***

This pane displays what the template looks like. Any changes you make within the other panes are reflected within this pane.

### ***General information***

This pane allows you to define basic template information, such as template name, description, etc.

### ***Grid Size***

Within this pane, you determine the number of rows and columns within your report. At any time during the creation process, you can add or delete columns.

### ***Properties – Selected Cells***

This pane allows you to define how the cell is used and what information will be contained within the cell.

---

## **Creating your Report Template**

### **Step One: Creating the Template**

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click **Custom Report Template**
3. There are two ways to add a Template:

- Within the tool bar directly above the **Navigation** pane, click the dropdown arrow next to **New**. From the list, select **Custom Report Template**
  - Within the **Actions** pane, click the **Add New Custom Report Template** link.
4. With either option the General – Custom Report Template window opens. Within the General Information pane, complete the following fields, required fields are marked within an asterisk (\*):
- **Report Template Name** – type-in the template name, be as specific as possible so when your users know what each template is designed for
  - **Description** – type-in a brief description of the template, your users will see both the template name and description when selecting
  - **Page Report When Out of Space** – click the box to insert a checkmark to allow the template to be copied to the next page if the first page runs out of room.

**!** It's important to understand that if the Page Report When Out of Space feature is utilized any cells containing report totals/aggregates will display on each page unless you decide otherwise. The totals displayed within the cell(s) will not reflect the totals/aggregates for just that page but for the report in its entirety.

- **Top Level Data Fill Behavior** – click the dropdown arrow to access a list, from the list select one of the following options to indicate how CAIRS manages
    - Automatically Determine
    - Duplicate Entire Record
    - New Row Per Record
5. At this point it is a good idea to save your progress, within the Actions ribbon group click the Save button to save your changes and continue working with the template

## Step Two: Grid Size

1. The next step is to determine the number of rows and columns within your template, within the Grid Size pane complete the following fields, both field are required:
  - **Total Rows** – type-in the total number of rows for your template
  - **Total Columns** – type-in the total number of columns for your template
2. Notice that after you type a number into the field, the appropriate number of row or columns appear within the Template Setup pan.

**!** Using the Grid Size pane, to add additional rows and columns adds the rows to the bottom and the columns to the right. Using the Grid Size pane to reduce the number of rows and columns at a later time deletes rows from the bottom and columns from the right including any information they contain.



3. At this point it is a good idea to save your progress, within the Actions ribbon group click the Save button to save your changes and continue working with the template

### Step Three: Template Goodies

1. When you highlight a cell or group of cells within the Template Setup pane, the Properties – Selected Cells pane becomes available. This pane allows you to setup data and other properties for the cell. You have a couple of options:
  - The cell can hold a constant value
  - The field can hold a text as well as include data from the work order or trouble ticket
  - The field can contain a sum of the value of previous fields.
  - You can design the appearance of the text from bold, italic or underline.
2. The following options are available within the Properties – Selected Cells pane:

#### Cell Text

Within this field, you can type text to include within the cell. The text can stand-alone or you can add information from the order/trouble or from anywhere within CAIRS to the field as well.

Text that exceeds the length of the cell will overflow into the cell to the right, if that cell does not contain any other information. To keep the text within the original cell, expand the column width.

#### Data Position

This determines where the information from the work order appears within the cell if you have entered text in the above field. You have two options, before the text or after the text.

---

**!** No delimiter is placed between the data and the cell text. If you want to separate the data from the cell text, place the desired delimiter before or after the text. For example, - Work Order Form. To use a space as a delimiter between cell text and data press the space bar after or before the cell text.

Important: It's important to know that a cell cannot display alpha numeric information simultaneously. If a cell contains text and then has numerical data associated to it as explained in Selecting a Data Category, Using Related Table Data and Using Related Field Data, the numerical data is converted to text. So for example, if you have a cell with the text Date, and want to display the report date, the best option is to associate an adjacent cell so that the adjacent cell can display the date as a date instead of as text.

---

#### Data Category

This field determines where the information you are entering into the field comes from, what table in CAIRS holds the information. The following options are available:

- None – Use Related Table and Field – this selection requires that you use the Related Table Date and the Related Field Data dropdowns to populate the cell

The following selections remove the Related Table Data and Related Field Data fields and replace them with a dropdown specific to your selection.

\* When the data source is the same for a group of connected cells, you can save time by assigning properties such as a Data Category to all of the cells at once by selecting a range of cells and then setting the cell properties. The cells retain their assigned Data Category and can then be assigned additional properties as needed.

- Report Information – this selection allows you to insert some necessary report information such as page numbers, date, time, etc.
- Work Order Custom Fields – this selection pulls information from the custom fields associated to a work order
- Order Information – this selection pulls information from the work order, for example, work order category, account number, subscriber, etc.
- Connectivity – this selection pulls information from the facilities section of the component
- Equipment and Services – this selection pulls information from the equipment and services section of the component, for example, equipment type, cost, location, etc.
- Set Management Component – this selection pulls information from a set device
- Circuit Component - this selection pulls information from a circuit
- Segment Component - this selection pulls information from a circuit segment
- Non Switch Number Component – this selection pulls information from any component that does not require a switch, for example, a cell phone
- Account Management - this selection pulls information from an account

If you select None, the Related Data fields are removed and replaced with a field name specific to your selection or Special Data Value.

#### Related Table Data & Related Field Data

When you select None in the Data Category field these fields become available to allow you to associate information outside the scope of the work order. For example, if you select the Subscriber Component, the entire range of fields relating to a subscriber becomes available within the Field Data. The following Related Tables are available:

- None
- Work Order/Trouble
- Circuit Component

- Segment for Circuit Component
- Configured Set Component
- Non-Switch Directory Component
- Subscriber Component
- Account Component
- General Component
- Notes for Order/Trouble

---

\* When the data source is the same for a group of connected cells, you can save time by assigning properties such as Related Field Data to all of the cells at once. The cells retain their assigned Related Field Data and can then be assigned additional properties as needed.

---

#### Data Aggregate Option

This option allows you to have a total for the cells that contain amounts. For example, if you want to know the total charges for the equipment and services associated to a work order, you would select the Sum directly below the last equipment or service field. The following options are available:

- None
- Group By
- Count
- Sum
- Average
- Minimum
- Maximum
- Combine in Cell

#### Multiply By

Use Multiply By to multiply a cell's contents by a specified number. For example, if a cell displays a total or numerical data, by entering a number a 3 in this field, CAIRS multiplies the contents by 3. The Multiply By field can be used to show a percentage-based tax amount or fee related to a total, or for any situation in which a numeric value needs to be multiplied by a fixed amount.

#### Font Size, Font Bold, Italic or Underline

Use these options to further customize the look of the information that appears in the selected cell.

3. As you make changes to your template, remember to click on the Save button within the Actions ribbon group to save your changes and continue working with the template.

## Row and Column Management

At the top of the General – Custom Report Template window is the Row/Column Management tab, this tab allows you to define row properties and well as add and remove row and/or columns.

### **Row Properties**

It's important to understand that if the Page Report When Out of Space feature is utilized any cells containing report totals/aggregates will display on each page unless you decide otherwise. The totals displayed within the cell(s) will not reflect the totals/aggregates for just that page but for the report in its entirety.

By utilizing the options within the Row Properties you can decide however, to keep cells with the previous data, include a cell(s) data on the first page only or include cell(s) data on the last page only.

The following row properties are available:

- **Keep with Previous Data** – This option will keep two or more rows of data together. If this option is not checked, then data that is on two separate rows will generate independently instead of staying together. First, all of the data for the first row will generate, and then the data for the next row will all be generated into the report.
- **Include on First Page Only** – select when wanting to see report totals on the first page of the report versus the last.
- **Include on Last Page Only** – select when wanting to see report totals on the last page of the report versus the first.
- **Shrinkable** – this options allows the row you have selected to shrink in order to print all on the same page
- **Skip if No Data** – this options allows the row to be skipped in the final report if there is no information contained within the row

---

**!** If you don't select either Include on First Page Only or Include on Last Page Only, the report totals will be included on every page.

---

### **Shrinkable Rows**

Currently the Custom Report Template does not include a page break preview that adjusts or shows where one page ends and another begins as found in many Microsoft Office products. Instead, you will create a shrinkable row and utilize print preview to adjust the reports page length.

A shrinkable row is simply an expanded row assigned a Shrinkable property. This row is expanded so that its space combined with the space of the existing template cells and information equal the height of a printed page. Typically, this row is directly below any rows that populate with report data eg. inventory, or a total/aggregate row.

This expanded row space then is reduced as each additional row of data is added to the report. Once this shrinkable space is used up by rows of report data, the report generates

an additional page and continues to add rows of data until the shrinkable space on that page is used up. In essence, by using a shrinkable row, you determine a fixed page height and subsequently determine how much room is available for data before additional pages generate.

So for example, there are 30 inventory items for the report you just created. The first inventory item populates within the row you created to populate with the inventory information. The next inventory item populates below the first in a newly created row. This row is created at the same height as the first inventory row and takes it's space from the space available within the Shrinkable row until no more Shrinkable space exists.

---

**!** If you do not need to print, the use of a Shrinkable row isn't necessary. If a Shrinkable row is not used the report will continue to create data rows until there is no more data, at which point the total/aggregate rows will display. The shrinkable row is also not necessary if it is not important that some elements of the report are duplicated on each page. The shrinkable row is also not necessary if the Page Report When Out of Space option is not used.

---

To create a shrinkable row, do the following:

1. Hover your mouse pointer over either the top or bottom border of the farthest left cell (the light grey cell) of the row to resize. The pointer icon changes to a single line with an arrow above and below.
2. Left click and hold down the mouse button. Drag the line to increase the row height.
3. Release the mouse button when the row is at the desired height.
4. Click the **Row/Column Management** tab.
5. Within the **Row Properties** ribbon group, checkmark the **Shrinkable** checkbox.
6. View the effect of the row upon the page size by exporting the custom report template to Excel and then choosing print preview. For steps on how to complete these two options, see Exporting, Previewing, Printing, Copying and Deleting.
7. Make any additional adjustments to the page size by repeating steps 1-6 as needed.

---

**\*** It can be extremely helpful to have text within a cell after the shrinkable row. This way when the report is previewed the text will provide an indicator of what adjustments need to be made to the shrinkable area to fit the report within a printable page. Adding report information such as a page number, date or time below the shrinkable is one such option. For steps on how to add report information, see Report Information.

---

### ***Grid Row Actions***

**Insert Row Above Selection** – within the Template Setup pane, highlight a row by clicking the grey block just to the left of the first cell, and click this selection to insert a row directly above the highlighted one.

**Insert Row Below Selection** - within the Template Setup pane, highlight a row by clicking the grey block just to the left of the first cell, and click this selection to insert a row directly below the highlighted one.

**Delete Selected Rows** - within the Template Setup pane, highlight a row by clicking the grey block just to the left of the first cell, and click this selection to delete the entire row

### ***Grid Column Actions***

**Insert Column Before Selection** - within the Template Setup pane, highlight a column by clicking the grey block at the top of the column, and click this selection to insert a column before the highlighted one.

**Insert Column After Selection** - within the Template Setup pane, highlight a column by clicking the grey block at the top of the column, and click this selection to insert a column after the highlighted one.

**Delete Selected Columns**- within the Template Setup pane, highlight a column by clicking the grey block at the top of the column, and click this selection to delete the entire column

### ***Resizing Rows and Columns***

The rows and columns work similar to rows and columns in an Excel Spreadsheet. Currently there is no way to reset the column and rows back to the default.

To resize a single row

1. Hover your mouse pointer over either the top or bottom border of the farthest left cell (the light grey cell) of the row to resize. The pointer icon changes to a single line with an arrow above and below.
2. Left click and hold down the mouse button. Drag the line to increase or decrease row height.
3. Release the mouse button when the row is at the desired height.

To resize a single column

1. Hover your mouse pointer over either the left or the right border of the top most cell (the light grey cell) of the column to resize. The pointer icon changes to a single line with an arrow to the left and right.
2. Left click and hold down the mouse button. Drag the line to increase or decrease column width.
3. Release the mouse button when the column is at the desired width.

To resize a multiple rows:

1. Left click the farthest left cell (the light gray cell) within the initial row that you want to resize.
2. Hold down the left mouse button and drag the pointer to the last row to resize. The selected rows highlight.

3. Hover your mouse pointer over either the top or bottom border of the farthest left cell (the light grey cell) of one of the selected rows. The pointer icon changes to a single line with an arrow above and below.
4. Left click and hold down the mouse button. Drag the line to increase or decrease the selected rows height. Notice the height of all selected rows adjust simultaneously.
5. Release the mouse button when the rows are at the desired height.

To resize multiple columns:

1. Left click the top most cell (the light gray cell) within the initial column that you want to resize.
2. Hold down the left mouse button and drag the pointer to the last column to resize. The selected columns highlight.
3. Hover your mouse pointer over either the left or right border of the top most cell (the light grey cell) of one of the selected columns. The pointer icon changes to a single line with an arrow to the left and to the right.
4. Left click and hold down the mouse button. Drag the line to increase or decrease the selected columns width. Notice the width of all selected columns adjust simultaneously.
5. Release the mouse button when the columns are at the desired width.

To resize all rows:

1. Left click the upper most left cell. All cells are selected and highlight.
2. Hover your mouse pointer over either the top or bottom border of the farthest left cell (the light grey cell) of one of the selected rows. The pointer icon changes to a single line with an arrow above and below.
3. Left click and hold down the mouse button. Drag the line to increase or decrease the height of all the rows. Notice the height of all the rows adjust simultaneously.
4. Release the mouse button when the rows are at the desired height.

To resize multiple columns:

1. Left click the upper most left cell. All cells are selected and highlight.
2. Hover your mouse pointer over either the left or right border of the top most cell (the light grey cell) of one of the selected columns. The pointer icon changes to a single line with an arrow to the left and right.
3. Left click and hold down the mouse button. Drag the line to increase or decrease the width of all the columns. Notice the width of all the columns adjust simultaneously.
4. Release the mouse button when the columns are at the desired width.

## Borders

You can add a border to you entire report, a single column or row, or a group of columns or row. There are several options available within the Grid Lines and Update Border ribbon groups.

Report Border:

It is recommended that you do not add a border surrounding the outside of the entire report until the very end of the creation process. If a double line report border is added before the rest of the report is completed and then later a single line border is added to a cell or cells contributing to the report border, any double line borders on these cells will be replaced by a single line border. Subsequently, when the report is exported or printed the report border will be inconsistent, containing both double and single lines.

To add a border to the entire report:

1. Left click the upper most left cell. All cells are selected and highlight.
2. Click the Custom Report Template tab.
3. From the Grid Lines ribbon group, select the grid line type.
4. The selected border is applied to the report.

---

**!** Double Line borders appear as a thick single line while viewing the custom report template within the Custom Report Template window. To view the double line border, export the custom report template to Excel and then choose print preview. For steps on how to complete these two options, see Exporting, Previewing, Printing, Copying and Deleting.

---

## Removing a Border

To remove a border from a cell or selected area:

1. Left click and hold down the mouse button within the first cell comprising the bordered area.
2. Drag your mouse to select and highlight any additional cells comprising the bordered area. The selected cells highlight.
3. Click the Custom Report Template tab.
4. From the Grid Lines ribbon group, select the grid line type None.
5. From the Grid Lines ribbon group, select the grid line type you want to remove.
  - **Left** – removes a left border.
  - **Right** – removes a right border.
  - **Top** – removes a top border.
  - **Bottom** – removes a bottom border.
  - **All** – removes a left, right, top and bottom border.



6. The selected border(s) is removed.

## Export/Copy/Delete

### *Exporting a Custom Report Template to Excel*

To export a custom report template to Excel:

1. Save your current template by clicking the **Save** button within the **Actions** ribbon group.
2. Within the top menu bar, click the **Excel** icon.
3. An Excel spreadsheet opens displaying the template.

### *Exporting a Custom Report Template to PDF*

To export a custom report template to PDF:

1. Save your current template by clicking the **Save** button within the **Actions** ribbon group.
2. Within the top menu bar, click the **PDF** icon.
3. An PDF opens displaying the template information.

---

**!** The actual report template does not export to PDF. Only the basic template information is exported. To export the actual template, use the Excel export option.

---

### *Copying a Custom Report Template*

The Copy feature allows you to create a duplicate of the custom report template.

To create a copy of the custom template:

1. Save your current template by clicking the **Save** button within the **Actions** ribbon group.
2. Click the **Custom Report Template** tab.
3. Within the **Template Actions** ribbon group, click the **Copy** button.
4. The template is copied and the copy opens in a new window. The copied template has the name “Copy of Template Name”.

---

**!** To create multiple copies of the same template you will need to rename either the original template or the “Copy of Template Name” template.

---

### *Deleting a Custom Report Template*

1. To delete a copy of the custom template:

- From the **Custom Report Template** window, click the **Delete** button within the **Actions** ribbon group.
  - From the **Custom Report Template** pane within the CAIRS window, click to highlight the template and then click the **Delete** button within the **Menu** tool bar.
2. A pop up appears asking if your sure you want to delete the custom report template.
  3. Click **Yes** to delete the template or **No** to cancel the operation.

---

## XML Editor

This feature allows you to select an XML file and edit the file before exporting or importing. Please contact Unique Communication Solutions technical support for further details.

# Security

The Security sub-menu allows administrators to define who has system access and their access type. Administrators create profiles allowing them to manage access rights and privileges for a group of users instead of dealing with each user individually. Within Security, administrators view login information and user actions.

This section of the manual is in the logical order of how you will enter items into your database. The orders as it appears here will not match that of the software.

---

## Security - Profiles

The profile system is the main method for establishing security levels for CAIRS users. CAIRS requires that every user have a profile assignment. A profile allows system administrators to design one set of access rights and privileges based on a group of people or a job description. There are three different access aspects for each profile: Menu and Actions, Switches, and Work Centers. When you create a profile, you limit the access rights for each profile/user has based on these three aspects.

First, you grant each profile access to certain menus and then actions it can perform within each menu. Let's take the Facilities menu for example. Within Facilities, there are three sub-menus: Buildings, Connections, and Sites; you may want to allow a profile to perform functions only within Buildings. To restrict profile functionality to Buildings you would remove the Allow functions for Connections, and Sites, making those menu options read only. We will get into this in more detail later.

Second, each profile can access one or more switches. When granting access within this option, you allow the profile members access to the switch records and can grant them an SMA switch connection. This access does not affect who can send information to the switch when completing work orders.

Finally, you can grant each profile access to specific work centers allowing people to be responsible for only their portion of the work order and the work order to flow electronically from one job center to the next.

### Adding a Profile

1. Click the System Admin menu.

2. In the Navigation pane, click the plus sign (+) next to Security to access the sub-menus.
3. Click Profiles.
4. There are two ways to add a new profile:
  - Within the tool bar directly above the Navigation pane, click the dropdown arrow next to New. From the list, select Profile.
  - Within the Actions pane, click the Add New Profile link.
5. With either option, the General-Profile window opens. Enter in the following information for the profile (required fields are marked with an asterisk (\*)):
  - Profile Name\* – type-in the alphanumeric profile name, we recommend keeping profile names easy to identify when adding a user, for example administrator, site user, TCO, etc.
  - Description – type-in a brief profile description
  - Disabled \* – click the box to insert a checkmark to disable the profile. We recommend administrators disable profiles instead of deleting them. This saves time by allowing you to activate a profile instead of re-adding.
6. Within the Actions ribbon group, click the Save (to save and stay) button to continue working with the profile, or click the Save & Close (to save and exit) button to return to the Profiles list.

## Profile - Menu and Actions

### *Adding Menu and Action Access to a Profile*

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Security to access the sub-menus.
3. Click Profiles.
4. In the Profiles list, double click the profile name.
5. The General-Profile window opens. Within the Show ribbon group, click the Menus and Actions button.
6. There are three panes of information within the Menus and Actions screen.
  - Menu privileges – displays a list of all the menu options within CAIRS. Next to each menu name, click the plus sign (+) to view the sub-menu options.

---

**!** When you highlight a menu name within the Menu Privileges pane, the information within the Action Privileges and Related Menus for Selected Action pane changes to reflect only the items associated to the selected menu.

---

- Action privileges – displays a list of available user actions within the selected menu option. There are five different actions: Allow List, Allow Select, Allow Update, Allow Add, and Allow Delete.
- Related menus for selected action – display a list of menu items related to the selected action. When you change an action within the Action privileges pane, you affect the options available within this pane. For example, if you choose to allow the profile to view the list for accounts, you also affect what the profile views in Configured Items.

7. We are going to break this into three sections based on the name of the panes

### **Section 1: Menu Privileges**

8. Within this pane, you will be determining if the profile can see and access menu options within the Navigation pane.
9. Next to each of the main menu items is a plus sign (+), click on the plus sign to view the sub-menu items, some menus have up to four sub-menus. When you click on the box to add or remove the checkmark, the sub-menu items are also affected. However, you can remove sub-menu privileges without affecting the main menus. It is a good idea to expand the entire menu group before you start to ensure that you are adding and removing the correct privileges.
10. Within the Menu privileges pane, there are two options available:
  - Enable – this box remains unchecked, meaning that the profile cannot perform any functions within the menu. Click on the box to insert a checkmark, this allows the profile to some basic functionality. Please keep in mind you have only enabled the menu option you must still add in the functionality by selecting the appropriate actions.
  - Visible – this field remains checked, meaning that the profile can see the menu option within the Navigation pane. Click on the field to remove the checkmark to remove the menu option from the Navigation pane.

### **Section 2: Action Privileges**

11. Within this pane, you are determining what actions the profile can perform. Notice that some of the options are selected and grayed out, this means that those actions are necessary for normal operation of the software and can not be removed.
12. At the top of this pane, there are two option buttons:
  - Actions for Selected Menu – CAIRS defaults to this selection, when you have a menu item highlighted within the Menu privileges pane, only the actions associated to that menu appear within the Action privileges pane.
  - All Actions – click the option button to list all the actions for all menu items for the profile within the pane.
13. In addition to the options, there is an Edit All Records button. When you click on the double down arrow next to Edit All Records, the checkboxes for the allow columns become available. The checkmarks are grayed out, click the field to remove the

mark. Click on the field again to re-add the checkmark, when you re-add, the entire column now contains checkmarks. CAIRS requires you to perform a few extra clicks to make sure that you really want to change the entire column, please do not get frustrated, we meant to do it that way!

14. Within this pane, there are seven columns of information:

- Action Group Name – displays the name of the menu item that will be affected when you change any of the allow options
- Group Type – displays the type of action that you are affecting when you change any of the allow actions, for example, File Attachment Actions, when you allow add, list and delete you are allowing the profile to attach, view and delete file attachments from the menu item (specifically the item listed within the action group name column)
- Allow List – a checkmark in the field indicates that the profile is allowed to view a list of the action group, for example if the action group is Site, you are allowing the profile to view a list of the sites. Leave the field blank to prohibit the profile from viewing the list of information.
- Allow Select – a checkmark in the field indicates that the profile is allowed to double click on any item within the list to view the complete details. Leave the field blank to prohibit the profiles from access any record within the menu item.
- Allow Update – a checkmark indicates that the profile can modify any record associated to the menu item. Leave the field blank to prohibit the profiles from making any changes to the record.

---

**!** When you add permissions for the following items, you are enabling links within the Actions pane, dropdown lists and buttons within the toolbar. As well as actions within the Action ribbon group.

---

- Allow Add – a checkmark indicates that the profile can add new records into the database. Leave the field blank to prohibit the profile from adding new items into the database.
- Allow Delete – a checkmark indicates that the profile can delete existing records from the database. Leave the field blank to prohibit the user from delete items from the database.

15. To add or prohibit privileges click on the box to add or remove the checkmark.

### **Section 3: Related menus for selected action**

16. When you start to change the privileges within the Action Privileges pane, you may be affecting other areas of the software. This pane displays the other areas that are affected by your selections. For example, if you allow a profile to add within Configured Items -> Set Management -> Configured Sets, you are also allowing the profile to perform the same action within Directory, Published Directory, etc.

17. It is good to pay close attention to the items that appear within this pane to make sure you are not granting the profile permission to an area that you do not want them to access.
18. When you finish adding/removing the appropriate privileges, click Save (to save and stay), or click Save & Close (to save and exit) from within the Actions ribbon group.

## Switch Access

When you grant the profile access to a particular switch, you allow them to view the switch records and its related CAIRS database information. You can also grant the profile access to SMA connection, allowing them to securely interface with the switch. To learn more about this connection see Switches.

### *Adding/Deleting Switch Access to a Profile*

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Security to access the sub-menus.
3. Click Profiles.
4. In the Profiles list, double click the profile name.
5. The General-Profile window opens. Within the Show ribbon group, click the Switches button.
6. The details pane displays all switch records with three columns of information:
  - Switch Name – displays the switch name, click the plus sign (+) next to the switch name to view the sites the switch is associated to.
  - Selected – a check mark in the column indicates the profile has access to view related switch information.
  - Grant SMA Permission – a check mark in the column indicates the profile can create a SMA switch connection. Within the Selected column, check mark and grant the profile switch access.
7. To grant the profile access, find the switch name within the list and click the box under the Selected column to insert a checkmark.
8. To grant SMA Permission, click on the box with the column to insert a checkmark
9. To remove access, find the switch name within the list. Click the box under either column to remove the checkmark to prohibit the profile from accessing the switch.
10. Within the Actions ribbon group, click Save (to save and stay) to continue working with the profile, or click Save & Close (to save and exit) to return to the profile list.

## Work Center Access

After you create a work center, you have to grant the appropriate profiles access to the center. Each profile is granted access to the work centers directly relating to their daily job

function. This allows the users to be responsible for only the information pertaining to their job.

### ***Adding/Deleting Work Center Access to a Profile***

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Security to access the sub-menus.
3. Click Profiles.
4. In the Profiles list, double click the profile name.
5. The General-Profile window opens. Within the Show ribbon group, click the Work Centers button.
6. A details pane displays the following three columns. Click on a column, as necessary:
  - Work Center Name – displays the work center name.
  - Selected – a check-marked column indicates the profile has access to view the work center information.
7. To grant access, click on the box in the Selected column to insert a checkmark granting the profile access to the work center.
8. To remove work center access, click on the box to remove the checkmark thus removing work center access
9. Within the Actions ribbon group, click Save (to save and stay) to continue working with the profile, or click Save & Close (to save and exit) to return to the profile list.

### **Disabling/Enabling a Profile**

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Security to access the sub-menus.
3. Click Profiles.
4. In the Profiles list, double click the profile name.
5. The General-Profile window opens.
6. To disable the profile, click on the box in the Disabled field to insert a checkmark. This disables the profile.
7. To enable the profile, click on the box to remove the checkmark
8. Within the Actions ribbon group, click Save (to save and stay) to continue working with the profile, or click Save & Close (to save and exit) to return to the profile list.



## Deleting a Profile

It is recommended administrators disable profiles instead of deleting them. This saves time by allowing profiles to be re-activated rather than re-added. Before deleting the profile, you must first reassign all users to another profile.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Security to access the sub-menus.
3. Click Profiles.
4. There are two ways to delete a profile:
5. Within the list, highlight the profile name. In the Actions pane, click the Delete button.
6. Double click the profile name within the list. The Profile window opens. Within the Actions ribbon group, click the Delete button.
7. Once you click Delete, a message box appears verifying that you really want to delete the profile. Click Yes to continue or No to cancel the operation.
8. If the profile is currently associated to any users, you must reassign the users before deleting the profile. If there are still user associations, a message appears saying the profile is currently in use. Click the Close button to return to the profile list.

## Copy Profile

Within each profile, you can create an identical copy of the profile by clicking the Copy Profile button within the Profile Actions ribbon group. This opens a new window allowing you to rename and modify the privileges for the new profile. This action is useful if you want to create profiles and limit by site.

---

## Security – Users

Within Users, an administrator creates CAIRS database users. There are two ways to add users, you can either add them manually or by connecting to your Active Directory. After adding a user, you must assign them a profile, granting them access to certain portions of the software based on their job description. To learn more about profiles, see Profiles.

There are three different types of users: mixed; windows authenticated or certificate authentication. You determine which authentication type you are using from the Security Type system setting. This setting must be determined before users can be added.

With Windows authentication, CAIRS will use your windows credentials as your username and password when logging in.

With Certificate Authentication, there are couple of behind the scenes settings that need to be configured for this to work properly. Before selecting this option, please contact our technical support staff to configure it properly. With certificates, CAIRS will authenticate a user based on their CAC. A user will login with their CAC, they will then need to be assigned a profile to access the software.

Finally, the Mixed type, this allows authentication for both Windows and Certificates. This security type allows for both users with CAC authentication and Windows authentication. CAIRS will first look for a certificate and use those credentials, however if a certificate is never used then CAIRS will use the window authentication.

## Users – Windows

These types of users will use their Windows credentials to log into CAIRS each time. There are two ways to add a user, you can add them manually with your domain name\user name, the password associated to their account will be used to login. Alternatively, you can connect to your Active Directory, find and select their name. CAIRS populates the fields based on their active directory account.

### ***Adding a User - Windows***

This allows you to add a user manually without connecting to your Active Directory.

1. Click the System Admin menu.
2. In the Navigation pane, click on Security then on Users - Windows
3. There are two ways to add a user:
  - Within the tool bar directly above the Navigation pane, click the dropdown arrow next to New. From the list select. Users.
  - Within the Actions pane, click the Add New Users link.
4. With either option, the General - User window opens. Enter the following user information (required fields are designated with an asterisk (\*)):
  - Supervisor Name – click the dropdown arrow to access a list and from the list, select the supervisor name.
  - User Name\* – type-in the login name for the user, make sure the name is formatted as domain name\user name
  - First Name – type-in the first name.
  - Last Name – type-in the last name.
  - Email Address – type-in the email address.
  - Phone Number – type-in the telephone number.
  - Alt Phone Number – type-in an alternate phone number.
  - Fax Phone Number – type-in the fax number.
  - TCO – click the dropdown arrow to access a list and from the list, select the TCO (Telephone Control Officer).
  - Resource Manager – click the dropdown arrow to access a list and from the list select the resource manager name.
  - Last Login Date – displays the date the user last logged into CAIRS.

- Last Login Location – displays the computer IP address last used to log into CAIRS.
- Last Password Change Date – displays the date the user changed their password.
- Disabled \* – a checkmark in the box indicates that the username has been disabled.
- New Unauthorized User \* – this field applies to users who access CAIRS via their CAC
- Operator Number – type-in the operator number for the user.
- User Job Title – type-in the job description for the user.
- Is System Administrator \* – click the box to insert a checkmark to indicate that this user is a System Administrator. This selection overrides any other and allows the user complete system access.
- Limit by Site \* - click the box to insert a checkmark limiting this user to only see the sites selected within the Sites window.
- Window Service Account \* - click the box to insert a checkmark enabling single sign-on. Meaning, when you login to Windows you also login to CAIRS, eliminating the need for a separate username and password

---

**!** In order for single sign to work properly, the Windows login and the Active Directory login must be the same.

---

- UCE Notifications – click the dropdown arrow to access a list and from the list, select one of the following options to determine if the user receives information when there is an event or error in UCE:
  - None - Don't notify of any events
  - Debug - Notify all events (This is only recommended when you are troubleshooting UCE from CAIRS UCE Monitor)
  - Errors - Notify error and critical events from UCE
  - Only - Only notify when UCE us down or not collecting calls
- Exclude from Work Order Assignments – if you want this user to be excluded from the work order system all together, click on this box to insert a checkmark.
- Manage Global Reports -
- Manage Record Layouts

---

**!** Once you have added the user, you now need to associate the user to a profile. You can associate more than one profile to a user, but beware that CAIRS will use the highest level

of permission. For example, if one profile has permission to a switch and the other does not, CAIRS allows the user to access the switch based on the higher profile.

---

5. To assign a profile to a user, highlight the profile within the Available Profiles and click the right arrow button. The profile name moves from the Available Profiles pane to the Assigned Profiles pane.
6. To remove an assigned profile, highlight the profile within the Assigned Profiles and click the left arrow button. The profile name moves back to the Available Profiles pane.
7. Within the Actions ribbon group, click Save (to save and stay) to continue working with this user, click on the Save & New button to assign another user, or click Save & Close (to save and exit) to return to the User list.

## Adding Users from Active Directory

This allows you to add a user from your Active Directory. You are required to login to the Active Directory so make sure you have an administrator name, password, and the domain name.

1. Click the System Admin menu.
2. In the Navigation pane, click on Security then on Users - Windows
3. In the Actions pane, click the Add User from Active Directory link.
4. The Provide Active Directory Credentials window opens. Login with your Administrator Name, Administrator Password, and Domain.
5. Click the OK button.
6. The Active Directory list displays. Within the Active Directory list:
  - Search for a Subscriber by typing the subscriber name or portion of the subscriber name in the text box in the upper right-hand corner. The list displays all subscribers that contain the portion of the search characters and the highlighted fields display the search characters. For example, if the search parameter typed in is 'Len', anywhere 'Len' appears in any active directory listings is displayed and highlighted within a new list. To return to the full list of users after a search, click the red X within the search parameters box.
  - Sort the list by clicking any column header. For example, click the Username column header to sort the list alphabetically by user name.
7. Within the list, double click the user name to add. The User Details window opens with the User Name, First Name, Last Name, and Email Address automatically populated with the Active Directory information.
8. Enter the remaining user details.

---

**!** Once you have added the user, you now need to associate the user to a profile. You can associate more than one profile to a user, but beware that CAIRS will use the highest level

of permission. For example, if one profile has permission to a switch and the other does not, CAIRS allows the user to access the switch based on the higher profile.

---

9. To assign a profile to a user, highlight the profile within the Available Profiles and click the right arrow button. The profile name moves from the Available Profiles pane to the Assigned Profiles pane.
10. To remove an assigned profile, highlight the profile within the Assigned Profiles and click the left arrow button. The profile name moves back to the Available Profiles pane.
11. Within the Actions ribbon group, click Save (to save and stay) to continue working with this user, click the Save & New button to assign another user, or click Save & Close (to save and exit) to return to the User list.

The Active Directory list continues to stay open until closed allowing administrators to add multiple users without having to login each time. To close the Active Directory list, click the red X in the upper right-hand corner.

## Users – Site Access

You can limit a user to view certain sites within the database. For this to work properly, on the Detail screen, place a check mark in the Limit by Site field. This limits the user to only the sites selected within the Sites button. Keep in mind that if you select a high-level site, you need to select the children as well. Therefore, if you want the user to access several different levels, you need to select each level.

### Site Access

1. Click the System Admin menu.
2. In the Navigation pane, click on Security then on Users - Windows
3. Depending on the amount of users you have within your database, the list may not readily populate. To populate the list of users, perform one of the following actions:
  - Within the search box, type any portion of the record and then click the magnifying glass
  - Click the Show All button
4. The General-User window opens.
5. Within the Show ribbon group, click the Sites button. The window displays two panes of information; the top pane displays the sites associated to the user. The lower pane displays a list of all the sites within your database, the following read-only information is available for each site:
  - Site Name – displays the name of the site, this is the lowest level of the site tree.
  - Site Path – displays the complete path to the site. Each level is separated by a >.
  - Site Level – displays the site level name or number.
  - Site Code – displays the three-digit alphanumeric site code.

**Adding a Site**

6. To add a site to the user, find the site within the Available Sites pane, and double click on the record. The site name now appears within the upper pane.

---

! Be aware that sites do not inherit the associations of their parents. You must associate each level to the user. For example, if you associate a parent and want all the children associated you must associate all children sites.

---

**Deleting a Site**

7. Within the top pane, right-click the record selector box just to the left of the site name to access a pop-up menu, from the menu select Delete.
8. Once you click Delete, a message box appears verifying that you really want to delete the site. Click Yes within the box to continue or No to cancel the operation.
9. Once selected, CAIRS draws a line through the site; allowing you to delete multiple items at once.
10. If you do not want to delete the site, right-click the record to access a pop-up menu and from the pop-up, click Undelete.
11. Once you select Undelete, a message box appears verifying that you really want to keep the site. Click Yes within the box to continue or No to cancel the operation.
12. Within the Actions ribbon group, click Save (to save and stay) to continue working with the user, or click Save & Close (to save and exit) to return to the Users list.

***Disabling/Enabling a User Account***

1. When you disable a user's account, their privileges are revoked immediately. If they are active in CAIRS when you disable the account, they will not be able to perform any further actions.
2. Click the System Admin menu.
3. In the Navigation pane, click on Security then on Users - Windows
4. Depending on the amount of users you have within your database, the list may not readily populate. To populate the list of users, perform one of the following actions:
  - Within the search box, type any portion of the record and then click the magnifying glass
  - Click the Show All button
5. The General-User window opens.

**Disabling**

6. There are two ways to disable an account.
  - Click on the box within the Disabled field to add a checkmark
  - Within the Security ribbon group, click the Disable User button. This adds a checkmark to the Disabled field

7. Click Save & Close (to save and exit).
8. Within the User list, a checkmark appears in the Disabled column.

### **Enabling**

9. There are two ways to enable an account.
  - Uncheck the box in the Disabled field.
  - Click the Enable button in the Security ribbon group.
10. Click Save & Close (to save and exit).

---

**!** As you disable and enable user accounts, the button name within the Security ribbon group changes name to the opposite of your action.

---

### ***Deleting a User***

1. Click the System Admin menu.
2. In the Navigation pane, click on Security then on Users - Windows
3. Depending on the amount of users you have within your database, the list may not readily populate. To populate the list of users, perform one of the following actions:
  - Within the search box, type any portion of the record and then click the magnifying glass
  - Click the Show All button
4. The Users list opens to the right, there are two ways to delete a user:
  - Highlight the user within the list. Within the tool bar directly above the Navigation pane, click the red X
  - Highlight the user within the list. Within the Actions pane, click the Delete Users link.
5. Double click on the user name within the list. The User window opens. Within the Actions ribbon group, click the Delete button.
6. Once you click Delete, a message box appears verifying that you really want to delete the user. Click Yes within the box to continue or No to cancel the operation

### ***Viewing User Activity***

1. Click the System Admin menu.
2. In the Navigation pane, click on Security then on Users - Windows
3. Depending on the amount of users you have within your database, the list may not readily populate. To populate the list of users, perform one of the following actions:
  - Within the search box, type any portion of the record and then click the magnifying glass

- Click the Show All button
4. The General-User window opens.
  5. Within the Activity ribbon group, click the User Activity button. The User Activity window opens displaying the following information:
    - Action Name\* – displays the completed action name. Some action examples are Delete Profile, Add New Terminal, etc.
    - Activity Date\* – displays the action date and time.
    - User Name\* – displays the username.
    - Last Name – displays the user’s last name.
    - First Name – displays the user’s first name.
    - Name or Number - displays the number or name of the information that the action influenced, for example, the primary telephone number, circuit name, subscriber name, etc. appears in the field.
    - Source\* – displays the IP address.
    - Work Order Number – displays the work order number, if any.
    - Security Check Successful – a checkmark in the field indicates that the completed action was within the scope of the user’s profile.
  6. To return to the User, click the ‘x’ in the upper right-hand corner of the window.

### ***Viewing User Accounts***

To sort the list based on a common element there are a few different options you can choose from within the Views pane. By clicking the options button next to an alternate sort option, the list automatically resorts.

1. Click the System Admin menu.
2. In the Navigation pane, click on Security then on Users - Windows
3. Within the Views pane, click one of the following options:
  - Simple List – this is the default list, the users appear alphabetically by user name.
  - Users with Profiles – displays list of each user and their assigned profiles, if a user is assigned to more than one profile their name will appear multiple times in the list
  - Users with Sites - displays list of each user and their assigned sites, if a user is assigned to more than one site their name will appear multiple times in the list
  - Users with Sites & Profiles - displays list of each user and their assigned profiles & sites, if a user is assigned to more than one their name will appear multiple times in the list



- New Users – displays a list of the user who have accessed the system that are not authorized yet
  - Disabled Users – displays a list of the user who are disabled
4. Double click a record to see its details.

## Users – Certificate

Once a user logs in with their CAC cards, a few things need to happen from an administrator standpoint. As an administrator, you will need to perform the following actions after the user has accessed CAIRS for the first time:

When a user opens CAIRS for the first time, they will get a message saying they do not have access, they will need to contact an administrator to be granted access. If they do not contact you, you can change the viewing option to view 'New Users' (Security → Users – Certificate → Views pane) this view displays a list of the users that are not authorized to use the system yet.

Access the user from Security → Users – Certificate, within the user make the following changes:

- New Authorized User – remove the checkbox
- Profile – assign them a profile by double clicking the profile name in the Available Profiles pane, it will move into the Assigned Profiles pane
- Sites – if the 'Limit By Site' field is checked, you will need to assign the user a site(s). Within the Sites button, double click on the site name in the lower to pane to move to the upper pane. Once in the upper pane the site is associated to the user.

Click on the Save & Close button within the Actions ribbon group.

The last step is to contact the user and verify they can login and see the menu options you designated for the assigned profile.

For each user you can view and edit the following information, most of the information will populate from their CAC information:

The first four fields display information that is associated to the user's CAC, these fields are read only

- User Name
- Email Address
- Serial Number
- EDIPI

The remaining fields are specific to CAIRS and are editable. Required fields are marked with an asterisk (\*).

- User Status – there are three statuses available for the user:

- New User – this will be the status of the user the first time they login into CAIRS. All new users need to be authorized before they can login and see any menu option.
- Authorized – this is the status that you will need to give each user so they can access CAIRS, their menu access depends on access rights associated to their profile(s)
- Revoked – you can revoke a user’s access by switching their status to revoked. This is immediate, once you click Save their access rights are removed.
- To change the status, click on the dropdown arrow to access a menu, and from the menu select one of the above statuses.
- TCO – click the dropdown arrow to access a list and from the list, select the TCO (Telephone Control Officer).
- Resource Manager – click the dropdown arrow to access a list and from the list select the resource manager name.
- Last Login Date – displays the date the user last logged into CAIRS.
- Last Login Location – displays the computer IP address last used to log into CAIRS.
- Is System Administrator – click the box to insert a checkmark to indicate that this user is a System Administrator. This selection overrides any other and allows the user complete system access.
- Limit by Site - click the box to insert a checkmark limiting this user to see only the sites selected within the Sites window.
- Window Service Account - click the box to insert a checkmark enabling single sign-on. Meaning, when you login to Windows you also login to CAIRS, eliminating the need to re-enter your username and password

---

**!** In order for single sign to work properly, the Windows login and the Active Directory login must be the same.

---

- UCE Notifications – click the dropdown arrow to access a list and from the list, select one of the following options to determine if the user receives information when there is an event or error in UCE:
  - None - Don’t notify of any events
  - Debug - Notify all events (This is only recommended when you are troubleshooting UCE from CAIRS UCE Monitor)
  - Errors - Notify error and critical events from UCE
  - Only - Only notify when UCE us down or not collecting calls

---

**!** Once you have added the user, you now need to associate the user to a profile. You can associate more than one profile to a user, but beware that CAIRS will use the highest level of permission. For example, if one profile has permission to a switch and the other does not, CAIRS allows the user to access the switch based on the higher profile.

---

To assign a profile to a user, highlight the profile within the Available Profiles and click the right arrow button. The profile name moves from the Available Profiles pane to the Assigned Profiles pane.

To remove an assigned profile, highlight the profile within the Assigned Profiles and click the left arrow button. The profile name moves back to the Available Profiles pane.

Within the Actions ribbon group, click Save (to save and stay) to continue working with this user, click on the Save & New button to add another user, or click Save & Close (to save and exit) to return to the User list.

Now that your user is added into the system, you can filter the sites that they have access to. To learn more about Site Access please see the Users- Site Access portion under Users – Windows.

If you are keeping track of user activity, then you can view all the action the user has performed in the system. Within the Activity ribbon group, click on the User Activity button. If the list of actions does not readily populate, click on the Show All link in the upper right-hand corner of the pane.

### ***Viewing User Accounts***

To sort the list based on a common element there are a few different options you can choose from within the Views pane. By clicking the options button next to an alternate sort option, the list automatically resorts.

1. Click the System Admin menu.
2. In the Navigation pane, click on Security then Users – Certificate.
3. Within the Views pane, click one of the following options:
  - Basic Lookup – displays just the username
  - Simple List – this is the default list, the users appear alphabetically by user name.
  - Users with Profiles – displays list of each user and their assigned profiles, if a user is assigned to more than one profile their name will appear multiple times in the list
  - Users with Sites - displays list of each user and their assigned sites, if a user is assigned to more than one site their name will appear multiple times in the list
  - Users with Sites & Profiles - displays list of each user and their assigned profiles & sites, if a user is assigned to more than one their name will appear multiple times in the list

- New Users – displays a list of the user who have accessed the system that are not authorized yet
  - Revoked Users – displays a list of the user whose access has been revoked
4. Double click a record to see its details.

---

## Security - Logged in Users

The Logged in Users displays a list of the users that are currently logged into CAIRS. The list displays the following information:

- User Name – displays the user's login name.
- Computer Name – displays the computer name
- IP Address – displays the computer's network address.
- Last Name – displays the user's last name.
- First Name – displays the user's first name.
- Log In Time – displays the date and time the user started their CAIRS session.

Each of these six columns can sort the list information alphabetically or numerically. For example, click the Last Name column to sort the list alphabetically based on the user's last name. Once clicked, a triangle appears in the column header. An upward pointing triangle indicates the list is in alphabetical order, while a downward pointing triangle indicates the list is in reverse-alphabetical order.

### Refresh Status

Within the Actions pane, click on the Refresh Status link to refresh the Logged in Users list, this updates the list to the most current users logged into CAIRS.

### Viewing User Activity

As an administrator, you can view user activities by double clicking the user name within the list. A complete activities list displays.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Security to access the sub-menus.
3. Click Logged in Users.
4. A list of the users currently logged into CAIRS displays, within the list double click on any record. The Security Monitor window opens.
5. The fields in the Security Monitor window are as follows:

- Action Name\* – displays the action that took place: Add, Update, or Delete. This keeps track of any database changes.
  - Activity Date\* – displays the date and time the action occurred.
  - User Name\* – displays the username.
  - First Name – displays the user's first name.
  - Last Name – displays the user's last name.
  - Name or Number - displays the number or name of the information that the action influenced, for example, the primary telephone number, circuit name, subscriber name, etc. appears in the field.
  - Source\* – displays the computer's IP address.
  - Work Order Number – displays the work order number.
  - Security Check Successful – a checkmark in the field indicates the completed action was within the scope of the user's profile.
6. Within the Actions ribbon group, click on the X to close the Security Monitor and return to the Logged In Users list.

---

## Security - Activity Log

The Activity Log displays detailed information of all database additions, updates, and deletions. The Activity Log displays the following columns of information:

- Action Name\* – displays the action completed.
- Activity Date\* – displays the action date and time.
- User Name – displays the username.
- First Name – displays the user's first name.
- Last Name – displays the user's last name.
- Name or Number – displays the number or name of the information that the action influenced, for example, the primary telephone number, circuit name, subscriber name, etc. appears in the field.
- Source\* – displays the computer's IP address.
- Work Order Number – displays the work order number.
- Security Check Successful – a checkmark in the field indicates that the completed action was within the scope of the user's profile.

Each of these columns can sort the list information alphabetically or numerically. For example, click the Last Name column to sort the list alphabetically based on the user's last name. Once clicked, a triangle appears in the column header. An upward pointing triangle indicates the list is in alphabetical order, while a downward pointing triangle indicates the list is in reverse-alphabetical order.

## Refresh Status

Within the Actions pane, click on the Refresh Status link to refresh the Activity Log, this updates the list to the most current activities completed in CAIRS.

## Viewing the Activity Log

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Security to access the sub-menus.
3. Click Activity Log. The Activity Log list opens to the right displaying the following six columns:
  - Action Name\* – displays the completed action name. Some action examples are Delete Profile, Add New Terminal, etc.
  - Activity Date\* – displays the action date and time.
  - User Name\* – displays the username.
  - Last Name – displays the user's last name.
  - First Name – displays the user's first name.
  - Name or Number - displays the number or name of the information that the action influenced, for example, the primary telephone number, circuit name, subscriber name, etc. appears in the field.
  - Source\* – displays the IP address.
  - Work Order Number – displays the work order number, if any.
  - Security Check Successful – a checkmark in the field indicates that the completed action was within the scope of the user's profile.
4. Each of these six columns can sort the list information alphabetically or numerically. For example, click the Last Name column to sort the list alphabetically based on the user's last name. Once clicked, a triangle appears in the column header. An upward pointing triangle indicates the list is in alphabetical order, while a downward pointing triangle indicates the list is in reverse-alphabetical order. To view a detailed description of the activity, double click the individual record. The Activity Log window opens displaying more details.

## Exporting the User Activity Log as XML

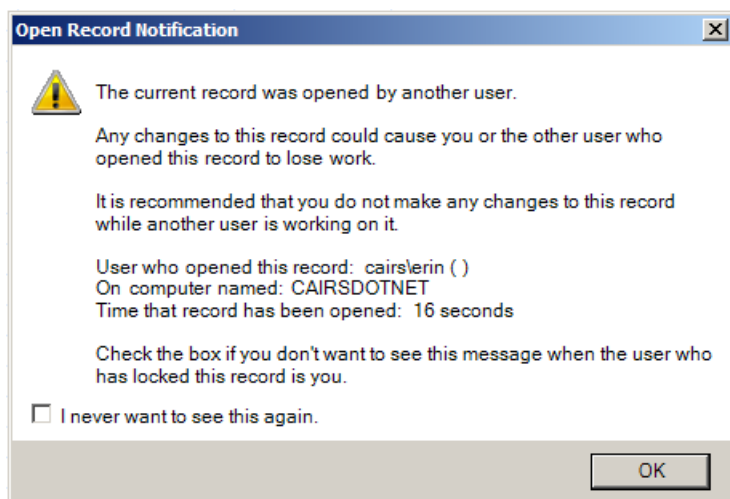
1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Security to access the sub-menus.
3. Click Activity Log.
4. Within the Actions pane, click the Export to XML link.

5. Within the Save As window, select the location. CAIRS auto-populates the Save as type: field with the XML file type.
6. Type the file name into the text box and click the Save button.
7. To stop the save process, click the Cancel button.
8. To view the file that you just saved, go to the saved file location and double click the file name. The file opens as a window within Internet Explorer.

---

## Security - Open Record Management

When a user opens a record that is currently open by someone else, the following message appears:



This message explains that if either user makes any changes the work may be lost. Within the message, we notify you of the user name and computer, so in the event that you need the record immediately you can contact the user.

As an administrator, you can view a list of locked records by user. This allows you to view and possibly release the record for use by another user.

### Delete Open Record Notifications

As an administrator, you can delete one or all of the open record notifications. This releases the record and allows other users to make changes and possible overwrite previous changes made. Within the actions pane there are two options, the first is Delete All Open Record Notifications, this deletes everything within the list and release the records.

The second option, Delete Open Record Notification, only becomes available when you highlight a record within the list to the right. This option allows you to delete single records to release the items associated. Within the list, find the record to release, click to highlight

the record and within the Actions pane click the Delete Open Record Notification. You are asked to verify that you really want to delete the open record management, click yes to continue or no to cancel the operation.



# Data Sync Center

The Data Sync Center compares the data in CAIRS with the data on each switch it's monitoring. The Unique installation team and the System Administrator will work in conjunction to perform a Switch Sync. The initial Switch Sync pulls data from the switch to create the foundation for your database.

System Administrators use subsequent syncs to synchronize the CAIRS database and the switch database. Unique Communications follows the industry standard that the "Switch is the Bible." Additionally, CAIRS provides the functionality of sync exceptions reporting ('out of sync') giving administrators the option of reviewing the database discrepancies.

Administrators can run subsequent syncs manually or schedule daily, weekly, or monthly syncs. Additionally, the Data Sync Center gives you switch syncs results by displaying the in-sync and out-of-sync data. You can configure the Data Sync to resolve exceptions (out-of-sync data) automatically or to generate a report (log) of exceptions for manual review. This is a great tool in maintaining database integrity.

The seven switch syncs CAIRS offers are:

- Port – compares the port numbers in your CAIRS database to the switch data.
- Number Plan – (CS2100/SL100 only) shows area and office codes based off the TOFC Name Report.
- Number Plan Listing – (CS2100/SL100 only) pulls in all the non-published listings, just the DNs not the configured set, from the switch.
- Feature Key Maps (FKM) Syncs (for EWSD switches) – compares the features key maps for the sets in the CAIRS database to the switch data.
- Configured Sets – compares the set device data in your CAIRS database to the switch data.
- Hunt Group Syncs – compares the hunt group data in your CAIRS database to the switch data.
- Switch Speed Dial (EWSD Switches) – compares the Speed Dial Groups data in your CAIRS database to the switch data.
- Switch Hunt Group Members (EWSD Switches) – compares the hunt group members data in your CAIRS database to the switch data.

- **Run Script Only**– this project allows you to run a switch script only; there will be no syncing once the script is run. This project provides more switch communication options for CAIRS.
- **Call Pickup** – compares the call pickup data from your switch to the call pickup groups within CAIRS

Administrators have additional functions within the Data Sync Center. The first is the 911 Interface. This allows you to create a template to gather information from within your CAIRS database to send to an external 911 program.

The final function allows a Unique Communications representative the ability to import information into your database from an external source such as an Access Database.

---

## Switch Sync Project

Creating a Switch Sync Project allows administrators to compare the database residing within the switch to the database within CAIRS. For each switch sync type, an administrator creates a new project and for each switch, you will have up to six projects. Each project allows you to schedule and perform syncs, view sync logs, etc. In order for you to create a switch sync project, you must have created and established a connection with each switch from within CAIRS. To learn more about how to do this, please see the Switches section.

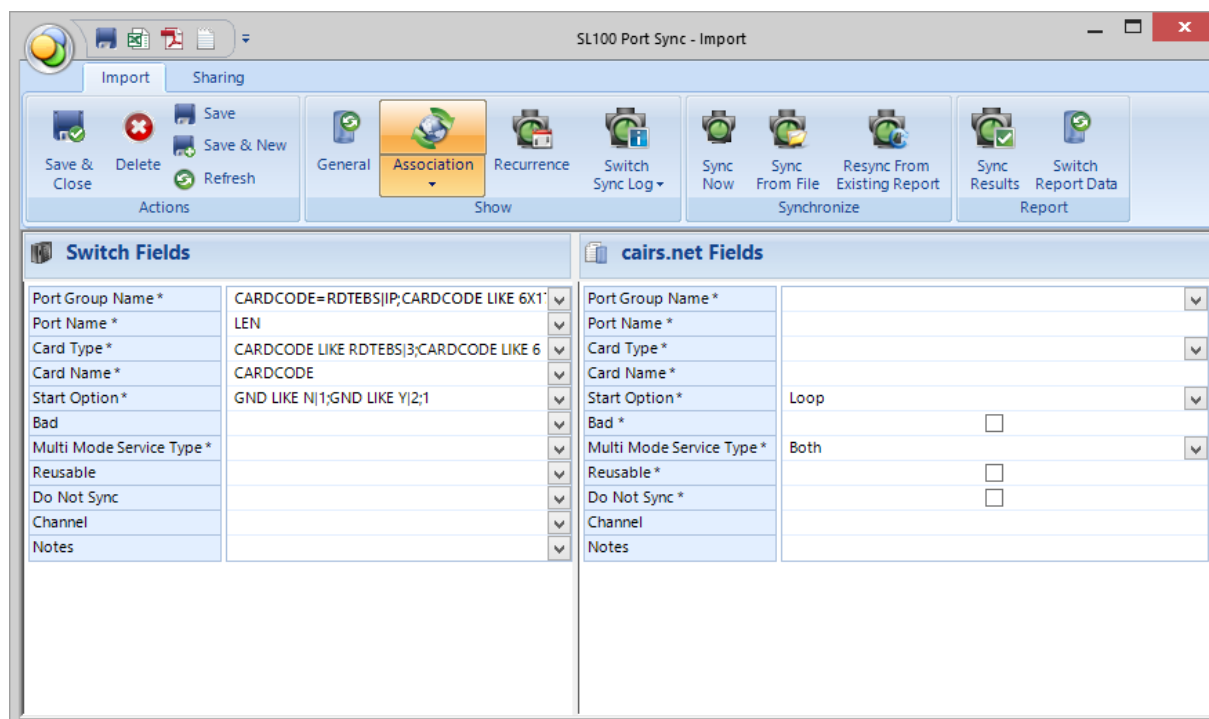
### Adding a Switch Sync Project

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click Switch Sync Project. There are two ways to add a project:
  - Within the tool bar directly above the Navigation pane, click the dropdown arrow next to New. From the list select Switch Sync Project.
  - Within the Actions pane, click the Add New Switch Sync Project link.
4. With either option, the General-Import screen opens. Complete the following fields. Required fields are marked with as asterisk (\*):
  - **Project Name\*** – type-in the project name.
  - **Switch Name\*** – click on the dropdown arrow to access a list and from the list select the switch you wish to sync with.
  - **Script Name\*** – click the dropdown arrow to access a list and from the list, select the script needed to perform the sync.
  - **Action\*** – click the dropdown arrow to access a list and from the list, select one of the sync types: Port, Number Plan, Number Plan Listing, Feature Key Maps, Configured Sets, Hunt Group Members, Switch Speed Dial, Switch Hunt Group Members, Run Script Only or Call Pickup Group.

- Auto Update – click the field to insert a checkmark in the box allowing auto-update. If this is checked, any discrepancies that are found from the switch data to your CAIRS data will be automatically updated to match the switch. If you select this, it is a good idea to change the comparison type to 'Ignore Not In Switch', this will leave any records that exist in CAIRS but not in the switch in place. This is helpful if you have virtual numbers in your CAIRS database.
  - Single Record Sync – this allows you to perform a sync for a single record in your switch.
  - Description – type-in a project description.
  - Comparison Type – click the dropdown arrow to access a list and from the list, select one of the following options:
    - Compare All – compares everything in/out of the database.
    - Ignore Not In Switch – ignores records in CAIRS that are not in the switch.
    - Use Advanced Sync Options – this option is available to use with the direct supervision of a Unique Communications Representative.
5. After completing the required information, within the Actions ribbon group, click Save (save and stay) button, Save & Close (save and return to the project list) or Save & New (save and refresh) to add a new project.

### ***Association***

The Association button is used to specify the data used to compile the Switch Sync Project. There are 2 panes in the section: Switch Fields and CAIRS fields. In each field used for the project, you must specify where you are getting the data. If the field information is coming from the switch database, use the dropdowns within the Switch Fields pane. If the field information is coming from your CAIRS database, use the dropdowns within the CAIRS pane. In the example below, you will see that a majority of the information for this port sync will be coming from the switch, CAIRS will populate the start option and service type for each record. Please contact a Unique Communications Representative for assistance in making changes to this section.



## Recurrence

Each sync project can be set to run automatically on a daily, weekly, or monthly basis. Within the Recurrence button you will be determining when your syncs will run.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click Switch Sync Project.
4. The Switch Sync Project list opens to the right. Within the list double click the project to schedule.
5. The General-Import screen opens. Within the Show ribbon group, click the Recurrence button.
6. The Data Sync Recurrence pop-up opens.
7. Within the Data Sync start time pane (top), click the dropdown arrow to select the sync start hour. The clock is on military time, so this will be a number between 0 and 23.
8. Within the Recurrence pattern pane, select how often to perform the sync. There are three choices:
  - Daily – once you select the option button next to Daily, two additional selections become available. You can choose to run the sync every 1-7 days by selecting the first option and typing in the number of weekdays or run the sync every weekday, skipping Saturday and Sunday.

- Weekly – once you select the option button next to Weekly, two additional selections become available allowing you to select the day of the week to perform the sync. Additionally, you are required to type in the number of weeks in-between syncs. For example, if you type in 2 and select Sunday, CAIRS performs a sync every other Sunday
  - Monthly – once you select the option button next to Monthly, an additional selection becomes available allowing you to choose what day of every month to perform the sync. To perform the sync on the 1st of every month, you would type-in a 1 in both fields
9. Within the Range of recurrence pane, enter the switch sync Start date using the drop-down calendar. To change the date, click the field to access a dropdown calendar. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.
  10. After you have selected your start date, decide if you want the sync to run continuously on this schedule or have an end date. To have CAIRS run this sync continuously on this schedule, click the radio button next to No end date otherwise click the radio button next to End by: and select the desired end date.
  11. Click the Ok button when finished or click Cancel to exit the pop-up without saving your changes.

### **Viewing Sync Schedules**

You can view existing sync schedules.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click Switch Sync Project.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to schedule.
5. The General-Import screen opens. Within the Show ribbon group, click the Recurrence button.
6. The Data Sync Recurrence pop-up opens. At the top of the pop-up, CAIRS tells you the recurrence pattern.
7. To exit, click the Ok button or the red X in the upper right-hand corner of the pop-up window.

### **Switch Sync Logs**

The Switch Sync Logs displays a list of the syncs that have occurred, the list included a few details for each sync such as date, time, status, parameters, etc. There are two additional options within this button, you can 'Cancel the last submitted Sync' and 'Clear the Sync Log'.

### **Viewing Switch Sync Project Log**

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click Switch Sync Project.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to schedule.
5. The General-Import screen opens. Within the Show ribbon group, click on the upper portion of the Switch Sync Log button.
6. The screen changes to displays a list of the syncs completed. The list displays the following read-only information:
  - Request ID – this is an internal code used by CAIRS to identify the sync request
  - Sync Status – displays the status of the sync, whether in progress, cancelled, etc.
  - Sync Details – displays any details for the sync
  - Date Time - displays the date and time the sync started
  - Sync Parameters - displays any unique parameters used for the sync
7. Click the plus sign (+) next to the request id to view the complete sync log details.

### **Switch Sync Log - Cancel Last Submitted Sync**

You can cancel the last submitted sync. This will only cancel syncs that have a status of not started or in progress.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click Switch Sync Project.
4. The Switch Sync Project list opens to the right. Within the list, double click the name of the sync project.
5. The General-Import screen opens. Within the Show ribbon group, click the lower portion of the Switch Sync Log button to access a drop-down menu and from the menu select, Cancel Last Submitted Sync.
6. A message box appears verifying the last sync was cancelled successfully.

### **Clearing the Sync Log**

1. Clearing the sync log removes all the information from the log.
2. Click the System Admin menu.

3. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
4. Click Switch Sync Project.
5. The Switch Sync Project list opens to the right. Within the list, double click the name of the sync project.
6. The General-Import screen opens. Within the Show ribbon group, click the lower portion of the Switch Sync Log button to access a drop-down menu and from the menu select, Clear Sync Log.
7. A message box appears verifying that you really want to clear the log. Keep in mind that if a sync is in progress it clears that log as well and there will be no way to know if the sync was successfully.
8. Within the box, click Yes to continue clearing the log or No to cancel.

### ***Synchronizing Your Data***

After building the Switch Sync Project, it is time to perform a switch sync. You can perform three different syncs

- Sync Now – compares data from within the switch to data within the CAIRS database.
- Sync from File – compares data you have within a file to data within the CAIRS database.
- Resync from an existing report – compares the data generated in a report to data within the CAIRS database.

When you created your switch sync project, you chose a comparison type and determined how the sync deals with certain records. If you choose the 'Compare all' type, the sync compares all data from both databases. Once complete, CAIRS generates reports with the out-of-sync data for both the CAIRS database and the switch.

The alternate comparison type, 'Ignore Not in Switch' compares both databases but generates a report showing records that are in CAIRS but not in the switch.

After any of the syncs run, you will get four reports, each displaying a different group of data from your switch or from CAIRS:

- In Sync – displays a list of the records found in both databases.
- Out of Sync – displays a list of out of sync records, that are either not in the switch database or not in the CAIRS database.
- Unable to Sync – displays a list of records CAIRS was unable to sync from either database.
- Not In Switch – displays a list of the records that are in your CAIRS database that are not in your switch database.

## Sync Now

This type of sync compares your existing CAIRS database to the switch database.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click Switch Sync Project.
4. The Switch Sync Project list opens to the right. Within the list, double click the name of the sync project.
5. The General-Import screen opens. Within the Synchronize ribbon group, click the Sync Now button.
6. The Scripts window opens displaying the list of switch scripts that commit the information to the switch.
7. Click the plus sign (+) next to the script name to view a list of parameters and values that are required for the script to run successfully, complete all parameters (fields marked with an asterisk (\*) are required).
8. By clicking the appropriate button at the bottom of the pop-up you perform one of the following actions:
  - Run Unattended – click this button if you have scheduled the sync to occur in the future. This allows CAIRS to run the sync at the scheduled time. If there is no schedule in place, the sync runs immediately.
  - Cancel – click this button to cancel the sync and close the pop-up.
9. As the Sync is progressing, you will see a small popup in the lower right hand corner of your main monitor. This box displays the progress of the sync, there are a few statuses you should pay close attention to:
  - Not Executed – this status means that the sync is in the process of executing, CAIRS is still trying to contact CES to start the process.
  - Script In Progress – this means that WOPR has connected to the switch and it is in the process of running the script to get sync your data
  - Script Failed – if the script failed it is no big deal, check all your parameters and try to run the sync again, if it continues to fail please contact our technical support team
  - Script Cancelled – you have requested that the sync be cancelled, once you submit the request to cancel the script/sync should be completed in 10 seconds
  - Sync in Progress – this is good! CAIRS is communicating with your switch and bringing back the information to compare to the CAIRS database. Don't be alarmed this could take a while to complete.



- Sync Failed – don't panic! Check your parameters, script association and connections and try the sync again. If it fails again please contact our technical support team.
  - Sync Cancelled – you have requested that the sync be cancelled, once you submit the request to cancel the script/sync should be completed in 10 seconds
  - Setup Not Complete – there are a few more steps in the setup that not to be completed before the sync can run. Please check all your properties and make sure that they scripts are associated to the switch and try the sync again.
  - Waiting for Compare – the comparison process has not started yet, please make sure that the CES process has been enabled
  - Cancellation Requested – if you have requested to cancel the script or sync this status appears, it will be brief as the cancellation takes less than 10 seconds.
  - Completed – You are successful!! The sync ran properly and now you can view the Sync Results.
10. Once the sync is complete, you can view the report by clicking the Sync Results button within the Report ribbon group.

### ***Sync from a File***

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click Switch Sync Project.
4. The Switch Sync Project list opens to the right. Within the list, double click the name of the sync project.
5. The General-Import screen opens. Within the Synchronize ribbon group, click the Sync From File button.
6. The Open box opens allowing you to browse to and select the file to synchronize. Once you find the file, double click the file name.
7. A message box opens verifying that you really want to continue with the sync. Please be aware the sync may take significant time to complete. Click Yes to continue or No to cancel the operation.
8. As your sync progresses, you will see a small popup in the lower right hand of your main monitor. This box displays the progress of the sync,
9. Once your sync is complete, you can view the report by clicking the Sync Results button within the Report ribbon group.

### ***ReSync from an Existing Report***

1. Click the System Admin menu.

2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click Switch Sync Project.
4. The Switch Sync Project list opens to the right. Within the list, double click the name of the sync project.
5. The General-Import screen opens. Within the Synchronize ribbon group, click the Resync From Existing Report button
6. A message box opens verifying that you really want to continue with the sync. Click Yes to continue or No to cancel the operation. Please be aware the sync may take significant time to complete.
7. Once your sync is complete, you can view the report by clicking the Sync Results button within the Report ribbon group.

## Sync Reports

Once you perform a switch sync, CAIRS creates a report for all data synced between the switch and the CAIRS database. Each report displays three pieces of information:

- Out of Sync – displays a list of out of sync records, that are either not in the switch database or not in the CAIRS database.
- Not In Switch – displays a list of the records that are in your CAIRS database that are not in your switch database.
- Unable to Sync – displays a list of records CAIRS was unable to sync from either database.
- In Sync – displays a list of the records found in both databases.

You can modify the records within the report and then perform a sync directly from the report.

### *Viewing a Report*

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click Switch Sync Project.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to schedule.
5. The General-Import screen opens. Within the Report ribbon group, click the Sync Results button.
6. The Sync results display. There are four tabs of information:
  - Out of Sync – displays a list of out of sync records, meaning they are either not in the switch database or not in the CAIRS database.

- Not In Switch – displays a list of the records that are in your CAIRS database that are not in your switch database.
  - Unable to Sync – displays a list of records that CAIRS was unable to sync from either database.
  - In Sync – displays a list of the records appearing the same in both databases.
7. To view all the records within a pane, click the Show All link in the pane header.
  8. CAIRS allows only 500 records to display in a batch. To view more or less than 500 records, click in the textbox next to Max Records to Send in Batch and type-in a new number.
  9. By clicking the appropriate icon in the toolbar along the top of the window, you can export the information seen on your screen in either an Excel or PDF format.
  10. Once you have the file exported, you can save or print the information.
  11. To exit, click Close.

### ***Out of Sync***

You may have records that are out of sync, meaning that they are in your switch database but they are not in CAIRS. These records are going to always be placed in the Out of Sync tab so you can determine what you want to do with them. Whether you want to sync the records into your CAIRS database or leave them out. For each record, each field is going to be represented in two columns, the first column displays the information from the switch the second column displays the information from the CAIRS database. The first three columns of the report are the most important:

- Processing State – if a record appears in this report the state is always going to say 'Waiting Evaluation', this lets you know the ball is in your court
- Record State – this column is always going to state 'Not in CAIRS' these records reside in your switch but not in CAIRS
- Status – this column is going to give the reason why record did not sync, this could be anything from a duplicate record to telephone number not in switch.

There are a few choices you have when dealing with the records. At the top of the pane are two buttons:

- Sync Out of Sync Records – after you have resolved any discrepancies or issues with the records you can try to sync the entire report again.
- Sync Single Number or Port – this allows you to sync individual records within the report. After you have resolved the discrepancy, click on the row to highlight and then click the button.



---

## EWSD Switch Sync

The four EWSD switch syncs are:

- Set Device Syncs – compares the set device data in your CAIRS database to the switch data.
- Port Syncs – compares the port numbers in your CAIRS database to the switch data.
- Feature Key Map (FKM) Syncs (for EWSD switches) – compares the features key maps for the sets in the CAIRS database to the data in the switch.
- Hunt Group Syncs – compares the hunt group data in your CAIRS database to the switch data.

### Sync Schedules

Switch syncs can be set up to run at a set time by creating a sync schedule. Existing sync schedules can also be modified or deleted.

#### *Creating a Sync Schedule*

Switch syncs can be scheduled to run automatically on a daily, weekly, or monthly basis.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click EWSD Switch Sync.
4. The Switch Sync list opens to the right, displaying switch name and types. Double click the switch name to synchronize.
5. The Switch Sync – [Switch Recurrence] window opens. The top pane displays two columns: the Sync Type and the Next Date Time column. This pane displays the four available sync types.
6. Click the sync type you want to schedule.
7. Once you have highlighted the sync type, type the sync start time in the Appointment time box. Use the arrow keys to increase or decrease the time.
8. Within the Recurrence pattern pane, select how often to perform the sync. There are three choices:
  - Daily – you can schedule the sync to occur every day, every 1 -7 days, or every weekday.
  - Weekly – you can schedule the sync to occur every week, every other week, etc. You will also provide the day of the week to perform the sync.

- Monthly – you can schedule the sync on a monthly basis and choose within that month when you want the sync performed. For example, you can schedule the sync on the 1st of every month (or every other month, etc.) or; you can schedule the sync on the 3rd Saturday of every month (or every other month, etc.).
9. Within the Range of recurrence pane, enter the Start date using the drop-down calendar. From the calendar, select the date to start the switch sync. To change the year, click the current year to access a set of up and down arrows. Click the appropriate arrow to select the year. To change the month, click the right or left arrow. Once at the appropriate month, click the number to select the date. The date populates in the box
  10. To save this schedule, go to the Schedule ribbon group, and click the Save Schedule button.
  11. The top pane will display the date and the time of your scheduled sync in the Next Date Time column.
  12. To exit, click Close.

### ***Viewing Sync Schedules***

You can view existing sync schedules.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign next to Data Sync Center to expand the menu items.
3. Click EWSD Switch Sync.
4. The Switch Sync list opens to the right displaying the switch names. Double click a switch name.
5. The Switch Sync – [Switch Recurrence] window opens. The top pane displays two columns: Sync Type and Next Date Time. This table displays all scheduled syncs including their date and times.
6. To view the sync schedule in more detail, click a sync type. Its start time, recurrence, and date range displays below.
7. To exit, click Close.

### ***Modifying a Sync Schedule***

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign next to Data Sync Center to expand the menu items.
3. Click on EWSD Switch Sync.
4. The Switch Sync list opens to the right displaying switch names. Double click a switch name.

5. The Switch Sync – [Switch Recurrence] window opens. The top pane displays two columns: the Sync Type and the Next Date Time columns. This table displays all scheduled syncs along with the date and the time.
6. Click the sync schedule to modify. Its start time, recurrence, and date range displays below.
7. Modify fields as necessary.
8. To save changes, go to the Schedule ribbon group and click the Save Schedule button.
9. To exit, click Close.

### ***Deleting a Sync Schedule***

You can delete the synch schedule if you no longer need a scheduled sync.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign next to Data Sync Center to expand the menu items.
3. Click EWSD Switch Sync.
4. The Switch Sync list opens to the right displaying switch names. Double click a switch name.
5. The Switch Sync – [Switch Recurrence] window opens. The top pane displays two columns: the Sync Type and the Next Date Time columns. This table displays all scheduled syncs, along with their date and time.
6. Click on the sync schedule to delete. Its start time, recurrence, and date range displays below.
7. Go to the Schedule ribbon group and click the Delete Schedule button.
8. The scheduled date and time is removed from the Next Date Time column indicating the schedule has been deleted.
9. To exit, click Close.

### **EWSD Switch Sync Logs**

CAIRS keeps a record of all syncs and sync details in a log. The sync status, sync date and time, the person who performed the sync, and the total number of out-of-sync records are displayed in the log.

#### ***Viewing Sync Log***

The Sync Logs display the types of syncs performed, the date and time of the syncs, and the results of those syncs (the number of out-of-sync records).

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.

3. Click Switch Sync Project.
4. The Switch Sync Project list opens to the right. Within the list, double click the project.
5. The Switch Sync – [Switch Recurrence] window opens. Within the Sync Log ribbon group, click the Sync Log button.
6. The Sync Details pane opens displaying the details of all syncs. CAIRS displays the following information in the sync log:
  - Sync Type – displays the performed sync type.
  - Sync Status – displays the sync status: completed or failed.
  - Sync Details – displays a brief sync description.
  - Notification Message – displays messages received during the sync.
  - Error Message – displays error messages received during the sync.
  - Sync Parameters – displays the sync parameters. For example, if the sync was run on a range of numbers or the entire switch database.
  - Date & Time – displays the sync date and time.
  - Records Out of Sync – displays how many records were out of sync.
7. To exit, click Close.

### ***Clearing the Sync Log***

Clearing the sync log removes all log information.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click EWSD Switch Sync Project.
4. The Switch Sync Project list opens to the right. Within the list double click the project to view.
5. The Switch Sync – [Switch Recurrence] window opens. Within the Sync Log ribbon group, click the Sync Log button.
6. The Sync Details pane opens displaying the details of all syncs. Within the list, highlight the sync you want to clear.

---

**!** Be aware there is no undo button so once you click delete the log is gone.

---

7. Within the Sync Log ribbon group, click the Delete Sync Log button.
8. To exit, click Close.



## Set Device Sync

To compare the set device data in your CAIRS database to the set device data in your switch you can perform a Set Device sync. The purpose of the sync is to see if the CAIRS database correctly reflects the switch database.

Set Device syncs also check for the Line Class Code, Call Pickup and Intercom Group features. (Note: Multiline Hunt Group synchronization is done through the Hunt Group Syncs.)

Run Set Device syncs anytime manually or schedule them at set time(s). (Please refer to the 'Creating a Sync Schedule' section to setup a Set Device sync schedule.)

### ***Performing a Set Device Sync***

To run a Set Device Sync manually, complete the following steps:

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click EWSD Switch Sync Project.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to view.
5. The Switch Sync – [Switch Recurrence] window opens. Within the Set Device Sync ribbon group, click the Get Switch Set Device button.
6. To send the script to the switch, click Yes to the message. CAIRS performs the set device sync.

### ***Viewing Set Device Sync Results***

After performing the Set Device sync, you can see what records are in-sync (in CAIRS and the switch) and which ones are out-of-sync (missing in CAIRS or in the switch).

Skip steps #1 through #5 if you have just completed a manual sync and/or you are already in the Switch Sync window.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click EWSD Switch Sync Project.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to view.
5. The Switch Sync – [Switch Recurrence] window opens.
6. To view in-sync set device data (data in the CAIRS database and the switch), within the Set Device Sync ribbon group, click the In Sync button.
7. To view out-of-sync set device data (data in the CAIRS database but not in the switch database or data within the switch but not in the CAIRS database), within the

Set Device Sync ribbon group, click the Out of Sync button. The Sync Details pane opens displaying the out-of-sync data.

8. To view the out-of-sync port numbers (numbers missing in CAIRS), click the upper portion of the Out of Sync button within the Port Sync ribbon group
9. The Sync Details pane opens displaying the out-of-sync data. To resolve the out-of-sync port numbers, refer to the 'Resolving Ports Sync Discrepancies' section.
10. To exit, click Close.

### ***Resolving Set Device Sync Discrepancies***

CAIRS offers an import function that resolves out-of-sync set device records by bringing the switch records into the CAIRS database.

To minimize errors and speed up the import process, resolve all analog sets first followed by all main listed numbers of digital sets (#1 button). Lastly, resolve any other appearances of those main digital sets.

Skip steps #1 through #5 if you have just completed a manual Set Device Sync and/or you are already in the Switch Sync window.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click EWSD Switch Sync Project.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to view.
5. The Switch Sync – [Switch Recurrence] window opens.
6. To view and resolve the out-of-sync set device records (data within the CAIRS database, but not in the switch, or data within the switch but not in the CAIRS database), click the upper portion of the Out of Sync button within the Set Device Sync ribbon group.
7. The Sync Details pane opens displaying the out-of-sync data.
8. To resolve all discrepancies at once and import all out-of-sync set devices into CAIRS, click the lower portion of the Out of Sync button to access a dropdown list. From the list select Import All
9. To resolve an individual record, double-click a record to review. The Switch Sync window opens displaying two panes.
  - CAIRS Data pane – displays the set device details if the record is in the CAIRS database and not in the switch.
  - Switch Data pane – displays the set device details if the record is in the switch database and not in CAIRS.
10. If the information within the CAIRS pane is populated, the set exists within the CAIRS database and not in the switch. You can delete the set from CAIRS by

clicking the Delete button within the Switch Sync Import pop-up. Be aware there is no undo button so once you click Delete the set is gone.

11. If the information within the switch pane is populated, the set exists within the switch but not in the CAIRS database. You can import the individual sets by clicking the Import button within the Switch Sync Import pop-up.
12. You can import all records appearing in the switch database but not in the CAIRS database by clicking the lower portion of the Out of Sync button within the Set Device Sync ribbon group. From the dropdown list, select Import All.
13. A pop-up message appears stating the sync process may take at least 1 second per record. Also, the import sync from the switch to the CAIRS database only works for sets already assigned in the database and with identical port types. Click O to continue.
14. Once the import is complete, another message pop-up appears stating the process is complete.
15. Click OK to continue.

## Port Sync

Initially a port sync goes to the switch and brings all port numbers (EQN for EWSD) from the switch into the CAIRS database. Subsequent syncs compare the port numbers in the CAIRS database with the ones in the switch. If CAIRS is missing any port numbers, those numbers show up as 'out-of- sync' numbers. Those 'out-of-sync' port numbers can then be imported into the CAIRS database.

### *Performing a Port Sync*

Run a Port Sync automatically by setting up a Sync Schedule. (Please refer to the 'Creating a Sync Schedule' section.) To run a Port Sync manually, complete the following steps:

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click EWSD Switch Sync Project.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to view.
5. The Switch Sync – [Switch Recurrence] window opens. Within the Port Sync ribbon group, click the Get Switch Ports button.
6. To send the script to the switch click Yes to the message. CAIRS then executes the port sync.

### *Viewing Ports Sync Results*

After a port sync, you can view all 'in-sync' (records in both CAIRS and in the switch) and 'out-of-sync' port numbers (records that are missing in CAIRS but are in the switch).

Skip steps #1 through #5 if you have just completed a manual sync and/or you are already in the Switch Sync window.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click EWSD Switch Sync Project.
4. The Switch Sync Project list opens to the right. Within the list double click the project to view.
5. The Switch Sync – [Switch Recurrence] window opens.
6. To view the in-sync port data (data in the CAIRS database and in the switch), click the In Sync button within the Port Sync ribbon group. The Sync Details pane opens displaying the set device records.
7. To view out-of-sync port data (data in the CAIRS but not in the switch database or data within the switch but not in the CAIRS database), click the upper portion of the Out of Sync button within the Port Sync ribbon group. The Sync Details pane opens displaying the out-of-sync data.
8. To resolve the out-of-sync port numbers, refer to the 'Resolving Ports Sync Discrepancies' section.
9. To exit, click Close.

### ***Resolving Port Sync Discrepancies***

To resolve out-of-sync port number records, CAIRS offers an import function that brings the switch port numbers into the CAIRS database.

Skip steps #1 through #5 if you have just completed a manual sync and/or you are already in the Switch Sync window.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click EWSD Switch Sync Project.
4. The Switch Sync Project list opens to the right. Within the list double click the project to view.
5. The Switch Sync – [Switch Recurrence] window opens. Double click the sync project
6. To view and resolve the out-of-sync port data (data within the CAIRS database, but not the switch, or data within the switch but not in the CAIRS database), click the upper portion of the Out of Sync button within the Set Device Sync ribbon group.
7. The Sync Details pane displays all port numbers in the switch and not in the CAIRS database.

8. To resolve all discrepancies at once and import all out-of-sync ports into CAIRS, click the lower portion of the Out of Sync button to access a dropdown list. From the list, select Import All.
9. To resolve an individual record, double-click a record to review. The Switch Sync window opens displaying two panes.
  - CAIRS Data pane – displays the port number details if the record is in the CAIRS database and not in the switch.
  - Switch Data pane – displays the port number details if the record is in the switch and not in CAIRS.
10. If the information within the CAIRS Data pane is populated, the port exists within the CAIRS database and not in the switch. You can delete the set from CAIRS by clicking the Delete button within the Switch Sync Import pop-up. There is no undo button so once you click Delete the set is gone.
11. If the information within the switch pane is populated, the port exists within the switch but not in the CAIRS database. Import the individual ports by clicking the Import button within the Switch Sync Import pop-up.
12. To exit, click Close.

## Feature Key Map Sync for EWSD only

Feature Key Map syncs bring the Feature Key Maps (FKM) pre-programmed into the EWSD switches by the switch technicians into the CAIRS database. The initial sync brings in all FKM's and the subsequent syncs checks for FKM's not within the CAIRS database. We classify the missing FKM's as 'out of sync' since they are on the switch but not in the CAIRS database. CAIRS offers you the option to view the 'out of sync' data and import it into you CAIRS database synchronizing the two databases. (Note: If you want to add additional Feature Key Maps into the switch, you must add those directly into the switch. Please refer to your switch technicians as CAIRS only imports what is already in the switch.)

### *Performing a Feature Key Map Sync*

You can get the switch Feature Key Map (FKM) for EWSD switch types by performing a FKM sync. A FKM sync can be run automatically by setting up a Sync Schedule (refer to the 'Creating a Sync Schedule' section) or run manually. To run a FKM Sync manually, complete the following steps:

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click EWSD Switch Sync Project.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to view.

5. The Switch Sync – [Switch Recurrence] window opens. Within the FKM Sync ribbon group, click the Get Switch FKM button.
6. Click Yes to the Send Script to Switch message. CAIRS executes the FKM sync.

### ***Viewing FKM Sync Results***

After a FKM sync, you can view all ‘in-sync’ FKMs (records in both CAIRS and the switch) and ‘out-of-sync’ (records missing in CAIRS but in the switch).

Skip steps #1 through #5 if you have just completed a manual sync and/or you are already in the Switch Sync window.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click EWSD Switch Sync Project.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to view.
5. The Switch Sync – [Switch Recurrence] window opens.
6. To view the in-sync FKM data (data in the CAIRS database and the switch), click the In Sync button within the FKM Sync ribbon group. The Sync Details pane opens displaying the set device records.
7. To view the out-of-sync FKM data (data in CAIRS but not in the switch database or data within the switch but not in the CAIRS database), click the upper portion of the Out of Sync button within the Port Sync ribbon group. The Sync Details pane opens displaying the out-of-sync data.
8. To resolve these discrepancies, refer to the ‘Resolving FKM Sync Discrepancies’ section.
9. To exit, click Close.

### ***Resolving FKM Sync Discrepancies***

To resolve out-of-sync FKM data, CAIRS offers an import function that brings in the FKMs from the switch into the CAIRS database.

Skip steps #1 through #5 if you have just completed a manual sync and/or you are already in the Switch Sync window.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click on EWSD Switch Sync Project.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to view.
5. The Switch Sync – [Switch Recurrence] window opens. Double click the sync project

6. To view the out-of-sync data (data in the switch but not in CAIRS), within the FKM Sync ribbon group, click the Out of Sync button.
7. The Sync Details pane opens displaying the out-of-sync FKM data.
8. To resolve all discrepancies at once and import all out-of-sync ports into CAIRS, click the lower portion of the Out of Sync button (within the FKM Sync ribbon group) to access a dropdown list. From the list, select Import All.
9. To resolve individual records one by one, double-click a record to review.
10. The Switch Sync window opens displaying two panes:
  - CAIRS Data pane – displays the FKM details if the record is in the CAIRS database and not in the switch.
  - Switch Data pane – displays the FKM details if the record is in the switch and not in CAIRS.
11. If the information within the CAIRS pane is populated, the FKM exists within the CAIRS database and not in the switch. You can delete the set from CAIRS by clicking the Delete button within the Switch Sync Import pop-up. There is no undo button so once you click delete the set is gone.
12. If the information within the switch pane is populated, the FKM exists within the switch but not in the CAIRS database. You can import the individual FKM by clicking the Import button within the Switch Sync Import pop-up.
13. To exit, click Close.

## Hunt Group Sync

Hunt Group syncs check the Multiline Hunt Group records in the CAIRS database against the switch. After a Hunt Group sync, CAIRS displays any discrepancies. An import function brings any missing data into CAIRS..

### *Performing a Hunt Group Sync*

Run a Hunt Group Sync automatically by setting up a Sync Schedule. (Please refer to the 'Creating a Sync Schedule' section.) To run a Set Device Sync manually, complete the following steps:

1. Click the System Admin menu.
2. In the Navigation pane, click on the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click EWSD Switch Sync Project.
4. The Switch Sync Project list opens to the right. Within the list, double click on the project to view.
5. The Switch Sync – [Switch Recurrence] window opens. Within the Hunt Group Sync ribbon group, click the Get Switch Hunt Group button.
6. Click Yes to the Send Script message. CAIRS executes the Hunt Group sync.

### ***Viewing Hunt Group Sync Results***

After performing a Hunt Group sync, you can see if the sync was successful and if any data is out of sync.

Skip steps #1 through #5 if you have just completed a manual sync and/or you are already in the Switch Sync window.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click EWSD Switch Sync Project.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to view.
5. The Switch Sync – [Switch Recurrence] window opens. Double click the sync project.
6. Click the upper portion of the Out of Sync button within the Port Sync ribbon group
7. To view the in-sync Hunt Group data (data in CAIRS but not the switch database or data within the switch but not in the CAIRS database), click the In Sync button within the Hunt Group Sync ribbon group. The Sync Details pane opens displaying the out-of-sync data.
8. To view the out-of-sync Hunt Group data (data in CAIRS but not the switch database or data within the switch but not in the CAIRS database), click the upper portion of the Out of Sync button within the Port Sync ribbon group.
9. The Sync Details pane opens displaying the out-of-sync data.
10. To resolve the out-of-sync port numbers, refer to the 'Resolving Ports Sync Discrepancies' section.
11. To exit, click Close.

### ***Resolving Hunt Group Sync Discrepancies***

To resolve out-of-sync Hunt Group data, CAIRS offers an import function that brings in the hunt group records from the switch into the CAIRS database.

Skip steps #1 through #5 if you have just completed a manual Hunt Group Sync and/or you are already in the Switch Sync window.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click EWSD Switch Sync Project.
4. The Switch Sync Project list opens to the right. Within the list, double click the project to view.
5. The Switch Sync – [Switch Recurrence] window opens. Double click the sync project



6. To view and resolve the out-of-sync Hunt Group data (data within the CAIRS database, but not the switch, or data within the switch but not the CAIRS database), click the upper portion of the Out of Sync button within the Hunt Group Sync ribbon group.
7. The Sync Details pane opens displaying the out-of-sync data.
8. To resolve all discrepancies at once and import all out-of-sync set devices into CAIRS, click the lower portion of the Out of Sync button to access a dropdown list. From the list select Import All.
9. To resolve an individual record, double-click a record to review. The Switch Sync window opens displaying two panes.
  - CAIRS Data pane – displays the multiline hunt group details if the record is in the CAIRS database and not in the switch.
  - Switch Data pane – displays the multiline hunt group details if the record is in the switch and not in cair.net.
10. If the information populates within the CAIRS pane, the group exists within the CAIRS database and not the switch. You can delete the group from CAIRS by clicking the Delete button within the Switch Sync Import pop-up. There is no undo button so once you click Delete the information is gone.
11. If the information populates within the switch pane, the group exists within the switch but not the CAIRS database. You can import the individual groups by clicking the Import button within the Switch Sync Import pop-up.
12. To exit, click Close.



---

## 411 Interface

The 411 Interface allows you to export directory information from the CAIRS database to send to another program. This is a two-step process, first you create the template, this defines file format, path, file name, etc. The second step is to create the actual file that you send to the other program.

There are two views available for sorting the 411 Interface list, Simple and Format 411. The Simple list is the default and displays the interfaces in alphabetical order. The Format 411 list, sorts the list based on the file type that you are creating whether, Fixed Width, Tab, XML or CSV.

### Creating a 411 Interface Template

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click 411 Interface.
4. Within the Actions pane, click the Add New Interface 411 link.
5. The General-411 Interface window opens. Within the window, complete the following fields, required fields are marked with an asterisk:
  - Template Name \* – type-in the template name.
  - Format 411 \* - click the drop-down arrow to access a format list. From the list, select one of the following file formats:
    - Fixed Width
    - Tab
    - XML
    - CSV
  - Path \* - type-in the path of where you want to save, whether on a network drive or locally. A quick way is to browse to the location in explorer, click into the address bar at the top of the window and copy the complete address and paste into the field.
  - Field Name – type-in the name of the file, if you leave this field blank CAIRS automatically names the file with date generated.
  - Use Phone Book – click the box to insert a checkmark to indicate that the directory information for the interface will come from the Phone Book and not Configured Items. The Phone Book is located in the Directory/Organization menu, it is populated directly from configured items however, users can enter in numbers that do not appear in your database. For example, they can enter in commercial numbers that do not belong to the BCO.

- Show Header – click the box to insert a checkmark to indicate that the file generated contains a header. The header will show the field names of the column you select in Column Mapping.
  - Run On Schedule – check mark the box to indicate you want the interface to run on the schedule you set within Service Manager. Leave the field blank to indicate you will run the interface manually.
6. At this point, you should save your progress, within the Actions ribbon group click Save to save your changes and continue working with the template.
  7. Next, you can determine what sites to include in the interface. Within the Show ribbon group, click the Sites button. The window displays two panes of information; the top pane displays the sites associated to the interface. The lower pane displays a list of all the sites within your database, the following read-only information is available for each site:
    - Site Name – displays the name of the site, this is the lowest level of the site tree.
    - Site Path – displays the complete path to the site. Each level is separated by a >.
    - Site Level – displays the site level name or number.
    - Site Code – displays the three-digit alphanumeric site code.
  8. To add a site to the interface, find the site within the Available Sites pane, and double click on the record. The site name now appears within the upper pane.
  9. You can associate all sites to the interface by clicking the lower portion of the sites button and selecting Select All Sites. Alternatively, you can unselect all sites by clicking the lower portion of the sites button and selecting Unselect All Sites.

---

**!** Be aware that sites do not inherit the associations of their parents. You must associate each level to the account. For example, if you associate a parent and want all the children associated you must associate all children site as well.

---

10. Within the Actions ribbon group, click Save (to save and stay) to continue adding information for the interface, or click Save & Close (to save and exit) to return to the 411 Interface list.

### **Column Mapping**

Within Column Mapping you can take fields from the CAIRS database and associate a custom field name. For example, in CAIRS the field is called Directory Building Name, however in your 411 system it is called Common Building Name. Within Column Mapping, you can have CAIRS change the field name when the interface is completed.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click 411 Interface.

4. The list of existing template populates to the right, within the list, click on the template to modify.

---

The tables within the Column Mapping button depend on where you want the information to be pulled from. In General Settings, you have to choose whether to use the Phone Book or Configured Items. If you choose to use the phone book, the interface can include numbers that are not within your database. If you choose not to use the phone book only the numbers within your configured items will be included in the interface. When you choose the Phone Book, the only table that will appear is the Phone Book Listing View. When you choose to not use the Phone Book, you will see all the tables listed below.

---

5. Within the Show ribbon group, click on the Column Mapping button. Within the window complete the following fields, required fields are marked with an asterisk:
  - Sort Index \* - this is the position of the where the field appears in the file, a sort position of 1 means the field will be listed first. Type-in the numeric sort position
  - Table Name \* - click the field to access a dropdown arrow, click the arrow to access a list of the following tables that are in your CAIRS database:
    - Site
    - Configured Directory Line
    - Number Plan Main
    - Number Plan Listing – Directory Number
    - Set Device
    - Subscriber
    - Building
    - Connectivity
    - Switch – Specific Class of Service
    - Class of Service Name
    - Organization Path
    - Directory Line Multiple Listing
    - Listing Subscriber

Once you select the table, the field name column displays only the fields that pertain to the table. For example, if you select the Subscriber Main table, the field names will pertain to only the information for a subscriber, such as first name, last name, rank, grade, etc.

6. Field Name \* - click the field to access a dropdown arrow, click the arrow to access a list of the fields that pertain to the table selected. From the list, click on the field name, it will now populate in the column.

7. Custom Name – type-in the custom field name, for example, if the CAIRS field name is connection, you can use this field to change the name to cable when the file generates.
8. Within the Actions ribbon group, click Save (to save and stay) to continue adding information for the interface, or click Save & Close (to save and exit) to return to the 411 Interface list.

### ***Creating Files***

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click 411 Interface.
4. The list of existing template populates to the right, within the list, click on the template to use to create your 411 files.
5. Within the Interface ribbon group, click the Create Files button.
6. A textbox displays indicating the interface is complete. Click the Ok button.
7. CAIRS creates a file to the location indicated in the Path field in the General Settings. Depending on your format type selected the file extension changes for example, if you chose Tab the file extension is .asc.

### ***Deleting an Interface***

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click 411 Interface.
4. In the 411 Interface list, click the interface you want to delete.
5. There are two ways to delete a interface:
6. Within the list, highlight the interface name. In the Actions pane, click the Delete Interface411 link.
7. Double click the interface name within the list. The 411 Interface window opens. Within the Actions ribbon group, click the Delete button.
8. Once you click Delete, a message box appears verifying that you really want to delete the interface. Click Yes to continue or No to cancel the operation.

---

## 911 Interface

*This is a paid module of CAIRS, please contact Unique Communications for further information.*

The 911 Interface works in connection with CES to create wither NENA or CSV files for transfer or exporting to a third-party software. The interface can run either manually or automatically on a schedule determined within CES.

Creating the interface is a two-step process, first you create the template, this defines file format, extension length, etc. The second step is to map fields from CAIRS to NENA or CSV fields.

### Creating a 911 Interface Template

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click 911 Interface.
4. Within the Actions pane, click the Add New Interface 911 link.
5. The General-911 Interface window opens. There are two panes of information; the left pane contains the general template information and the right pane displays the number plans included in the interface.
6. Within the left pane, configure the following fields required fields are marked with an asterisk (\*):
  - Template Name\* – type-in the template name.
  - Format 911\* – click the drop-down arrow to access a format list. From the list, select one of the following file formats:
    - NENA
    - UCID
    - XML
    - CSV

---

**!** Depending on the format that you choose, the fields may be different. For the purposes of this document, we will define all fields.

---

- Path\* – double-click the field to access the Browse For Folder pop-up. Within the pop-up, browse to the location you want the created files to be saved in, this can be local or on a shared drive.
- File Name – this will be the name of the file that is created when the interface is run, if left blank the file name will be the data the file is generated.

- Extension Length\* – from the drop-down list select the extension length, 3 to 10 digits.
- Last Date Time – this populates with the date and time of when the last 911 file created.
- NENA Format – when you select the NENA format, this field auto-populates to the NENA 2 format.
- Email Address – if CAIRS has the capability to email notification, when a 911 interface creates the file this email address will receive a notification
- Initialize or Change – type-in I for initial, meaning you are creating a brand-new file to send or type-in C for change meaning you only want to send the changes made within the database to the 911 system.
- Company Name – type-in the company name.
- State – type-in your state code.
- Extract Date – this field populates with the current date.
- Country ID – type-in your country ID.
- Cycle Counter – if multiple files are created in a day, this number indicates the increment by which the file name will increase. For example, if you set this to 5, the first file name would be 10272020-5, the second would be 10272020-10 and so on.
- Modify Termination – check mark the field to indicate you want to modify the termination. This option is only available for NENA and XML files.
- No Header Footer – click the field to insert a checkmark to indicate that you do not want a header or footer in the created file, leave blank to have both a header and footer.
- Include All Number – checkmark the field to indicate that all numbers are included in the interface
- Run on Schedule \* – check mark the box to indicate you want the interface to run on the schedule you set within Service Manager. Leave the field blank to indicate you will run the interface manually.
- Remove Counter in File Name – click the field to remove the cycle counter in the file name, this pertains to only CSV files.
- Remove XX Ports from Configured Sets – this is for CS2100 switches only, when checked this will remove virtual XX ports from the interface, essentially removing the virtual phone numbers from the interface.
- Input Data Source – click the field to access a dropdown list, from the select either:
  - All Phones Standard – this will use the location information associated in the facilities pane of the set



- Emergency Response Location – this will use the ERL associated to the building and the Emergency Location Extension. The extensions will need to be created in Buildings prior to associating them to the set.
7. The right pane displays a list of the Number Plans within your database. The Number Plan Name, Directory Number Mask and Interface 911 Prefix are read only information. This information come directly from the number plan listing. This pane allows you to select which number plans to include in the interface file. To include a number plan, click on the box in the Include column.

---

**!** In there are any numbers within the Interface 911 Prefix column, those numbers will be appended to each number transferred in the interface. For example, if you have an extension length of 7 and the prefix of 702, each number transferred starts with the 702 and then the 7-digit number. This allows you to send more digits through the interface than what you track within your CAIRS database. You add the Interface 911 Prefix within the Number Plan.

---

8. Within the Actions ribbon group, click Save (to save and stay) to continue adding information for the interface, or click Save & Close (to save and exit) to return to the 911 Interface list.

### ***NENA and XML Column Mapping***

Once you have created the basic information for the interface, you can connect the fields together. This means that you are associating the fields within NENA to the field within CAIRS. There are 12 columns of information:

- NENA Field – displays the field name within the NENA field
- NENA Size – displays the maximum character limit for the NENA field
- Default Mapping – displays the default CAIRS field that is associated with the NENA field
- Custom Mapping Table and Custom Mapping Field – for fields that do not appear in the default mapping, you can use these two columns to pull fields from different tables within your database. Once you select the table, the associated fields populate with the mapping field column allowing you to select any field that appears in that table.
- Cisco Custom Mapping Source and Custom Mapping Field – these columns pull fields from the tables that are specific to a Cisco Call Manager
- AS5300 Custom Mapping Source and Custom Mapping Field – these columns pull fields from the tables that are specific to an Avaya AS5300 switch
- NEC Custom Mapping Source and Custom Mapping Field – these columns pull fields from the tables that are specific to a NEC Switch
- Custom Value – displays the static field value, for example, you may want to pre-define your state id for all numbers included in the file. Within this field, you would type-in your state abbreviation.

---

**!** You cannot have a value in both the custom mapping field and the custom value. If you try to enter information into the custom value field, it will delete your selection in the custom mapping table and field columns and vice versa.

---

### ***Modifying the Field Mapping***

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click 911 Interface. The list of existing template populates to the right, within the list, click on the template to modify.
4. Within the Show ribbon group, click on the Column Mapping button.
5. The screen changes to display the columns listed above. You will notice that we have pre-determined some fields for you. However, you can change those values at any time.
6. In the list, find the field to modify, within the Column Mapping Table column click on the field to access a dropdown list. From the list select the appropriate table, for example, if you were mapping Building Name you would select Building. There are several different tables to choose from, each having its own set of custom fields, you may have to try a few selections before you find the appropriate table/field combination.
7. Next, you select the field to associate. Within the Column Mapping Field column, click on the field to access a dropdown list, from the list select the CAIRS field name.
8. Continue mapping fields together. Once complete, within the Actions ribbon group, click Save (to save and stay) to continue adding information for the interface, or click Save & Close (to save and exit) to return to the 911 Interface list.

### ***CSV Column Mapping***

Once you have created the basic information for the interface, you can connect the fields together. This means that you are associating the fields within your CSV file to the field within CAIRS. There are nine columns of information:

- CSV Field – displays the field name within the NENA field
- Custom Mapping Table and Custom Mapping Field – you can use these two columns to pull fields from different tables within your database. Once you select the table, the associated fields populate with the mapping field column allowing you to select any field that appears in that table.
- Cisco Custom Mapping Table and Custom Mapping Field – these columns pull fields from the tables that are specific to a Cisco Call Manager
- AS5300 Custom Mapping Table and Custom Mapping Field – these columns pull fields from the tables that are specific to a Avaya AS5300 switch

- NEC Custom Mapping Source and Custom Mapping Field – these columns pull fields from the tables that are specific to a NEC Switch
- Custom Value – displays the static field value, for example, you may want to pre-define your state id for all numbers included in the file. Within this field, you would type-in your state abbreviation.

---

**!** You cannot have a value in both the custom mapping field and the custom value. If you try to enter information into the custom value field, it will delete your selection in the custom mapping table and field columns and vice versa.

---

### ***Modifying the Field Mapping***

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click 911 Interface. The list of existing template populates to the right, within the list, click on the template to modify.
4. Within the Show ribbon group, click on the Column Mapping button.
5. The screen changes to display the columns listed above.
6. There are 21 CSV fields that you will need to map for information to appear within the interface files. For each field select the Custom Mapping Table first. This will populate the fields within the dropdown for the Custom Mapping Field column.
7. Within the Custom Mapping Field column, select the field that you want to appear in the interface file. There are several different tables to choose from, each having its own set of custom fields, you may have to try a few selections before you find the appropriate table/field combination.
8. Please note that if you do not put anything in each field, a column will still appear in the interface file. If you do not want the field to appear select 'NONE' in both columns.
9. Once complete, within the Actions ribbon group, click Save (to save and stay) to continue adding information for the interface, or click Save & Close (to save and exit) to return to the 911 Interface list.

### ***Creating Files***

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click 911 Interface.
4. In the 911 Interface list, double click the interface to modify. The General-911 Interface window opens.
5. Within the Interface ribbon group, click the Create Files button.

6. A textbox displays indicating the interface is complete. Click the Ok button.
7. CAIRS creates a file to the location indicated in the Path field.

## Deleting an Interface

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Data Sync Center to expand the menu items.
3. Click 911 Interface.
4. In the 911 Interface list, click the interface you want to delete.
5. There are two ways to delete an interface:
  - Within the list, highlight the interface name. In the Actions pane click the Delete Interface911 link.
  - Double click the interface name within the list. The 911 Interface window opens. Within the Actions ribbon group, click the Delete button.
6. Once you click Delete, a message box appears verifying that you really want to delete the interface. Click Yes to continue or No to cancel the operation.

## 911 Interface CES Process

As stated earlier, the 911 Interface can run either automatically or manually. In order for the interface to run automatically a schedule will need to be created within the CES process. You can run the process multiple times per day if needed. Often times, running the interface once per day is sufficient. Within the CES process, click on the Schedule Process button within the Special Actions ribbon group, the Choose Date popup opens. The popup displays the current date and time to change the date, click on the dropdown arrow to access a calendar. From the calendar, select the date to run the process. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box. To change the time, click on the hour, minute or AM/PM field and type in the new time. Once complete, click on the OK button.

---

## Import External Data

These tools are used during the initial installation of CAIRS by Unique Communications installers and database experts to import customer data into the CAIRS database. Please contact Unique Communication Solutions technical support for further details.

# Work Flow Setup

Within Work Flow Setup, your CAIRS administrator customizes each workflow to mirror the actual way you do business. There are two parts to each workflow: work centers and time frames. Each workflow contains one or more work centers and each work center is responsible for completing fields within a Data Component. When fields are required to be completed in a time sequence, work centers are placed into Time Frames. The Time Frame allows one work center to complete its fields before sending the work order onto the next time frame.

The CAIRS administrator defines each step in a work order including where each step fits into the required time sequence (Time Frame) and how many time frames each work order requires. The CAIRS administrator works hand-in-hand with a Unique Communications representative to design your sites work centers and work flows.

---

## Work Center

Work Center defines each stop a workflow needs to make to be completed. A work center can be an individual, an organization, an outside recourse, etc. Some Work Flows require only one Work Center, while others require several Work Centers.

When more than one Work Center is required, there may be a required sequential order for the workflow. This requires the use of multiple Time Frames in the CAIRS software. The Time Frames sequence the workflow follows is established when the Work Flow is established.

When creating a new work or trouble ticket you need to select the work order required for that specific order type. This allows the CAIRS software to recognize all the required steps for all Work Centers involved to complete the order.

### Adding/Deleting a Work Center

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Work Flow Setup to access the sub-menus.
3. Click Work Center.

#### Adding

4. There are two ways to add a work center:
  - Within the tool bar directly above the Navigation pane, click the dropdown arrow next to New. From the list, select Work Center.
  - Within the Actions pane, click the Add New Work Center link.
5. The Work Center window opens. In the Work Center Name field, type-in the new name.

### **Deleting**

6. Within the list of work centers, highlight the work center to delete. There are two ways to delete a work center:
  - Within the tool bar directly above the Navigation pane, click the red X.
  - Double click the work center name within the list. The Work Center window opens. Within the Actions ribbon group, click the Delete button.
7. Once you click on Delete, a message box appears verifying that you really want to delete the work center, click Yes to continue or No to cancel the operation.
8. Within the Actions ribbon group, click on the Save (to save and stay) button, click on the Save & Close (to save and exit) button, or click on the Save & New (to save and refresh the screen) button to continue adding in additional work centers.

---

## **Work Order Custom Fields**

Custom Fields allow you to add necessary information, measures of progress, specific details, etc. to work orders.

### **Adding a Work Order Custom Field**

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Work Flow Setup to access the sub-menus.
3. Click Work Flow Custom Fields.
4. There are two ways to add a custom field:
  - Within the tool bar directly above the Navigation pane, click the dropdown arrow next to New. From the list select Work Flow Custom Fields.
  - Within the Actions pane, click the Add New Work Flow Custom link.
5. With either option, the General - Custom Fields window opens. Complete the following fields for the custom field:
  - Group Name – click on the dropdown arrow to access a list and from the list, select the group name the custom field will belong to.
  - Field Name – type-in the custom field's new name.

- Field Type – click the dropdown arrow to access a list from the list, select whether the field is a Yes/No, Text, Entry Date, or Drop Down.

**!** If you selected the Dropdown field type, a lower pane becomes available to allow you to create the dropdown values. Within the lower pane, complete the following information to populate the dropdown list:

- Data Value \* - type-in the information that will appear in the list
  - Data Description \* - type-in a description of the data value
  - Sort Order \* - this determines the position the field appears within the list, each new field is numbered sequentially. To change the order, click on the field you want to appear at the top of the list and type a 1 in the field. If two fields are numbered the same, they appear in the list as they appear within this pane.
6. Within the Actions ribbon group, click the Save (to save and stay) button, click on the Save & Close (to save and exit) button, or click on the Save & New (to save and refresh the screen) button to continue adding in custom fields.

## Deleting a Work Order Custom Field

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Work Flow Setup to access the sub-menus.
3. Click Work Flow Custom Fields.
4. The Work Flow Custom Field list opens to the right. Within the list, highlight the custom field to delete. There are two ways to delete a custom field:
  - Within the Actions pane, click the Delete Work Flow Custom Field link.
  - Within the tool bar directly above the Navigation pane, click the red X.
5. Once you click Delete, a message box appears verifying that you really want to delete the custom field. Click Yes to continue or No to cancel the operation.

## Work Flow

Please note that if you make any changes to a work flow and want to see them appear, you must logout and log back in to see the changes within Orders/Troubles.

### Adding a New Work Flow

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Work Flow Setup to access the sub-menus.
3. Click Work Flows.

4. There are two ways to add a work flow:
  - Within the tool bar directly above the Navigation pane, click the dropdown arrow next to New. From the list, select Work Flows.
  - Within the Actions pane, click the Add Work Flow link.
5. The General – Work Flow window opens. There are 5 information panes:
6. Work Flow Information – allows you to enter in basic workflow information, for example, whether it is for trouble tickets, workflow name, etc.
  - Custom Fields – lists the custom field(s) created within your database. Associate these fields to any portion of the workflow.
  - Work Centers – lists the work centers created within your database.
  - Work Templates – create and associate templates with various workflows. For example, you can create a template for a new telephone install that includes the Subscriber and Set Device components. You can then use the template for workflows at different sites within your database.
  - Work Flow Setup – within this pane you create the actual workflow by dragging and dropping information from the other panes.
  - In the Work Flow Information pane, complete the following fields (required fields are marked with an asterisk (\*)):
    - Work Flow Name\* – type-in the workflow name. The name should be as specific as possible, for example, Add Analog Set.
    - Disabled – this field remains empty until you click the field to insert a checkmark indicating the workflow is disabled and cannot be used throughout the system.
    - Is Trouble Work Flow – this field remains empty until you click the field to insert a checkmark indicating the workflow is for Trouble Tickets use only.
    - Days to Completion\* – type-in the number of days required for a user to complete this work order.

---

**!** The only difference between a work flow for a work order and a trouble ticket, is checking the above box. This separates your work flow, so when you access work orders you will only see the work flows that are indicated as work orders. Alternately, when you access trouble tickets, you will only see the work flows indicated as trouble tickets.

---

7. Within the Actions ribbon group, click the Save button. This saves your changes and leaves you on the General – Work Flow window.
8. The next step is to add a Work Center into the Work Flow. Within the Work Centers pane, click on the record selector box next to the name to highlight the work center, while holding down the button on your mouse, drag and drop the work center into the Work Flow Setup pane.



9. Once you have added the work center at least one work center, a 1 populates within the time frame field and a new time frame position is created within the grid.
10. Click on the plus sign (+) next to the timeframe to view the work center you just added.

---

**!** A timeframe provides a sequence of work center completion. For instance, if you have 3 time frames, the work centers in time frame 1 need to be completed before the work flow can be sent to time frame 2, and so on.

---

11. At this point, you can continue to drag and drop work centers. If you want to add a work center to time frame 2, click on the record selector box next to the name to highlight the work center, while holding down the button on your mouse, drag and drop the work center to directly below the solid gray line. Once you add the work center, a 2 populates in the field and a new frame position is created within the grid.
12. For each work center, there is the Optional Step column, this field remains empty until you click on the field to insert a checkmark in the box. A checkmark indicates the work center is optional and does not need a user to complete any fields before sending the work order to the next work center.
13. At this point it is a good idea to save your progress, within the Actions ribbon group, click the Save button to save your changes and allow you to continue working with the workflow.
14. Next to each Work Center Name is a plus sign (+), click on the plus to start to add your data components. A data component defines what you are adding, moving or changing for this work flow, these are available data components:
  - Set Device
  - Circuit
  - Subscriber
  - Account
  - Cell Phone
  - Auth Code
  - General
  - Land Radio
  - AS5300 Sets
  - Cisco Sets
  - Hardware

---

**!** It is possible for one work order to contain all the data components; however, it is less confusing if you assign only the components relevant to the work flow you're designing. For example, if you are creating a circuit installation workflow, the circuit, billing account, and

physical work completed components should be the only components assigned to a work center.

---

15. To add a data component to a work center, click the dropdown arrow within the data component field to access a list and from the list, select one of the above components. Once you click the arrow, a new row becomes available allowing you to add more components.
16. For each data component, there is the Required column, this field remains empty until you click on the field to insert a checkmark in the box. A checkmark indicates the user must complete the required data component fields before sending the work order to the next work center.
17. Continue to add data components by clicking the dropdown arrow in the new row.
18. Again, it is a good idea to save your progress, within the Actions ribbon group, click the Save button to save your changes and allow you to continue working with the work flow.
19. Next, you can add custom fields to each work center. There are two ways to add custom fields to a work center:
  - Within the Custom Field pane click on the record selector box next to the name to highlight the Custom Field, while holding down the button on your mouse, drag and drop it into the correct position within the Work Flow Setup pane.
  - (Recommended) Click the dropdown arrow in the Field Name column and select the custom field. Once selected the field appears in the column and a new blank line appears allowing you to add multiple fields.
20. Next to each Custom Field, there is the Required column that remains empty until you click the field to insert a checkmark in the box. A checkmark indicates that the user must complete the field before sending the work order to the next work center.
21. Once you have added your work centers, data components and custom field, you have completed the work flow. Within the Actions ribbon group, click Save (to save and stay) or click Save & Close (to save and exit).
22. Within the Work Flows list, your new work order appears, to view the complete click the each plus sign (+) next to the name.

## Disabling/Enabling a Work Flow

CAIRS requires that you disable a work order before deleting it. This ensures all open work orders are closed before you delete the workflow from your database.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Work Flow Setup to access the sub-menus.
3. Click Work Flows.
4. Within the Work Flow list, click the name of the work flow to disable.

**Disabling**

5. There are two ways to disable a work flow:
  - Within the Actions pane, click the Disable Work Flow link. A message appears verifying that you really want to disable the workflow. Click Yes to continue or No to cancel.
  - Double click the Work Flow within the list. The Work Flow window opens. Within the Work Flow Information pane, checkmark the box in the Disabled field.
6. Within the Actions ribbon group, click the Save & Close button to return to the Work Flow list.
7. A message appears verifying that you really want to disable the workflow. Click Yes to the message.

**Enabling**

8. There are two ways to enable a work flow:
  - Within the Actions Pane, click the Enable Work Flow link.
  - Double click the Work Flow within the list. The Work Flow window opens. From within the Work Flow Information pane, uncheck the box in the Disabled field.
9. The workflow is removed from this list and returned to the active workflows.

***Viewing Existing Work Flows***

When you click on System Admin → Work Flow Setup → Work Flows, a list of existing workflows appears on the right hand side of the main menu. By clicking the plus sign (+) next to the workflow name the time frames within the work order appear. You can go one-step further by clicking the plus sign (+) next to the time frame to see the work centers within that time frame. The last step is clicking the plus sign (+) next to the work center name and displaying the data component assigned to the work center.

---

**Email Templates**

The work order system can email subscribers updates during the work order process. In order for this to happen, you will have to have credentials to access the SMTP server. You will also need to make sure you setup your Email Setting within System Settings → Email Settings.

For each action that occurs during the work order process an email can be sent to the TCO and/or subscriber. We have created pre-defined templates that are sent when a work order is approved or rejected or moved to a new center, etc. The following templates are created:

- Work Order Approval – this email is sent to Subscribers when their work order has been approved by a TCO, Resource Manager and/or Commanding Officer

- Portal Registration Authorized – after a subscriber has registered on the portal, they need to be authorized within CAIRS, once that action is complete they will receive this email
- New Work Order from Portal – this email will be sent to CAIRS users once a new work order has been added through Subscriber Portal
- Pending Work Orders – this email will be sent if a work order is received from the portal that is missing information.
- Work Order Rejected – if your work order is rejected by a TCO, Resource Manager or Commanding Officer, you will receive this email
- Work Order – Order Status – if the status of your work order changes during the process, you will receive this email
- Work Center Change Notification – as the work order moves along the work flow, subscribers will receive this email when the work order enters a new work center
- Work Order Assigned to You – if someone sends a work directly to a CAIRS user, the user will receive this email

## Enabling & Disabling a Template

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Work Flow Setup to access the sub-menus.
3. Click on Email Template
4. Double click the Template within the list. The template window opens.
5. In the lower portion of the window, click on the checkbox next to Enable this notification.
6. To Disable the notification, click on the box to remove the checkmark.
7. Click on the Save and Close button to continue working with the template or click on the Save button to close the window and return to the list.

## Modifying a Template

You can modify the text of each of the above templates. When you access a template, there are two pane the left-hand pane is the text of the email that will be sent to the subscriber. The pane to the right, displays a list of variables that can be associated to the template. These variables can be used to pull information from the work order and place it in the email text. For example, if you use the variable `_UserFirstName_ CAIRS` will replace that text with the first name of the subscriber/TCO associated to the work order.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Work Flow Setup to access the sub-menus.

3. Click Email Template
4. Within the list, click on the template to modify. A popup opens with the message details.
5. The top line is the Subject field, this is the action that is associated to the work order for example, Work Order Approved. To change the field, click on the field and type in th new information.
6. The body of the email is in the main pane, to change the text click into the pane and type the new information.
7. The variables that can be associated to the email are to the right. To place a variable into the email text, place your cursor when the variable should be place and click on the field within the Variables pane. The variable text will be placed into the body of the email.
8. When you have finished modifying the email template, click on the Save button to return to the list.



# System Settings

Within System Settings, your CAIRS administrator defines how CAIRS operates in certain situations. Administrators also define the universal characteristics of how users view information within the database. For example, the administrator defines the site levels, meaning that they determine the hierarchal relationship of your sites (Country, State, etc.)

---

## Settings

Use System Settings to configure how your CAIRS operates. When you install CAIRS, a Unique Communication Representative and your CAIRS administrators determine these settings. There are four columns of information for each setting:

- Setting Name\* – the setting name.
- Category\* – the portion of the software this setting is for or the software name. For example, Billing, Orders/Trouble, Subscriber Portal, etc.
- Setting Value\* – displays the actual setting, for example, True, False, etc. If you are using the True or False setting, make sure the capitalize the word or it will not accept the setting.
- Description\* – displays a brief setting description.

The following settings are available (the list below is sorted by category, to match this list click on the Category column header once):

### **Category – Activity Log**

The Activity Log setting determine whether you if you are going to keep track of all the changes that occur within your database. If you choose to keep track you will need to set all the settings. If you choose to not keep track, you can ignore these settings.

- Activity Log Directory Path – displays the path to the location of your activity log.
- Diagnostic Logging – this setting is used for diagnostics purposes only. This settings should remain at False until told to change by a Unique Representative.
- Disable All Activity Logging – determines whether you want to create the log. A value of False indicates that you want to create the activity log. A value of True indicates that you do not want to create the activity log.

- Log New Record Field Details – determines whether you want to see the field data for changed or new information, when set to true, the Activity Log → Detailed List displays an Old Value column and a New Value column. If set to False, those columns do not appear.
- Max Activity Log Size MB – displays the log file’s maximum size in megabytes. After reaching the maximum size, the file archives to a location designated by CAIRS. Once archived, you no longer see the records within your active database.
- Max Days to Keep Activity Log – displays the maximum number of days to keep the activity log within the database. Once the allotted days have passed, CAIRS saves the file and creates a new log.
- Min Days to Keep Activity Log – displays the minimum number of days to keep the activity log active within the CAIRS database
- Security Monitor TimeOut After – this defaults to 10 meaning that CES will wait 10 minutes before it removes idle users from the Security Monitor (Logged in Users) report.

### **Category – Billing**

These settings deal with all things needed to generate a bill for unofficial and/or official accounts. If you choose not to run official or unofficial bills, you can ignore these settings.

- Allow Negative Funding Amounts for Official – a value of True allows you to enter in a negative amount in the Amount Submitted when applying funds. This is helpful if you have made any clerical errors on funding entries. If set to False, only positive amounts can be entered into the amount submitted.
- Auto Fill Install Date for new Assigned Equipment and Services – a value of True will automatically populate the install date of all newly installed equipment and/or service. A value of False requires the user to enter in the install date.
- Auto set Delete Date to Installed Date for One-time charges on Equipment/Services – a value of True indicates that when you add an equipment/service with a one-time charge the delete auto-populates with the same date as the installed date. A value of False indicates that you must enter a date in the Delete Date field.
- Bill Distribution Folder for SP – If the “Distribute Bills Folder’ setting is set to True, you need to enter the name of the folder that Subscriber Portal will look for to access your bills. This is only the folder name.
- Bill Distribution Folder for CEDC – displays the CEDC folder of where your imported vendor media files are downloaded into.
- Bill Distribution Folder Path from CES – if the ‘Distribute Bills to Folder’ setting is set to True; this is the complete path of where CES will distribute the bills to. This is the combination of both the ‘Bill Distribution Folder for SP’ and the Bill Distribution Folder Path from SP’ settings.
- Bill Distribution Folder Path from SP – this is the path to the folder name where Subscriber Portal will look for your bills, this works with the folder you listed in the ‘Bill Distribution Folder for SP’ setting, do not include the name of the folder. This setting is



designed for an enterprise system to allow for CAIRS to support multiple sites within Subscriber Portal.

- Bill Official Calls from Prior Fiscal Years – determines if call records from the previous fiscal year will be included in the current year's bills. If set to true, the calls are included; if set to false, the calls are not included.
- Bulk Insert Block Size – this determines the block size of the records that are being imported with vendor media imports. The default is to a minimum of 1000 records in the block.
- Customer Code Association Repair – If set to true, CAIRS will make sure that if an order/trouble ticket has a Customer Code associated it must also have an account associated. If set to false, a customer code can be associated to an order/trouble without an account.
- Discard Original Billing Data After Finalize – this setting is only valid if using Dynamic Billing. If set to true, after you have finalized your bill the original billing data will be removed. A historical copy of the bill will be available for reporting purposes. This is help to limit the size of your database.
- Distribute Bills to Email – If set to true then CES distributes bills via email, each account assigned an email address gets a bill, if set to false no emails are sent.
- Distribute Bills to Folder – determines if you want to send bills generated to a folder you designate in another setting (Bill Distribution Folder Path). If set to True then CES delivers the bills to the folder.
- Distribute Bills to Printer – determines whether you want to send the bill generated to a printer. If set to True then CES delivers the bills to the designated printer. This setting is useful if you want to print and mail the bills to your customers.
- Enable Automatic Official Billing – determines whether you want CAIRS to generate your bills automatically based on your billing cycle, a value of True turns this on for official billing.
- Enable Automatic Unofficial Billing – determines whether you want CAIRS to generate your bills automatically based on your billing cycle, a value of True turns this on for unofficial billing.
- Exclude Zero Cost Billing – If set to true, all zero costed items will be removed from the bill you will only see costed items. If set to false, all items will be included in the bill regardless of cost.

The next three settings determine how you want CAIRS to fill your organization information; you must set one of the three to true and the other two to false.

- Fill Organization from Call Accounts – this setting determines where the organization information comes from for call records. If set to True the organization information associated within the Accounts for Calls tab is the one used to update the call records. If set to False, the organization associated within the Accounts for Equipment and Services is used.

- Fill Organization from Equipment and Service Accounts – this setting determines where the organization information comes from for call records. If set to True the organization information associated within the Accounts for Equipment and Services tab is used to update the call records. If set to False, the organization associated within the Accounts for Calls is used.
- Filter Organizations By Account – this setting determines whether you want to filter the organization dropdown box by account number, this means that if you select an account (anywhere in the system), the orgs within the list are only those associated to the account. A true setting filters the list while a false displays the entire list of orgs.
- First Official Billing Date – this is the start billing date for all of your official accounts, any charges occurring before this date are not billed.
- First Unofficial Billing Date - this is the start billing date for all of your unofficial accounts, any charges occurring before this date are not billed.
- Log All Unbilled Account in Billing Cycle – determines whether the accounts that did not generate a bill during the cycle are placed into a log for your review. A value of true generates a log with the accounts that have not bill and a value of false does not generate a log. The log can be viewed after you run the bill in Accounts – Official/Unofficial – Run Bill Requests, double click on any bill to open the General – Billing Cycle window. In the lower right-hand corner is the Unbilled pane, any account that are unbilled appear there.
- Months to Keep Official Bill Files – this setting works in conjunction with the Distribute Bills to Folder setting, if that setting is set to true, then this setting determines how many months to keep the official bill files before deleting. This defaults to 60 months.
- Months to Keep Unofficial Bill Files – this setting works in conjunction with the Distribute Bills to Folder setting, if that setting is set to true, then this setting determines how many months to keep the unofficial bill files before deleting. This defaults to 60 months.
- Official Billing System – there are two billing systems that you can choose from: Classic or Dynamic. The Classic is the current billing system and the setting default, where all billing cycles are run progressively from month to month. Meaning you must run April's bill before you can run May's bill and so on. The Dynamic billing system allows for billing periods to be run together, amongst several other advantages, to learn more please see the chapter on Dynamic Billing. There is also a Hybrid setting, this allows for you to transition from the classic to the dynamic seamlessly.
- Operator Assisted Call Text – allows you to determine the Call Type that you want to use for operator assisted calls. This defaults to 'Operator Assisted'.
- Precision for Minutes Summary in Billing Reports – determines that number of decimal places for the minutes and seconds in your billing reports. The setting can have a value of 0 to 4, the corresponding settings are:
  - 0 – displays minutes only, no second value (1)
  - 1 – displays the minutes and rounds the seconds to a tenth of a second (1:4)
  - 2 – displays the minutes and rounds the seconds to a hundredth of a second

- 3 – displays the minutes and rounds the seconds to a thousandth of a second
- 4 – displays the minutes and rounds the seconds to a ten-thousandth of a second
- Reset Official Bill Balance Every Bill – determines if you want to carry any balances forward for each billing cycle. If set to True, for each new billing cycle the account balance is set to \$0.00. If set to false, any unpaid balances carry to the next cycle.
- Reset Official Bill Balance Every Fiscal Year – determines if you want to carry any balances forward for each new Fiscal year. If set to True, for each new fiscal year the account balance is set to \$0.00. If set to false, any unpaid balances carry to the new fiscal year.
- Return Top Phone Number for Account – when you are viewing an account, there is a yellow status bar directly below the ribbon; this bar contains important account information, including a number field. This setting determines whether the number field is present in the status bar. If set to True, the first telephone found relating to the account populates the field, this may slow down the loading of the complete account details. If set to False, the telephone field is removed from the status bar, this may load the account details quicker.
- Update Call Records from Directory Line – as a default, CAIRS updates the call records through the account number. If this setting is set to True, then CAIRS updates the call record information through Set Management. If there are multiple listings, the primary number is used for billing the call records.
- Upload File Block Size - this determines the block size of the imported records that are being uploaded. The default is to a minimum of 1000 records in the block.
- Use Enhanced Customer Codes – this setting is only valid if using Dynamic Billing. When set to true, customer codes will be added into CAIRS, everything billing related will now relate to a customer code. If set to false, all billing will be related to an account.
- Use Funded Program – if set to true the new funded program will become available for use within CAIRS and Subscriber Portal. Please do not turn this setting on without consulting with a Unique Representative first.
- Validate New Equipment to Account – determines whether CAIRS will validate the account prior to saving when new equipment or services are added. When a user adds equipment or services, CAIRS will verify that the account that is associated to the record has the appropriate charge type associated. If the charge type is not associated the user will not be able to save the record.

### **Category Call Records Auto Archive**

- Call Record Auto Archive Cut Off Days – this defaults to 730 days, meaning that any call record older than 730 days will automatically be archived.
- Call Record Auto Archive Folder Path – displays the folder location of where the archived text files can be found
- Call Record Auto Archive Hours Per Iteration – this defaults to 10 indicating that the call record archive process can only run for 10 hours per session.

- Call Record Auto Archive Max Threads – the default is to 4 meaning that you can only have 4 instances of the auto archive running at 1 time
- Call Record Auto Archive Parallel Processing Enabled – defaults to False. If set to true multiple threads of the process can be running at one time, which can improve system performance.

### **Category – Call Records**

- Archive Bulk Size – allows you to determine the number of call records that you want to copy when archiving or restoring. The default is set to 10,000 calls in each file. You can increase or decrease the value by entering a different number.
- Billing Interval – indicates your billing interval; every second, every 6 seconds or every minute. This defaults to 0 meaning that every second is billed.
- Current Currency Symbol – displays the currency symbol you are using for all billing, for example the \$ sign.
- Days Till Expiration Warning – this setting determines the number of days before you receive an expiration warning for foreign currency. The default is 355 days, meaning that you must update the exchange rate every 355 days.
- Do Not Round to Two Decimals - if you are using the re-pricing option, CAIRS automatically rounds the call price to two decimal points. This defaults to false which rounds the call pricing to 2 decimals (\$10.55). Set this to True to round to 4 decimal places (\$10.3405).
- Foreign Currency Expiration Warning – this setting works in conjunction with the ‘Days Till Expiration Warning’, if set to true than the administrator receives the warning, if set to false no warning is given.
- Foreign Currency Symbol – displays the foreign currency symbol if you are billing in a foreign currency
- Round First Minute – determines whether to round the first minute of billing up, if set to true, if the call is 30 seconds long the customer is charged for the full minute. If set to false, the customer is charged for 30 seconds. This defaults to false.
- Round to Next Period – determines whether to round up to the next whole number, if set to false, if a call was 3 min 15 sec long, the customer would be billed for 4 min. If set to false, the customer is charged for exactly 3 min 15 sec.
- Start Call Pricing Date – indicates the start date when call records will be priced using the automatic pricing
- Unit Value – displays the number of units for each value. For example, 100 units (cents) in \$1 or 100 pence in 1 pound.
- Update Auth Code Calls by Extension if Missing - in the event that an authorization code does not exist within your database, you can use this setting to have the calling extension billed for the call. This defaults to False meaning that the call record will not be billed to any number until you create the authorization code and run the CES

process to Change Call Ownership. However, if you set this to True, CAIRS will automatically bills the calling extension for the call record.

- Update Missing Billing Subscriber From Directory Line – ideally call records are updated with the subscriber information associated to authorization codes, if you do not use authorization codes the update comes from the billing account number. If there is no subscriber information on either one of those, CAIRS uses the subscriber information related to the directory line (aka configured set). If this is set to true, CAIRS tries the authorization code then the billing account then the configured set for the subscriber information. If set to false, CAIRS tries, only the authorization code and billing account for subscriber information, if there is no subscriber within either of those then the field is left blank for the call record.
- Use Primary Billing Site in Number Plan for Call Record Update – allows you to bill two matching numbers in different number plans to different accounts. When your calls are brought into your active calls, they go through a matching process that associates important information such as site, account number, organization, etc. If this setting is set to True, the matching process looks first at the site associated to the call record and matches that up with the Primary Billing Site within the Number Plan, thus determining the proper extension to associate with the call record.
- Use Site Specific Unit Interval Settings – determines whether you use site-specific call pricing, databases that have multiple sites associated use this setting. If set to true, each site contains a Call Pricing Group, Unit Value, Billing Interval, Round to First Period and Round to Next Period fields that will now be used for call pricing. If there is no Call Pricing Group associated with the site, CAIRS will use the default Call Pricing Group. If this setting is set to false all calls are priced based on the default call pricing groups.
- Use Foreign Currency – when set to True, all billing is in the foreign currency determined within your rate tables.

### **Category – Configured Items**

- Clear Buttons when Changing Set Type – if you need to change the set type for a digital set device and don't want to have to clear all the button data first, set this to true and CAIRS will automatically clear the buttons except for the primary listed number. This is useful for sites that use the switch syncs.
- Connectivity for Standard Sets - Determine where connectivity will be installed either on the Standard Set, the Standard Directory record, or both. It is recommended that you choose either the set (Standard Set) or the number (Standard Directory) and not both.
- Connectivity Required - Determines whether or not connectivity is required. This setting affects all connectivity in CAIRS, and not just configured sets. If set to true, connectivity is required for everything in CAIRS. If set to False, connectivity will be optional on all records.
- Default Published Option – this setting determines the default publishing option when you are creating a new configured set. Enter one of the following numbers to choose your option:

- 0 – Published (if you do not change this setting, it will default to 0 meaning all new sets are published)
- 1 - Non-Published
- 2 - Classified
- 3 - Temporary
- 4 - Alternate
- Group Terminals By Room – a value of true indicates that the terminal for a building are grouped together based on room number, a value of false displays the list based on the order in which they were added to the building
- SL100 and CS2100 Call Pickup Group Use Link LEN – a value of True indicates that when you delete the Pilot number of a Call Pickup Group, CAIRS automatically takes the lowest LEN in the group and makes that the Pilot for the Call Pickup Group. If set to False, when you delete the Pilot the next position in the Call Pickup Groups is made the Pilot.
- VoIP Switched Share Number Plan Listings – if your VoIP phones and your TDM phones share the same number plan this setting must be set to true to allow sharing. If set to false, each one must have its own number plan.

### **Category – Dropdown**

- Exclude Organization Path from Organization Name – determines whether the organization name and path appear within one or separate columns. A value of True separates the organization name and path into two separate columns, while a value of False combines the organization name and path within the same column.
- Exclude Site Path from Site Name – If True then the Site Path when you access the site dropdown list there will be two columns, the first with the site name and the second with the complete path to the site. If set to False, the site name appears first followed by ~~ and then the path.
- Include Account Number in Organization Dropdown – determines if the account numbers associated with an organization appears in the Organization dropdown. If set to true, the account numbers appear in the dropdown, if set to false the account number do not appear in the dropdown.
- Include Misc Fields In Organization Drop-down – determines whether miscellaneous organization fields are included next to the organization name and path in the organization dropdown. A value of true displays all misc fields within the dropdown, while a value of False hides these columns.
- Include Organization Code with name in Organization Dropdown – determines whether the code and the name appear in the organization dropdown list. If set to true then the code appears before the name followed by a dash (-) and then the organization name, in the first column of the dropdown. If you have not associated a code to the organization, a dash will appear before the organization name. If set to false then just the organization path appears in the dropdown in the first column of the dropdown.

- Include Rank in Subscriber Dropdown – determines whether a subscriber’s rank will be included in the subscriber dropdown. This defaults to true, meaning the rank will be included in the dropdown.

### **Category – Export**

- Default PDF to Landscape – determines the orientation of your export in PDF format. If set to True then the PDF format defaults to a landscape orientation, if set to False (the default) the orientation remains as portrait.
- PDF Landscape Width – If you have set the Default PDF to Landscape setting to true, this setting is required to determine the width of the columns on the page. This number references the column width of each item in the header, the higher the number the smaller the column width. If you choose a small number, your information may appear on two rows. This defaults to 150.
- PDF Portrait Width - If you have, set the Default PDF to Landscape setting to False, this setting determines the width of the columns on the page when using the portrait setting. This number references the column width of each item in the header, the higher the number the smaller the column width. If you choose a small number, your information may appear on two rows. This defaults to 100.
- Prompt for PDF Page Orientation –when set to True the user is prompted to select whether they want to print the report in portrait or landscape. If set the False, no prompt is given and the default setting is used.

### **Category – Facilities**

- Prevent Duplicate Binding Posts in Terminal – determines if you can have binding posts with the same number appear in a terminal. This setting defaults to False meaning that you cannot have binding posts with the same number in a terminal.
- Show Nearest Building Button in Facilities – when set to True a Nearest Building button displays in Facilities to show the building closet based on the latitude, longitude and elevation coordinates. The default is set to False meaning the button will not display.

### **Category – Form Layout**

- Default Form Layout to Admin Layout – determines whether the default form layout for all users will be the administrator’s layout. A value of true changes all form layouts to the administrators. A value of False allows each user, based on permissions, to customize their form layout.
- Require Permissions for Form Layout – determines whether you want to allow your users the ability to customize form layouts. A value of false allows any user to change the layout; a value of true requires permissions.

### **Category – Global Report**

- Global Report Maximum Export Rows - determines how many rows the CES process that manages global exports will save to a file before starting a new file. This setting is useful to prevent the file from being too large to email. The minimum row value is 500, maximum row value is 1,000,000.

- Limit Global Reports by Profile – if set to true only profiles with access to global reports will be able to use the reports. If set to false, all users will have access to global reports.
- Show Global Report When Opening Menu – is set to true Global Reports will open when a user opens any menu option. If set to false the menu will not be shown at all. It is recommended that this setting remain to true.
- Show Report External Integration Settings – if set to true, users will be able to use charts for certain data.
- Use Global Reporting – this setting defaults to true to allow all users to run global reports. If set to false global reporting will be disabled.

### **Category – Remedy Interface**

- Base Debug Path – this is the path relative to CES where XML WSDL files of the soap request are created when interfaces have Debug Log selected.
- CAIRS User UserName – this is the CAIRS username under which CAIRS Work Orders/Trouble Tickets will be created under in Remedy.
- Remedy Base Service Url – this is the Base URL for querying the server to get service results. When entering the URL do not include the remedy service name (aka method name) into the field.
- Remedy Base Url – this is the http path to the remedy server. Again, when entering the URL do not include the remedy service name.
- Remedy Base WSDL Url – this is the base URL used for querying the server to get the WSDL field template. Again, when entering the URL do not include the remedy service name.
- Remedy Web Service Read/Write Timeout – this setting defaults to 300 seconds, meaning CAIRS will wait 300 second before the read or write times out.
- Remedy Web Service Request Timeout – this setting defaults to 100 seconds, meaning CAIRS will wait 100 seconds before the http web request times out.
- Remedy Web Service Timeout – this setting defaults to 100 seconds, meaning CAIRS will wait 100 seconds before the web service times out.
- Remedy Web Service Write Timeout - this setting defaults to 100 seconds, meaning CAIRS will wait 100 seconds before the web service write times out.
- Site Name – this is the site name under which work orders/trouble tickets will be created is there is not site data found.
- Verbose Logging – if set to true, CAIRS will record all log events to the System Admin → Service Management → General Error Log. If set to false, only error and change events will be logged.

### **Category – Startup**



- Check for Software Updates – determines whether to check for software updates when starting the software. A value of False does not check for updates whereas a value of True checks.
- Disable Sound Played for Trouble Ticket Notifications - if set to true when a new trouble ticket is assigned to you, you will not get a sound notification. The setting defaults to false, allowing for the sound to play
- Disable Sound Played for Work Order Notifications - if set to true when a new work order is assigned to you, you will not get a sound notification. The setting defaults to false, allowing for the sound to play
- Disable Toll Ticket Notifications – determines whether you are notified of toll ticket statuses when you first start CAIRS. A value of true allows the notifications to appear.
- Disable Trouble Ticket Notifications – determines whether you are notified of trouble ticket status when you first start CAIRS. A value of true allows notifications to appear.
- Disable Work Order Notifications - determines whether you are notified of work order status when you first start CAIRS. A value of true allows notifications to appear.
- Display Warning Message – when set to True the user must accept the DOD warning message before they can access CAIRS, if set to False the warning message does not appear.
- Instance Count – displays the maximum number of CAIRS client instances a single user can open. The default is 5, meaning you can have 5 instances of CAIRS open at the same time on the same computer.

### **Category – Subscriber Portal**

- Auto Authorize Subscribers - If true, this setting will take the Windows or Certificate login information and create a default authorized subscriber. The subscriber will be assigned to the default profile as well as site. If set to false, when a new subscriber registers an administrator will have to authorize the user and assign a profile and site.
- Default\_Subscriber\_Password – when a subscriber forgets their password to Subscriber Portal, you can have a default password setup or you can have CAIRS randomly generate a password. If you type in a password here, when a subscriber needs a reset you the Reset Password button and this is the password.
- Email List When New Subscriber Registers – this is the list of email address that will receive an email when a new subscriber registers. If there are multiple email address, separate each new email with a comma.
- Filter Orgs By Customer Code – if set to true, the organization list within service requests will be filter to the selected customer code. If set to false, all organizations will appear in the list.
- Filter Org List – if set to true, only the organizations the subscriber is associated to will appear in the list in service requests. If set to false, all organizations will appear in the list.

- Hide Add Another Service Request – if set to true, the ‘Add Another’ button in service requests will be hidden. If set to false, the button will become available.
- Password Reset Email – if a user needs a password reset, this is the email address that the customer will send the request to
- Password Reset Subject – this is the subject of the email sent when a password request is needed
- Portal Security Type - Determines which type of security CAIRS subscriber portal uses. The following options are available:
  - Forms – allows for a username and password
  - Windows – allows Windows authentication only
  - Certificate – allows for Client Certificate authentication
- Require Customer Code – if set to true the customer code field will be required when completing any request in the portal.
- Require File Upload on Registration – if set to true, when a new user registers on the portal they will be required to upload the necessary documentation.
- Require Notes – if set to true, users will be required to enter something into the notes field before a request can be submitted.
- Require Subscriber Authorization – if set to true, all new registered users will be required to be authorized by a system admin before gaining access to the portal.
- Show Only General Task in Troubles – if set to true, only the General Tasks option will be available in Troubles. If set to false, general task as well as troubles will be available.
- Show All Accounts in Service Requests – If set to false, the accounts will be filtered to only the accounts associated to the subscriber. If set to true, all accounts will display in the account dropdown.
- Show All Customer Codes in Service Requests – If set to false the customer code dropdown will be filtered to include only the codes associated to the subscriber. If set to true, all customers codes will appear in the dropdown.
- Show All Orgs in Service Requests – If set to false the organization dropdown will be filtered to include only the organizations associated to the subscriber. If set to true, all organizations will appear in the dropdown.
- Show All Phone Numbers For Change or Disconnect – if set to true, all telephone numbers will be displayed for change and disconnect service requests. If set to false, only the number associated to the subscriber will be displayed.
- Show Operator Phone Book – this determines if the operator phone book link will appear in the toolbar on the portal. To show the link, set to true.
- Show Switch Phone Book – this determines if the switch phone book link will appear in the toolbar on the portal. To show the link, set to true.

- SP Web Site URL – displays the URL to your Subscriber Portal
- Subscriber Password Security Level – this setting determines the level of complexity for passwords when a subscriber is using username/password authentication. The setting can either be High or Low.

### **Category - Switch**

- Days to Keep Switch Sync Log – determines the number of days to keep the Switch Sync Log on file. After the allotted days the log is deleted.
- Enable RAX and CXGRP on site – if set to true then a RAX and CXGRP are added to the General – Sites window and you associate each one. This is specific to the EWSD.
- Max Days To Store UCE Events – determines the maximum number of days to keep the acknowledged UCE events. This defaults to 30.
- Max Idle Minutes for SMA Sessions – displays the maximum number of minutes a SMA session can remain open while inactive. Once those minutes have passed, the session automatically ends.
- Switch API Location – determines your Switch API location.
- Sync Options On Features – if set to true, when a set sync is running it will sync the features and their options. If set to false, the sync will only sync feature names.
- Use Wopr – if set to true, CAIRS will use WOPR (Work Order Processing Real-Time) for switch provisioning.

### **Category - System**

- Alarm and Traffic System URL – displays the Alarm and Traffic System URL.
- Alternate User File Location – this setting allows you to change the location of the folder that saves all your user configurations, as a default we save the file in the c:\Users\Username\Documents\CAIRS. If your network restricts access to that location, put the alternate location here.
- Always Reset Search – a value of False tells the system to use the previous search parameters when refreshing a menu list or navigating back to a menu. A value of True tells the system to remove any search parameters when refreshing a menu list.
- Always Show Database Utilities Menu – this setting determines whether the Database Utilities menu is visible under System Admin. A value of True shows the menu option and a value of False means the menu is not shown. Keep in mind that the tools within the Database Utilities menu are powerful and could damage your database if not used properly. Do not perform any function with the menu option unless directed by a Unique Communication's Representative.
- API User Type – Determines which type of user an API call will be authorized under, the setting can either be User or Subscriber. If nothing is in the setting, subscriber will be used as a default.

- Auto Authorize User - If true, this setting will take the Windows or Certificate login information and create a default authorized user. Profile designated as the default user profile will be assigned automatically.
- Auto Update Organization Full Path - If true, behind the scenes CAIRS will automatically update the organization path to its full length.
- CAIRS CEDC Domain – displays the domain name where the CEDC is installed.
- Client Web Service Timeout (in Minutes) – this setting determines how long a CAIRS client waits for a response from the CEDC before returning an error. This setting is set to a minimum value of 10 minutes.
- Customer Name – if you are managing multiple databases this setting is useful because it displays the customer name in the status bar at the bottom of the CAIRS window. Type the name into the setting value field.
- Enable Global Memory Leak Fix – this setting defaults to true to enable the memory leak fix.
- Maximum File Attachment Size in MB – displays the maximum file attachment size allowed within your system. This defaults to 2.9 mb. If you allow file attachments within Subscriber Portal you need to increase this amount in connection with the MaxRequestLength in the web.config file to allow for large attachments.
- MoraleMinder System Path – displays MoraleMinder’s installation path.
- Note Default Font Size – this setting determines the font size for all notes throughout CAIRS. The default is 12, the minimum font size allowed is 8 the maximum font size is 40.
- Note Override Clipboard Fix Rich Text Font Size – this setting defaults to true, in some instances when you copy note text from CAIRS the font size may reduce to 75%. This setting allows for CAIRS to automatically correct the font size to a larger more readable size. If the font remains the same you can disable the auto-fix by making this setting false.
- Remember Form Size – when you resize a form CAIRS can remember the size so your wont have to resize anymore. Set this to True to have CAIRS remember your form size. This defaults to True.
- Save Column Sort Order – When set to True, the sort order the user has chosen remains in place for future searches. If set to False the sort order returns to the default.
- Security Type – there are three different options within Security you can choose either Windows, Certificate or Mixed. With Window authentication, CAIRS will use your windows credentials to login. With Certificate, CAIRS will use your CAC credentials to login. Mixed allows for all types of authentication. To learn more about the different security types please see the section of Security. To change the security type, type in the appropriate type.
- Server to Client Messaging – When a new order is created or changes are made to an existing work order, emails can be sent to users. The emails contain a link that when

clicked can open the order within CAIRS. If this is set to True then CAIRS will open the order, if set to False CAIRS will not open the order.

- Share File Through Database Transfer – this setting should remain at False. However, some sites may not have a common file share, if set to true this setting would allow files to be transferred through the database.
- Use Public Organizations - when set to True, a new menu option appears within Directory/Organization called Public Organizations. The true value also allows you to generate bills for the organizations for any charges incurred. A value of False leaves the menu option hidden.
- Vendor Media Import Menu Option – There are four options available for VMI they are Standard, Advance, Basic and All. To learn more about each of these options please see Vendor Media Imports. The default setting is Standard.

### **Category – Toll Tickets**

- Control Number Mask – determines the mask of the toll ticket control number, this default to T=TTCN-;D=yyyy;T=-;D=MM;T=-;I\_M=00000;T=-;I\_N=000. Your control number will look like TTCN-2015-09-00000-356465730241718240
- Use Toll Ticket Option – a value of true indicates that you will use the control ticket option in available in Directory/Organizations. If set to False, the menu item is disabled.
- VIP Control Number Mask - determines the mask of the toll ticket control number for VIP's, the default is T=VIP-TTCN-;D=yyyy;T=-;D=MM;T=-;I\_M=00000;T=-;I\_N=000. Your control number will look like VIP-TTCN-2015-09-00000-356465730241718240

### **Category – Work Order**

- Don't Close General Orders Until Sub-Orders are Closed – determines whether you can close the general work order before all sub-orders are closed. A value of True prevents you from setting a close date on the general work order until all the related sub-orders are closed. A value of False allows you to close the general work order, even if sub-orders are still open.

## **Changing a Setting**

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) System Setting to access the sub-menus
3. Click Settings.
4. The list of the system settings displays to the right, within the list double click the setting to change.
5. Click the Setting Value and type in the new value.
6. If the value is true or false, you must capitalize the first letter for CAIRS to recognize it.

7. Within the Actions ribbon group, click the Save & Close button to return to the settings list.

## Manage File Attachment Types

Within System Settings, you can determine what types of files your users can attach to records within your database. These file types are restricted to size based on the Maximum File Attachment Size in MB System Setting.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) System Setting to access the sub-menus
3. Click Settings.
4. There are two ways to manage your file types:
  - Within the toolbar directly above the Navigation pane, click the Manage Attachment File Types button.
  - Within the Actions pane, click the Manage Attachment File Types link.
5. Within either option, the Manage Attachment File Types window opens. Within the window, there are two columns: Extension and Description.
6. Click on the row with an asterisk (\*) to add a new file type, within the Extension column type-in the allowed file attachment extension (the extension is anything after the period, for example, if the file name is picture.png, the extension is png).
7. Once you start typing the file extension, a new row appears at the top of the list allowing you to add multiple types at one time.
8. To delete a file type, right-click the record selector box next to the Extension to access a popup menu, from the menu select Delete. A message box appears verifying that you really want to delete the file type, click Yes to continue or No to cancel the operation.
9. Once selected, CAIRS draws a line through the type allowing you to delete multiple items at once.
10. Within the Actions ribbon group, click Save (to save and stay) to continue working with the file types, or click Save & Close (to save and exit) to return to System Settings.

## Import System Metadata

Metadata provides information about where you can find details inside of CAIRS. The metadata in CAIRS serves two functions, first it allows for the generation of reports to be very quick. This is because the metadata provides the location of where to find the information inside the CAIRS database. CAIRS is Sql based so information is stored in several different tables, the metadata narrows down the searching to only the relevant

tables. For example, if you are reporting on Circuits, the number of tables you can access is under 15 making the searching must easier.

We will provide you with the latest metadata to import. To import the metadata, click on the link, you will Browse to the location of the file and click to highlight. Click on the Open button to import the data. CAIRS will need to be re-started after the import takes place.

### **Export System Metadata**

For troubleshooting purposes, you can export your metadata. When you click on the link, you will be asked to save the JSON file to any location.





---

## Site Levels

Site Levels defines your site's hierarchal relationship and name basis. For example, Country, State, County, and City; Division, Brigade, Regiment, and Squadron; 1, 2, 3, and so on. Site Levels must be determined before a user can enter sites into your database. When a user enters a site into the database, they determine the level where it belongs.

### Adding a Site Level

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to System Settings. Click Site Levels.
3. There are three ways to add a Site Level:
  - Within the tool bar directly above the Navigation pane, click the dropdown arrow next to New. From the list, select Site Levels.
  - Within the toolbar directly above the Navigation pane, click the Add Level button.
  - Within the Actions pane, click the Add Level link.
4. With either option, the General-Site Level window opens and the Level Number field automatically populates with the next number in sequence.
5. Type-in the level name.
6. Within the Actions ribbon group, click Save & Close (to save and exit).

### Deleting a Site Level

Two scenarios will prevent you from deleting a site level. First, if the site level is associated to any record within your database, you must move the records to another site level. Second, the level must be at the bottom of the hierarchy, you cannot delete level 2 without first deleting level 3.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to System Setting. Click Site Levels.
3. The Site Levels list opens to the right.
4. Within the list, highlight the level to delete. There are three ways to delete a level:
  - Within the tool bar directly above the Navigation pane, click the red X.
  - Within the Actions pane, click the Delete Site Level link.
  - Double click the level name within the list. The Site Level window opens. Within the Actions ribbon group, click the Delete button.

5. Once you click Delete, a message box appears verifying that you really want to delete the site level. Click Yes within the box to continue or No to cancel the operation.
6. If the site level is associated to a record or is not at the bottom of the hierarchy a warning message appears, this means that you still have assignments that need to be reassigned.

---

## Organization Levels

Organization Levels define your associated organization's hierarchal relationship and naming conventions for example, Org, Sub-Org, Department and Unit; Division, Wing, Group and Squadron; 1, 2, 3 and so on. The organizational levels must first be determined before adding organizational records into CAIRS. Organization levels must be determined before users can enter information into the organizational tree. When users enter an organization into the database, they determine the level where it belongs.

### Adding an Organization Level

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to System Settings. Click Organization Levels.
3. There are three ways to add an Organization Level:
  - Within the tool bar directly above the Navigation pane, click the dropdown arrow next to New. From the list, select Org Levels.
  - Within the toolbar directly above the Navigation pane, click the Add Level button.
  - Within the Actions pane, click the Add Level link.
4. The General – Org Level window opens.
5. Type-in the level name. The level appears at the bottom of the list. At this time, there is no way to add a level within the list, CAIRS only allows you to add it at the bottom of the list.
6. Click Save & Close (to save and exit).

### Deleting an Organization Level

Two scenarios will prevent you from deleting an org level. First, if the org level is associated to any record within your database, you must move the records to another level. Second, the level must be at the bottom of the hierarchy, you cannot delete level 2 without first deleting level 3.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to System Settings. Click Organization Levels.

3. The Organization Levels list opens to the right.
  - Within the list, highlight the level to delete. There are three ways to delete a level:
  - Within the tool bar directly above the Navigation pane, click the red X.
  - Within the Actions pane, click the Delete Org Level link.
4. Double click the level name within the list. The Org Level window opens. Within the Actions ribbon group, click the Delete button.
5. Once you click Delete, a message box appears verifying that you really want to organization level, click Yes within the box to continue or No to cancel the operation.
6. If the site level is associated to a record or is not at the bottom of the hierarchy a warning message appears, this means that you still have assignments that need to be reassigned

---

## Email Settings

Email Settings allow Administrators to setup emailing capabilities in CAIRS. When the correct settings are entered into the required fields, CAIRS can send email notifications for Work Orders, Trouble Tickets, Subscriber Portal Requests, and auto generated Bills.

---

**!** An SMTP server is required in order for CAIRS to send email notifications.

---

To allow CAIRS to authenticate and access the SMTP server, the following fields must be completed:

- Domain Name – displays the name of the Fully Qualified Domain name (FQDN) or IP address of the SMTP server.
- Enable Email – a value of true allows CAIRS to send emails, a value of false prevents CAIRS from sending emails,
- Server Port – the port the SMTP server uses to send email. Typically port 25.
- SMTP\_Admin\_Address – email address CAIRS email notifications originate from.
- SMTP\_Admin\_Name – name from which CAIRS email notifications originate.
- Use\_SSL – set to True if the SMTP server requires SSL authentication.
- User\_AUTH\_Required – set to True if the SMTP server requires a Username and Password.
- User\_Name – the SMTP Authentication Username.
- User\_Password – the SMTP Authentication password. This password is encrypted and securely stored in the CAIRS system.

Once you defined the above settings, within the lower portion of the screen you can test the settings. Within the textbox, type-in an email address and click the Test button. If the user receives the email your settings are correct.



# Subscriber Portal Settings

This menu option allows you to build the Configuration Packages available on Subscriber Portal. A Configuration Package is the equipment, services and related inventory associated to a work order submitted via Subscriber Portal.

In addition, you can determine the settings for your Subscriber Portal, for example, password requirements, URL, Phone Book, etc.

---

## Configuration Packages

A Configuration Package allows administrators to create a set of management rules for how equipment, services, and other pieces of information apply to Subscriber Portal submitted work orders. As an administrator, you can limit each configuration package to a site, organization, or subscriber type. You also determine whether the configuration package requires resource or manager approval.

- When creating a configuration package, you determine the following:
  - Is this for a Set Device, Cell Phone, Circuit, etc.?
- If this is a set device, what template or set type is used?
- Is this for a New Service, Change in Service or Delete Service?
- Is this for one site or all database sites?
- Is this for one organization or all within the database?
- Does this package require resource or funding approval?
- Does this package require manager approval?
- Are there equipment/features required with the set device or circuit?
- Is there a service required with the set device or circuit?
- What fields does the customer need to complete before submitting the package?

Once you have determined the answers to these, you are ready to create your configuration package. Once created, the package becomes available in Subscriber Portal and accessible for customers to complete and send into CAIRS.

Once a customer submits a package, a CAIRS user can view the submitted packages within Orders/Troubles→ Projects/Portal Requests. The CAIRS user accepts the package and sends it into the proper work order flow within the CAIRS database. When the work order is complete, the submitting customer receives a completion notification.

The process to create a Configuration Package is identical for all components. Therefore, we will cover only how to create a Configuration Package for a Set Device.

## Managing Package Categories

### *Adding/Deleting a Package Category*

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Subscriber Portal to access the submenu
3. Click Configuration Packages.
4. There are two ways to manage your package categories:
5. Within the toolbar directly above the Navigation pane, click the Manage Package Categories button.
6. Within the Action pane, click the Manage Package Categories link.

#### **Adding**

7. With either option, the Manage Package Categories window opens. In the Manage Package Categories list pane, click the top row, marked with an asterisk (\*) to add a new record.
8. Type the new category name.
9. To add another type, click the Save button and repeat steps 4 and 5, as necessary.

#### **Deleting**

10. There are two ways to select the category to delete:
11. Right-click the record selector box (located just left of the name) and from the pop-up box, click Delete.
12. Highlight the name in the list and within the Actions ribbon group click the Delete button.
13. Once you click Delete, a message box displays verifying that you really want to delete the category. Click Yes within the box to continue or No to cancel the operation.
14. Once selected, CAIRS draws a line through the category allowing you to delete multiple items at once.
15. If you do not want to delete the category, right-click and click Undelete.
16. Once you select Undelete, a message box displays verifying that you really want to keep the item. Click Yes within the box to continue or No to cancel the operation.

17.

18. Within the Actions ribbon group, click the Save (to save and stay) button or click the Save & Close (to save and exit) button.

## Creating a Configuration Package

Keep in mind when creating the package; you are creating something a customer (and, not necessarily a CAIRS user) can see. It is recommended you use terminology the layperson can understand.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Subscriber Portal to access the submenu
3. Again, click the plus sign (+) next to Configuration Packages to access a submenu of the different configuration packages you can create, the following options are available:
  - Set Device Package
  - Circuit Package
  - Cell Phone Package
  - Authorization Code Package
  - General Task Package
4. From the list click on the package type that you want to create.
5. In the Actions pane, click the Add New Configuration Package link.
6. The General – Configuration Package window opens. Enter the following package information (required fields are indicted with an asterisk):
  - Package Name\* – type the package name, the name displayed on Subscriber Portal. The name should be general enough for the layperson to understand the purpose of the work order.
  - Package Type\* – this field auto-populates with the package type selected from the main menu, either Set Device or Circuit.
  - Package Action\* – from the drop-down box, select one of the following:
    - New Service
    - Change Existing Service
    - Disconnect Service
  - Configuration Package Category – click the drop-down arrow to access a list and from the list select the package category
  - WorkFlow Name\* – click the drop-down arrow to access a list and from the list, select the name of the work flow within CAIRS that once submitted, this configuration package will associate with.

- Is Private – click the field to insert a checkmark to indicate the package is visible only within CAIRS and not within Subscriber Portal.
  - Limit By Site – click the field to insert a checkmark limiting visibility to only those sites selected within the Sites Ribbon group.
  - Limit By Organization – click the field to insert a checkmark limiting visibility to only those Organizations selected within the Organizations Ribbon group.
  - Limit By Subscriber Type\*– click the drop-down arrow to access a list. From the list, select Official or Unofficial. This limits the package to either official or unofficial subscribers.
  - Required Resource Approval – click the field to insert a checkmark indicating the Configuration Package needs the approval of a Resource Manager before submitting into CAIRS.
  - Requires TCO Approval – click the field to insert a checkmark indicating the Configuration Package needs TCO approval before submission into CAIRS.
  - Description – type a Configuration Package description.
  - Sort Order – this determines what position on the portal this configuration package appears. A value of 1 indicates the highest position.
7. If the Configuration Package you are creating is a Set Device Package, the lower pane displays the field Template Name. Click the field to access a drop-down list and from the list, select the type of phone to associate with this configuration package.
  8. Within the Actions ribbon group, click Save (to save and stay) to continue adding information for the package, or click Save & Close (to save and exit) to return to the configuration package list.

## Deleting a Configuration Package

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Subscriber Portal to access the submenu
3. Again, click the plus sign (+) next to Configuration Packages to access a submenu of the different configuration packages you can create, the following options are available:
  - Set Device Package
  - Circuit Package
  - Cell Phone Package
  - Authorization Code Package
  - General Task Package



4. Within the list, click the package type. Depending on the amount of package you have within your database, the list may not readily populate. To populate the list, perform one of the following actions:
  - Within the search box, type any portion of the record and click the magnifying glass
  - Click the Show All button
5. The Configuration Package list opens. Within the list, highlight the package you want to delete. There are two ways to delete a package:
  - Within the toolbar directly above the Navigation pane, click the red X.
  - Double-click the package name within the list. The Configuration Package window opens. Within the Actions ribbon group, click the Delete button.
6. Once you click Delete, a message box displays verifying that you really want to package. Click Yes within the box to continue or No to cancel the operation.

## Configuration Packages - Sites

### *Adding/Deleting Site Access to a Configuration Package*

Configuration Packages can be configured to only allow specific sites access. In order for this to work properly, you must check mark the Limit by Site field on the General screen granting site access on a non- inheritance, individual basis. Therefore, if you want the package to be available at several sites, place a check mark by each site name.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Subscriber Portal to access the submenu
3. Again, click the plus sign (+) next to Configuration Packages to access a submenu of the different configuration packages you can create, the following options are available:
  - Set Device Package
  - Circuit Package
  - Cell Phone Package
  - Authorization Code Package
  - General Task Package
4. Within the list, click the package type. Depending on the amount of package you have within your database, the list may not readily populate. To populate the list, perform one of the following actions:
  - Within the search box, type any portion of the record and click the magnifying glass
  - Click the Show All button

5. The Configuration Package list opens. Within the list, double-click the package to open the General – Configuration Package window.
6. Within the Show ribbon group, click the Sites button. The window displays two panes of information; the top pane displays the sites associated to the package. The lower pane displays a list of all the sites within your database, the following read-only information is available for each site:
  - Site Name – displays the name of the site, this is the lowest level of the site tree.
  - Site Path – displays the complete path to the site. Each level is separated by a >.
  - Site Level – displays the site level name or number.
  - Site Code – displays the three-digit alphanumeric site code.

**!** You can search for a site within the Search All Sites pane by typing in the name or portion of the name within the Search text box, and then click the magnifying glass. Any record with the search characteristics displays within the pane.

### **Adding**

7. To add a site to the package, find the site within the list, and double-click the record, the site name now displays within the upper pane.

**!** Be aware that sites do not inherit the associations of their parents. You must associate each level to the account. For example, if you associate a parent and want all the children associated you must associate all children site as well.

### **Deleting**

8. Within the Show ribbon group, click the Sites button.
9. Within the top pane, right-click on the site name to access a pop-up menu, from the menu select Delete.
10. Once you click Delete, a message box displays verifying that you really want to delete the site. Click Yes within the box to continue or No to cancel the operation.
11. Once selected, CAIRS draws a line through the site; allowing you to delete multiple items at once.
12. If you do not want to delete the site, right-click the record to access a pop-up menu, and click Undelete.
13. Once you select Undelete, a message box displays verifying that you really want to keep the site. Click Yes within the box to continue or No to cancel the operation.
14. Within the Actions ribbon group, click Save (to save and stay) to continue working with the package, or click Save & Close (to save and exit) to return to the Configuration Package list.

## Configuration Packages - Organizations

A package can be limited to allow only certain organizations access. To allow only certain organizations access, click the Limit by Organization checkbox from the General screen. When granting access in the Organization Tree, lower levels inherit the access when you select a higher-level, so you will want to be sure to click the checkbox next to each lower level that should have package access.

### ***Adding/Deleting Organization Access to the Configuration Package***

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Subscriber Portal to access the submenu
3. Again, click the plus sign (+) next to Configuration Packages to access a submenu of the different configuration packages you can create, the following options are available:
  - Set Device Package
  - Circuit Package
  - Cell Phone Package
  - Authorization Code Package
  - General Task Package
4. Within the list, click the package type. Depending on the amount of package you have within your database, the list may not readily populate. To populate the list, perform one of the following actions:
  - Within the search box, type any portion of the record and click the magnifying glass
  - Click the Show All button
5. The Configuration Package list opens. Within the list, double-click the package to open the General – Configuration Package window.
6. Within the Show ribbon group, click the Organizations button. The screen display two panes of information; the top pane displays the organization associated to the package. The lower pane displays the complete list of organizations currently established within your database.
7. Within the Search Organization (lower pane), there are 6 columns of information:
  - Organization Name – displays the lowest level of the organization tree.
  - Organization Path – displays the complete path to the organization name. Each level is separated by >.
  - Account Number – displays the account number associated to the organization name.
  - TCO – displays the TCO Group associated to the organization

- Organization Code – displays the organization code
- Organization Abbreviation – displays the organization abbreviation

### **Adding**

8. To add an organization to a package, find the name within the list and double-click the row. The organization name displays in the Selected Organizations pane. The lowest level of the organization is listed first, after the two ~~ the complete path to the organization is displayed, each level is separated by a >.

---

**!** You can search for an organization within the Search Organization pane by typing in the name or portion of the name within the Search text box, once entered click the magnifying glass. Any record with the search characteristics displays within the pane.

---

### **Deleting**

9. Within the Selected Organizations pane, right-click the Organization to delete. A small pop-up menu opens. Click Delete.
10. Once you click Delete, a message box displays verifying that you really want to delete the Organization. Click Yes within the box to continue or No to cancel the operation.
11. Once selected, CAIRS draws a line through the name allowing you to delete multiple items at once.
12. If you do not want to delete the Organization, right-click the record to access a pop-up menu, and click Undelete.
13. Once you select Undelete, a message box displays verifying that you really want to undelete the selection. Click Yes within the box to continue or No to cancel the operation.
14. Within the Actions ribbon group, click Save (to save and stay) to continue adding information for the package, or click Save & Close (to save and exit) to return to the configuration package list.

## **Configuration Packages – Related Inventory**

Adding equipment and services to a configuration package allows the customer to view the requested work order's requirements and costs.

### ***Adding/Deleting Related Inventory to a Configuration Package***

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Subscriber Portal to access the submenu
3. Again, click the plus sign (+) next to Configuration Packages to access a submenu of the different configuration packages you can create, the following options are available:

- Set Device Package
  - Circuit Package
  - Cell Phone Package
  - Authorization Code Package
  - General Task Package
4. Within the list, click the package type. Depending on the amount of package you have within your database, the list may not readily populate. To populate the list, perform one of the following actions:
    - Within the search box, type any portion of the record and click the magnifying glass
    - Click the Show All button
  5. The Configuration Package list opens. Within the list, double-click the package to open the General – Configuration Package window.
  6. Within the Show ribbon group, click the Related Inventory button.

### **Adding**

7. This window is broken into two categories; Equipment (top pane) and Services (bottom pane). Anything added in this window is associated with the configuration package.
8. In the Equipment pane, click the field marked with an asterisk (\*) to enter a new piece of equipment for the package. Use the drop-down lists or type the appropriate information into each of the following columns (required fields are marked with an asterisk (\*)):
  - Equipment Type\* – click the drop-down arrow to access a list, from the list select the equipment type. For example, set devices, circuit type, telephone type, etc.
  - Equipment Name\* – click the drop-down arrow to access a list, from the list select the equipment name.
  - Part Name\* – click on the drop-down arrow to access a list, from the list select the equipment part name.
  - Site – click the drop-down arrow to access a list and from the list, select the site. The site drop-down list displays the bottom-most site first. After the ~~ is the complete path to the site. In the example below, we selected the Henderson site, which is a child to Las Vegas. Each site level is separated by a >.
  - Serial Number\* – click on the drop-down arrow to access a list, from the list select the equipment's serial number.
  - Quantity – this field auto-populates with a pre-determined quantity amount. To change, click the field and type the new information.
  - Sort Position – indicates the position the equipment displays within the list.

- One Time Cost – this field auto-populates with the equipment’s one-time charge.
  - Recurring Cost – this field auto-populates with the equipment’s recurring charge.
9. Follow the same procedure outlined above to enter in a Service.

### **Deleting**

10. Within either the Equipment or Services pane, right-click on the selector box next to the name, a small pop-up menu opens, within the box click Delete.
11. Once you click on Delete, a message box displays verifying that you really want to delete the equipment or service. Click Yes to continue or No to cancel the operation.
12. Once you click Yes, CAIRS places a solid line through the entire row. To complete the process and remove the equipment/service you must save before exiting.
13. Within the Actions ribbon group, click Save (to save and stay) to continue adding information for the package, or click Save & Close (to save and exit) to return to the configuration package list.

## **Configuration Packages - Related Fields**

### ***Adding/Deleting Related Fields to a Configuration Package***

Administrators can add fields to this ribbon group and require the Subscriber to complete them before submitting the package into CAIRS.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Subscriber Portal to access the submenu
3. Again, click the plus sign (+) next to Configuration Packages to access a submenu of the different configuration packages you can create, the following options are available:
  - Set Device Package
  - Circuit Package
  - Cell Phone Package
  - Authorization Code Package
  - General Task Package
4. Within the list, click the package type. Depending on the amount of package you have within your database, the list may not readily populate. To populate the list, perform one of the following actions:
  - Within the search box, type any portion of the record and click the magnifying glass
  - Click the Show All button

5. The Configuration Package list opens. Within the list, double-click the package to open the General – Configuration Package window.
6. Within the Show ribbon group, click the Related Fields button.

### **Adding**

7. Within this ribbon group, you add fields the Subscriber must complete before submitting the Configuration package into CAIRS. There are two panes of information; the left-hand pane displays any workflow custom fields that may need to be completed. The right-hand pane allows you to add your own custom fields, to add a field click the row marked with an asterisk (\*) and complete the following fields (required fields are marked with an asterisk (\*)):
  - Sort Position – indicates the order the Subscriber completes the fields. Click the field to enter a number starting with zero (0). Assign each added field the next number.
  - Display Name\* – click on the drop-down arrow to access a list. From the list, select the field type: Location, Related Directory Line Data, Related Work Order Fields or Custom Field.
  - Field Name\* – click on the drop-down arrow to access a list from the list select the name of the field the subscriber needs to complete. The fields change based on the information you selected in the Display Name column.
  - Custom Field Name – type the field name as it will appear on the Subscriber Portal page. For instance, if the CAIRS field name is Termination, you may want to change it to Building.
  - Availability\* – click the drop-down arrow to access a list and from the list, select when the field becomes available to the subscriber. The following options are available:
    - At Creation – select this option to have the field display the moment the order is created, then throughout the entire work order process.
    - For Review – this field displays after the creation of the work order and displays the status of the review process.
    - After Close – this field displays when the work order is completed.
    - Not Available – this field’s purpose is still in development.
  - Textbox Lines – this numeric value determines the amount of lines within the textbox used to enter in the information. The larger the number the bigger the textbox, it is best to start with a lower number and increase as needed.
  - Required Field – a checkmark in the field indicates that this is a required field, click the box to remove the checkmark to make the field optional.

### **Deleting**

8. Within the list of fields, right-click the name to access a pop-up menu, click Delete.

9. Once you click Delete, a message box displays verifying that you really want to delete the field. Click Yes to continue or No to cancel the operation.
10. Once selected, CAIRS draws a line through the site; allowing you to delete multiple fields at once.
11. If you do not want to delete the field, right-click the record, and click Undelete.
12. Once you select Undelete, a message box displays verifying that you really want to keep the field. Click Yes within the box to continue or No to cancel the operation.
13. Within the Actions ribbon group, click Save (to save and stay) to continue adding information for the package, or click Save & Close (to save and exit) to return to the configuration package list.

## Configuration Packages – History

Please see Common Elements – History to learn more.

## Subscriber Portal General Settings

### *Subscriber Portal Security*

This section allows you to manage what information a subscriber sees within their portal. As an administrator, you determine the column visibility and order of what the subscriber sees within the portal. For example, if you have two sets of subscribers, one that uses authorization codes and one that does not, this allows you to create two profiles. One profile that has authorization codes visible and another that does not.

There is a three-step process. First, you need to create the different profiles for each subscriber type, you can have as many as you want or just one. Second, you need to associate each subscriber to the correct profile. Finally, you need to determine the column visibility and order within the portal.

### **Step One: Profile**

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Security to access the sub-menus.
3. Click Profiles.
4. There are two ways to add a new profile:
  - Within the tool bar directly above the Navigation pane, click the dropdown arrow next to New. From the list, select Profile.
  - Within the Actions pane, click the Add New Profile link.
5. With either option, the General-Profile window opens. The only field you need to add is the Profile Name, all other settings are determined within the portal.
6. Enter in the following information for the profile (required fields are marked with an asterisk (\*)):



7. Profile Name\* – type-in the alphanumeric profile name, we recommend keeping profile names easy to identify when adding a user, for example Subscriber – Auth, Subscriber – No Auth, etc.
8. Within the Actions ribbon group, click the Save & Close (to save and exit) button to continue to step two.

### **Step Two: Profile Association**

When you are associating profiles to subscribers, there are two ways. First, you can associate all subscribers to the same profile to you can create a few different profiles and associated each one individually.

The following steps walk you through both.

1. From the main menu, click System Admin.
2. Within the Navigation pane, click Subscriber Portal Settings then Subscriber Portal Security.
3. There are two ways to manage your Subscriber Security:
  - From within the Menu toolbar, click the Manage Subscriber Security button.
  - Within the Actions pane, click the Manage Subscriber Security link.
4. With either option, the Subscriber Security pop-up opens, there are four columns of information:
  - Last and First Name – display the subscribers first and last name
  - User Name – displays the username the subscriber uses when logging into Subscriber Portal
  - Profile Name – this is the name of the profile that you created within the System Admin – Security – Profiles
5. Find the subscriber that you want to associate to a profile, if you can readily find the subscriber, you can perform a search. To search for a specific subscriber perform one of the following actions:
6. Within the search box, type any portion of the record and click the magnifying glass
7. Click the Show All button
8. Once the list populates, within the Profile Name field, click the dropdown arrow to access a list of the all profiles, within the list select the appropriate profile for the subscriber.
9. To associate all subscribers to the same profiles, associate one subscriber to the profile, then click the selector box next to the last name to highlight the complete row. Within the Edit ribbon group, click the 'Replace All With Current Profile' button. You are asked to confirm that you are replacing all subscribers with the profile, within the message box click yes to continue or no to cancel the operation.
10. When you are done associating, click the Save button to return to the Subscriber Security list.

**Step Three: Column Visibility**

Within Subscriber Portal, you determine what columns each profile can see. The ability to change column visibility is only available to system administrators. After you login as an administrator, throughout Subscriber Portal, there are Customize Grid links. When you click on the link a list of the fields for the appropriate section appear along with the field position and a visibility checkbox.

At the top of the list, select the Profile that you want to effect by clicking the dropdown arrow and selecting the profile name. As a default, every field is visible, to remove the field click on the box to remove the checkmark.

In addition, you can adjust the position by clicking the Up or Down links to the right of the field name. Once you complete making your changes, click on the Save button.





# Call Record Settings

Within Call Record Settings, you are creating the structure that you can use to re-price your call records. Ideally, as UCE collects and formats the calls, they are priced with the UCE Rate Tables. However, calls may need to be re-priced once they are within the CAIRS active call database. The Call Pricing Groups combines the rates types, zones, rate groups, dial codes and call types together to form how the call is priced.

The following options are available within Call Record Settings:

- Call Pricing Group – ties all of the below information into one group to allow the call to be re-priced properly.
- Call Types – determines the call types that are allowed from your switches.
- Dial Codes Group – determines the various dial codes including area codes, country codes, etc.
- Rate Group – determines the period and cost for each rate type.
- Zone Group – determines the times for each rate type. For example, you can one rate for calls made between the hours of 7:00 am to 7:00 pm and another rate for calls made between 7:01 and 11:59, and so on.
- Rate Type – ties the zone and the rate together.
- Digits to Add – allows you to add digits to the beginning of call record extensions
- Call Record General Settings – manage call record general settings.
- Import UCE Data – allows you to import your DSS or UPT files into CAIRS

Within this document, the order of the menu options does not match the order within the software. This is because when you are creating your Call Pricing Groups, you need to start with the basics and work your way up. Therefore, we will start at the bottom of the list and work our way up.

---

## Rate Type

A rate type is the basic building block for the call-pricing group. You are creating a rate type that eventually ties a zone group and the rate group together. For example, you can have three rate types; day, evening and night.

## Adding/Deleting a Rate Type

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next Call Record Settings
3. Click Rate Type.

### Adding

4. There are three ways to add a rate type:
  - Within the tool bar directly above the Navigation pane, click the dropdown arrow next to New. From the list, select Rate Type.
  - Within the toolbar directly above the Navigation pane, click on the Add Rate Type button.
  - Within the Actions pane, click the Add Rate Type link.
5. With either option, the General – Rate Type window opens.
6. Within the Rate Type field, type in the name of the type. When naming a rate type keep in mind that when you assign it to a zone, you are attaching hours. You might want to think about naming it daytime, evening, nighttime, etc.

### Deleting

7. The list of existing rate types populates to the right, click on the rate type to highlight. There are three ways to delete a rate type:
8. Within the tool bar directly above the Navigation pane, click the red 'X'.
9. Within the toolbar directly above the Navigation pane, click on the Delete Rate Type button
10. Within the Actions pane, click the Delete Rate Type link.
11. With either option, a warning message appears verifying that you really want to delete the rate type. In addition, if the rate type is associated to a rate or zone, the associate will also be deleted.
12. Once you click yes within the message box, the rate type is removed from the system.
13. Within the Actions ribbon group, click on the Save (to save and stay) button, click the Save & Close (to save and exit) button, or click the Save & New (to save and refresh the screen) button to continue adding in additional rate types.

---

## Zone Groups

A zone group determines the times the rate type is available. For example, in the same example as above, the zone times determine what time of day the rate type day starts and ends. Please keep mind that when creating your zone times, you cannot have overlapping times.

## Adding/Deleting a Zone Group

1. Click the System Admin menu.
2. In the Navigation pane, click on the plus sign (+) next Call Record Settings.
3. Click Zone Group.
4. There are three ways to add a zone group:
  - Within the tool bar directly above the Navigation pane, click the dropdown arrow next to New. From the list, select Zone Group.
  - Within the toolbar directly above the Navigation pane, click the Add Zone Group button.
  - Within the Actions pane, click the Add Zone Group link.
5. With either option, the General-Zone Group window opens. There are two panes of information, the top pane allows you to name the zone group, and the lower pane allows you create the time structure.
6. Within the top pane, click the field next to Zone Group and type in the name. This is a required field; you must enter something in this field.
7. Within the lower pane, complete the following fields, all fields are required:
  - Rate Type – click the dropdown arrow to access a list of the existing rate types and from the list select the rate type.

---

**!** When determining the times, click on the portion of the time (hour, minutes or AM/PM) to insert your cursor and then click on the up and down arrows. Alternatively, click on the portion of the time and type-in the new information.

---

- Start Time – the field defaults to 12:00 AM, click on the field to access a set of up and down arrow, click the appropriate arrow until you have reached the start time for the rate. If the time requires a PM, click to place your cursor within the AM and click on either arrow. The AM turns to PM and vice versa.

---

**!** Remember, when you entering in the times, you cannot overlap. We have designed CAIRS to stop a rate at 00:59 and start a new rate at 00:00.

---

- End Time – the field defaults to 11:59 PM, click on the field to access a set of up and down arrow, click on the appropriate arrow until you have reached the start time for the rate. If the time requires a PM, click to place your cursor within the AM and click on either arrow. The AM turns to PM and vice versa.
- Monday – Sunday – for each day the rate applies, click on the appropriate box to insert a checkmark. The day can appear in multiple rate types, just as long as there is no overlapping!

---

**! Removing a Zone Time** – If you make a mistake and want to start over, no worries! Right click the record selector box next to the rate to access a pop-up menu. From the menu, select Delete. Answer Yes to the verify that you really want to remove and you're all set!

---

### Deleting

8. There are three ways to delete a zone:
  - Within the tool bar directly above the Navigation pane, click the red 'X'.
  - Within the toolbar directly above the Navigation pane, click on the Delete Zone Group button.
  - Within the Actions pane, click the Delete Rate Type link.
9. With either option, a warning message appears verifying that you really want to delete the rate type. In addition, if the zone is associated to a call pricing groups or dial codes, the associate will also be deleted.
10. Once you click yes within the message box, the zone type is removed from the system.
11. Within the Actions ribbon group, click the Save (to save and stay) button, click the Save & Close (to save and exit) button, or click on the Save & New (to save and refresh the screen) button to continue adding in additional Zone Groups.

---

## Rate Groups

A rate group allows you to determine how much each period of time costs for each rate type which already includes the zone group.

### Adding/Deleting a Rate Group

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next Call Record Settings.
3. Click Rate Group.
4. There are three ways to add a rate group:
  - Within the tool bar directly above the Navigation pane, click the dropdown arrow next to New. From the list, select Rate Group.
  - Within the toolbar directly above the Navigation pane, click on the Add Rate Group button.
  - Within the Actions pane, click the Add Rate Group link.
5. With either option, the General-Rate Group window opens. There are two panes of information, the top pane allows you to name the rate group, and the lower pane allows you create the cost of each time period.



6. Within the top pane, click on the field and type-in the name of the rate group.
7. Within the lower pane, complete the following fields, all fields are required:
  - Rate Type – click the dropdown arrow to access a list of the existing rate types and from the list select the rate type.
  - First Period – type in the number of seconds for the first time period of billing. For example, the first 60 seconds of a call may cost more or less than the rest of the call.
  - First Cost – type-in the cost for the first period of billing.
  - Other Period – type-in the number of seconds for the other periods, for example, for each 180 seconds of a call you charge a different rate.
  - Other Cost – type in the cost for the other period.

### **Deleting**

8. Click the rate group to highlight. There are three ways to delete a rate group:
  - Within the tool bar directly above the Navigation pane, click the red 'X'.
  - Within the toolbar directly above the Navigation pane, click the Delete Rate Group button.
  - Within the Actions pane, click the Delete Rate Group link.
9. With either option, a warning message appears verifying that you really want to delete the rate group. In addition, if the group is associated to a call-pricing group or dial codes, the associate will also be deleted.
10. Once you click yes within the message box, the rate group is removed from the system.
11. Within the Actions ribbon group, click the Save (to save and stay) button, click the Save & Close (to save and exit) button, or click the Save & New (to save and refresh the screen) button to continue adding in additional Rate Groups.

---

## **Dial Code Groups**

Within dial codes, you are entering the various codes used when making calls. These can include country codes, area codes, DSN codes, etc. You can place each code into a group allows for correct billing, for example, CONUS vs OCONUS.

### **Adding/Deleting a Dial Code Group**

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next Call Record Settings.
3. Click Dial Code Groups.

### **Adding**

4. There are three ways to add a group:
  - Within the tool bar directly above the Navigation pane, click the dropdown arrow next to New. From the list, select Dial Code Group.
  - Within the toolbar directly above the Navigation pane, click on the Add Dial Code Group button.
  - Within the Actions pane, click the Add Dial Code Group link.
5. With either option, the General-Dial Code Group window opens. There are two panes of information, the top pane allows you to name the dial codes group, and the lower pane allows you to enter the specific codes.
6. Within the top pane, click the field next to Dial Codes Group and type in the name. This is a required field and you must enter something in this field.
7. Within the lower pane, click the top row, marked with an asterisk (\*) to add a new record, complete the following fields (required fields are marked with an asterisk (\*)):
  - Code\* – enter the numeric six-digit dial code; this is the code that matches the call record to the call pricing group. For example, you would enter 702 for call made to Nevada. When the call records is matched, it matches from the most specific to the least specific, for example, if I have a 7022 and a 702 code, my 7022160266 number matches on the 7022 dial code first.
  - Country – type-in the country name, if applicable.
  - State – type-in the state name, if applicable.
  - Abbv\* – type-in the two-digit abbreviation for the dial code, for example, the abbreviation of Nevada would be NV.
  - City – type-in the name of the city the code applies to, if applicable.
8. Once you click the row marked with an asterisk to enter the code, a new row appears at the top of the list to allow you to add multiple items at one time.

### **Deleting**

9. Click the dial codes group to highlight. There are three ways to delete a group:
  - Within the tool bar directly above the Navigation pane, click the red 'X'.
  - Within the toolbar directly above the Navigation pane, click on the Delete Dial Codes Group button.
  - Within the Actions pane, click the Delete Dial Codes Group link.
10. With either option, a warning message appears verifying that you really want to delete the rate group. In addition, if the group is associated to a call pricing the associate will also be deleted.
11. Once you click yes within the message box, the dial codes group is removed from the system.

12. Within the Actions ribbon group, click the Save (to save and stay) button. Click the Save & Close (to save and exit) button, or click on the Save & New (to save and refresh the screen) button to continue adding in dial codes.

---

## Call Types

Within call types, you define which calls that you allow your customers to make through you switch(s).

### Adding/Deleting a Call Type

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next Call Record Settings.
3. Click Call Types.

#### Adding

4. There are three ways to add a type:
  - Within the tool bar directly above the Navigation pane, click the dropdown arrow next to New. From the list, select Call Types.
  - Within the toolbar directly above the Navigation pane, click the Add Call Types button.
  - Within the Actions pane, click the Add Call Types link.
5. With either option, the General-Call Types window opens. Within the top pane complete the following fields (required fields are marked with an asterisk (\*)):
  - Call Type\* – type in the name of the call type, for example, INTNL, LDist, Local, Inhouse, etc.
  - Type of Service Name – click on the dropdown arrow to access a list and from the list, select the type of service name associated to the call type.
  - Do Not Bill – this field determines whether the call type is included in billing, the field defaults to no checkmark, meaning that the call type will be included in the bill. Click the field to insert a checkmark to indicate that the call type will not be included in the bill.

---

**!** For the next section to make sense, you need to add a Call Pricing Group into the database. Please refer to Call Pricing Group → Add a Call Pricing Group for more detail.

---

6. Within the lower portion complete the following fields (required fields are marked with an asterisk (\*)):
  - Call Pricing Group\* – click the dropdown arrow to access a list, and from the list, select the Call Pricing Group.

---

**!** In the event that the call record does not match any dial code group, the call will be priced using this pricing.

---

- First Period – type in the number of seconds for the first time period of billing. For example, the first 60 seconds of a call may cost more or less than the rest of the call.
- First Cost – type-in the cost for the first period of billing.
- Other Period – type-in the number of seconds for the other periods, for example, for each 180 seconds of a call you charge a different rate.
- Other Cost – type in the cost for the other period.
- Grace Time – the information in this field does not apply to re-pricing your calls, we will use this field in the future when UCE is integrated into CAIRS.
- Adjustment – the information in this field does not apply to re-pricing your calls, we will use this field in the future when UCE is integrated into CAIRS.
- Dial Codes Group – click the dropdown arrow to access a list and from the list, select the dial code group associated with the call type.
- Use Zone Billing – this field works in conjunction with Dial Code Groups. Click the field to insert a checkmark indicating you want to use zone billing, which in turn prices your calls based on the dial code group. If a call record does not match any code within the dial code group, the default pricing goes into effect.

### **Deleting**

7. Click the call type to highlight. There are three ways to delete a type:
8. Within the tool bar directly above the Navigation pane, click the red 'X'.
9. Within the toolbar directly above the Navigation pane, click the Delete Call Types button.
10. Within the Actions pane, click the Delete Call Types link.
11. With either option, a warning message appears verifying that you really want to delete the type. In addition, if the group is associated to a call pricing group the associate will also be deleted.
12. Within the Actions ribbon group, click the Save (to save and stay) button. Click the Save & Close (to save and exit) button, or click the Save & New (to save and refresh the screen) button to continue adding in call types.

---

## **Call Pricing Group**

Finally, the section where we pull it all together, within Call Pricing Group you are associating the dial codes with a Rate Group and Zone Group. In addition, if you are using foreign currency, you can enter in an exchange rate.

Once you have added the call pricing group, you can associate the dial codes to the rate and zone groups. Often times, a site only needs one call pricing group to associate all the dial codes to the appropriate rates and zones.

## Adding a Call Pricing Group

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next Call Record Settings.
3. Click Call Pricing Group.
4. There are three ways to add a group:
  - Within the tool bar directly above the Navigation pane, click the dropdown arrow next to New. From the list, select Call Pricing Group.
  - Within the toolbar directly above the Navigation pane, click the Add Call Pricing Group button.
  - Within the Actions pane, click the Add Call Pricing Group link.
5. With either option the General – Call Pricing Group window opens. There are two panes of information, the top pane allows you to name the group whereas the bottom pane allows you to assign an exchange rate.
6. Within the top pane, click the field next to Call Pricing Group and type-in the name of the group. This is a required field.
7. Within the lower pane, click the row marked with an asterisk (\*) to add a new record, complete the following fields (required fields are marked with an asterisk (\*)):
  - Conversion Rate – click the field to access a dropdown arrow, then click on the dropdown arrow to access a calendar, from the calendar select the effective date of the exchange rate. The calendar defaults to today's date to change the date, to change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.
  - Conversion Rate\* – type-in the multiplier of the conversion rate. The exchange rate is a multiplier to the dollar, for example, if the yen is worth twice the dollar, you would enter a 2 in the field.
8. Within the Actions ribbon group, click the Save (to save and stay) button, click the Save & Close (to save and exit) button, or click on the Save & New (to save and refresh the screen) button to continue adding in call pricing groups.

## Adding/Deleting Dial Codes to a Group

1. Click the System Admin menu.
2. In the Navigation pane, click on the plus sign (+) next Call Record Settings.
3. Click Call Pricing Group. The list of existing call pricing group populates to the right. Double click the record to open the General – Call Pricing Group window.

**Adding**

4. Within the Show ribbon group, click on the Dial Codes Group button. The screen changes to display the Rate and Zone Associations. Next to each Dial Code Group Name click the plus sign (+) to access the codes. For each code complete the following information:
  - Rate Group – click the dropdown arrow to access a list and from the list, select the rate group. Remember that a rate group defines how much is charges for each period of a call, for example the first 60 seconds vs. the remaining increments.
  - Zone Group – click the dropdown arrow to access a list and from the list, select the zone group. Remember the zone group, determines the time the rates are available, they could be the daytime, evening or night hours.

**Deleting**

5. Click the group that you want to delete. There are three ways to delete a type:
6. Within the tool bar directly above the Navigation pane, click the red 'X'.
7. Within the toolbar directly above the Navigation pane, click on the Delete Call Types button.
8. Within the Actions pane, click the Delete Call Types link.
9. With either option, a warning message appears verifying that you really want to delete the type, within the box click Yes to continue or No to cancel the operation.
10. Within the Actions ribbon group, click on the Save (to save and stay) button, click on the Save & Close (to save and exit) button, or click on the Save & New (to save and refresh the screen) button to continue adding in call pricing groups information.

---

**Digits to Add**

Within Digits to Add, you can add digits to the beginning of each call record extension collected. This allows different extension lengths within your CAIRS database and your call record data. For example, if you call record data only collects a four digits extension and your CAIRS database contains seven-digit extension you can use this option to append each call record with the additional three digits.

**Adding/Deleting Digits to Add**

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next Call Record Settings.
3. Click Digits to Add
4. There are two ways to manage your digits to add:
  - Within the toolbar directly above the Navigation pane, click the Add Digits to Add button.

- Within the Actions pane, click the Add Digits to Add link.
5. With either option, the General – Digits to Add window opens. There are two panes of information the Digits to Add pane and the Digits to Add Details.
  6. Within the Digits to Add pane, complete the following information (required fields are marked within an asterisk (\*)):
    - Switch Name \* - click the dropdown arrow to access a list and from the list, select the switch name of where the call records are coming from.
    - Disable – this field defaults to be blank, to disable the digits to add, click on the checkbox to insert a checkmark. The checkmark disables the system from appending the call record extension with the digits.
    - Within the Digits to Add Details pane, complete the following information (required fields are marked within an asterisk (\*)):
      - Starting With \* - enter the digits that start the call records, this is sort of a search parameter to tell CAIRS what records to look for. For example, if you are collecting 45000 and you want to append the numbers with 21, you would enter a 4 in this field, each call record that started with a four and is 5 digits long, CAIRS would append with a 21.
      - Ext Length \* - type in the length of the extension as it is collected from your switch
      - NNX Info to Add \* - type-in the digits to append to the start of the extension.

### **Deleting**

7. Click the group that you want to delete. There are three ways to delete a type:
8. Within the tool bar directly above the Navigation pane, click the red 'X'.
9. Within the toolbar directly above the Navigation pane, click on the Delete Digits to Add button.
10. Within the Actions pane, click the Delete Call Types link.
11. With either option, a warning message appears verifying that you really want to delete the selection, within the box click Yes to continue or No to cancel the operation.
12. Within the Actions ribbon group, click on the Save (to save and stay) button, click on the Save & Close (to save and exit) button, or click on the Save & New (to save and refresh the screen) button to continue adding information

---

## **Call Record General Settings**

Call Record Settings allow your CAIRS administrator and a Unique Communications Representative determine how CAIRS will deal with call records and some related

functions. To learn more about these settings please see the System Settings → Settings → Category - Call Records.



# Billing Settings

Within Billing Settings, you are configuring your billing reports for Official and Unofficial accounts in Billing Report Setup. Within Billing General Settings, you are defining how CAIRS bills your one-time, recurring and call charges.

---

## Billing Report Setup

This menu option allows you to design the appearance of your bills. The following menu options are available within Billing Reports:

- Official Report Setup
- Unofficial Report Setup
- Combined Official Report Setup
- Combined Unofficial Report Setup
- Billing Information
- Mailed Bill Elements

The first four options allow you to design the bills for the appropriate account type whether official or unofficial.

When you add a Billing Report Configuration, there are a few panes of information. The Report General Settings pane allows you to name the report, designate your report separation options, and indicate whether the report is generated to the Subscriber Portal. The second pane contains the element relating to the header rows of the report. These element types maybe lines, dates, etc.

The Report Body Sections allows you to create what information you want to see within the report. For example, if you want to see a report for call charges and one-time charges or a report for all charges. For each element type, you can determine the page location as well as font, font size and style.

In addition to determining the element types, you also place single fields from the account into the report. For example, if you want the account number to appear in the report, you would select Account Number from the Element Data Fields column. When you select an element data field, the element type auto-populates with Data Field Value.

## Important Considerations:

We will cover the process once within the manual, as the process to create a configuration for official accounts is the same as the process for unofficial accounts.

When working within the Report Header Rows pane and the Report Body Sections pane, the information you select works from the top of the page down.

The Report Preview pane will show a preview of the report every time you add a new element. Also, a new pdf window opens with the newly added element.

When you select a field from the Element Data Fields column, it is a good idea to enter in text, for example, if you select account number from the list and enter in nothing in the text field, only the account number prints on the report. However, if you type-in Account Number in the text field, the text Account Number appears before the actual number.

The Element Data Field is used to place single values into the report.

The Element Type is used to place large amount of data into the report.

## Creating a New Billing Report Configuration

1. Click the System Admin menu.
2. In the Navigation pane, click Billing Settings.
3. Click Billing Report Setup.
4. Select either Official Report Setup or Unofficial Report Setup.
5. Within the Actions pane, click either Add New Official Report Setup (when creating an Official Report) or Add New Unofficial Report Setup (when creating an Unofficial Report).
6. The General – Alternate Billing Report Setup window opens.
7. Within the Report General Settings pane complete the following information (required fields are marked with an asterisk (\*)):
  - Report Name\* – within the field type-in the name of the report, this should be as specific as possible so the user knows what the report will generate
  - Report Separation Option\* – click on the dropdown arrow to access a list, from the list select whether to separate the report based on of the following options:
    - Entire Account – when you generate the report, the entire account is contained within one report
    - By Number – each telephone number associated to the account creates a new report.
  - Generate For Portal – click on the field to insert a checkmark in the field, this indicates that the report generates to your Subscriber Portal. Leave the field blank to generate the bill to email or mail.
8. At this point, it is a good idea to save your progress, within the Actions ribbon group click on the Save button.

## **Report Header – Element Types**

9. The next step is to build the header of your report, within the Report Header Rows pane you can start to add elements into the report. To start adding in items, click on the row marked with an asterisk (\*), this row is always used to add new items. There are two different ways to proceed
10. First, you can select an Element Type; these are items like page numbering, text, etc. To add an Element Type, click on the dropdown arrow to access the following list, make the appropriate selection:
  - Data Field Value – when you select Data Field Value, you must also select a option within the Element Data Field. This allows the report to pull information from the account to place into the report. For example, the account number, previous balance, etc. Please remember that you are still working in the header of your report, so you may want to add only basic elements and information.
  - Date and Time Generated – inserts the date and time of when you generated the report
  - Empty Row – inserts an empty row
  - Horizontal Line – inserts a horizontal line
  - Page Numbering – inserts that page numbers
  - Text Only – when you select Text Only, you can type the text into the Text column or you can click on the Text Editor tab at the bottom of the Report Preview pane to type-in or edit the text.
11. If you selected the Data Field Value in the Element Type column you must make a selection within the Element Data Field, there are several selections available. Please keep in mind when making a selection that the information that will display is a single piece of information, there will be no details.
12. If you selected Text in the Element Type column, you must type-in the text within the column. If there is, a large amount of text to type-in you can click on the Text Editor tab, located at the bottom of the Report Preview pane, and type-in the complete text.
13. Once you have completed the first three columns, it is time to determine how you want the element to appear, complete the following information:
  - Text And Data Output Option – click on the dropdown arrow to access a list of the following options:
    - Text Space Data – this options place a space after the text and then starts the next column of information
    - Text Tab Data – this option places a tab after the text, this allows the report to be formatted more evenly
    - Keep with Next Text – this option keeps the text and data information together, if selected, multiple items will print on one line, for example, if you have 3 data field value, they will appear on the same row

- Left Justify Text Right Justify Data – this options left justifies the text and right justifies the data, for example, if you have the text of Account Number, the text 'Account Number' is justified to the left and the actual number is justified to the right.
- Center – this options centers the information on the page
- Right Justify – this options justifies the information to the right hand side of the page

**!** If you have multiple Data Field Values group together, you can decide whether to place them on the same line. If you select either the Text Space or Text Tab Data, each new data field appears on its own line. If you select Keep with Next Text for each of the values listed together, then they appear on the same line.

- Font Name, Size, and Style – click on the row to highlight. Within the Report Header Actions ribbon group, click on the Change Font button to access the Font pop-up opens. Make any necessary changes to the font, style or size, when complete click on the OK button. The names of your selections appear in the fields. Alternatively, you can type in the font name and size into the fields. Within the Font Style field, click on the dropdown arrow to access a list, from the list select one of the following: Regular, Bold, Italic, Underline, Strikeout.
14. Within the Begin Include Date and End Include Date, you can determine what date ranges you want to include within the report. Click on the dropdown arrow to access a calendar, from the calendar select the first date to include in the report and/or the last date to include within the report. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.
  15. You can also select a specific billing cycle to include in the report, within the Include On Billing Cycle field, click on the dropdown arrow to access a list of the billing cycles setup within your database, from the list select the cycle to include in the report.
  16. Continue adding Element Types and/or Element Data Fields into the header of your report. When you are finished, click on the Save button within the Actions ribbon group.

### **Report Header – Element Data Fields**

17. As stated earlier, the Element Data Field takes bits of information from the account to place into the report. An example would be, if you wanted the account number to appears somewhere within the report or the previous balance. To learn more about the Element Date Fields, please the next section. It is important to note that when make a Element Data Field selection, the field name that appears in the field does not print in the report, you must add your own text.

### **Report Body– Element Data Fields**

18. Now that you have created the header of your report, it is time to determine what you want in the body. What information do you want to see within your report? It is best to start entering the single value before you start adding in a large group of information. This is where you will use the Element Data Field to place information into the report.
19. Within the Element Data Field, click on the dropdown arrow to access a list of the items that you can place into your report. These elements are fields from the account that contain a single value, for example, the account number, previous balance, etc. When you select the data field, Element Type auto-populates with Data Field Type. Below is a list of the values within the dropdown, if special circumstances are needed they are indicated next to the value:

- Account Number
- Account Previous Balance
- Bill Cycle Period No Fiscal Year
- Bill Cycle Period With Fiscal Year
- Bill End Date
- Bill End Month and Year

\*\*Often times charges from Vendors arrive later than when you produce the bills, the following fields allow you to report on charges from previous months that may have arrived late.

- Bill End Month and Year 2 Months Previous
- Bill End Month and Year Next 2 Months
- Bill End Month and Year Next Month
- Bill End Month and Year Previous Month
- Bill Start and End Date
- Bill Start Date
- Configured Item Name or Number – displays the telephone number, cell phone number, circuit name, etc that is associated to the account
- Configured Item Type – displays the type of item whether a circuit, telephone number, etc

\*\*The Directory fields pertain to those accounts associated to a telephone number or cell phone number. If these fields are placed into a report you should always select the report separation by number, this allows the proper information to appear for each new number.

- Directory Building Name
- Directory Directory Building Name
- Directory Job Description

- Directory Office Symbol
- Directory Personnel
- Directory Site Name
- None
- Organization Name – this field displays the bottom most name of the associated organization hierarchy.
- Organization Path – this field displays the complete path the associated organization. If you want to display the organization this is, the better choose of the two fields.

\*\*If you select Report Separation by Number then you should select a total report based on report separation.

- Total Call Charges By Account
- Total Call Charges By Report Separation
- Total Charges by Account
- Total One Time Charges By Account
- Total One Time Charges By Report Separation
- Total Payment and Adjustments By Account
- Total Recurring Charges by Account
- Total Recurring Charges by Report Separation
- Total Reimbursable Call Charges By Account
- Total Reimbursable Charges by Account
- Total Reimbursable One Time Charges by Account
- Total Reimbursable Recurring Charges by Account

20. Once you have selected the element to place in the report, it is time to determine how you want the element to appear, complete the following information:

- Text And Data Output Option – click on the dropdown arrow to access a list of the following options:
- Text Space Data – this options place a space after the text and then starts the next column of information
- Text Tab Data – this option places a tab after the text, this allows the report to be formatted more evenly
- Keep with Next Text – this option keeps the text and data information together, if selected, multiple items will print on one line, for example, if you have 3 data field value, they will appear on the same row

- Left Justify Text Right Justify Data – this options left justifies the text and right justifies the data, for example, if you have the text of Account Number, the text 'Account Number' is justified to the left and the actual number is justified to the right.
- Center – this options centers the information on the page
- Right Justify – this options justifies the information to the right hand side of the page

**!** If you have multiple Data Field Values group together, you can decide whether to place them on the same line. If you select either the Text Space or Text Tab Data, each new data field appears on its own line. If you select Keep with Next Text for each of the values listed together, then they appear on the same line.

21. Font Name, Size, and Style – click on the row to highlight. Within the Report Header Actions ribbon group, click on the Change Font button to access the Font pop-up opens. Make any necessary changes to the font, style or size, when complete click on the OK button. The names of your selections appear in the fields. Alternatively, you can type in the font name and size into the fields. Within the Font Style field, click on the dropdown arrow to access a list, from the list select one of the following: Regular, Bold, Italic, Underline, Strikeout.
22. Within the Begin Include Date and End Include Date, you can determine what date ranges you want to include within the report. Click on the dropdown arrow to access a calendar, from the calendar select the first date to include in the report and/or the last date to include within the report. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.
23. You can also select a specific billing cycle to include in the report, within the Include On Billing Cycle field, click on the dropdown arrow to access a list of the billing cycles setup within your database, from the list select the cycle to include in the report.
24. Continue adding Element Data Fields into the body of your report. When you are finished, click on the Save button within the Actions ribbon group.

### **Report Body – Element Types**

25. The element types within the report body are a little different than those within the heading, these element types represent a large amount of data that you want to place into your report. For example, the call record detail for an account, this selection is going to print all the call records associated to the account for the specified period.
26. Click the dropdown arrow to access a list, from the list select one of the following element types:
  - Call Record Detail
  - Call Record Detail Separated By Call Type

- Call Record Summary By Call Type
- Data Field Value
- Empty Row
- Horizontal Line
- NonReimbursable Call Record Detail
- NonReimbursable Call Record Detail Separated By Call Type
- NonReimbursable One Time Charge Detail
- NonReimbursable Recurring Charge Detail
- One Time Charge Detail
- Recurring Charge Detail
- Reimbursable Call Record Detail
- Reimbursable Call Record Detail Separated By Call Type
- Reimbursable Recurring Charge Detail
- Text Only

27. Once you have selected the element to place in the report, it is time to determine how you want the element to appear, complete the following information:

- Text and Data Output Option – click on the dropdown arrow to access a list of the following options:
  - Text Space Data – this option places a space after the text and then starts the next column of information
  - Text Tab Data – this option places a tab after the text, this allows the report to be formatted more evenly
  - Keep with Next Text – this option keeps the text and data information together, if selected, multiple items will print on one line, for example, if you have 3 data field value, they will appear on the same row
  - Left Justify Text Right Justify Data – this option left justifies the text and right justifies the data, for example, if you have the text of Account Number, the text 'Account Number' is justified to the left and the actual number is justified to the right.
  - Center – this option centers the information on the page
  - Right Justify – this option justifies the information to the right hand side of the page

---

**!** If you have multiple Data Field Values group together, you can decide whether to place them on the same line. If you select either the Text Space or Text Tab Data, each new data



field appears on its own line. If you select Keep with Next Text for each of the values listed together, then they appear on the same line.

---

28. Font Name, Size, and Style – click on the row to highlight. Within the Report Header Actions ribbon group, click on the Change Font button to access the Font pop-up opens. Make any necessary changes to the font, style or size, when complete click on the OK button. The names of your selections appear in the fields. Alternatively, you can type in the font name and size into the fields. Within the Font Style field, click on the dropdown arrow to access a list, from the list select one of the following: Regular, Bold, Italic, Underline, Strikeout.
29. Within the Begin Include Date and End Include Date, you can determine what date ranges you want to include within the report. Click on the dropdown arrow to access a calendar, from the calendar select the first date to include in the report and/or the last date to include within the report. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.
30. You can also select a specific billing cycle to include in the report, within the Include On Billing Cycle field, click on the dropdown arrow to access a list of the billing cycles setup within your database, from the list select the cycle to include in the report.
31. Continue adding Element Data Fields into the body of report. When you are finished, click on the Save & Close button within the Actions ribbon group to return to the Billing Report Setup list.

## Preview Actions

As you know, when you are configuring your billing report the preview window displays any changes as you make them. In some situations, this may get very distracting, so you can disable the preview window.

Within the Preview Actions ribbon group, click the Disable Automatic Preview. This highlights the button and disables the preview; the last preview remains in the pane.

Even though you have disabled the preview, you can refresh the Report Preview pane by clicking the Generate Preview button within the Preview Actions ribbon group.

If you want to activate the preview pane again, simply click the Disable Automatic Preview button to remove the highlight.

## Deleting an Element

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to System Setting.
3. Click on Billing Report Setup, within the right hand click on either Official Report Setup or Unofficial Report Setup.
4. Before the Billing Report Setup list populates, you must either:

5. Within the search box, type-in any portion of the record and then click the magnifying glass.
6. Click the Show All button.
7. Within the list, double click on the report name to access the General - Alternate Billing Report Setup window opens.
8. Within either the header or body panes, click on the element that you want to delete to highlight your selection. Right click the record selector box (located just left of the element name) and from the pop-up box, click Delete.
9. Once you click Delete, a message box appears verifying that you really want to delete the element. Click Yes within the box to continue or No to cancel the operation.
10. Once selected, CAIRS draws a line through the category allowing you to delete multiple elements at once.
11. If you do not want to delete the element, right-click the record to access a pop-up menu. From the pop-up, click Undelete.
12. Once you select Undelete, a message box appears verifying that you really want to keep the element. Click Yes within the box to continue or No to cancel the operation.
13. Within the Actions ribbon group, click the Save (to save and stay) button or click the Save & Close (to save and exit) button.

## Moving a Header Element Up or Down

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to System Setting.
3. Click on Billing Report Setup, within the right hand click on either Official Report Setup or Unofficial Report Setup.
4. Before the Billing Report Setup list populates, you must either:
5. Within the search box, type-in any portion of the record and then click the magnifying glass.
6. Click the Show All button.
7. Within the list, double click on the report name to access the General - Alternate Billing Report Setup window opens.
8. Within the Report Header Rows pane, click on the element to move within the report, then click on the Move Element Up or Move Element down button within the Report Header Actions ribbon group.
9. The element move within the list, until you click on the Save button, the record selector box contains the outline of a pencil.
10. To finalize your moves, click on the Save button within the Actions ribbon group.

## Moving a Body Element Up or Down

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to System Setting.
3. Click on Billing Report Setup, within the right hand click on either Official Report Setup or Unofficial Report Setup.
4. Before the Billing Report Setup list populates, you must either:
5. Within the search box, type-in any portion of the record and then click the magnifying glass.
6. Click the Show All button.
7. Within the list, double click on the report name to access the General - Alternate Billing Report Setup window opens.
8. Within the Report Body Sections pane, click on the element to move within the report, then click on the Move Element Up or Move Element down button within the Report Body Actions ribbon group.
9. The element move within the list, until you click on the Save button, the record selector box contains the outline of a pencil.
10. To finalize your moves, click on the Save button within the Actions ribbon group.

## Deleting a Billing Report

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to System Setting.
3. Click on Billing Report Setup, within the right hand click on either Official Report Setup or Unofficial Report Setup.
4. Before the Billing Report Setup list populates, you must either:
5. Within the search box, type-in any portion of the record and then click the magnifying glass.
6. Click the Show All button.
7. Once the Alternate Billing Report Setup displays, complete one of the following actions to delete the report:
8. Highlight the report within the list. Within the tool bar directly above the Navigation pane, click the red X
9. Highlight the report within the list. Within the Actions pane, click the Delete Billing Report Configuration link.
10. Once you click Delete, a message box appears verifying that you really want to report, click Yes within the box to continue or No to cancel the operation.

---

## Combined Report Setup

The Combined Report allows you to combine two or more of your reports together into one. This allows you to print or view all the telephone numbers associated to an organization in one report. All the call records, one-time and recurring charges display on one bill.

We will cover the process once within the manual, as the process to create a combined report for official accounts is the same as the process for unofficial accounts.

### Creating a Combined Report

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to System Setting.
3. Click on Billing Report Setup, within the right hand click on either Combined Official Report Setup or Combined Unofficial Report Setup.
4. Within the Actions pane, click the Add New Billing Report Configuration Main Combined link
5. The General – Combined Billing Report Setup window opens. Within the Combined Report General Settings pane, complete the following two fields (required fields are marked with an asterisk (\*)):
  - Report Name \* - within the field type-in the name of the report, this should be as specific as possible so the user knows what the report will generate
  - Generate For Portal - click on the field to insert a checkmark in the field, this indicates that the report generates to your Subscriber Portal. Leave the field blank to generate the bill to email or mail.
  - At this point, you should have your progress; within the Actions pane click the Save button to continue working with this report.
6. Within the Reports to Include pane, you determine what reports you want to combine into one. Click the dropdown arrow to access a list, from the list select the first report to insert into the report.
7. Continue to select the report to combine into one.
8. Within the Combined Report Preview pane, a preview of what the report will look like appears within the pane.
9. Once you have completed the combining process, it is time to save your report, within the Actions pane click the Save & Close button to return to the Billing Report Setup list.

### Removing a Report from a Combined Report

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to System Setting.

3. Click on Billing Report Setup, within the right hand click on either Combined Official Report Setup or Combined Unofficial Report Setup.
4. Before the Billing Report Setup list populates, you must either:
  - Within the search box, type-in any portion of the record and then click the magnifying glass.
  - Click the Show All button.
5. Within the Reports to Include pane, click the report that you want to remove to highlight the row. Right click the record selector box (located just left of the name) and from the pop-up box, click Delete.
6. Once you click Delete, a message box appears verifying that you really want to delete the report. Click Yes within the box to continue or No to cancel the operation.
7. Once selected, CAIRS draws a line through the category allowing you to delete multiple reports at once.
8. If you do not want to delete the report, right-click the record to access a pop-up menu. From the pop-up, click Undelete.
9. Once you select Undelete, a message box appears verifying that you really want to keep the report. Click Yes within the box to continue or No to cancel the operation.
10. Within the Actions ribbon group, click the Save (to save and stay) button or click the Save & Close (to save and exit) button.

## Deleting a Combined Billing Report Setup

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to System Setting.
3. Click on Billing Report Setup, within the right hand click on either Combined Official Report Setup or Combined Unofficial Report Setup.
4. Before the Billing Report Setup list populates, you must either:
  - Within the search box, type-in any portion of the record and then click the magnifying glass.
  - Click the Show All button.
5. Once the Combined Alternate Billing Report Setup list displays, complete one of the following actions to delete the report:
  - Highlight the report within the list. Within the tool bar directly above the Navigation pane, click the red X
  - Highlight the report within the list. Within the Actions pane, click the Delete Billing Report Configuration Main Combined link.
6. Once you click Delete, a message box appears verifying that you really want to report, click Yes within the box to continue or No to cancel the operation.

## Generating a Report

To generate the reports, you access the account through Accounting → Accounts → Official or Unofficial. Once you have the account open, you can click on the Sharing Tab and select the PDF option. A small pop-up opens to allow you to determine how to export the report, click the option button next to the Export report for selected bill. Another pop-up opens allowing you to select one of the report configurations you have created. Once you click the Generate Report button, the report appears on screen for you to save, print or email.

## Billing Information

This information appears as the return address associated with the printed and mailed bill.

### ***Adding/Deleting a Global Billing Information***

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to System Settings. Click Billing Report Setup then Billing Information.

#### **Adding**

3. Within the Actions pane, click the Add New Billing Global Info link
4. The Bill Setup window opens. Complete the following information:
  - Contact\* – type-in the bill contact name.
  - Street\* – type-in the street address.
  - City\* – type-in the city name.
  - State Province – type-in the province name.
  - Zip Postal – type-in the zip code.
  - Country Region – type in the country or the region.
  - Contact Number – type in your contact telephone number.
  - Web Site – type in the web site.
  - Bill Icon – type-in the icon description.
  - Bill Notice Title – type-in the notice title.
  - Certify Notice Text – certify the notice text to validate.

#### **Deleting**

5. Within the list, highlight the contact to delete. There are two ways to delete a contact:
6. Within the tool bar directly above the Navigation pane, click the red X.
7. Double click the contact within the list. The Bill Setup window opens. Within the Actions ribbon group, click the Delete button.

8. Once you click Delete, a message box appears verifying you really want to delete the bill setup. Click Yes within the box to continue or No to cancel the operation.
9. Within the Actions ribbon group, click Save (to save and stay), click Save & New (to save and open a new record), or click Save & Close (to save and exit).

## Mailed Bill Elements

The Mailed Bill Elements allows you to customize the appearance of the bills sent to your customers. You create an overlay for each item you want to appear on the bill. For example, if you want the billing address, barcode and a logo, you will create three different overlays. The process of building the overlay is simple and you can play with the positions of each item to get it to your liking.

When creating an overlay, you can apply several different elements to your bill. The following is a list of each element:

- Billing Address – displays the billing or mailing address associated with the account.
- Horizontal Line – allows you to create a solid line across your bill to divide the bill into parts.
- Text – allows you to enter in your own text message.
- Image – allows you to place an image within your bill, commonly used to insert your logo.
- Statement Balance Summary – allows you to display a brief summary of the account.
- Account Bar Code – allows you to place the account code printed as a barcode.
- Account Overdue Status – displays the current status of the account
- Account Closed Text – allows you to enter text for a closed account

Once you have decided which elements you want, you will need to decide where on the bill each item appears. The following is a list of element appearance options:

- Page Range\* – you can choose to have the element appear:
  - Within First Section – the element appears within the top section of the first page of the bill. This allows you to line up each element to appear in an envelope for mailing purposes.
  - Within Header – the element appears within the header of every page of the bill.
  - Every Page – the element appears on every page in the position you designate.
  - First Page – the element appears on the first page only.
  - Last Page – the element appears on the last page only.
  - All But First Page – the element appears on every page of the bill except the first page.

- All But Last Page – the element appears on every page of the bill except the last page.

Once you decide on which page(s) the element appears on, you then designate the elements position on the page. CAIRS measures each of the positions in pixels allowing the appearance of the bill to be the same on different computer monitor sizes and screen resolutions. The following two positions choices are available:

- Left Position\* – designate the position where the element appears on the page from the left margin.
- Top Position\* – designate the position where the element appears on the page from the top margin.

You may have to try several different positions to get the correct page location.

As you, add elements into the report, the report auto-saves. At the same time, the preview window changes to display the elements that you just added.

### ***Creating a New Bill Overlay***

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to System Setting. Click Billing Report Setup then Mailed Bill Elements
3. There are two ways to add an Billing Report Element:
  - Within the tool bar directly above the Navigation pane, click the dropdown arrow next to New. From the list, select Billing Report Element.
  - Within the Actions pane, click the Globally Manage Billing Report Elements link.
4. With either option, the Billing Report Elements Global Management window opens. Within the top pane, complete the following overlay information (required fields are marked with an asterisk (\*)):
  - Overlay Name – type-in the new overlay name, for example, Address, Barcode, etc.
  - Element Type\* – click the dropdown arrow to access a list and from the list, select one of the following options:
    - Billing Address – enters the billing address associated with the account number.
    - Horizontal Line – depending on the position, length and thickness you designate, a horizontal line is drawn on the bill. Generally, you use this to separate bill sections.
    - Text – select to enter your own text into a portion of the bill.
    - Image – select to enter in an image, for example, a logo, map, etc.
    - Statement Balance Summary – select to display a brief summary of the bill charges.



- Account Bar Code – select to display the account number printed in barcode.
  - Page Range\* – click the field to access a dropdown list and from the list, select one on the following options:
    - Within First Section – the element appears in the top section of the first page of the bill, allowing you to line the element up with an envelope for mailing purposes.
    - Within Header – the element appears within the header of every page of the bill.
    - Every Page – the element appears on every page in the designate position.
    - First Page – the element appears on the first page only.
    - Last Page – the element appears on the last page only.
    - All But First Page – the element appears on every page of the bill except the first page.
    - All But Last Page – the element appears on every page of the bill except the last page.
  - Left Position\* – type-in a number to have CAIRS place the element that many pixels from left margin, start with a one in this field to gauge where on the page the information displays, you can always change it later.
  - Top Position\* – type-in a number to have CAIRS place the element that many pixels from top margin, start with a one in this field to gauge where on the page the information displays, you can always change it later.
  - Line Length – type-in a number to have CAIRS draw a solid line across the bill (try typing in 530, this should make the line go all the across the paper.).
  - Line Thickness – type-in a number representing the line thickness (start with a 1 in this field and go up from there to gauge the thickness)
5. To learn more about the Text and Font Fields please see the Adding Text to a Bill Overlay section. To learn more about inserting an image, please see Adding an Image to a Bill.
- Element Inclusion Start Date – click the dropdown arrow to access a calendar, from the calendar select the first date to include the element within the report. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.
  - Element Inclusion End Date - click the dropdown arrow to access a calendar, from the calendar select the last date to include the element within the report. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.

6. As you add elements into the Billing Report Elements pane, the Preview pane changes to displays the elements added.
7. Within the Actions ribbon group, click the Close button to return to the Billing Report Elements list.

### ***Adding Text to a Bill Overlay***

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to System Setting. Click Billing Report Setup then Mailed Bill Elements
3. There are two ways to add a Billing Report Element:
  - Within the tool bar directly above the Navigation pane, click the dropdown arrow next to New. From the list, select Billing Report Element.
  - Within the Actions pane, click the Globally Manage Billing Report Elements link.
4. With either option, the Billing Report Elements Global Management window opens. Within the top pane, select Text as the Element Type.
5. Within the Text (lower left-hand corner) pane, type-in your text message as it will appear on the bill.
6. Complete the following fields to position the text on the bill.
  - Page Range\* – click the field to access a dropdown list and from the list select one on the following options:
    - Within First Section – the text appears in the top section of the first page of the bill.
    - Within Header – the text appears within the header of every page of the bill.
    - Every Page – the text appears on every page in the position that you designate.
    - First Page – the text appears on the first page only.
    - Last Page – the text appears on the last page only.
    - All But First Page – the text appears on every page of the bill except the first page.
    - All But Last Page – the text appears on every page of the bill except the last page.
  - Left Position\* – type-in a number to have CAIRS place the element that many pixels from left margin, start with a one in this field to gauge where on the page the information displays, you can always change it later.
  - Top Position\* – type-in a number to have CAIRS place the element that many pixels from top margin, start with a one in this field to gauge where on the page the information displays, you can always change it later.
  - Text – you can type-in your text here or in the Text pane.

- Font Name, Size and Style – within the Billing Report Element Actions ribbon group, click on the Change Font button to access the Font pop-up opens. Make any necessary changes to the font, style or size, when complete click on the OK button. The names of your selections appear in the fields. Alternatively, you can type in the font name and size into the fields. Within the Font Style field, type-in one of the following styles: Regular, Bold, Italic, Underline, Strikeout.
7. Element Inclusion Start Date – click the dropdown arrow to access a calendar, from the calendar select the first date to include the element within the report. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.
  8. Element Inclusion End Date - click the dropdown arrow to access a calendar, from the calendar select the last date to include the element within the report. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.
  9. Within the Actions ribbon group, click the Close button to return to the Billing Report Elements list.

### ***Adding an Image to a Bill***

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to System Setting. Click Billing Report Setup then Mailed Bill Elements
3. There are two ways to add a Billing Report Element:
  - Within the tool bar directly above the Navigation pane, click the dropdown arrow next to New. From the list, select Billing Report Element.
  - Within the Actions pane, click the Globally Manage Billing Report Elements link.
4. With either option, the Billing Report Elements Global Management window opens. Within the top pane, select Image as the Element Type.
5. Within the Image Attachment ribbon group, click the Attach Image button.
6. The Select the image file to attach window opens. Browse to the location of the file and once found, highlight the file name. Click the Open button.
7. The image appears in the pane on the lower right hand corner.
8. Complete the following fields to position the image on the bill:
  - Page Range – click the field to access a dropdown list and from the list select one on the following options:
    - Within First Section – the image appears in the top section of the first bill page.
    - Within Header – the image appears within the header of every bill page.
    - Every Page – the image appears on every page in the designated position.
    - First Page – the image appears on the first page only.

- Last Page – the image appears on the last page only.
  - All But First Page – the image appears on every page of the bill except the first page.
  - All But Last Page – the image appears on every page of the bill except the last page.
  - Left Position – type-in a number to have CAIRS place the image that many pixels from left margin.
  - Top Position – type-in a number to have CAIRS place the image that many pixels from top margin.
  - Element Inclusion Start Date – click the dropdown arrow to access a calendar, from the calendar select the first date to include the element within the report. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.
  - Element Inclusion End Date - click the dropdown arrow to access a calendar, from the calendar select the last date to include the element within the report. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.
9. Within the Actions ribbon group, click the Close button to return to the Billing Report Elements list.

### ***Deleting an Element***

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to System Setting. Click Billing Report Setup then Mailed Bill Elements
3. Within the Actions pane, click the Globally Manage Billing Report Elements link. This opens the Billing Report Elements Global Management window.
4. Within the Billing Reports Elements pane, right click on the record selector box (located just left of the Overlay name) and from the pop-up box, click Delete.
5. Once you click Delete, a message box appears verifying that you really want to delete the element. Click Yes within the box to continue or No to cancel the operation.
6. Once selected, CAIRS draws a line through the element allowing you to delete multiple elements at once.
7. If you do not want to delete the element, right-click the record to access a pop-up menu. From the pop-up, click Undelete.
8. Once you select Undelete, a message box appears verifying that you really want to keep the element. Click Yes within the box to continue or No to cancel the operation.

### ***Generating a Report***

To generate the reports, you access the account through Accounting → Accounts → Official or Unofficial. Once you have the account open, you can click on the Sharing Tab and select the PDF option. A small pop-up opens to allow you to determine how to export the report, click the option button next to the Export mailed report for selected bill. Once you click OK, the report appears on screen for you to save, print, or email.

---

## **Billing General Settings**

Billing General Settings allow your CAIRS administrator and a Unique Communications Representative determine how CAIRS bills for your one-time, recurring and call charges. To learn more about these settings please see the System Settings → Settings → Category - Billing.

### **Default Accounts**

Default Accounts provides a way for charges that are not already associated to an account or that cannot be assigned to an account to still be billed. There are two different default accounts, one for call charges and one for discrepancies.

The Default Account for Calls will be responsible for call charges that are associated to an extension that is not associated to an account. The call charges can be collected through UCE or can be imported through Vendor Media.

The Default Account for Discrepancies will be responsible for the difference between the invoice amount and the imported charges. These charges will only be seen when you import charges through Vendor Media Imports.

If you are using the Funded Program, negative balances for accounts can also be transferred to the default account. When funds become available the negative account balances will be transferred back to the original account.

#### ***Default Account for Calls***

1. Click System Admin
2. In the Navigation pane, click Billing Settings then Billing General Settings
3. There are two ways to add an default account for calls:
4. Within the toolbar directly above the Navigation pane, click the Manage Default Account for Calls button.
5. Within the Actions pane, click Manage Default Account for Calls link.
6. With either of the above options, the Update Settings popup opens.
7. Click on the dropdown arrow in the Default Account Number textbox, this brings up a list of all the account numbers within your database.
8. From the list, select the default account. Once the account is populated in the field, click the Update button.

9. As calls are processed or during the Update Call Record process the call records that do not have an associated account are associated to this account number.

#### **Changing the Account**

10. If you want to change the default account number, select a new one from the list and click on the Update button.

#### **Removing the Account**

11. If you want to remove the default account number, select the blank space at the top of the list and click the Update button.

### ***Default Account for Discrepancies***

1. Click System Admin
2. In the Navigation pane, click Billing Settings then Billing General Settings
3. There are two ways to add an default account for calls:
4. Within the toolbar directly above the Navigation pane, click the Manage Default Account for Discrepancies button.
5. Within the Actions pane, click Manage Default Account for Calls link.
6. With either of the above options, the Update Settings popup opens.
7. Click on the dropdown arrow in the Default Account Number textbox, this brings up a list of all the account numbers within your database.
8. From the list, select the default account. Once the account is populated in the field, click the Update button.
9. After you have imported charges through the Vendor Media Import, any discrepancies between the invoice and the detail files can be transferred to this account.

#### **Changing the Account**

10. If you want to change the default account number, select a new one from the list and click on the Update button.

#### **Removing the Account**

11. If you want to remove the default account number, select the blank space at the top of the list and click the Update button.

---

## **Currency Exchange Rate**

In CAIRS you can bill either with the dollar or foreign currency. In order to bill in a foreign currency and use the vendor media import, you will need to keep the exchange rate up-to-date. You need to change a few settings in order for you to bill in a foreign currency. To access the setting go to System Admin – Call Record Settings, you will need to adjust the following settings:

- Current Currency Symbol – displays the currency symbol you are using for all billing, for example the \$ sign.
- Days Till Expiration Warning – this setting determines the number of days before you receive an expiration warning for foreign currency. The default is 355 days, meaning that you must update the exchange rate every 355 days.
- Foreign Currency Expiration Warning – this setting works in conjunction with the ‘Days Till Expiration Warning’, if set to true then the administrator receives the warning, if set to false no warning is given.
- Foreign Currency Symbol – displays the foreign currency symbol if you are billing in a foreign currency
- Unit Value – displays the number of units for each value. For example, 100 units (cents) in \$1 or 100 pence in 1 pound.
- Use Foreign Currency – when set to True, all billing is in the foreign currency determined within your rate tables.

CAIRS will not be able to support the use of more than one form of currency. For example if you bill some accounts in dollars and some is yen, CAIRS will not be able to differentiate which account need yen and which need dollar. The currency that will be billed and used is the one you designate in the System Setting → Foreign Currency Symbol.

## Add New Billing Currency

1. Click System Admin
2. In the Navigation pane, click Billing Settings and then Currency Exchange Rate.
3. There are two ways you can start to add an exchange rate with either of the following methods,
  - Within the toolbar directly above the Navigation pane, click the drop-down arrow next to New, then select Currency Exchange Rate.
  - Within the Actions pane, click Currency Exchange Rate.
4. With either of the above options once selected the General – Currency Exchange Rate window opens. There are two panes of information the Billing Currency pane allows you to define the details of the rate such as symbol, culture, etc. The Exchange Rate pane allows you to determine the rate and direction.
5. Within the Billing Currency pane, complete the following fields, all fields are required to be completed before continuing:
  - Billing Currency \* - type-in the name of the currency for example: Euro, Yen, etc
  - Currency Culture \* - click on the dropdown arrow to access a menu and from the menu select the culture of the currency for example if you are using the Yen the culture would Japanese (Japan). You can search for the culture by typing in any portion of the country name into the text box in the upper right hand corner of the dropdown. Once selected the culture name appears in the field.

- Currency Symbol – Once you have selected a culture this field will automatically populate with the corresponding symbol
  - Default Conversion Direction – click on the dropdown arrow to access a menu from the menu select one of the following options:
    - To (system to foreign) – this is the default direction and will change imported invoices from the dollar to the foreign currency
    - To (foreign to system) – this does the opposite and will change the imported invoices from the foreign currency to the dollar
6. Once you have completed the fields, it is a good idea to save your progress, within the Actions ribbon group click on the Save button.
  7. Within the Exchange Rate pane, complete the following fields, all fields are required to be completed before continuing:
    - Exchange Rate – type in the current rate of exchange to the dollar, for example 1.25 means that \$1.2500 is equal to 1,0000 Euro. The complete exchange rate will appear in the Example pane so you can verify the rate.
    - Starting Date – click on the field to access drop-down arrow, once clicked a calendar displays. From the calendar, select the starting date for the rate. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.
    - Conversion Direction - click on the dropdown arrow to access a menu from the menu select one of the following options:
      - To (system to foreign) – this is the default direction and will change imported invoices from the dollar to the foreign currency
      - To (foreign to system) – this does the opposite and will change the imported invoices from the foreign currency to the dollar
  8. Once all the fields are complete you can save the exchange rate, within the Actions ribbon group click on the Save button to continue working or the Save & Close button to return to the list.



# Service Management

---

## General Error Log

General Error Log is where an administrator views certain system errors and exceptions. The log is designed to only collect errors Unique Communications has programmed to catch within the system.

### Viewing the Service Exception Log

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Service Management. Click General Error Log.
3. Before the General Error Log populates, you must either:
4. Within the search box, type-in any portion of the record and then click the magnifying glass.
5. Click the Show All button.
6. The log opens to the right, displaying all errors that have occurred within your system.
7. Double click any to view the Service Exception Log.
8. A window opens displaying the following read only information:
  - Date Time – displays the exception occurrence date.
  - System – displays the menu option name where the exception occurred.
  - Action – displays the name of the action taking place when the exception occurred.
  - Message – displays the message received by the user when the error occurred.
  - Description – display how many times this error was received.
  - Full Exception – displays the entire message received by the user when the error occurred.
9. Within the Actions ribbon group, click Close.

## Delete an Error Log

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Service Management. Click General Error Log.
3. Before the General Error Log populates, you must either:
4. Within the search box, type-in any portion of the record and then click the magnifying glass.
5. Click the Show All button.
6. The log opens to the right, displaying all errors that have occurred within your system, within the list, click on the log to delete.
7. Within the Actions pane, click the Delete Log button.
8. A warning message appears verifying that you really want to delete the log, within the box click Yes to continue or No to cancel the operation.

## Clear all errors

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to Service Management. Click General Error Log.
3. Before the General Error Log populates, you must either:
  - Within the search box, type-in any portion of the record and then click the magnifying glass.
  - Click the Show All button.
4. The log opens to the right, displaying all errors that have occurred within your system.
5. Within the Actions pane, click the Clear all errors link.
6. A warning message appears verifying that you really want to delete the entire log, within the box click Yes to continue or No to cancel the operation.

---

## Email Error Log

The Email Error Log lists the errors generated when CAIRS tries to authenticate or communicate with the SMTP server or SMTP recipient. The Email Error Log details the following:

- Error Date – displays the date the error occurred.
- Subject – attempted email's subject line.
- Error Message\* – error returned by SMTP server.
- Attachment Count- number of email attachments.

To view the details of a specific error:

Double click the error message. The Email Log Detail window opens.

The email error details display.

---

## Service Manager

The CAIRS Enterprise Services (CES) component is a windows service, which does background processing for CAIRS activities such as scheduling, summarizing data for reports, and WOPR server data collection and maintenance. Below is a list of the threads available:

- 411 Interface – Exports directory information to a 3rd party 411 system
- 911 Interface – Exports directory information to a 3rd party 911 system
- Ali File Transfer – transfers the updated Ali file to the desired location
- AS5300 Switch Sync – performs the sync between your CAIRS database and your AS5300 switch
- Call Record Auto Archive – automatically archives calls, these calls remain in your database
- Call Record Old Archive to Flat File Migration - – when enabled this process automatically removes call records from your database and into a zipped tab delimited text file
- Change Call Ownership – when you make a change to call ownership, this process starts automatically to update the call records with the new billing information for the proper date ranges. This will only update call records that have not been billed.
- Check UCE Status - Verifies that the data is being received from each UCE program
- Cisco Switch Sync - performs the sync between your CAIRS database and your Cisco Call Manager switch
- Clean Up Users Not Logged in - This process finds users within the System Admin --> Security --> Logged In Users list that have not been updated and removes the record from the list.
- Clear Old UCE Events - UCE send info to the CAIRS db, this clears out old events as new ones come in
- Create Payment Distribution - This should be removed as we have removed payment distribution from Accounting.
- Custom Report Distribution – if you are using global reporting this process needs to be enabled to run reports
- Data Sync - Performs any automatically scheduled Switch Data Syncs
- Delete old activity log records - Deletes any activity log records that are older than age specified to keep

- Deliver Bills - Creates the bill files specified for each account
- Directory Transfer Manager - Creates new Phonebook records for any new numbers in use on a set device
- Dynamic Billing Manager – generates new bills for accounts if you are using the Dynamic Billing System
- EWSD Data Sync - Performs any automatically scheduled EWSD Switch Data Syncs
- Execute Billing - Generates the new bills for accounts
- Find Overdue Accounts - Finds accounts in the database that are overdue
- Fix Billed Assignment Extension Out of Sync with Call Record Extension - This process looks at the child extensions and updates them to include the area code from the parent.
- Manage Preventive Maintenance Jobs – allows you to run PMJ on a schedule
- Metadata Import Manager – in order to use global reporting, metadata needs to be imported into your database. This process imports the metadata when needed.
- Net Tools Client – this process is for a future release
- Reassign Accounts - When you create a Bulk Accounts Change, this process runs to reassign one or more accounts with a Subscriber, org, billing start date, etc.
- Remove Duplicate Account Management Records - Searches Accounts for Equipment and Service for duplicate entries on the same record
- Reprice Calls - Processes any Reprice Calls requests
- Rollback Billing – this process must be enabled to allow you to roll back the bills that you have generated for multiple accounts. This does not effect the roll back process for an individual account.
- Schedule a Recurrence Pattern for the Data Sync - This process runs data and switch syncs that are set on a recurrence pattern.
- Search Engine Reindexing – reindexes SOLR search on a schedule
- Standard Reports (In Development) – this process will email standard pre-defined reports based on a schedule.
- Sync Accounts with Customer Code – syncs your accounts with their associated customer codes
- Toll Ticket Call Match Manager - This process matches the call records with the toll tickets.
- Toll Ticket Control Numbers Creator - The process creates the toll ticket control numbers.
- Transfer Imported Cross Connects - Attaches imported cable & pair records to the specified set or circuit segment

- UCE Collection Monitoring - This monitors UCE and provides a message when an error occurs.
- Update Account Status - When you update an account status this process runs to perform the action as indicated in Status Change Configuration.
- Update call record data - Appends the Account and Organization information to the call records
- Vendor Media Import Manager - Once you have selected a file to import this process runs to bring the file into the database as call records, equipment records, etc.

For each thread, the following information displays:

- Service Action Name
- Start Wait Time Sec
- Cycle Period Sec
- Startup Type
- Notification Level
- Disabled
- Date Last Started
- Date Last Completed
- Last Reported Status
- Status Last Updated Date
- Process Current Record
- Total Records To Process
- Additional Process Information
- Next Expected Run Time for Process

You can double click on any records to view and modify the complete thread details. There are three panes of information within the Service Manager Details window, they are:

- Service Information – display basic process information such as name, startup type (by cycle time or manual), notification level, etc.
- Status – this pane displays status updates on the process, for example the date last started and completed, total records processed, next run time, etc.
- Pending Runtimes – if you choose to schedule a process to run at a future time, this pane display the expected run time of the process

## Viewing the Service Log

When you access a process, you can view the Service Log. Within the Log ribbon group, click on the Service Log button. The following information displays:

- Date Time
- System
- Action
- Message
- Description
- Full Exception

## Viewing Process History

Please see Common Elements → History

## Run Process Now

At any time, you can run a CES process, double click on the process to access the Service Manager Details. Within the Special Actions ribbon group, click on the Run Process Now button. CES will run the current process; you will see the Monitoring CAIRS Remote Service Process popup. As the process runs, the status displays within the popup. If the process fails, you can click on the Error Details button within the popup to view the error details. If the process completes the status displays within the Status pane.

## Scheduling a Process

Double click on any process to open the Service Manager Detail window. Within the Special Actions ribbon group, click on the Schedule Process button, the Choose Date popup opens. The popup displays the current date and time to change the time, click on the dropdown arrow to access a calendar. From the calendar, select the date to run the process. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box. To change the time, click on the hour, minute or AM/PM field and type in the new time.

Once you have the new date and time selected, click on the OK button. The scheduled time appears in the Pending Runtimes pane.

In the Special Actions ribbon group is the Refresh Status Automatically button, click on this button to have CAIRS automatically refresh the screen.

## Monitor CES Processes

You can monitor all CES processes as they work through your data to complete the specific action. Within the Actions pane, click the Monitor CES Processes link, the CES Monitor window opens. There are two panes of information within this window, the Remote CES Instances and CES Processes.

The Remote CES Instances pane displays a list of all the CES instances and its status, computer name, version, last response date and time, some additional information (like IP address). The following statuses are available:

- Active – An active status means you CES is running and its version number matches that of your CAIRS. All active statuses are marked in a solid green line. Green is good!
- Initializing – This status is associated with a pulsing yellow line. This means that you CES is working to determine whether it is Active or Offline. This is important to monitor until it changes to Green or Red.
- Offline – The status is marked in a solid red line. This means that you CES is offline. There are a couple of causes, first your version numbers do not match, update either CES or your CAIRS. Second, the instance of CES is no longer valid, meaning you may have changed servers, if this happens you can delete all offline instances of CES.
- Duplicate – This status is marked in a solid purple line. This is status needs immediate attention. This means that there are duplicate instances of CES running; this can cause damage to your CAIRS. You need to stop the duplicate instance and uninstall.
- Obsolete – An obsolete status means that your CES is out-of-date. If your CES is actively running, the status will remain in obsolete, you need to update you version immediately. If the instance of CES is offline, the status changes to obsolete after the initiation is complete, you can delete this instance of CES.
- The CES process pane displays an individual status of all the different CES processes available. For each process there are three-color options, they are as follows:
  - Green – this means the process is completed or has not yet been initialized
  - Red – this means that you have disabled the process. You can enable the process by closing out of the monitor, open the process from the Service Manager list and remove the checkmark from the disabled field.
  - Maroon – this means the process is currently running, when completed the color will change to green.

To view further details of the process, you can close out of the CES Monitor and open the individual process through the Service Manager list.

## Activity Log Conversion Task

This allows administrators to convert the activity log into the new format to include a few fields that we recently added to the history section. Currently, CAIRS places all activity in an old SQL table that requires you to convert them into the new format to see a few fields that we recently added. This conversion task specifically applies to the Detailed List when viewing the Activity Log within System Admin → Security → Activity Log.

### ***Add/Delete New User Activity Log Conversion***

1. Click the System Admin menu.

2. In the Navigation pane, click the plus sign (+) next to Service Management. Click Activity Log Conversion Task.
3. Within the Actions pane, click the Add New User Activity Log Conversion link.
4. The General – User Activity Log Conversion Task window opens.

### **Add**

5. Complete the following fields to start a task request (required fields are marked with an asterisk (\*)):
  - Task Name \* - type-in the name of the task
  - Activity Start Date – click the field to access drop-down arrow, once clicked a calendar displays. From the calendar, select the activity start date. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.
  - Activity End Date - click the field to access drop-down arrow, once clicked a calendar displays. From the calendar, select the activity end date. To change the month and year click the right or left arrow, and once at the appropriate month and year, click the number to select the date. The date populates in the box.

**!** If you want to run this conversion on a frequent basis to convert new activities to the updated format, leave the dates blank and insert a checkmark in the Is Recurring Task field. This tells CES to complete this process every time a cycle runs.

- Records to Process Per Iteration – type-in the number of records to process during the current CES cycle
  - Is Recurring Task – click the box to insert a checkmark to indicate that every time a CES cycle runs, this task runs. This allows new activity to convert to the new format.
  - Description – type-in a description of the task if necessary
  - Status – when you first create the task, the status is pending. Once the task runs, this field changes to Completed.
6. Once you have completed the necessary information, within the Actions ribbon group, click the Save button to continue working with the task or the Save & Close button to return to the User Activity Conversion Task list.

### **Delete**

7. Find the task to delete and click to highlight.
8. Within the Actions pane, click the Delete User Activity Log Conversion link.
9. You are asked if you really want to delete the task, click yes to continue the operation or no to cancel.
10. Once clicked you are returned to the User Activity Log Conversion Task list.



# Number Plan

Number Plan contains information regarding the different dialing plans or exchanges within your database. A number plan is a way to group or catalog all similar telephone numbers together. For example, a number plan may be 702-216-0000 to 702-216-5000.

## Adding a Number Plan

1. Click the System Admin menu.
2. In the Navigation pane, click Number Plan.
3. There are two ways to add a Number Plan:
  - Within the tool bar directly above the Navigation pane, click the dropdown arrow next to New. From the list, select Directory Number Management – NNX.
  - Within the Actions pane, click the Add New Number Plan link.
4. With either option, the Number Plan window opens. Complete the following information (fields with an asterisk (\*) are required):
  - Number Plan Name\* – the number plan name as it should appear when viewing, reporting on, etc. When naming the number plan, be as specific as possible to ensure users can identify it in the future.
  - Number Plan Type\* – click the dropdown arrow to access a list and from the list, select one of the following number plan types:
    - Commercial – numbers appearing outside the sites standard dialing plan but important for the site to track, for example, pay phones, restaurants, etc. These numbers appear in the directory.
    - Standard – telephone numbers used for official and unofficial business.
    - Special – telephone numbers not restricted to the standard dialing plan's rules, for example 411 and 911. These have to be created as a dialing plan to be added within the Work Order System.
  - Primary Billing Site – click the dropdown arrow to access a list of sites from the list select the primary billing site. This allows call records to be matched to the appropriate number plan based on site information, thus allowing the call records

to be associated to the correct extension. This is helpful if you have the same telephone number on two different sites.

- Dial Length\* – type in a number from 3 to 10 indicating the length of the digits dialed.
- Country Code\* – type in the country code, up to 4 numeric digits.
- Area Code – type in the area code, up to 3 numeric digits.
- Directory Number Mask – type in the mask for the directory numbers within this number plan.

---

An example of a mask would be 216-####. This means every number within this number plan requires that 216 be dialed before the 4 digit extension. Another mask example would be ###-####, meaning that any seven digit combination of numbers can be used for an extension.

---

- DSN Exchange – type in the DSN exchange, up to 3 numeric 6 digits.
- Months Before Reuse\* – type in a number to indicate the number of months before reissuing directory numbers within this number plan. Use a zero to reissue the number immediately.
- Official – check mark the box to indicate the numbers within this number plan are for official use only.

---

**!** The following fields are used, is your switch uses a different prefix than CAIRS. This is currently used for HiPath only.

---

- CAIRS Prefix – type-in the prefix for the telephone numbers within your CAIRS database.
  - Switch Prefix – type-in the prefix for the telephone numbers as they appear within your switch database.
  - Base Digits – type-in the number of digits that follow the prefix.
  - Interface 911 Prefix – type the prefix that you want to append to all numbers within this dial plan when you generate a 911 file within the 911 Interface.
5. Within the Actions ribbon group, click Save (to save and stay), click Save & Close (to save and exit), or click Save & New (to save and refresh the screen).

## Site Associations

### *Adding/Deleting a Site to a Number Plan*

1. Click the System Admin menu.
2. In the Navigation pane, click Number Plan.

3. Within the Directory Number Management-NNX list, double click the number plan to open.
4. The Number Plan window opens. Within the Show ribbon group, click the Sites button. The window displays two panes of information; the top pane displays the sites associated to the number plan. The lower pane displays a list of all the sites within your database, the following read-only information is available for each site:
  - Site Name – displays the name of the site, this is the lowest level of the site tree.
  - Site Path – displays the complete path to the site. Each level is separated by a >.
  - Site Level – displays the site level name or number.
  - Site Code – displays the three-digit alphanumeric site code.

---

**!** You can search for a site within the Search All Sites pane by typing in the name or portion of the name within the Search text box, and then click the magnifying glass. Any record with the search characteristics displays within the pane.

---

### **Adding**

5. To add a site to the number plan, find the site within the list, and double-click the record, the site name now displays within the upper pane.

---

**!** Be aware that sites do not inherit the associations of their parents. You must associate each level to the account. For example, if you associate a parent and want all the children associated you must associate all children site as well.

---

### **Deleting**

6. Within the top pane, right-click on the site name to access a pop-up menu, from the menu select Delete.
7. Once you click Delete, a message box displays verifying that you really want to delete the site. Click Yes within the box to continue or No to cancel the operation.
8. Once selected, CAIRS draws a line through the site; allowing you to delete multiple items at once.
9. If you do not want to delete the site, right-click the record to access a pop-up menu, and click Undelete.
10. Once you select Undelete, a message box displays verifying that you really want to keep the site. Click Yes within the box to continue or No to cancel the operation.
11. Within the Actions ribbon group, click Save (to save and stay) to continue adding information for the number plan, or click Save & Close (to save and exit) to return to the number plan list.

## Switch Access

### *Adding/Deleting a Switch to a Number Plan*

1. Click the System Admin menu.
2. In the Navigation pane, click Number Plan.
3. Within the Directory Number Management-NNX list, double click the number plan to open.
4. The Number Plan window opens. Within the Show ribbon group, click the Switches button.
5. The details pane displays the following information for all switch records:
  - Switch Name –displays the switch name, click the plus sign (+) next to the switch name to view the sites the switch is associated to.
  - Selected – a check mark in the column indicates the profile has access to view related switch information.

### **Adding**

6. Find the switch name within the list, and click the box under the Selected column to insert a checkmark granting the profile access to the switch.

### **Deleting**

7. Find the switch name within the list, and click the box under either column to remove the checkmark to prohibit the profile from accessing the switch.
8. Within the Actions ribbon group, click Save (to save and stay) to continue adding information for the number plan, or click on Save & Close (to save and exit) to return to the number plan list.

## Number Ranges

### *Adding a Number Range*

1. Click the System Admin menu.
2. In the Navigation pane, click Number Plan.
3. Within the Directory Number Management-NNX list, double click the number plan to open.
4. The Number Plan window opens. Within the Numbers ribbon group, click the Add Number Range button.
5. The Add Range pop-up window opens. Complete the following fields:
  - Start Number – click the field to type-in the first number of the range. Notice the directory mask appears in the field to aid in entering the number correctly.
  - End Number – click the field to type-in the last number in the range. Notice the directory mask appears in the field to aid in entering the number correctly.

- Number Type – click the dropdown arrow to access a list and from the list, select whether the numbers within this range are DID (Direct Inward Dial), Non-DID (Non-Direct Inward Dial) or Reserved.
  - Switch Name – click the dropdown arrow to access a list and from the list, select the switch associated with the number range.
6. Within the pop-up window, click the Save button.
  7. Within the Actions ribbon group, click Save (to save and stay) to continue adding information for the number plan, or click Save & Close (to save and exit) to return to the number plan list.

### ***Modifying a Number Range***

A number range's type and the switch it is associated to can be modified.

1. Click the System Admin menu.
2. In the Navigation pane, click Number Plan.
3. Within the Directory Number Management-NNX list, double click the number plan to open.
4. The Number Plan window opens. Within the Show ribbon group, click the Numbers button to access a drop-down. From the list, click All Numbers.
5. A complete list of number ranges appears. For the next step, use the list as a reference point.
6. Within the Numbers ribbon group, click the Modify Number Range button.
7. The Modify Range pop-up window opens. Complete the following fields:
  - Start Number – click the field to type-in the first number of the range. Notice the directory mask appears in the field to aid in entering the number correctly.
  - End Number – click the field to type-in the last number in the range. Notice the directory mask appears in the field to aid in entering the number correctly.
  - Number Type – click on the dropdown arrow to access a list, from the list select whether the numbers within this range are DID (Direct Inward Dial), Non-DID (Non-Direct Inward Dial) or Reserved.
  - Switch Name – click on the dropdown arrow to access a list, from the list select the switch associated with the number range.
8. Within the pop-up window, click the Save button.
9. Within the Actions ribbon group, click Save (to save and stay) to continue adding information for the number plan, or click Save & Close (to save and exit) to return to the number plan list.

### ***Deleting a Number Range***

An administrator can delete a range of numbers no longer in use. In order to delete the range, all assignments within the range need to be reassigned before you can delete the range.

1. Click the System Admin menu.
2. In the Navigation pane, click Number Plan.
3. Within the Directory Number Management-NNX list, double click the number plan to open.
4. The Number Plan window opens. Within the Numbers ribbon group, click the Delete Number Range button.
5. The Delete Range pop-up box opens. Complete the following fields:
  - Start Number – type the first number of the range to delete. Notice the directory mask appears in the field to aid in entering the number correctly. You must enter in a number currently within the number plan.
  - End Number – type in the last number in the range to delete. Notice the directory mask appears in the field to aid in entering the number correctly. You must enter in a number currently within the number plan.
6. Within the pop-up window, click the Save button.
7. Within the Actions ribbon group, click Save (to save and stay) to continue adding information for the number plan, or click Save & Close (to save and exit) to return to the number plan list.

## **Numbers**

### ***Viewing All Numbers within a Number Plan***

1. Click the System Admin menu.
2. In the Navigation pane, click Number Plan.
3. Within the Directory Number Management-NNX list, double click the number plan to open.
4. The Number Plan window opens. Within the Show ribbon group, click the lower portion of the Numbers button to access a drop-down.
5. From the drop-down, click All Numbers.
6. The All Numbers list pane opens displaying all existing number ranges within this number plan. Click the plus sign (+) next to a number range to view all numbers within the range.

### ***Deleting a Number Plan***

Please keep in mind that to delete a number plan, all telephone assignments must first be re-assigned or deleted. There are two ways to delete a number plan:

1. Click the System Admin menu.
2. In the Navigation pane, click Number Plan.
3. Within the Directory Number Management-NNX list, highlight the plan to delete. There are two ways to delete a plan:
4. Within the tool bar directly above the Navigation pane, click the red X.
5. Highlight the plan number within the list and within the Actions pane click the Delete Number Plan link.
6. Once you click Delete, a message box appears verifying that you really want to delete the number plan, click Yes within the box to continue or No to cancel the operation.
7. If telephone numbers are still associated with this number plan, a message box will say, "There are Dial Plan Numbers associated with this Dial Plan it cannot be deleted as this time." Click OK to continue.





# Custom Report Template

The Custom Report Template allows you to create a customized report for printing your work order information. In the creating process, you first design a template, which includes rows, columns, borders, etc. Then you can add in fields from the work order, what this does is when you generate the report if you have the field Building, the building name/number from the work order populates in the field. You can further customize your report by adding in shrinking rows, leaving out spaces, etc. The process to create the template may be a little time consuming but well worth the payoff!

---

## Understanding the Custom Report Template Window

### Ribbon Groups

Each ribbon group allows you to perform a set of functions relating to you template, for example, setting your grid lines, adding borders, copying the template, etc.

### *Actions*

Within the Actions ribbon group, you can perform the following:

- Save & Close – click this button to save the completed information and to return to the Custom Report Template list.
- Delete – click this button to delete the template
- Save – click this button to save the completed information and continue working with the template.
- Save & New – click this button to save the template and to start adding a new template.
- Refresh – click this button to refresh the screen and apply recently changed items.

### ***Grid Lines and Update Border***

The following three selections determine the lines for the border of the selected cell(s) within the grid in the Template Setup pane:

- Single Line – this selection creates a single line border for the selected cell within the grid
- Double Line – this selection creates a double line border for selected cell within the grid
- None – no border is created for the selected cell, or the border in place are removed

### ***Template Actions***

Within this ribbon group you can copy or export your template.

## **Template Panes**

There are four panes of information within the Custom Report Template window, they are:

- Template Setup
- General Information
- Grid Size
- Properties – Selected Cells

### ***Template Setup***

This pane displays what the template looks like. Any changes you make within the other panes are reflected within this pane.

### ***General information***

This pane allows you to define basic template information, such as template name, description, etc.

### ***Grid Size***

Within this pane, you determine the number of rows and columns within your report. At any time during the creation process, you can add or delete columns.

### ***Properties – Selected Cells***

This pane allows you to define how the cell is used and what information will be contained within the cell.

---

## **Creating your Report Template**

## Step One: Creating the Template

1. Click the System Admin menu.
2. In the Navigation pane, click Custom Report Template
3. There are two ways to add a Template:
  - Within the tool bar directly above the Navigation pane, click the dropdown arrow next to New. From the list, select Custom Report Template
  - Within the Actions pane, click the Add New Custom Report Template link.
4. With either option the General – Custom Report Template window opens. Within the General Information pane, complete the following fields, required fields are marked within an asterisk (\*):
  - Report Template Name – type-in the template name, be as specific as possible so when your users know what each template is designed for
  - Description – type-in a brief description of the template, your users will see both the template name and description when selecting
  - Page Report When Out of Space – click the box to insert a checkmark to allow the template to be copied to the next page if the first page runs out of room.

---

**!** It's important to understand that if the Page Report When Out of Space feature is utilized any cells containing report totals/aggregates will display on each page unless you decide otherwise. The totals displayed within the cell(s) will not reflect the totals/aggregates for just that page but for the report in its entirety.

---

- Top Level Data Fill Behavior – click the dropdown arrow to access a list, from the list select one of the following options to indicate how CAIRS manages
    - Automatically Determine
    - Duplicate Entire Record
    - New Row Per Record
5. At this point it is a good idea to save your progress, within the Actions ribbon group click the Save button to save your changes and continue working with the template

## Step Two: Grid Size

1. The next step is to determine the number of rows and columns within your template, within the Grid Size pane complete the following fields, both field are required:
  - Total Rows – type-in the total number of rows for your template
  - Total Columns – type-in the total number of columns for your template
2. Notice that after you type a number into the field, the appropriate number of row or columns appear within the Template Setup pan.

---

! Using the Grid Size pane, to add additional rows and columns adds the rows to the bottom and the columns to the right. Using the Grid Size pane to reduce the number of rows and columns at a later time deletes rows from the bottom and columns from the right including any information they contain.

---

3. At this point it is a good idea to save your progress, within the Actions ribbon group click the Save button to save your changes and continue working with the template

### Step Three: Template Goodies

1. When you highlight a cell or group of cells within the Template Setup pane, the Properties – Selected Cells pane becomes available. This pane allows you to setup data and other properties for the cell. You have a couple of options:
  - The cell can hold a constant value
  - The field can hold a text as well as include data from the work order or trouble ticket
  - The field can contain a sum of the value of previous fields.
  - You can design the appearance of the text from bold, italic or underline.
2. The following options are available within the Properties – Selected Cells pane:

#### **Cell Text**

Within this field, you can type text to include within the cell. The text can stand-alone or you can add information from the order/trouble or from anywhere within CAIRS to the field as well.

Text that exceeds the length of the cell will overflow into the cell to the right, if that cell does not contain any other information. To keep the text within the original cell, expand the column width.

#### **Data Position**

This determines where the information from the work order appears within the cell if you have entered text in the above field. You have two options, before the text or after the text.

---

! No delimiter is placed between the data and the cell text. If you want to separate the data from the cell text, place the desired delimiter before or after the text. For example, - Work Order Form. To use a space as a delimiter between cell text and data press the space bar after or before the cell text.

Important: It's important to know that a cell cannot display alpha numeric information simultaneously. If a cell contains text and then has numerical data associated to it as explained in Selecting a Data Category, Using Related Table Data and Using Related Field Data, the numerical data is converted to text. So for example, if you have a cell with the text Date, and want to display the report date, the best option is to associate an adjacent cell so that the adjacent cell can display the date as a date instead of as text.

---

## **Data Category**

This field determines where the information you are entering into the field comes from, what table in CAIRS holds the information. The following options are available:

- None – Use Related Table and Field – this selection requires that you use the Related Table Date and the Related Field Data dropdowns to populate the cell

The following selections remove the Related Table Data and Related Field Data fields and replace them with a dropdown specific to your selection.

---

\* When the data source is the same for a group of connected cells, you can save time by assigning properties such as a Data Category to all of the cells at once by selecting a range of cells and then setting the cell properties. The cells retain their assigned Data Category and can then be assigned additional properties as needed.

---

- Report Information – this selection allows you to insert some necessary report information such as page numbers, date, time, etc.
- Work Order Custom Fields – this selection pulls information from the custom fields associated to a work order
- Order Information – this selection pulls information from the work order, for example, work order category, account number, subscriber, etc.
- Connectivity – this selection pulls information from the facilities section of the component
- Equipment and Services – this selection pulls information from the equipment and services section of the component, for example, equipment type, cost, location, etc.
- Set Management Component – this selection pulls information from a set device
- Circuit Component - this selection pulls information from a circuit
- Segment Component - this selection pulls information from a circuit segment
- Non Switch Number Component – this selection pulls information from any component that does not require a switch, for example, a cell phone
- Account Management - this selection pulls information from an account

---

If you select None, the Related Data fields are removed and replaced with a field name specific to your selection or Special Data Value.

---

## **Related Table Data & Related Field Data**

When you select None in the Data Category field these fields become available to allow you to associate information outside the scope of the work order. For example, if you select the Subscriber Component, the entire range of fields relating to a subscriber becomes available within the Field Data. The following Related Tables are available:

- None

- Work Order/Trouble
  - Circuit Component
  - Segment for Circuit Component
  - Configured Set Component
  - Non-Switch Directory Component
  - Subscriber Component
  - Account Component
  - General Component
  - Notes for Order/Trouble
- 

\* When the data source is the same for a group of connected cells, you can save time by assigning properties such as Related Field Data to all of the cells at once. The cells retain their assigned Related Field Data and can then be assigned additional properties as needed.

---

### **Data Aggregate Option**

This option allows you to have a total for the cells that contain amounts. For example, if you want to know the total charges for the equipment and services associated to a work order, you would select the Sum directly below the last equipment or service field. The following options are available:

- None
- Group By
- Count
- Sum
- Average
- Minimum
- Maximum
- Combine in Cell

### **Multiply By**

Use Multiply By to multiply a cell's contents by a specified number. For example, if a cell displays a total or numerical data, by entering a number a 3 in this field, CAIRS multiplies the contents by 3. The Multiply By field can be used to show a percentage-based tax amount or fee related to a total, or for any situation in which a numeric value needs to be multiplied by a fixed amount.

### **Font Size, Font Bold, Italic or Underline**

Use these options to further customize the look of the information that appears in the selected cell.

As you make changes to your template, remember to click on the Save button within the Actions ribbon group to save your changes and continue working with the template.

## Row and Column Management

At the top of the General – Custom Report Template window is the Row/Column Management tab, this tab allows you to define row properties and well as add and remove row and/or columns.

### ***Row Properties***

It's important to understand that if the Page Report When Out of Space feature is utilized any cells containing report totals/aggregates will display on each page unless you decide otherwise. The totals displayed within the cell(s) will not reflect the totals/aggregates for just that page but for the report in its entirety.

By utilizing the options within the Row Properties you can decide however, to keep cells with the previous data, include a cell(s) data on the first page only or include cell(s) data on the last page only.

The following row properties are available:

- Keep with Previous Data – This option will keep two or more rows of data together. If this option is not checked, then data that is on two separate rows will generate independently instead of staying together. First, all of the data for the first row will generate, and then the data for the next row will all be generated into the report.
- Include on First Page Only – select when wanting to see report totals on the first page of the report versus the last.
- Include on Last Page Only – select when wanting to see report totals on the last page of the report versus the first.
- Shrinkable – this options allows the row you have selected to shrink in order to print all on the same page
- Skip if No Data – this options allows the row to be skipped in the final report if there is no information contained within the row

---

**!** If you don't select either Include on First Page Only or Include on Last Page Only, the report totals will be included on every page.

---

### ***Shrinkable Rows***

Currently the Custom Report Template does not include a page break preview that adjusts or shows where one page ends and another begins as found in many Microsoft Office products. Instead, you will create a shrinkable row and utilize print preview to adjust the reports page length.

A shrinkable row is simply an expanded row assigned a Shrinkable property. This row is expanded so that its space combined with the space of the existing template cells and information equal the height of a printed page. Typically, this row is directly below any rows that populate with report data eg. inventory, or a total/aggregate row.

This expanded row space then is reduced as each additional row of data is added to the report. Once this shrinkable space is used up by rows of report data, the report generates an additional page and continues to add rows of data until the shrinkable space on that page is used up. In essence, by using a shrinkable row, you determine a fixed page height and subsequently determine how much room is available for data before additional pages generate.

So for example, there are 30 inventory items for the report you just created. The first inventory item populates within the row you created to populate with the inventory information. The next inventory item populates below the first in a newly created row. This row is created at the same height as the first inventory row and takes it's space from the space available within the Shrinkable row until no more Shrinkable space exists.

---

**!** If you do not need to print, the use of a Shrinkable row isn't necessary. If a Shrinkable row is not used the report will continue to create data rows until there is no more data, at which point the total/aggregate rows will display. The shrinkable row is also not necessary if it is not important that some elements of the report are duplicated on each page. The shrinkable row is also not necessary if the Page Report When Out of Space option is not used.

---

**To create a shrinkable row, do the following:**

1. Hover your mouse pointer over either the top or bottom border of the farthest left cell (the light grey cell) of the row to resize. The pointer icon changes to a single line with an arrow above and below.
2. Left click and hold down the mouse button. Drag the line to increase the row height.
3. Release the mouse button when the row is at the desired height.
4. Click the Row/Column Management tab.
5. Within the Row Properties ribbon group, checkmark the Shrinkable checkbox.
6. View the effect of the row upon the page size by exporting the custom report template to Excel and then choosing print preview. For steps on how to complete these two options, see Exporting, Previewing, Printing, Copying and Deleting.
7. Make any additional adjustments to the page size by repeating steps 1-6 as needed.

---

**\*** It can be extremely helpful to have text within a cell after the shrinkable row. This way when the report is previewed the text will provide an indicator of what adjustments need to be made to the shrinkable area to fit the report within a printable page. Adding report information such as a page number, date or time below the shrinkable is one such option. For steps on how to add report information, see Report Information.

---



### ***Grid Row Actions***

- Insert Row Above Selection – within the Template Setup pane, highlight a row by clicking the grey block just to the left of the first cell, and click this selection to insert a row directly above the highlighted one.
- Insert Row Below Selection - within the Template Setup pane, highlight a row by clicking the grey block just to the left of the first cell, and click this selection to insert a row directly below the highlighted one.
- Delete Selected Rows - within the Template Setup pane, highlight a row by clicking the grey block just to the left of the first cell, and click this selection to delete the entire row

### ***Grid Column Actions***

- Insert Column Before Selection - within the Template Setup pane, highlight a column by clicking the grey block at the top of the column, and click this selection to insert a column before the highlighted one.
- Insert Column After Selection - within the Template Setup pane, highlight a column by clicking the grey block at the top of the column, and click this selection to insert a column after the highlighted one.
- Delete Selected Columns- within the Template Setup pane, highlight a column by clicking the grey block at the top of the column, and click this selection to delete the entire column

### ***Resizing Rows and Columns***

The rows and columns work similar to rows and columns in an Excel Spreadsheet. Currently there is no way to reset the column and rows back to the default.

#### **To resize a single row**

1. Hover your mouse pointer over either the top or bottom border of the farthest left cell (the light grey cell) of the row to resize. The pointer icon changes to a single line with an arrow above and below.
2. Left click and hold down the mouse button. Drag the line to increase or decrease row height.
3. Release the mouse button when the row is at the desired height.

#### **To resize a single column**

1. Hover your mouse pointer over either the left or the right border of the top most cell (the light grey cell) of the column to resize. The pointer icon changes to a single line with an arrow to the left and right.
2. Left click and hold down the mouse button. Drag the line to increase or decrease column width.
3. Release the mouse button when the column is at the desired width.

#### **To resize multiple rows**

1. Left click the farthest left cell (the light gray cell) within the initial row that you want to resize.
2. Hold down the left mouse button and drag the pointer to the last row to resize. The selected rows highlight.
3. Hover your mouse pointer over either the top or bottom border of the farthest left cell (the light grey cell) of one of the selected rows. The pointer icon changes to a single line with an arrow above and below.
4. Left click and hold down the mouse button. Drag the line to increase or decrease the selected rows height. Notice the height of all selected rows adjust simultaneously.
5. Release the mouse button when the rows are at the desired height.

**To resize multiple columns:**

1. Left click the top most cell (the light gray cell) within the initial column that you want to resize.
2. Hold down the left mouse button and drag the pointer to the last column to resize. The selected columns highlight.
3. Hover your mouse pointer over either the left or right border of the top most cell (the light grey cell) of one of the selected columns. The pointer icon changes to a single line with an arrow to the left and to the right.
4. Left click and hold down the mouse button. Drag the line to increase or decrease the selected columns width. Notice the width of all selected columns adjust simultaneously.
5. Release the mouse button when the columns are at the desired width.

**To resize all rows:**

1. Left click the upper most left cell. All cells are selected and highlight.
2. Hover your mouse pointer over either the top or bottom border of the farthest left cell (the light grey cell) of one of the selected rows. The pointer icon changes to a single line with an arrow above and below.
3. Left click and hold down the mouse button. Drag the line to increase or decrease the height of all the rows. Notice the height of all the rows adjust simultaneously.
4. Release the mouse button when the rows are at the desired height.

**To resize multiple columns:**

1. Left click the upper most left cell. All cells are selected and highlight.
2. Hover your mouse pointer over either the left or right border of the top most cell (the light grey cell) of one of the selected columns. The pointer icon changes to a single line with an arrow to the left and right.
3. Left click and hold down the mouse button. Drag the line to increase or decrease the width of all the columns. Notice the width of all the columns adjust simultaneously.
4. Release the mouse button when the columns are at the desired width.

## Borders

You can add a border to you entire report, a single column or row, or a group of columns or row. There are several options available within the Grid Lines and Update Border ribbon groups.

### Report Border:

It is recommended that you do not add a border surrounding the outside of the entire report until the very end of the creation process. If a double line report border is added before the rest of the report is completed and then later a single line border is added to a cell or cells contributing to the report border, any double line borders on these cells will be replaced by a single line border. Subsequently, when the report is exported or printed the report border will be inconsistent, containing both double and single lines.

5. To add a border to the entire report:
6. Left click the upper most left cell. All cells are selected and highlight.
7. Click the Custom Report Template tab.
8. From the Grid Lines ribbon group, select the grid line type.
9. The selected border is applied to the report.

---

**!** Double Line borders appear as a thick single line while viewing the custom report template within the Custom Report Template window. To view the double line border, export the custom report template to Excel and then choose print preview. For steps on how to complete these two options, see Exporting, Previewing, Printing, Copying and Deleting.

---

### Removing a Border

To remove a border from a cell or selected area:

1. Left click and hold down the mouse button within the first cell comprising the bordered area.
2. Drag your mouse to select and highlight any additional cells comprising the bordered area. The selected cells highlight.
3. Click the Custom Report Template tab.
4. From the Grid Lines ribbon group, select the grid line type None.
5. From the Grid Lines ribbon group, select the grid line type you want to remove.
6. Left – removes a left border.
7. Right – removes a right border.
8. Top – removes a top border.
9. Bottom – removes a bottom border.
10. All – removes a left, right, top and bottom border.
11. The selected border(s) is removed.

## Export/Copy/Delete

### ***Exporting a Custom Report Template***

1. To export a custom report template to Excel:
2. Save your current template by clicking the Save button within the Actions ribbon group.
3. Within the top menu bar, click the Excel icon.
4. Within the top menu bar, click the PDF icon.
5. An Excel spreadsheet or PDF opens displaying the template.

---

**!** The actual report template does not export to PDF. Only the basic template information is exported. To export the actual template, use the Excel export option.

---

### ***Copying a Custom Report Template***

The Copy feature allows you to create a duplicate of the custom report template.

6. To create a copy of the custom template:
7. Save your current template by clicking the Save button within the Actions ribbon group.
8. Click the Custom Report Template tab.
9. Within the Template Actions ribbon group, click the Copy button.
10. The template is copied and the copy opens in a new window. The copied template has the name “Copy of Template Name”.

---

**!** To create multiple copies of the same template you will need to rename either the original template or the “Copy of Template Name” template.

---

### ***Deleting a Custom Report Template***

To delete a copy of the custom template:

1. From the Custom Report Template window, click the Delete button within the Actions ribbon group.
2. From the Custom Report Template pane within the CAIRS window, click to highlight the template and then click the Delete button within the Menu tool bar.
3. A pop up appears asking if you’re sure you want to delete the custom report template.
4. Click Yes to delete the template or No to cancel the operation.

## **XML Editor**

This feature allows you to select an XML file and edit the file before exporting or importing. Please contact Unique Communication Solutions technical support for further details.



---

## Auto Number Setup

Within Auto Number Setup, administrators define how CAIRS numbers work orders, trouble tickets, authorizations etc. There are seven columns of information for each numbering setup:

1. Component\* – defines the component: work order, trouble ticket, official or unofficial account, authorization code, etc.
2. Mask – defines the mask that will be used, whether the numbering will be date based or random.
3. Enabled\* – defines whether you will use the auto-numbering feature within CAIRS.
4. Current Increment – The current counter used to hold the value for the most recently used number. For example if the work orders auto number schema is ‘Two digit day, two digit month, two digit year, three digit number incrementing by day (010109001)’ and there have been 3 work orders today, the current increment would be 3. When there is another work order that day the increment would be 4.
5. Last Increment Update – This date is the last date the current increment was updated. This lets the system know if it needs to set the current increment back to zero or keep it going. For example if the Trouble Ticket auto number schema is ‘Two digit day, two digit month, two digit year, six digit number incrementing by month (010109000001)’ and the Last Increment Date was the last day of December 2010 and today is January 1st 2011 the system would set the Current Increment to 0 because it is a new month.
6. Reset Increment Value – this determines what the first number will be when the auto-number schema is reset
7. Use Fiscal Year – defines whether the auto-number resets on the start of your fiscal year or the regular year

Once each auto-number component is defined, when you access the component the word “Auto” appears in the field. After you complete the required fields for the component and click the ‘Save’ or ‘Save & Close’ button CAIRS generates the number based on your selections. You can overwrite the auto number by deleting the word auto and typing in the appropriate information.

### Adding a New Auto-Number Schema

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to System Settings, click Auto Number Setup.
3. There are two ways to start to add a new auto-number scheme
  - Within the tool bar directly above the Navigation pane, click the dropdown arrow next to New. From the list, select Auto Number Setup.

- Within the Actions pane, click the Add New Auto Number Schema link.
4. With either option, the General – Auto Number window opens. There are 3 panes of information:
    - Mask Properties – within this pane you will determine how the auto number setup will work
    - Mask Elements – when you add an element to the schema it will appear in this pane
    - Example – this pane displays an example of what your auto number setup will look like when used.
  5. Within the Mask Properties, complete the following fields for the auto number setup:
    - Component \* – click the dropdown arrow to access a list of the components that are available for auto numbering, the following options are available:
      - Work Orders
      - Trouble Tickets
      - Official Accounts
      - Unofficial Accounts
      - Auth Code
      - Payment Deposit Number
      - Portal Work Order
      - Portal Trouble Ticket
      - Default Mask
      - Toll Ticket Control Number
      - VIP Toll Ticket Control Number
      - Toll Ticket ID Number
      - General Task
    - Mask – as you add mask parts, this field will populate with the mask of the auto number
    - Enabled – this defaults to a null value which means that it is not being used, click on the box to enter a checkmark to enable the auto numbering
    - Current Increment – this determines the numerical increase for each new number used
    - Last Increment Update – displays the last increment value that was used
    - Reset Increment Value \* – determines what the first number will be when you reset the auto numbering sequence



- Use Fiscal Year – when checked the auto numbering scheme will reset every fiscal as determined by the year set in Accounting (the start date can be January 1st, October 1st, or a date that you determine). When left unchecked, the auto number reset will occur as determined by your selection in the 'Add Incrementing Mask Part' ribbon group.
- Once you have completed the fields, you can start to add elements into the mask. Within the Add Standard Mask Parts you will need to determine what elements to add. We will discuss each one in detail
- Add Date Part – when selected a popup opens allowing you to select which date you want in the mask, to select an option click the radio button next to your option. You have the following options available
  - 2 Digit year. Set the Use Fiscal Year as checked to use the fiscal year start date from the official billing fiscal year start date
  - 4 Digit year. Set the Use Fiscal Year as checked to use the fiscal year start date from the official billing fiscal year start date
  - 2 Digit Month
  - 2 Digit day of the month
  - Day of the week abbreviation
  - Full day of the week name
  - 2 digit hour using a 12 hour clock
  - 2 digit hour using a 24 hour clock
  - 2 digit minute
  - Month name abbreviation
  - Full month name
  - 2 digit second
  - AM/PM designator
  - Milliseconds
  - Advanced – Input a mask using a custom data and time format string
- 6. Add Julian Date – if none of the above date options work you can simply add the Julian to the mask, click on this button to add it to the elements pane
- 7. Add a Random Number – when selected a popup opens allowing you to choose the number of digits your number will be, you have the option of 2 through 9 digits. Please keep in mind this a randomly generated number it does not reset and duplicate numbers have appeared so use this wisely. Actually, it is a good idea to not use this, you should use the Incrementing Mask Part instead!

8. Add Text – when select a popup opens allowing you to enter in text that will be a part of the mask, once entered click on the OK button to add the part to the elements pane
9. Add Organization Name – when selected the Organization Name will appear in the mask
10. After you have made your selections, you will notice that each element you have chosen appears in the Mask Elements pane. There are a couple of actions you have for each element, next to each element is and up and down arrow. When you click on either one, it will move the element up or down in the order of the mask. On the right hand side, is an 'X' when you click on it the element is removed from the mask.
11. The Example pane, you will see what your auto-number schema will look like when used for the component.
12. You aren't done yet! The last thing you need to determine is when your increment will reset, within the 'Add Incrementing Mask Part' ribbon group you must choose ONE of the following options:
  - Add Calendar Year Reset Increment – when selected a popup opens allowing you to select choose a 2 through 9 digit number that will reset every calendar year.
  - Add Daily Reset Increment - when selected a popup opens allowing you to select choose a 2 through 9 digit number that will reset every day.
  - Add Monthly Reset Increment - when selected a popup opens allowing you to select choose a 2 through 9 digit number that will reset every month.
  - Add Fiscal Year Reset Increment - when selected a popup opens allowing you to select choose a 2 through 9 digit number that will reset every Fiscal year. Your fiscal year is determined within Accounts – Official Accounts – Billing Cycle Plan.
13. Once you have made your selection, you will notice that the ribbon group is greyed out, to make a different selection remove the part from the Mask Elements pane.
14. One last step, within the Actions ribbon group, click on the Save button to continue working or click on the Save & Close button to return to the Auto Number Setup list.

## Deleting an Auto Number Setup

You can delete an auto-number; however it is a good idea to simply Disable it so it can be used again the future. To disable an auto number schema, open the record by double clicking on the record from the Auto Number Setup list. When the record opens, within the Mask Properties pane, remove the checkmark from the Enabled field. Click on the Save & Close button, the setup still appears in the list however it is no longer enabled.

To delete, you can simply highlight the setup with the list and click on the Delete Auto Number Schema link within the Actions pane. You are asked if you really want to delete the setup, click yes to continue or no to cancel the operation.

---

## Field Customization

Field Customization allows your site to use its own terminology to define components, locations, or other information within the CAIRS software.

There are two ways that you can customize your fields. First, you can access Field Customization within System Admin → System Settings. With this option, a list of all the tables within CAIRS appears, you can know find the table and make the appropriate modifications.

The second alternative allows you to access a small pop-up box for any list and make changes to a field name everywhere in the software or only in the current view. When you access this option, you can rename the field for yourself, your profile or for every user. To learn more about this option, please see User Interface → Navigating the Main Form → Modifying the List Line Display → Renaming Fields.

Within this section, we will cover how to customizing your fields within System Admin.

### Customizing Field Names

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to System Settings. Click Field Customization.
3. The Field Customization list appears, displaying the names of all the database tables. Double click the table name.
4. The Field Customization window opens displaying the selected table's field names. The following columns of information display with read only columns italicized:
  - Original Field Name\* – displays the default field name. This is a read only field.
  - Custom Field Name – type-in the new field name. If this field appears in multiple tables' CAIRS automatically changes each instance of this field.
  - Mask – type-in the mask for the field. A mask defines allowable character types within the field. For instance, if you entered in a group of pound (#) signs as the mask, only numbers would be allowed in the field.
  - Minimum Length – type-in the minimum number of characters allowed in the field.
  - Maximum Length – type-in the maximum number of characters allowed in the field.
  - Data Type – displays the type of data. This is a read only field.
  - Is Drop Down – click on the field to insert a checkmark in the box indicating this field will have a drop-down box associated within it.
  - Is Currency – click the field to insert a checkmark in the box indicating this field is for currency.

- Required By Admin – click the field to insert a checkmark in the box indicating that your CAIRS administrator requires the field.
  - Required by System – if this field is a system requirement, the box contains a checkmark; these fields are required to maintain a consistent and relational database.
  - Custom Field Help – type-in a brief statement that appears when the customer scrolls over the field name.
5. Within the Actions ribbon group, click Save (to save and stay), or Save & Close (to save and exit).

## Adding a Drop-Down List to a Field

For a field to have a custom drop-down list it must be a text only field and require no more than 255 characters.

1. Click the System Admin menu.
2. In the Navigation pane, click the plus sign (+) next to System Settings. Click Field Customization.
3. The Field Customization list appears, displaying the names of all database tables. Double click the table name.
4. The Field Customization window opens displaying the selected table's field names. Click a field name to add a drop-down list.
5. In the Is Drop-down column, click the box to check mark it.
6. Within the Show ribbon group, click the Field Dropdown button.
7. Click the top line marked with an asterisk (\*) and type the first value for the drop-down list. Tab over to the Notes column and enter any necessary information. Notice that when you start typing in the field, CAIRS automatically creates a new field above the one you are currently working in.
8. Within the Actions ribbon group, click Save (to save and stay), or click Save & Close (to save and exit).

---

## Suggested Indexes

This is used by Unique Communication's Representatives to troubleshoot the performance of your system. This has no value until SQL Queries are run against your database.

---

## Software Information

Within software information you can view information regarding CAIRS, it associated components, computer information, database information, just to name a few. In the event

that you have to contact our technical support department, they will ask you several questions about this page. The information is read-only.



# Glossary of Terms

## **Term1**

Type definition here.

## **Term2**

Type definition here.





# Index

## 4

411 Interface 48, 225

## 9

911 Interface 52, 229

911 Interface CES Process 234

## A

Actions 163, 335

Activity Log Conversion Task 153, 325

Add New Billing Currency 144, 317

Add New User Activity Log Conversion 153

Add/Delete New User Activity Log Conversion 325

Adding a Call Pricing Group 113, 291

Adding a Call Type 111

Adding a Dial Code Group 110

Adding a Drop-Down List to a Field 87, 354

Adding a Global Billing Information 131

Adding a New Auto-Number Schema 83, 349

Adding a New Work Flow 61, 237

Adding a Number Plan 155, 327

Adding a Number Range 159, 330

Adding a Package Category 89

Adding a Profile 3, 177

Adding a Rate Group 109

Adding a Rate Type 106

Adding a Site Level 79, 263

Adding a Site to a Number Plan 156

Adding a Switch Sync Project 26, 200

Adding a Switch to a Number Plan 158

Adding a User - Windows 11, 184

Adding a Work Center 58

Adding a Work Order Custom Field 59, 236

Adding a Zone Group 107

Adding an Image to a Bill 137, 313

Adding an Organization Level 80, 264

Adding Dial Codes to a Group 114

Adding Digits to Add 115

Adding Menu and Action Access to a Profile 3, 178

Adding Organization Access to the Configuration Package 94

Adding Related Fields to a Configuration Package 99

Adding Related Inventory to a Configuration Package 97

Adding Site Access to a Configuration Package 92

Adding Site Access to a Profile 14

Adding Switch Access to a Profile 7

Adding Text to a Bill Overlay 135, 312

Adding Users from Active Directory 12, 186

Adding Work Center Access to a Profile 8

Adding/Deleting a Call Type 289

Adding/Deleting a Dial Code Group 287

Adding/Deleting a Global Billing Information 308

Adding/Deleting a Package Category 268

Adding/Deleting a Rate Group 286

Adding/Deleting a Rate Type 284

Adding/Deleting a Site to a Number Plan 328

Adding/Deleting a Switch to a Number Plan 330

Adding/Deleting a Work Center 235

Adding/Deleting a Zone Group 285

Adding/Deleting Dial Codes to a Group 291

Adding/Deleting Digits to Add 292

Adding/Deleting Organization Access to the Configuration Package 273

Adding/Deleting Related Fields to a Configuration Package 276

Adding/Deleting Related Inventory to a Configuration Package 274

Adding/Deleting Site Access to a Configuration Package 271

Adding/Deleting Switch Access to a Profile 181

Adding/Deleting Work Center Access to a Profile 182

Association 27, 201

Auto Number Setup 82, 349

## B

Billing General Settings 138, 315

Billing Information 131, 308

Billing Report Setup 119, 295

Billing Settings 118, 295

Borders 173, 345

## C

Call Pricing Group 113, 290

Call Record General Settings 116, 293

Call Record Settings 105, 283

Call Types 111, 289

Changing a Setting 77, 259

Clear all errors 147, 320

Clearing the Sync Log 30, 39, 204, 214  
 Column Mapping 50, 226  
 Combined Report Setup 129, 306  
 Configuration Packages 88, 267  
 Configuration Packages - History 101, 278  
 Configuration Packages - Organizations 94, 273  
 Configuration Packages - Related Fields 99, 276  
 Configuration Packages - Related Inventory 97, 274  
 Configuration Packages - Sites 92, 271  
 Copy Profile 10, 183  
 Copying a Custom Report Template 174, 346  
 Creating a 411 Interface Template 48, 225  
 Creating a 911 Interface Template 52, 229  
 Creating a Combined Report 129, 306  
 Creating a Configuration Package 90, 269  
 Creating a New Bill Overlay 133, 310  
 Creating a New Billing Report Configuration 120, 296  
 Creating a Sync Schedule 36, 211  
 Creating Files 51, 56, 228, 233  
 Creating your Report Template 164, 336  
 CSV Column Mapping 55, 232  
 Currency Exchange Rate 143, 316  
 Custom Report Template 163, 335  
 Customizing Field Names 86, 353

## D

Data Sync Center 25, 199  
 Default Account for Calls 142, 315  
 Default Account for Discrepancies 143, 316  
 Default Accounts 142, 315  
 Deleing a Zone Group 108  
 Delete an Error Log 147, 320  
 Delete Open Record Notifications 24, 197  
 Delete User Activity Log Conversion 154  
 Deleting 79  
 Deleting a Billing Report 129, 305  
 Deleting a Call Pricing Group 115  
 Deleting a Call Type 113  
 Deleting a Combined Billing Report Setup 131, 307  
 Deleting a Configuration Package 91, 270  
 Deleting a Custom Report Template 175, 346  
 Deleting a Dial Code Group 111  
 Deleting a Number Plan 162, 333  
 Deleting a Number Range 160, 332  
 Deleting a Package Category 89  
 Deleting a Profile 9, 183  
 Deleting a Rate Group 109  
 Deleting a Rate Type 106  
 Deleting a Site Level 79, 263  
 Deleting a Switch from a Number Plan 158  
 Deleting a Sync Schedule 38, 213  
 Deleting a User 16, 189

Deleting a Work Center 59  
 Deleting a Work Order Custom Field 60, 237  
 Deleting a Zone Time 108  
 Deleting an Auto Number Setup 85, 352  
 Deleting an Element 127, 138, 303, 314  
 Deleting an Interface 51, 56, 228, 234  
 Deleting an Organization Level 81, 264  
 Deleting Digits to Add 116  
 Deleting Global Billing Information 132  
 Deleting Organization Access from a Configuration Package 96  
 Deleting Related Fields from a Configuration Package 100  
 Deleting Related Inventory from a Configuration Package 98  
 Deleting Site Access 157  
 Deleting Site Access from a Configuration Package 93  
 Deleting Site Access from a Profile 14  
 Deleting Switch Access from a Profile 7  
 Deleting Work Center Access from a Profile 8  
 Dial Code Groups 110, 287  
 Digits to Add 115, 292  
 Disabling a Profile 9  
 Disabling a User Account 15  
 Disabling a Work Flow 63  
 Disabling/Enabling a Profile 182  
 Disabling/Enabling a User Account 188  
 Disabling/Enabling a Work Flow 240

## E

Email Error Log 147, 320  
 Email Settings 81, 265  
 Email Templates 64, 241  
 Enable a Work Flow 64  
 Enabling & Disabling a Template 65, 242  
 Enabling a Profile 9  
 Enabling a User Account 16  
 EWSD Switch Sync 35, 211  
 EWSD Switch Sync Logs 38, 213  
 Export System Metadata 261  
 Export/Copy/Delete 174, 346  
 Exporting a Custom Report Template 346  
 Exporting a Custom Report Template to Excel 174  
 Exporting a Custom Report Template to PDF 174  
 Exporting the User Activity Log as XML 23, 196

## F

Feature Key Map Sync for EWSD only 44, 219  
 Field Customization 86, 353

## G

General Error Log 146, 319

General information 164, 336  
 Generating a Report 131, 138, 308, 315  
 Glossary of Terms 357  
 Grid Column Actions 171, 343  
 Grid Lines and Update Border 164, 336  
 Grid Row Actions 171, 343  
 Grid Size 164, 336

**H**

Hunt Group Sync 46, 221

**I**

Import External Data 57, 234  
 Import System Metadata 260  
 Important Considerations: 119, 296

**M**

Mailed Bill Elements 132, 309  
 Manage Default Account for Calls 78  
 Manage Default Account for Discrepancies 78  
 Manage File Attachment Types 77, 260  
 Managing Package Categories 89, 268  
 Menu and Actions 3  
 Modifying a Number Range 159, 331  
 Modifying a Site Level Name 79  
 Modifying a Sync Schedule 37, 212  
 Modifying a Template 65, 242  
 Modifying Menu and Action Access from a Profile 6  
 Modifying the Field Mapping 54, 55, 232, 233  
 Monitor CES Processes 152, 324  
 Moving a Body Element Up or Down 305  
 Moving a Header Element Up or Down 304  
 Moving an Body Element Up or Down 128  
 Moving an Header Element Up or Down 128

**N**

NENA and XML Column Mapping 231  
 NENA Column Mapping 53  
 Number Plan 155, 327  
 Number Ranges 159, 330  
 Numbers 161, 332

**O**

Organization Levels 80, 264  
 Out of Sync 35, 209

**P**

Performing a Feature Key Map Sync 44, 219  
 Performing a Hunt Group Sync 46, 221

Performing a Port Sync 42, 217  
 Performing a Set Device Sync 40, 215  
 Port Sync 42, 217  
 Preview Actions 127, 303  
 Profile - Menu and Actions 178  
 Properties - Selected Cells 164, 336

**R**

Rate Groups 109, 286  
 Rate Type 106, 283  
 Recurrence 28, 202  
 Refresh Status 21, 23, 194, 196  
 Removing a Report from a Combined Report 130, 306  
 Resizing Rows and Columns 171, 343  
 Resolving FKM Sync Discrepancies 45, 220  
 Resolving Hunt Group Sync Discrepancies 47, 222  
 Resolving Port Sync Discrepancies 43, 218  
 Resolving Set Device Sync Discrepancies 41, 216  
 ReSync from an Existing Report 33, 207  
 Ribbon Groups 163, 335  
 Row and Column Management 169, 341  
 Row Properties 169, 341  
 Run Process Now 152, 324

**S**

Scheduling a Process 152, 324  
 Security 2, 177  
 Security - Activity Log 22, 195  
 Security - Logged in Users 21, 194  
 Security - Open Record Management 24, 197  
 Security - Profiles 2, 177  
 Security - Users 10, 183  
 Service Management 146, 319  
 Service Manager 148, 321  
 Set Device Sync 39, 215  
 Settings 67, 245  
 Shrinkable Rows 169, 341  
 Site Access 187  
 Site Associations 156, 328  
 Site Levels 79, 263  
 Software Information 87, 354  
 Step One: Creating the Template 165, 337  
 Step One: Profile 103  
 Step Three: Column Visibility 104  
 Step Three: Template Goodies 166, 338  
 Step Two: Grid Size 165, 337  
 Step Two: Profile Association 103  
 Subscriber Portal General Settings 103, 278  
 Subscriber Portal Security 103, 278  
 Subscriber Portal Settings 88, 267  
 Suggested Indexes 87, 354  
 Switch Access 6, 158, 181, 330

Switch Sync Log - Cancel Last Submitted Sync  
30, 204  
Switch Sync Logs 29, 203  
Switch Sync Project 26, 200  
Sync from a File 33, 207  
Sync Now 32, 206  
Sync Reports 34, 208  
Sync Schedules 36, 211  
Synchronizing Your Data 31, 205  
System Admin 1  
System Settings 66, 245

**T**

Template Actions 164, 336  
Template Panes 164, 336  
Template Setup 164, 336

**U**

Understanding the Custom Report Template  
Window 163, 335  
Users - Certificate 18, 191  
Users - Site Access 13, 187  
Users - Windows 10, 184  
Users – Windows 10

**V**

Viewing a Report 34, 208  
Viewing All Numbers within a Number Plan 161,  
332  
Viewing Assigned Numbers within a Number Plan  
161  
Viewing Available Number within a Number Plan  
161  
Viewing Existing Work Flows 64, 241  
Viewing FKM Sync Results 44, 220  
Viewing Hunt Group Sync Results 46, 222  
Viewing Ports Sync Results 42, 217  
Viewing Process History 151, 324  
Viewing Set Device Sync Results 40, 215  
Viewing Switch Sync Project Log 30, 204  
Viewing Sync Log 38, 213  
Viewing Sync Schedules 29, 37, 203, 212  
Viewing the Activity Log 23, 196  
Viewing the History of a Configuration Package  
101  
Viewing the Service Exception Log 146, 319  
Viewing the Service Log 151, 323  
Viewing User Accounts 17, 20, 190, 193  
Viewing User Activity 16, 21, 189, 194

**W**

Work Center 58, 235

Work Center Access 8, 181  
Work Flow 60, 237  
Work Flow Setup 58, 235  
Work Order Custom Fields 59, 236

**X**

XML Editor 175, 347

**Z**

Zone Groups 107, 284