CAIRS User Guide

Unique Communications

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

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CAIRS Getting Started

To start, make sure your computer is turned on and you are logged in!! On your desktop, double-click on the following icon:
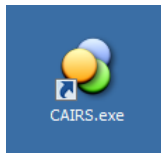
In most cases, after you double click on the CAIRS icon, the program opens to the main menu. This is because you have Single Sign-On enabled. However, in some cases you may need to type your user name and password.

Login (DoD message)

Depending on your site rules, a DoD message may appear, click Accept to enter the world of CAIRS.

CAIRS is a profile-based system meaning, that your System Administrator has developed profiles or a set of set access rights for you based on your job description or what you will be doing within the system. Based on your profile, you may see all the menu options or a select few. For the purposes of this document, we will discuss all items contained within the user interface as if you would have access to the entire system.

Before you can really start to manipulate items within your CAIRS, your System Administrators have certain requirements to meet. For example, creating the site levels, organizational levels, number plans, work flow setup, etc. Your System Administrators have worked closely with a Unique Communication Solutions representative to try to simulate the way you process your work today. We cannot always match your processes but we try to come close!

So, you have logged in, now what? Let us discuss what you are seeing.

Main Menu

In the lower left-hand corner is the main menu, there are nine menu options (again, you may not see all of them, the items you see are based on your profile). Here is a list of the menu items and a brief description of each:

1. **Favorites** – displays the items that each individual user has marked as a favorite
1. **Configured Items** – manage all information relating to your set devices, circuits, and cell phones.
2. **Orders/Troubles** – open and close work orders, trouble tickets or general task relating to a set device, circuits, cell phone, circuit, subscriber, account, etc. You can also generate reports based on your open, closed, or cancelled order, troubles, or task.
2. **Subscribers** – manage all information relating to your subscribers, telephone control officer groups, resource manager groups, commanding officers and supervising managers.
3. **Equipment/Services** – manage all equipment and services offered as well as their associated vendors, service providers and manufacturers.
3. **Accounting** – manage all one-time, recurring and call charges related to your official and/or unofficial accounts. You can perform several billing tasks that include generating a monthly bill, accepting payments, import vendor media, etc.
4. **Facilities** – manage your sites, connection groups, buildings, terminal, and/or frames.
4. **Switches** – manage your switches and their related information. You can also create an SMA (Secure Maintenance Access) connection to allow specific users to login and out of the switch.
5. **Directory/Organization** – manage your organizational structure (we call it a tree!). You can also create operator phone books for both your standard directory and your DSN directory. For those who use Toll Tickets, this menu will become your best friend!
5. **System Admin** – this is where your system administrators create the backbone of CAIRS and determines how your system will function in certain situations.

Toolbars

Now, let's start at the top of the window and work our way down.
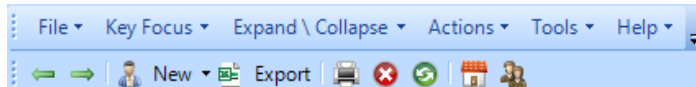
The top toolbar has the following four items:

- **File** – clicking File displays two options.
  1. **Change Connection** – this option allows you to create the connection string for your database, you will need your administrative rights to set your connection string.
  - **Exit** – allows you to exit the program.
2. **Key Focus –** this allows you to place the focus of CAIRS to a specific section of screen to allow you to use the keyboard to select items instead of a mouse click.

For example, if you click on Actions, it will highlight the first action in the Actions pane, you can then use your keyboard to scroll through all the actions with the up and down arrows. This is helpful for users that like to use the tab and arrow keys to navigate through CAIRS. The following Key Focus areas are available:

- **Home –** this will return you to the main menu in CAIRS from wherever you are in the software
3. **Favorites –** this will return you to your Favorites menu
- **Navigation –** this will place the focus on the first item in the Navigation pane
4. **Actions –** this will place the focus on the first action in the Actions pane.
- **Favorite Report & Views –** this will place the focus on the first item listed in the pane
5. **Active Menu –** this will place the focus back to the menu that you are currently viewing, this will only appear if the menu has submenus.
- **Custom Reports** – this will place the focus on the first report in the Global Reports pane
6. **Default Views –** this will place the focus on the first report in the lower right hand corner Views pane

- **Expand\Collapse –** all of the panes within the Navigation pane have a double arrow on the right-hand side of the title bar, this allows you to expand and collapse the pane. You can also use this menu item to do the same thing. The following options are available:
    7. **Home Menu**
    - **Navigation**
    8. **Actions**
    - **Favorite Reports & Views**
    9. **Global Reports**
    - **Custom Reports**
    10. **Default Views**

- **Actions** – once you make a selection within the Navigation Pane, the Actions button becomes available with the actions that you can perform for your selection. For example, when you select Configured Items – Set Management, the only action you can perform is to 'Add a Set'.   If there are no actions to perform, the button s greyed out.

11. **Tools** – contains two submenu, Options and Delete Local Settings.

- **Options** – when you click on this selection, a small popup opens with the following options:

    12. **When CAIRS starts** – you can choose what menu option CAIRS goes to when you first login, there are three options available:

- Go to Home Page

13. Go to the last visited page

- Go to a specific menu – click on the … to choose the location you are currently on. To change the location, exit out of Options, navigate to the proper location, and then come back into Options and click on the … button again.

14. **Set home page** – you can set your home page, click on the … button, this selects the page that you are currently on. To change the location, exit out of Options, navigate to the proper location, and then come back into Options and click on the … button again.

Once you have made you selections, click on the OK button. To cancel the operation or delete changes made click on the Cancel button. To restore CAIRS to the default locations, click on the Restore Defaults button.

- **Messenger** – this allows you to send a message to user who are currently logged into CAIRS.

- **Delete Local Settings** – when selected this will delete your custom form layouts and searches that you have created. There is no undo option, when the process is complete, you will get a 'Process Completed Successfully' notification.

- **Help** – Contains three submenu options.

15. **About** – when clicked, the About CAIRS pop up displays.

- **Version Notes** – opens a web page displaying the CAIRS release notes, including information on new features, bugs, and refinements.

16. **Check for Software Updates** – when clicked the software checks for a newer version of itself. If one is available, a popup appears with the updated version number and the option to update your software client.

- **Keyboard Shortcuts** – when clicked this will bring up a complete list of the keyboard shortcuts for each menu option, to view a complete list please see the KS Appendix

17. **Add or Remove** – if you click on the drop-down arrow just to the right of the Help button the Add or Remove options becomes available. When clicked there are three options:

- **File Menu** – this defaults to include all the options within the toolbar, to remove a menu click on it remove the checkmark. To re-add either click on the menu again or click on Reset Toolbar to display all option again.

18. **Customize** – This allows you to further customize CAIRS, please contact Unique if you want to use any of these options.

The lower toolbar allows you some handy ways to use CAIRS. The following options are available:

Back and Forward Arrows - these arrows allow you to navigate between the areas of the software that you have accessed since you logged in. Once you close the software, the buttons refresh and you start from scratch upon login.

New – Click the drop-down arrow to access a list of the items that you can create, it does not matter where you are in the software, and however, the menu option you are currently in appears first in the list.

Export – Click this button to export the information contained within the list pane to a excel, pdf, or tab delimited file.

Print – Click this button to print the information contained within the list pane

Delete – When you highlight a record within the list pane and click this button, you can delete that record. This option is only available in specific menus.

Refresh – Click to refresh the information within the list.

Home – Click on the button to return to the main menu list.

Messenger – click on this icon to send a message to users who are currently logged into CAIRS.

Navigation Pane

Directly above the main menu is the Navigation pane, it displays the menu and any sub-menus, actions, and views relating to the highlighted menu item.

Once you click on any menu item, the navigation pane displays a list of sub-menus. In some instances, the sub-menus automatically display, however, if there is a plus sign (+) next to the menu name, there are additional sub-menus. To view those menus, click on the plus sign once to open, click it again to collapse the menu.

Directly below the System Admin menu option there is a small drop-down arrow, click on the arrow to access the following options:
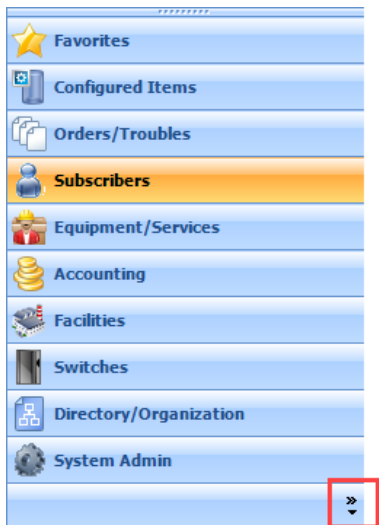
- **Show More Buttons** - this button is unavailable when all Main Menu options/buttons are visible. Show More Buttons becomes available once a button(s) has been removed and is used to restore a hidden/removed button.

19. **Show Fewer Buttons** - this button removes a one button at a time starting from the bottom button from the Main Menu. The following screenshot shows the Main Menu with the System Admin button removed.

    - **Navigation Pane Options** - Clicking this option opens the Navigation Pane Options pop up. Check mark or un-checkmark the boxes next to each Main Menu option and click **OK** to save your selection and close the popup. The button is either added or removed from Main Menu depending on your selection.

      Additionally, you can change the order the button(s) appear within the Main Menu by clicking and highlighting the button name within the list. Click the **Move Up** button to move the selection up one spot or click **Move Down** to move the selection down one spot. Click **OK** to save your work and close the pop up or **Cancel** to cancel and close the pop up.
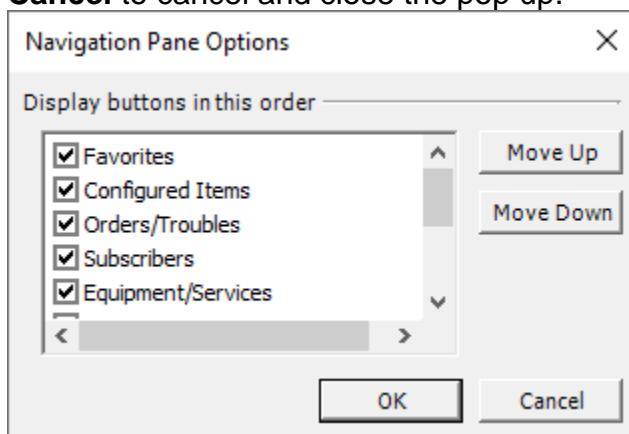
    - **Add or Remove Buttons** - Clicking **Add or Remove Buttons** displays a list of available Main Menu buttons.
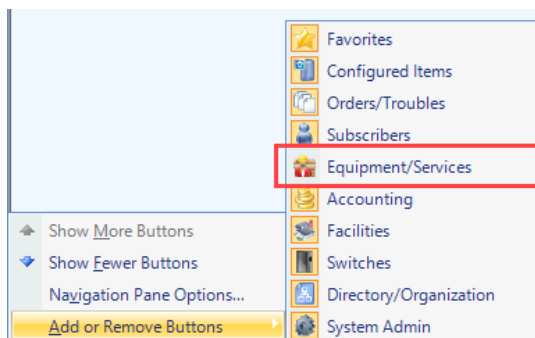
Mouse over to highlight the button to remove and left click. The button is immediately removed from the Main Menu and the menu item is no longer highlighted in orange within the Add or Remove Buttons list, indicating it has been removed from the list.

Actions Pane

For each menu item, there are certain actions that you can perform, for example, adding a new item, deleting an item, etc. Each action that you can perform is located within the Actions pane. There might be a few, there might be several, it all depends on the menu option! Most of the links that you see within this pane, we represent as buttons within the lower toolbar as well as selections within the Actions drop-down list within the upper toolbar.

Favorite Reports and Views Pane

The Favorite reports and View's pane contains additional ways that you can sort the information displayed within the List. When you click on the name of the view the list changes to display the information sorted appropriately. Depending on your selection, the list may appear collapsed, to view the information beneath a heading click the plus sign (+) next to the name, to collapse the selection, click on the minus sign (-). Not all sections have a Views pane.

With the addition of global reporting in CAIRS, all reports whether they are pre-built or custom can appear in the Favorite Reports and Views pane. All of the pre-built reports that have been in CAIRS will still appear in the pane as a favorite indicated by the yellow star. However, you can now remove reports that you no longer need by clicking on the star to remove the favorite. The view is no removed from the pane. This is not a permanent! You can undo the removal by finding the view in the lower right hand corner views pane, within that pane find the removed view and click on the star to place it back in the Favorites pane. The view will appear at the bottom of the list, you can use the up and down arrows or drag and drop to change its location with the pane.

Any Global Report that you have created can also be placed in the Views pane. In the Global Reports pane, next to each report name is the Favorite star. Click on the star to make it yellow, the report will now appear in both panes. In the Favorite Report and Views pane, the report will appear at the bottom of the list. You can adjust the order by using the up and down arrows or drag and drop.

! Not all of the Main Menu options consistently utilize the Action and Views areas. Actions will not display until you select a Subsection so depending on the Main Menu option selected you may not see one or both of these areas. For example, if you select either Orders or Troubles, the Actions section does not populate because there are no specific Actions related to the Section. In this situation, you need to click the plus sign (+) to the left of the Section, or double click the name (Orders or Troubles) to open and view the subsection menu.

The List

Finally, the big pane to the right, it currently displays a list of the menu options. Once you access a menu, it changes to display a list of sub-menus. Click on a sub-menu to view the list of associated items. Although the list may not populate right away, you will see the line display of the fields that will populate.

There are a few ways to get the list to populate, this is where you can search for the information that you want to see. There are a few different search options available:

- **Show All** – this is the easy way, click the link to populate the list with every record within your database. Remember, if you have a large database the list may take a long time to populate. We recommend using a search option.

20. **Instant** – this search allows you to type any portion of the record within the textbox, and then click on the magnifying glass to view the matching records.

- **Advanced** – this search allows you to place a descriptor on your search, for example, Contains, Equal to, start date, end start, etc. By clicking the double-down arrow, next to the magnifying glass, you can view a list of fields available to search on. Next, to each field is a Contains button; click the button to access a list of all the possible search descriptors. Once you choose a descriptor, type the search criteria into the field and click the magnifying glass to view the matching records.

Here are a few helpful hints to remember while working with the list:

- **Sorting –** you can sort the list by clicking any column header to sort it alphabetically or numerically. To sort the list in reverse order, click the column header again. With either sort order, the list shows the fields that contain no value first.

21. **Changing Column Order** – you change the location of any column within the list by clicking the column header and dragging it to the new position. The list remains this way even if you logout!

- **Remove Columns** – you can remove columns that appear within the list by right-clicking the column to access a pop-up menu, from the menu select 'Remove this Column'. If you want to re-add a column header, access the pop-up menu again and select 'Show Column' or 'Reset Column Visibility'.

22. **Renaming Fields** – you can rename any field at any time in any location. Right column anywhere within the list pane to access a pop-up menu, from the menu select 'Rename Field Everywhere' or 'Rename Field in View', a textbox opens allowing you to type the new field name.

The Bottom Line

The bottom line of the CAIRS window displays some very helpful information. This is where you can see your last successful login and the IP address of your computer. Also, the location of your database.

Messenger

The messenger can be used to send simple messages to anyone who is currently logged in their CAIRS Client.

! In order to make messenger appear as a menu option, there is a system setting that needs to be modified. The 'Server to Client Messaging" setting needs to be set to 'Long"

When you click on the messenger, a popup opens with a list of the users that are currently logged into CAIRS. There are a few options when messaging:

- **Message to User** – within the popup double click on the user you want to send a message to, another popup opens. Within the lower pane, type your message. Once complete hit the enter key on your keyboard. The messages will appear in the upper pane.

- **Broadcast Message** – you can broadcast a message to 2 or more users at one time. Click on the Messenger at the top of the popup, a menu appears from the menu select Broadcast Message. You will be required to select 2 or more users to broadcast. On your final user, double click to open the message, within the lower pane type your message. Once complete hit the enter key on your keyboard. The messages will appear in the upper pane.

If you have a large amount of people that are currently logged into CAIRS, you can use the Select menu to perform one of the following options:

- **Select All** – this will place a checkmark next to all users to broadcast a message to, you can then use the Broadcast Message option

- **Select None** – this removes all checkmarks

- **Invert Selection** – this removes the checkmarks from currently selects users and adds checkmarks to those that were not selected. Again, once selected you would use the Broadcast Message option

If you are a System Administration, there will be an additional menu selection at the top of the popup. The Admin menu will allow you to perform two functions:

- **Log Out Users With Warning** – after you have selected the users from the list, click this option to automatically close their CAIRS after 5 minutes. The users will be sent a message that their CAIRS will close in 5 minutes and to save any unsaved work.

- **Log Out Users Without Warning** – after you have selected the users from the list that you want to log out of CAIRS, click this option to automatically close their CAIRS. The user is not notified and their CAIRS is closed immediately.

Favorites

All menu options can be placed into your Favorites menu. To favorite a menu, click on the blank star next to the item so that it turns yellow. Once yellow the item will now appear in the Favorites menu option. To access your favorites, click on the Favorites menu option at the top of the list in the navigation pane. As you add menu items to the favorites list, the most recently added item appears at the end of the list.

To rearrange menu items within Favorite's menu, you can drag and drop the item to anywhere within the list. Alternatively, you can use the up and down arrows to move the menu items around within the list.

To un-favorite a menu option, click on the star to blank it out, the menu item is immediately removed from the favorite's menu.

You can turn off the Favorites stars by clicking the gear at the top of the Navigation pane. There are three options: Always, Never and On Hover. The default is to have the favorites always appear, to change click the radio button next to one of the other selections.

Sorting the Menu

You can change the sort order of the panes within the Navigation pane by using the up and down arrows next to each item. This is helpful so you can put your most commonly used items at the top of the pane. You can also drag and drop items around within the list.

If you do not want to see the arrow you can turn them on and off. Within the title bar of the Navigation pane, click on the gear, you can choose to Always Show or Never Show the sorting options.

Keyboard Shortcuts

Instead of using your mouse, you can use the keyboard to navigate to menu options within CAIRS. For example, to access Orders in My Work Centers you would press and hold the Control button and then type MWCO. When you are typing in the letters, you must type them within 3 seconds.

To view a complete list of the keyboard shortcuts you can click on the Help drop-down menu in the top tool bar and select Keyboard Shortcuts. You can also view the complete list in the Keyboard Shortcuts Appendix of this manual.

Customizing your CAIRS

When you right-click anywhere within 'The List' pane a small popup opens, this popup allows you to perform various functions to customize your CAIRS. The following options are available:

- **Rename field everywhere –** right-click on any column header or field name to rename the field everywhere in CAIRS

23. **Rename field in view –** right-click on any column header of field to rename the field in this view/menu option only

- **Mask on field everywhere –** right-click on any column header or field to change the mask for the field everywhere in CAIRS. 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.

24. **Mask on field in view -** right-click on any column header or field to change the mask for the field in this view/menu option only. 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.

- **Change field required everywhere –** this customization is helpful when you are in actual component, by right clicking on any field you can make that field required everywhere within the software. For example, if you are in a set and right click on Room and Jack to require everywhere, the fields are now required when you add a circuit, cell phone, etc. Anywhere that field appears it is now an entry is now required before you can save the record.

25. **Change field required in view –** this customization is helpful when you are in an actual component, you can make a field required in just that view. That means that if you are in a set and right click on the Subscriber field and make it required in this view, anytime you add or modify a set an entry in the Subscriber field is required. To remove the requirement, right click on the field again and select Change field required in view.

- **Update Drop-down** – you can add a drop-down add or update fields into drop-down lists for fields that you want to have custom drop-down. For each selection in the drop-down, you must enter the Value. The notes and sort field are optional. If you use the sort field, all values must be assigned a sort position. This will be greyed out for fields that are designated as drop-down fields, for example, you cannot change the Site drop-down from here you must access Facilities → Sites.

! A note about custom dropdown boxes – when you create a custom dropdown there is no blank field. Once you select a value from the list, you will have to click out of the dropdown and into the field to delete the value. Alternately, you can create a blank selection in the customize area by simply pressing the space bar in the field marked with an asterisk.

- **Copy –** this selection allows you to copy the contents of a field and paste to another.

26. **Customize –** right-click anywhere to access the Customize Display popup. This popup allows you to completely customize the appearance of the list. There are three panes within the popup: Customize For, Column Layout and Column Properties.

- **Remove this column –** right-click on any column header to remove the field from the line display. If you remove a column, a new option appears, Show Column, when selected a list of the columns you have removed appear. Within the list select the column header to re-add to the list.

27. Reset Column Visibility – select this to reset the column visibility to the defaults, any removed column will re-appear within the line display.

- **Reset Saved Sort –** when you click on any column header you can sort the list based on that field, when you select this, the list returns to the default sort.

More Customization

When you select the Customize option from the above popup, another popup opens allowing you to further customized your CAIRS. This allows you to customize the fields that appear in each menu option in CAIRS. The one pictured below corresponds to the fields within Orders.
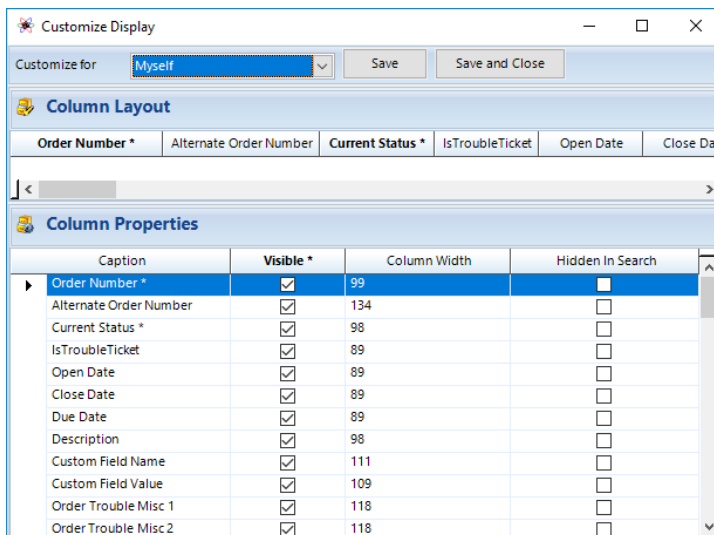
- **Customize For** – click the drop-down arrow to access of list, from the list select who you want to customize the list for:

    - **Myself** – this selection allows you to customize the list for your login only

    - **Selected Profile** – when selected an additional pane appears below with a list of all the profiles within your system. At the top is a dropdown, you can use that to select a single profile to change or you can select multiple profiles by placing a checkmark next to each profile name.

      Profiles may already have customization, to view their customization, click the dropdown arrow to select the profile name, then click on the Load Display button. This will change the fields that are already customized.

    - **Entire System** – this selection customizes the layout for all users.

- **Column Layout** – within this pane, you can change the order of the columns as they appear in the list. To change the line, click and hold the column header. Drag the column header to the new position within the line display. Two red arrows appear on each side of the header when it is available to be dropped into place.

- **Column Properties** – within this pane, you can determine field visibility, field column width, and whether fields appear in search results.

- **Caption** – displays the field name, this is a read-only field.

- **Read Only** – when you have selected a profile, this column displays allowing you to change the field to read only access. A checkmark in the column means the field is read only for the selected profile.

- **Visible** – this defaults to contain a checkmark to indicate that the field is visible in the display, click the field to remove the checkmark to remove it from the display

- **Column Width** – this field determines the width of the column, click on the field and type the new length, the higher the number the wider the column.

- **Hidden in Search** – click the field to insert a checkmark to hide this field in the Advanced Search

When you completed customizing the list, click on the Save and Close button to close. Your customizations will not take effect right away, you will need to exit the list and re-enter to see your changes.

Collapsing the Panes

Collapse the Navigation and Main Menu panes when you need to provide more room within the CAIRS window for list results or panes.

1. Clicking the double arrow next to the selected Main Menu option name collapses the Navigation and Main Menu panes.
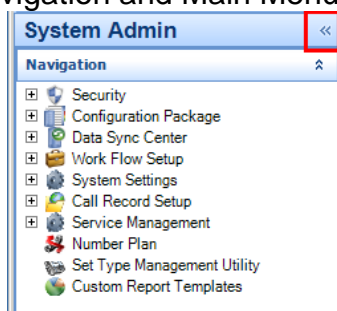
The screenshot below shows the collapsed Main Menu and Navigation pane.
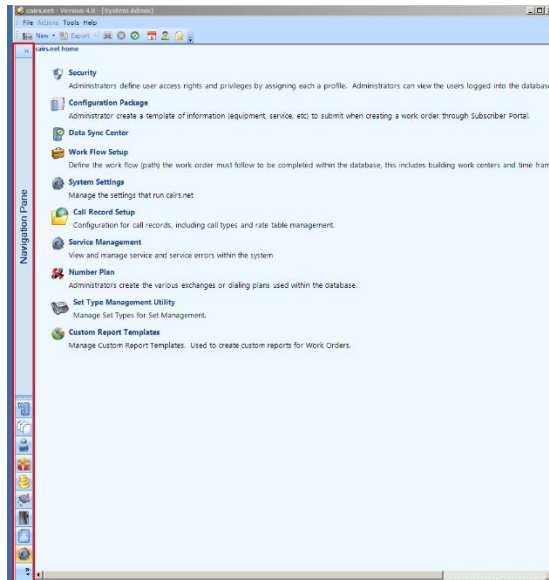
The double arrow ⟨»⟩ now points to the right. To maximize the panes, click the double arrow.

Searching the List

There are two types of searches, Instant and Advanced. We will overview both of these.

Instant Search

Instant searches are performed from the Instant Search field located in the upper right-hand corner of the Main Form and allow you to search for alpha, numeric, or alphanumeric information.

1. Once the search term is entered, click the magnifying glass icon located next to the Instant Search field to initiate the search. The results matching your criteria display.

2. When clicked, the drop-down arrow next to the Instant Search field displays four additional options.

Advanced Search

The Advanced Search allows you to place a descriptor on your search, for example, Contains, Equal to, start date, end start, etc.

1. Click the double drop-down arrow next to the magnifying glass.
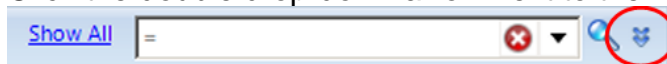
2. The Advanced Search field opens displaying search fields corresponding to the selected Band.
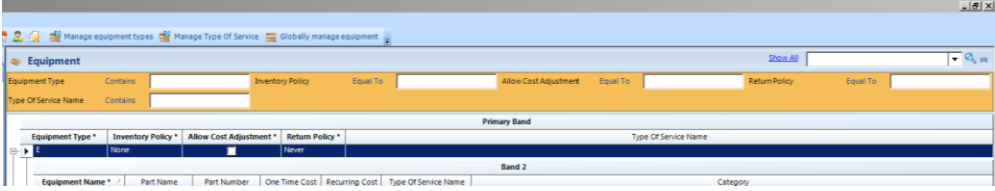
3. Next to each search field is a search criteria descriptor such as Contains, Equal to, Contains etc. This descriptor tells the system how to look for the information within the fields. A different descriptor can be selected by clicking the field's descriptor button.
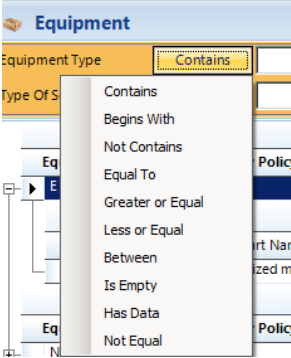
4. Choose the new descriptor and type the search criteria into the field. Press **Enter**. Results matching your search criteria display.
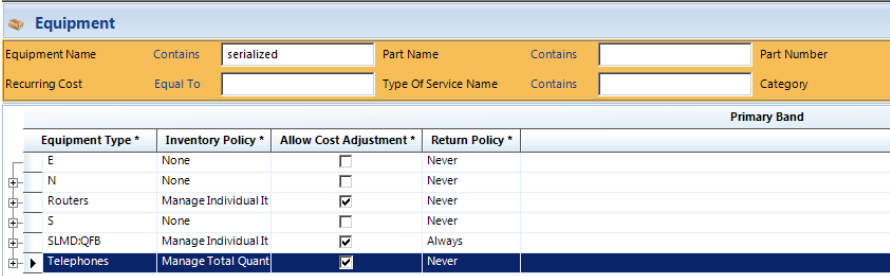
Search Options

Last Search – When you click on this link, CAIRS performs your previous search and displays the results.

Choosing a Band to Search – When searching the Primary Band, you are only searching the highest level of the tree. If you have only a Primary Band you will never be able to uncheck that band as the check boxes are more like radio buttons, where one must always be selected.
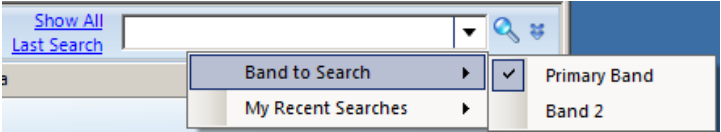
Where you will see more than one band within Band to Search is on a screen where data can be expanded. In that case you will see additional bands corresponding to the number of levels of expanded data. Band 2, includes the fields underneath the Primary Band while

Band 3 includes the fields underneath Band 2.

To search the fields within a secondary Band (Band 2, 3, 4, etc.) click to checkmark the desired Band within the **Band to Search** menu.
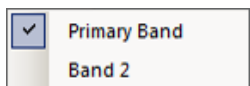
My Recent Searches – Displays recent searches. Keep in mind; this only displays your searches.
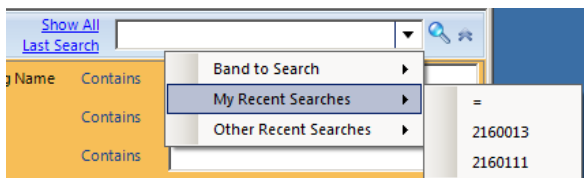
Other Recent Searches – Displays the recent searches from all users.
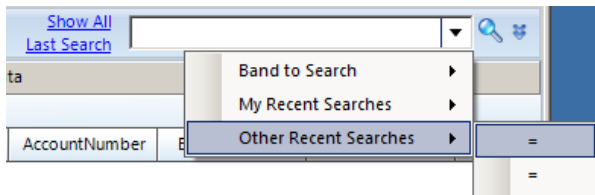
Detail Record

When you double-click on any record within The List or add a new record, the General window opens. (The title at the top of the screen changes depending on what detail record you are in!)

Quick Access Toolbar

At the top of every detail record, there are always going to be three buttons: print, excel, pdf and text. These allow you to export the information within the window to the appropriate program.

Sharing

Typically, within a Details Record there is a Sharing tab next to the Ribbon Tab.
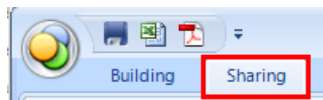
Clicking the Sharing tab displays the following Ribbon Groups.
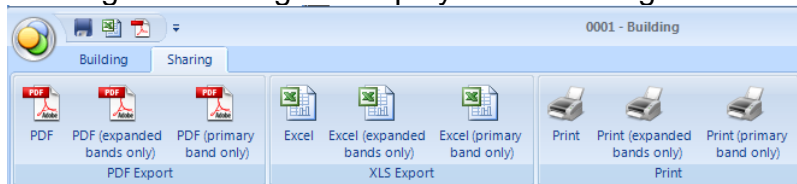
The Ribbon

The Ribbon, located at the top of each record, allows you to quickly navigate to actions you can perform for the record. We have organized all the actions into groups. Each ribbon group allows you to perform a task, view information, obtain details, etc.

Within each ribbon group are button, there are three different kinds of buttons: Standard, Segmented and Combination.

Standard Button

The screenshot below shows an example of a standard button. Standard buttons have only one function and unlike Segmented Buttons, they are not segmented so that the upper and lower portions have separate functions.

Segmented Button

The Segmented button provides two different functions. When clicked, the top part of the button acts as a Standard Button with a single function, and the bottom part of the button provides a menu containing one or more additional options.
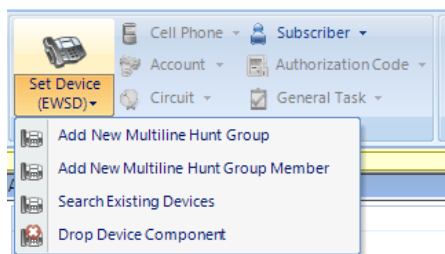
Combination Button
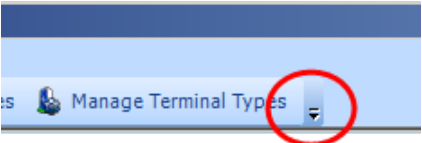
A Combination Button is a button containing a Standard button and a drop-down arrow on the side. The Standard Button has a single function and when clicked, the drop-down arrow displays one or more additional options.
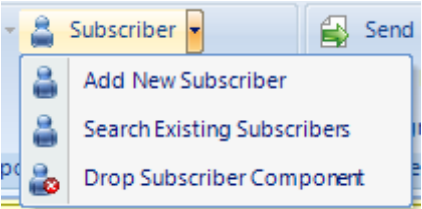
Auto Hide

1. Sections within a Detail Record can be hidden by clicking the auto-hide button located within the upper right-hand corner of each section. The screenshot below
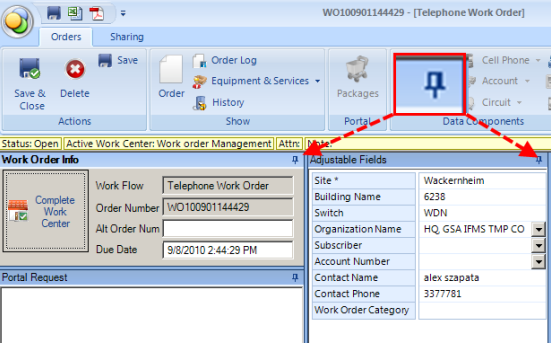
   shows the button icon.

2. After clicking the icon, the section collapses and becomes hidden. The screenshot below shows the Work Order Info section after clicking Auto Hide. Notice that the pushpin icon no longer points down but now points to the left.
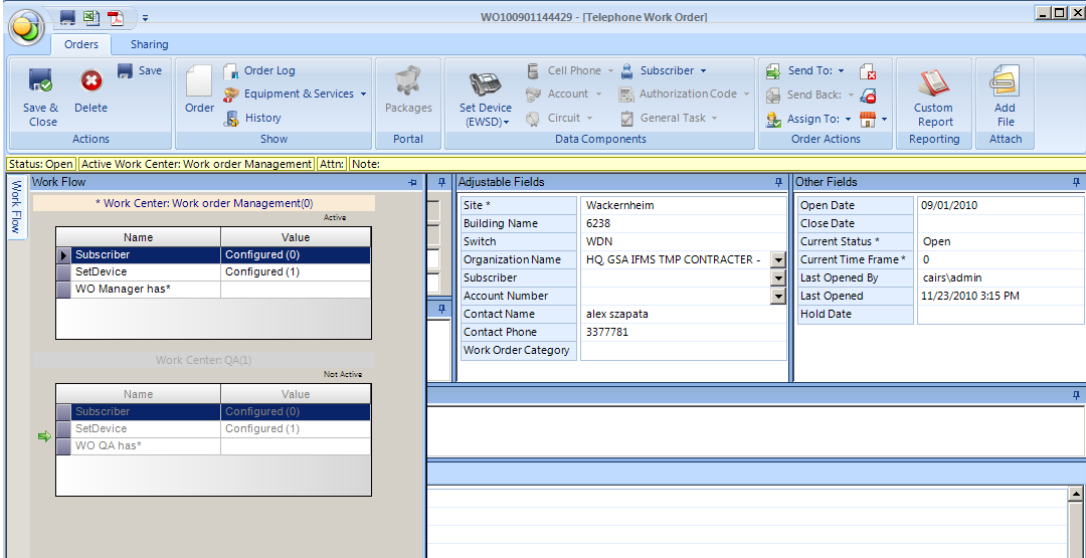
3. To unhide the section, re-click the icon. The section expands and is no longer hidden.
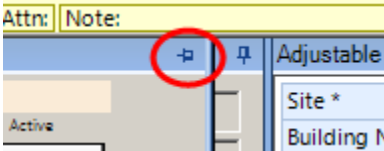
Popup Window

Clicking certain buttons provides a Popup window allowing the user to choose specific items required to complete a particular task.

For example, from a Telephone Work Order Detail Record clicking the Add File element within the Attach Ribbon Group opens the Select the file to attach Popup. This popup allows the user to attach various types of files to the work order.

Drop-downs

Each drop-down is searchable! When you click on a drop-down arrow there is a textbox at the top of the list that allows you to perform a search. Within the textbox, type in the record or any portion of the record and the results appear in the lower portion of the popup.

Form Layout

Within Form Layout you can customize the location and visibility panes that you see on the main form. You will be able to reposition pane, show/hid panes, create personal layouts, create shared layouts, etc.

Before you can start to customize any form, there a few behind the scenes settings that need to be determined by your administrator. First let's take care of the system settings, there are two that deal with form layout, they are:

- Default Form Layout To Admin Layout – If set to true, when User opens any form, it will be set up the way your System Admin had their form setup. If set to False, then the form will open to the default setup.

28. Require Permissions For Form Layout – If set to true, User must have permission in their profile to change their layout. This defaults to False meaning anyone can change their form layout.

Second, all profiles need to make sure they have the proper permissions to change the form layout.

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. From the Show Ribbon Group, click Menus and Actions.

6. At the top of the Actions Privileges pane, click on the radio button next to 'All Actions'

7. A list of all system actions appears, within the list find the 'Form Layout' and 'Form Shared Layout'

8. In the 'Allows Update' column click to add a checkmark.

9. Within the Actions ribbon group, click on the 'Save & Close' button.

Positioning Panes

When you click and drag a pane (from its blue title bar) to another area of the work space, a docking "compass" displays to guide you. The compass has 8 arrows: 4 in the center of the window, and 4 at the outer edges.

The outer arrows assist you to easily position the pane to the top-most, bottom-most, far-left, and far-right areas of the work space. The center arrows assist you in positioning the pane to a specific area (of your choosing) within the work space. A shaded outline shows you the general area where the pane will be docked.
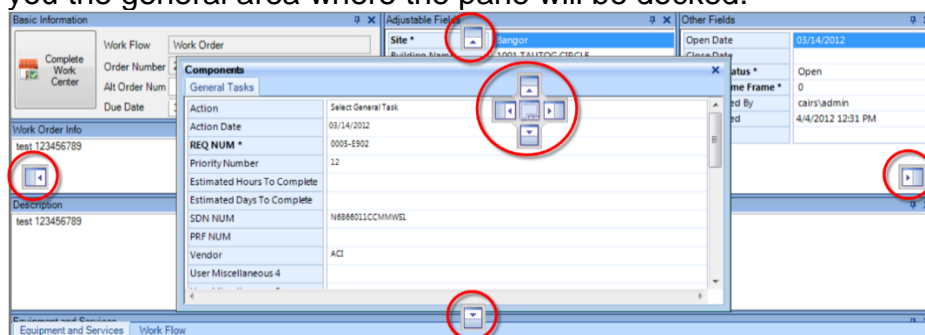
Docking a Pane

To dock a pane within the work space:

1. Double-click on the blue title bar of the docked pane. The pane is now positioned on top of the work space ("floating").

2. From the blue title bar, click and drag the pane until the compass displays.

3. When the pane you are dragging reaches the area where you want to dock it, the designated area is shaded.

4. Position your cursor over the arrow and release the mouse.

5. Your pane is now docked.

6. You can resize a docked pane by clicking on ✛ or ⊹⊹ between two panes.

Floating Panes

A floating pane is one that is not docked to any side and "floats" above the work space. You can work in a pane while it is floating within the work space, or from its floating position, you can drag it to be *docked* within your work space.
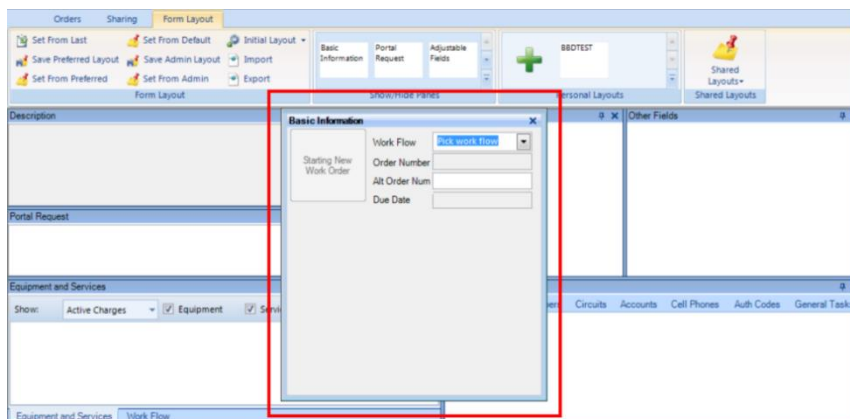
Show / Hide Panes Ribbon Group

Depending on how you work, you sometimes may want more (or need less) work space within a record. Using Show/Hide Panes, you can free more space by hiding certain panes that you do not routinely work with. When needed, you can show hidden panes by "un-hiding" from the work space.

Panes that are *docked* within the work space are shown here as white with black text. Panes that are *hidden* from the work space, are shown as gray with white text and display **(Hidden)**.

Hiding a Pane

There are several ways to hide a pane:

- Click the **'X'** in the upper-right corner of the pane.

- Right-click the blue title bar of the docked pane and select **Hide** from the drop-down menu.

- Within the Show / Hide Ribbon Group, single-click on the name of the pane you wish to hide.

With any of these options, the name of the pane within the Show/Hide Ribbon Group will change from black to white, and will display **(Hidden).**

Retrieving a Pane
To retrieve a pane (or multiple panes) that you have hidden:

- Within the Show/Hide Ribbon Group, single-click on the name of the hidden pane.
  The pane is now re-docked to its previous position prior to being hidden.

Form Layout Ribbon Group

- **Set From Last –** (default) sets the panes within the work space to the last layout that was used.

- **Save Preferred Layout –** saves the current layout as preferred.

- **Set From Preferred –** brings up current saved preferred layout.

- **Set From Default –** reverts to default layout.

- **Save Admin Layout –** saves layout for Admin (*must have Admin permission).

- **Set From Admin –** sets to saved Admin layout (*must have Admin permission).

- **Initial Layout** – sets the layout that is used when record is opened. Options for Initial Layout are:

  - Layout from Default

  - Layout from Last

  - Layout from Preferred

  - Layout from Admin

- **Import –** allows you to import a layout.

- **Export –** allows you to export a layout.

Saving/Sending/Sharing Layouts

Personal Layouts

You can save a layout that you created within your own work space. When you right click on a saved layout, a small menu opens with the following options:

- **Delete** – deletes your personal layout.

- **Rename** – renames your personal layout.

- **Overwrite layout with current data** – allows you to save the current layout as a Personal Layout

Exporting a Layout
You can export a saved layout for sharing (Ex. To share with another User or to share to a website).

29. From the Form Layout Ribbon Group, click **Export.**

1. From the **Save Layout As. . .** window, browse to the location to save, create a **File name** for your layout. Once you click Save the file is saved in the specified location.

Importing a Layout
You can import a layout from another User.

6. From the Form Layout Ribbon Group, click **Import.**

1. Browse to the location of the saved layout, click on the name to highlight.

2. Click the 'Open' button

Data Fill

Data Fill acts as a productivity-increasing template by allowing you to complete multiple forms without having to enter the same information repeatedly. The Data Fill tab is available in two places, Configured Items - Set Management and Configured Items - Circuits.

It is helpful to know a few design features before using Data Fill to its full capacity.

- The Data Fill tab only becomes active when the feature can be used within the software and is designed to disappear when you cannot use the template.

- Templates are user specific, stored locally on the user's machine and therefore, only the user who created the template can use the template.

- Data Fill is designed to exclude some fields within the template. Generally, excluded fields are specific to the component you are adding for example; you cannot include the Directory Number in the template.

- A warning appears when you switch to the template in the middle of a form. If you have completed a field that is within the template, you have the option of keeping your existing information or replacing it with the information from the template. If the field is blank within the template but complete on your form, the template will not overwrite your entry.

- The Data Fill tab is only available for new components.

Getting Started

Several choices within the Data Fill tab determine where the template information is pulled from. Choose the information source by clicking one of the following options:

- **Fill Last Values** – fills out the component with the last saved information. For example, if you just completed a new set install, it fills the appropriate fields with the same information as the newly installed set.

- **Save Default Template** and Fill Default Values– this allows you create a template to use when adding new components into the database, you populate the fields and then click on this button to save the template. To use the template, click the Fill Default Values button.

- **Automatic Fill** – the following choices tell caris.net how you want to use the Data Fill tab. Each time you open a new component CAIRS can perform one of the following:

  - **Automatic from Default** – this selection requires you to build the template. Once built, each time you add a new component the fields are automatically populated with the information.

  - **Automatic from Last** – this selection populates the field with the same information as the last saved component. Automatic from Last differs from Fill Last Values by filling out each new component opened.

  - **Turn off Automatic** – when selected auto fill is turned off. The Fill Last Value and Fill Default Values are still available but you are required to make a selection.

! The Data Fill option is only available on new records, whether a set device or a circuit, with that in mind, we will start the following how to direction after you have entered the new record.

Creating a Default Template

You can create several different templates to use within CAIRS. Keep in mind only you can access the templates created and saved on your local machine.

1. Before you create the actual template, you need to populate the fields you want included within the template. Within each of the panes, complete the appropriate information.

! Keep in mind that some fields are not allowed within the template. Generally, these fields are component specific, for example, directory number, port, etc.

2. Once the fields are populated, click the **Data Fill** tab within the toolbar.
3. Click **Save Default Template** within the **Data Fill Options** ribbon group.

Choosing an Automatic Fill

Once you have created your default template, you have really chosen to have CAIRS automatically use the default template whenever you open a new record.

1. Click the **Data Fill** tab and then the **Automatic Fill** button. There are three selections to choose from:

- **Automatic from Default** – once you have created the template, you can select this option. Once selected it becomes grayed out verifying that you have chosen to use the default template.
- **Automatic from Last** – when you highlight and click this selection, the new record populates with the same information you previously saved. This selection is helpful when creating a few of the same components.
- **Turn off Automatic Fill** – when you select this, you are completely turning off automatic fill.

2. Click the **Set Device** tab. Within the **Actions** ribbon group, click the **Save & Close** button.

Fill From Last Saved

Our one-time fill options allow you to populate fields automatically based on the last saved information. This means that when you are adding a new component, you save and close then add another new component and select the Fill from Last option, the fields you completed in the first component copy and populate the fields in the second component.

1. Click the **Data Fill** tab and then the **Fill from Last Values** button.
2. Click the **Set Device** tab. Within the **Actions** ribbon group, click the **Save & Close** button.

Fill Default Values

1. Click the **Data Fill** tab and then the **Fill Default Values** button.
2. Click the **Set Device** tab. Within the **Actions** ribbon group, click the **Save & Close** button.

Clear Values

1. Click the **Data Fill** tab and then the **Clear Values** button.

2. Depending on your auto fill selection, you can either click the **Fill Default Values** or **Fill from Last Values** buttons.

3. Alternatively, click the **Set Device** tab to enter in information.

4. Within the **Actions** ribbon group, click the **Save & Close** button.

Creating a Custom Template

1. Before you create the actual template, you need to populate the fields you want to include within the template. Within each of the panes, complete the appropriate information.

! Keep in mind that some fields are not allowed within the template. Generally, these fields are component specific, for example, directory number, port, etc.

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2. Once the fields are populated, click the **Data Fill** tab within the toolbar.

3. Click the green plus (+) sign. You will be asked to name your template. Type-in the name and click the **OK** or Cancel button. Your template name now appears as a button within the ribbon group.

Using a Custom Template

1. Within the **Data Fill Options** ribbon group, click the name of the custom template.

2. When asked if you wish to overwrite existing information, click **yes** to overwrite or **no** to keep the information.

3. Click the **Set Device** tab, within the **Actions** ribbon group and click the **Save & Close** button.

Deleting a Custom Template

1. Within the **Data Fill Options** ribbon group, right click the name of the custom template to access a drop-down list.

2. From the list, select **Delete Template**. The template name is removed from the ribbon group.

Renaming a Custom Template

1. Within the **Data Fill Options** ribbon group, right click the name of the custom template to access a drop-down list.

2. From the list, select **Rename Template** within the **Save Custom Data Fill** popup and type-in the new name of the template.

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3. Click the **OK** button to save your changes or click **Cancel** to return to the previous screen.

Overwriting the Custom Template

1. You have two options:

    - Create a new template by populating the fields on the first tab and overwrite the existing template.

    - Select the template, add/remove populated fields from the template and then overwrite.

2. With either option, right click the template name to access a drop-down list and from the list, select **Overwrite template with current data**. The template is now saved with the current information.

Common Elements

There are a few things in CAIRS that are on pretty much every record that you will open. These common elements are History, Notes and File Attachments. In an effort to save space and paper in the event that we print a manual, we will cover the process to add, modify and delete each of these here. When reading this section, please keep in mind that we will start each process from within a record, this could be a set device, work order, trouble ticket, user, etc.

Notes

Often times users make small changes or adjustments to records that do not warrant creating a work order or trouble ticket. To keep an accurate history, it is a good idea to place a note on the record. Notes can be added, modified or deleted.

There are two different note types within CAIRS. First, are basic notes that you can add through the Notes button in the ribbon. These notes are only viewable from within the record and are only available from within Set Management → Configured Sets.

The more detailed notes and the more widely used throughout CAIRS, have their own pane within the record. These notes allow for a subject, category, formatting, etc. In certain sections, these notes can be searched on from the navigation pane of the associated menu option. For example, within Work Orders there is a view specifically for Notes associated to any work order.

For this section of the manual we will cover how to add, modify and delete both type of notes.

Basic Notes

The basis notes as stated before are only with Set Management → Configured Items.

Adding/Deleting a Note

1. When you are viewing a record in CAIRS, there is always the ribbon at the top of the window. Within the Notes ribbon group, click the lower half of the Notes button to access a drop-down menu.

Adding a Note

2. From the menu, click Add Note.

3. A box opens, type the text in the box.

4. When finished, click the X in the upper right-hand corner of the box to save and close. A small yellow icon now appears on the notes button to indicate the record has existing notes.

Viewing the Note Details

5. To view your new note, click on the upper portion of the Notes button, the screen changes to display a list of the notes associated to the record. New notes populate at the top of the list.

6. Double click on the note to view the complete text

Deleting a Note from a Set Record

7. All notes associated to the record appear below the ribbon. Click on the note to highlight, within the Notes ribbon group, click the lower half of the Notes button to access a drop-down menu.

8. From the menu, click Delete Note.

9. Once you click Delete, a message box displays verifying that you really want to delete the note. Click Yes within the box to continue or No to cancel the operation. There is no undo action, once you click yes the note is deleted from the system.

Detailed Notes

The Detail Notes in CAIRS allow you to provide more information for a note that includes such things as templates, categories, formatting option, etc. Before starting to add notes to records, you should first create your categories and templates. A category helps to group the notes based on a common characteristic. For example, if work orders a few note categories are Update Order, Remove Component, Update Description, etc. Templates allow you to create a standard text guideline for each of the categories that you have created.

Note Categories

Note categories allow you to group your notes based on a common characteristic. As stated earlier, most menu options that have the detailed notes pane also have a specific view for the notes associated to a record. When viewing the list, you can sort it alpha-numerically based on category name.

Each menu option will have their own specific note categories, they are not shared from menu option to menu option.

Add/Modify/Delete a Note Category

1. Within the notes pane of any record, there is a menu bar at the top, to add/modify/delete note categories click on the Manage Categories link.

2. The Manage Note Categories popup opens.

3. To add a new category, click on the field marked with an asterisk (*) and start typing the category name. As you type a new row appear at the top of the list marked with an asterisk to allow you to add multiple categories at once.

4. To modify a category, click in the row and make any necessary modifications.

5. To delete a category, right click on the record selector next to the category name, a dropdown menu opens. From the menu, select Delete. When asked if you really want to delete the category click Yes to continue or No to cancel the operation.

6. When you have finished working with the categories, click on the Save & Close button within the Actions ribbon group.

Category Document Templates

For each category you create, you can also create a document template. The template allows you to create the title, body and formatting of each note within the category. Once you select a note template, the note text automatically populates in the note editor. This is a handy time saving tool to allow you to quickly add notes to records.

1. Within the Notes pane, click on the Manage Categories link

2. The Manage Note Categories popup opens. Within the list, select the category to associate a template with

3. Within the Note Template ribbon group, click the Edit Note Template button. The Note Template Editor opens.

Alternatively, from the main notes window, next to the Category dropdown box there are 3 buttons; Load, Modify and Create. To Create a new template from here, first select the Category then click on the Create button.

4. Type the text of the note into the editor. You can add formatting to the text by using the buttons with the menu bar.

5. Once finished, click on the Save button in the lower right-hand corner.

6. To use a template, select the associated category from the Category dropdown list. Once selected click on the Load button.

7. Whenever you select the particular category, your template automatically populates in the Notes Editor.

Adding a Note to a Record

1. Within the Notes pane, click on the Add Note link. The Note Editor popup opens.

2. You can simply start typing the text of the note into the Editor; however, you have several options while creating your note:

Note Category

3. In the Category drop-down, click on the arrow to access a list of the categories and from the list select the associated category. This category simply groups your notes based on a common characteristic.

4. If the category has a template, the template text automatically populates in the note editor. You can modify the template by clicking in the note editor to change any necessary information.

5. Next to the Category drop-down are a few options:

   - Load – if you have already created the note and want to use the template instead, click on the Load button. You will be notified that loading the template will overwrite any existing information. Click Yes to continue or No to cancel the operation.

   6. Modify – You can modify the template by clicking on the Modify link, the Note Template Editor opens allowing you to make changes. Once complete, remember to click Save!

   - Create – You can create a new template by clicking on the Create button, the Note Template Editor opens; within the body type the text and once complete click Save

Changing the Note Font

7. At the top of the Notes Editor are several options available to modify the look of the note. You have the following options available:

   - Bold/Italic/Underline

   8. Bullet

   - Numbering

   9. Font Color

   - Font Highlight

   10. Font Type and Size

11. Click on any button and start typing the text of your note.

12. To change any text within your note, highlight the text and click on the appropriate button.

Adding a Note Subject

13. You can add a subject to a note by clicking in the Subject field and typing in the subject line.

Undo/Redo

14. If at any time during the creation of your note you make a mistake, we have taken care of you with the undo and redo buttons. These buttons will only work if you have not clicked the Save button.

Status Bar

15. At the bottom of the note editor, there is a status bar that displays the following information:

- Created By

16. Creation Date

- Last Modified Date

17. Modified By

18. When you have completed your note, click on the Save button in the lower right-hand corner. The note is saved and you are returned to the Work Order.

Viewing All Notes Added to a Record

1. All notes that you have created display within the Notes pane, the most recent note appears at the top of the list.

2. There are two viewing options:

- Standard – this view displays the note in its entirety

3. Condensed – this view displays only the top portion of the note

4. You can further condense the list by clicking the minus sign next to Created By for each note, this only displays the subject of the note. To view the complete note details, click on the plus sign.

5. There is one more viewing option, when you are in any sub-menu of Work Orders there is an option in the Views panes to see all notes related to an order or trouble. To view the note details, double click on the row to open the Work Order.

Editing a Note

To edit a note, find the note within the list and click on the Edit link on the far-right side of the pane. The popup opens allowing you to edit and save the note. The position of the note does not change within the list because the list is based on date and time created.

Deleting a Note from a Record

1. All notes that you have created display within the Notes pane, the most recent note appears at the top of the list.

2. Within the note header, click on the Delete link on the far-right hand side of the header.

3. The note is removed from the list.

History

History provides the user with a timeline of the actions completed on the record. The main window provides a basic list of the actions and by double-clicking on any action; a pop-up opens with a detailed action description.

Viewing the History of a Record

1. Within the Show ribbon group, click the History button. The following read only information displays for each action performed:

   - Action Name* – describes the completed action. For example, Add New Work Order Activity, Update Work Order, Add New Set, etc.

2. Custom Field Name – displayed the field name of the modified information

   - Old Value – displays the old information

3. New Value – displays the new information

   - User Name – displays the user name for the person who completed the action.

4. 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.

5. 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.

6. 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 actions taken on the record, to view more detail double click on the row.

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

File Attachments

Before you can attach files to a record, your CAIRS administrator must determine the allowable file types and size. Please contact your CAIRS administrator if you are unable to attach files.

There are two different types of files that you can attach to a record; you can attach any allowable file type or you can attach a link to a file in a shared location. Although attaching a file is easy and convenient, any time changes need to be made to the file, the file will have to be saved and then attached to the record again. When attaching a link to a file, the file is held in the shared location so any changes are automatically saved and attached to the record.

Whenever a file is attached it will follow the record until the file is removed. Throughout CAIRS almost all records have a place to attach a record. We will cover the process here as is applies to all records, the process to add a file or link is the same.

Attaching a File or External Link to a Set Record

1. When you are viewing a record in CAIRS, there is always the ribbon at the top of the window. Within the Attach ribbon group, click on either Add File or the Add External Link button.
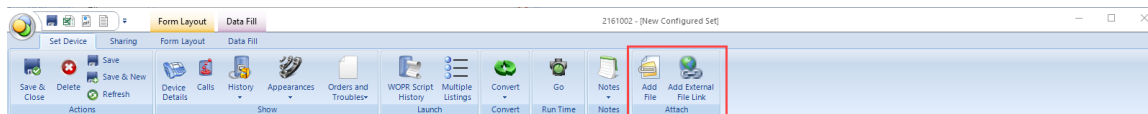
2. The Select the File to Attach window opens. Browse to select the file to attach and click the Open button.

! If the file type that you want to add in not showing up within your location, click on the file type drop-down arrow to select the correct file format. If the file type is not available within the drop-down, please contact your CAIRS administrator to add the file type to the allowable file types list.

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3. Once attached, a button displays directly below the ribbon. To view the attached file, click the button.

Viewing and Saving an Attached File

1. When you are viewing a record in CAIRS, there is always the ribbon at the top of the window. Directly below the ribbon, a button displays with the file name.

2. Click the button to view the attachment.

3. Alternatively, right-click the file name to access a pop-up menu, then select Open.

4. To save, right-click the file name to access a pop-up menu, and then select Save Target As.

5. Within the Save Target As window, browse to the location of where you want the file saved and click the Save button.

Deleting a File from a Record

1. When you are viewing a record in CAIRS, there is always the ribbon at the top of the window. Directly below the ribbon, a button displays with the file name.

2. Right-click the file name to access a pop-up menu, and then select Delete.

3. Once you click Delete, a message box displays verifying that you really want to delete the file. Click Yes within the box to continue or No to cancel the operation.

Configured Items

Configured Items encompasses most of the devices within your database, this can include sets, circuits, network devices, cell phones, etc. Within each section you can add, modify and delete each of the specific devices. You can also view all the related details such as equipment, services, connectivity, etc. There are several different menu options within Configured Items:

- Standard Sets
4. Cisco Phones
- AS5300 Phones
5. NEC
- Set Management
6. Network Devices
- Authorization Codes
7. Circuits
- Cell Phones
8. Land Radio
- Hardware
9. Assigned Inventory
- Accounting Entries

Standard Sets

Standard Sets allows you to view all set related data for all sets regardless of switch type in one location. You can also create a project to import multiple set devices into your database at one time.

Standard Set Devices

Within Standard Set Devices you can view every set that you have assigned within your database. This includes all the related connectivity, equipment, services, account, etc.

Standard Set Import Project

Standard Directory

Cisco Phones

A few things need to be setup within CAIRS before you can view your complete inventory of cisco phones. First, you must create the Cisco switch with an SMA connection in switches. To learn more about creating a switch, please see the Switches chapter.

Next, you will need to perform a switch sync. The sync pulls all the telephone information from your switch to populate CAIRS. Once the sync is complete you will be able to view your complete Cisco phone inventory and there related data.

Once you have the switch created and the sync done, you can start to perform adds, moves and changes for all your cisco phones.

Performing a Sync

Before you can start to perform any actions on your Cisco phones, you will need to perform a sync. The sync duplicates the data you have in your Cisco switch into the CAIRS database.

1. Click **Configured Items**.
2. In the **Navigation** pane, select Cisco Phones
3. Within the Actions pane, click on the 'Resync from Switch' link
4. A box with the sync progress will open in the lower right hand corner of your screen. Once the sync is complete, the box will close and your inventory will populate with the list.

Don't worry you can sync multiple times without losing any of the data that you have entered into CAIRS.

Set Data

Depending on your access rights to the switch, you may be able to load the information directly from the switch each time you access the set. However, if your access rights are restricted a sync can be performed and the data will be placed in a cache. This allows you to view the data without making changes. However, in some situations you may be able to connect to the switch and make changes. There are two buttons with the Set Data ribbon group that allow you to load data and possibly make changes.

- **Load Live Data** – click on this button to connect to the switch and load the set information. You will be able to edit the information once loaded

5. **Load Cached Data** – click on this button to load the set information from the cached data. The only fields that you will be able to edit are field specific to CAIRS. All switch related fields are read only.

**Within in each switch there is a data caching setting. If you cannot see live data, please contact your CAIRS administrator.

Understanding the Cisco Window

When you access a Cisco set, it is a little different then a set device in Set Management. There are three panes of information: Information from CAIRS, Switch Summary Information, and Switch Detail Information.

Information from CAIRS

This pane displays the information that resides in the CAIRS database. You will see the switch name, phone model and phone template.

Switch Summary Information

This pane displays the information associated to each button on the set. When you click on the link, the switch detail pane changes to displays the buttons information.

Switch Detail Information

This pane displays the current data associated to the set within your CUCM. There are four tabs of information at the bottom. The Switch Detail Information displays the current information associated to the set, this information comes directly from your CUCM. The remaining tabs display the sets connectivity, account information and any equipment or services associated to the set.

Configuring a New Cisco Phone

1. Click **Configured Items**.

2. In the **Navigation** pane, select Cisco Phones

3. There are two ways you can start to add a cisco phone, with either option the General – Cisco Phone window opens:

   - Within the toolbar directly above the **Navigation** pane, click the drop-down arrow next to **New**, then select Cisco Phone.

4. Within the Actions pane, click Add New Cisco Phone

5. In the Information from CAIRS pane, complete the following fields, required fields are marked with an asterisk (*):

   - **Switch Name** * - click on the dropdown arrow to access a list of the switched created in your database, from the list select the CUCM to add the phone to

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6. **Phone Model * -** click on the dropdown arrow to access a list of the phone models associated with your CUCM. The models that appear in this list are populated directly from your switch.

- **Phone Template *** - click on the dropdown arrow to access a list of the phone template associated with your CUCM. Again, the templates within this list come directly from the templates created in your CUCM, to manipulate this information you must access your CUCM directly.

7. **Site** – click the drop-down arrow to access a list, then, select the set installation site. The site drop-down list displays the bottom-most site first. After the ~~ is the complete path to the site.

- **Organization Name** – click the drop-down arrow to access a list, and then select the name of the organization. There can be three columns of information: org code, organization name and organization path. The org code is 3-character code used to identify the org, your administrator determines if this column is visible. The organization name column displays the lowest child organization name. The organization path displays the complete path to the selected org, this includes all parents and children. Once you select an organization, the complete path populates within the field.

8. **End User –** type in the name of the end user of the phone

- **Device Name –** type in the specific device name that was registered in the CUCM

9. **Description** – type in the description of the phone, up to 99 characters

- **Device Pool –** type in the device pool

10. **IP Address** – type in the IP Address for the device

- **CUCM Misc 1 – 5 –** use these fields to enter in any additional information regarding the phone. Each field contains a maximum of 99 characters.

11. **Publishing *** – this field defaults to published meaning the phone number will appear as a listing in the printed and online directory. To change the listing, click the drop-down arrow to access a list, and then select one of the following publishing options:

- **Non-published** – if selected, this listing will not display in any printed or online directory.

12. **Classified** – if selected, this listing displays in the classified directory only.

- **Temporary** – if selected, this displays as a temporary listing.

13. **Alternate** – DO NOT USE, there is no Alternate Telephone number available for a CUCM phone.

14. Once you have the above required fields completed the other two panes of information will become available for you to populate. Let's start with the Switch Detail Information pane.

Switch Detail Information Pane

15. Within the Switch Detail Information pane, there are several sections of information based on the phone model and template that you have chosen within the Information from CAIRS pane. We will cover the panes that are consistent for every phone added into the CUCM

Section 1: Phone Type

16. There are two fields within this pane, the phone model and the protocol. The model matches the one from the information from cair.net pane. The protocol used is pre-determined by your CUCM

Section 2: Device Information

17. This pane allows you to add more information regarding the phone.

There are several fields of information displayed within this pane, for the purposes of this manual we are going to focus on the fields that are required. To learn more about each field, click on the Open CUCM Help button with the Cisco ribbon group

18. Complete all necessary fields, you must complete the field marked with an asterisk (*):

- MAC Address * - type in the MAC address of the gateway. This MAC address is the unique identifier for the device

19. Device Pool * - click on the arrow to access a dropdown list, from the list select the appropriate device pool

- Phone Button Template * - this field auto-populates with the phone template you selected in the information from CAIRS pane. To change the template, click on the dropdown arrow to access a list of template, from the list select the new phone button template

20. Common Phone Profile * - click the arrow to access a dropdown list, from the list select either the Standard or Special phone profile

- Location * - click on the arrow to access a dropdown list, from the list select the location of the device

Section 3: Protocol Specific Information

21. Within this section you are going to complete fields that are specific to the protocol associated to the set model. The protocol is determined by your CUCM settings. Complete all necessary fields, you must complete the field marked with an asterisk (*):

- Device Security Profile * - click the arrow to access a dropdown list, from the list select the security profile for the device.

Other Sections

22. The remaining sections are phone specific, if any section has required fields those will be indicated by an asterisk (*). You must complete those fields before you can save the device.

23. Once you have completed the information within the Switch Detail pane, it is a good idea to Save the information you have entered. Within the Action ribbon group, click on the Save button.

Switch Summary Information

24. Within the switch summary pane, you can configure the set buttons with telephone numbers or features. You can click on any of the links within the pane to access the buttons information.

25. At this point you have completed the necessary set information, you can Save and Close to return to the main menu or you can continue to add set connectivity, account management and equipment or services. Please see the below sections to learn more.

Set Connectivity

1. Click **Configured Items**.

2. In the **Navigation** pane, select Cisco Phones

3. Depending on the amount of records 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 then click the magnifying glass.

   4. Click the **Show All** button.

5. Within the list, double click on the Cisco phone to access its detailed information.

6. Connectivity, Equipment & Services and Account Management all share a pane, to access Connectivity click on the tab at the bottom of the pane.

7. There are two sections within the Facilities pane. The top portion allows you to assign a few basic items within Facilities, and the lower half allows you to assign the complete facilities package.

8. Within the top section, complete the following fields (required fields are marked with an asterisk (*):

   - **Assigned Site** – click the drop-down arrow to access a list, from the list select the assigned site.

   9. **Assigned Building** * – click the drop-down arrow to access a list, and then select the building name.

   - **Alternate Location –** type in any alternate location information relating to the set. This field can appear in the 911 interface

   10. **Directory Building Name** – this field auto-populates with the Directory Building Name that appears on the Building Record. The Directory Building name is

defined as the common name for the building, for example, the assigned building name is 100 and the directory building name is Post Office. This field is read only.

- **Floor** – type the floor number, if applicable.

11. **Room** – type the room number, if applicable.

- **Jack** – type the jack number, if applicable.

12. **Dedicated Plant** – click the arrow to access a drop-down list, from the list select the type of dedication, it automatically defaults to Not Dedicated. You can change the selection to dedicate with port or dedicated without port. When you choose to dedicate, anytime you move or delete the device, the facilities remain in place and are unavailable to use in other situations.

- **Latitude/Longitude/Elevation –** type in the coordinates of where the phone is located. If used this information, will transfer in the 911 interface and display the terminal that is nearest the location of the phone.

These coordinates work in connection with the Nearest Building tab (if you do not see the tab, you will need to change the system setting 'Show Nearest Building Button in Facilities' to True). The buildings with the nearest coordinates will appear in the tab.

13. Within the lower section, when you click the first line (marked with an asterisk) the site and building name populate with the information you entered in the upper section. If the building only has 1 terminal the name of the terminal will also auto-populate.

14. If there is more than one terminal, click the drop-down arrow to access a list, and then select the terminal name associated with the building.

15. If you do not see, the Connection Name line, click the plus sign (+) next to the site name. The following fields open to allow you to complete adding the facilities, complete the following fields (required fields are marked with an asterisk (*):

- **Connection Name** – click the drop-down arrow to access a list, and then select the set's connection.

16. **Path Number** – this field auto-populates with the next available path in the terminal. To change this selection, click the drop-down arrow to access a list and then select the set's path number.

- **Path Usage** – click the drop-down arrow to access a list, then, select the path usage type. This is a list that is pre-defined within Facilities and indicates how the path is being used, for example, data, voice, transmit, etc.

17. **Out Binding Post** or **Out Frame Location** – these fields auto-populate with number(s) corresponding to the path number. This information is defined within Facilities; each terminal is designed with either a Binding Post or Frame Location. This field is a Read Only field.

- **In Row, Block, Pin** – these fields auto-populate within number(s) corresponding to the path number. This information is defined within Facilities; each terminal is designed with either a Binding Post or Frame Location. This is a Read Only field.

18. At this point it is a good idea to save the information you entered so far, within the **Actions** ribbon group, click the **Save** button.

Account Management

The Account Management tab displays the different account numbers that are associated to the set. Each account number can be responsible for different charges.

At the top of the pane is a dropdown box, this box allows you to select the different buttons appearances on the set. The pane will change to display the appropriate account information.

There are 3 different types of charges you can associated to the set; one-time, recurring and call charges. For each charge type, you can associate a different account. This allows you to have up to 3 different accounts associated to the set.

Adding an account number

1. Click **Configured Items**.

2. In the **Navigation** pane, select Cisco Phones

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. Within the list, double click on the Cisco phone to access its detailed information.

6. Within the lower portion of the Switch Details pane is the Account Management tab. If you are not already on the Account Management tab, click on the tab. The pane changes to display the accounts related to the different charge types for the set.

7. At the top of the pane is a Number dropdown list, click on the arrow to access a list of the telephone numbers of the set. From the list, select the number that you want to associate an account, the list will default to the primary telephone number.

! **Default from Primary Number** – If you place a checkmark in the box, all charges relating to any telephone number of the set will automatically be associated to the account related to the primary telephone number.

Include Inactive Accounts – this defaults to remain unchecked meaning that you are only going to see accounts that are active or that have a Billing End Date that has not occurred yet. If you check the box, all the accounts will appear within the list whether they have active charges or billed charges.

8. Click the row marked with the asterisk to enter in a new account number for the equipment and services. Complete the following fields, required fields are marked with an asterisk (*):

- **Charge Type*** – click the drop-down arrow to access a list, then select one of the following choices:

    - **All Charges** – bills the account for all charges

    9. **Recurring Charges** - bills the account for only recurring charges

    - **One-time Charges** – bills the account for only one- time charges

    10. **Call Charges** – bills the account for charges related to call

- **Site*** – once you click any of the drop-down lists, the site name auto-populates with the site selected on the General-Set Device window.

- **Subscriber Name** – click on the drop-down arrow to access a list, and from the list select the appropriate subscriber

- **Organization –** if you have selected an account number associated to an organization, that organization name populates within the field. This is a read only field.

- **Account Number*** – click the drop-down arrow to access a list of the account numbers and their associated organizations. If an account number is associated to multiple organizations, the account number appears in the list multiple times, for example if account number 2424 is associated to three different organizations, there are three appearances of the account number within the drop-down. Each account number references the different organization name.

    From the list, select the account number and organization responsible for the charges.

! When you create an account number, you can assign it to an organization or to a subscriber; this designates the account as official or unofficial. If you select an account with an organization, it is most likely an Official Account. If you select an account where the organization is blank, it is most likely an Unofficial account and associated to a subscriber.

- **Billing Start Date*** – click the drop-down arrow to access a calendar, from the calendar select the date to start the billing. 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.

- **Billing End Date** – click the drop-down arrow to access a calendar, from the calendar select the date to stop the billing for the equipment or service. 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.

11. Within the Actions ribbon group, click Save (to save and stay) to continue working with the set, or click Save & Close (to save and exit) to return to the Set Management list.

Deleting an Account Number from a Set

1. Click **Configured Items**.

2. In the **Navigation** pane, select Cisco Phones

3. Depending on the amount of records 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 then click the magnifying glass.

   4. Click the **Show All** button.

5. Within the list, double click on the Cisco phone to access its detailed information.

6. Within the lower portion of the Switch Details pane is the Account Management tab. If you are not already on the Account Management tab, click on the tab. The pane changes to display the accounts related to the different charge types for the set.

7. At the top of the pane is a Number dropdown list, click on the arrow to access a list of the telephone numbers of the set, from the list select the telephone to modify. The pane changes to display the account number associated to the telephone number.

! **Delete Date** When you are deleting an account you can manually set the Delete Date or Billing End Date. This allows you to set the end date in the future or past. If you do not fill out the billing end date, CAIRS will automatically stop the billing the date you delete the account from the set.

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8. Within the list, right click on the selector box next to the charge type, a small popup menu opens, within the box click **Delete**.

9. Once you click Delete, a message box appears verifying that you really want to delete the account. Click Yes within the box to continue or No to cancel the operation.

10. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with the set, or click **Save & Close** (to save and exit).

Equipment & Services

Please see Common Elements – Equipment & Services to learn more.

Show Related Orders and Troubles

Within this button, you can view the open or complete work orders or troubles relating to the set.

1. Click **Configured Items**.

2. In the **Navigation** pane, select Cisco Phones

3. Depending on the amount of records 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 then click the magnifying glass.

   4. Click the **Show All** button.

5. Within the list, double click on the Cisco phone to access its detailed information.

6. Within the **Show** ribbon group, click on the Show Related Orders and Troubles button.

7. A list of all associated work order and trouble tickets appear within the pane. The following information is displayed:

   - Work Order Number

   8. Work Flow Name

   - Org Name

   9. Site Name

   - Work Order Desc

   10. Open Date

   - Current Status

11. By double clicking on the work order number, the work order opens allowing you to view the complete detailed information. Click on the x in the upper right-hand corner to close the work order and return to the phone.

Calls

To view the calls associated to the phone, click the Calls button within the Show ribbon group. Depending on the amount of calls associated to the phone, the list may not populate right away. To populate the list, complete one of the following:

- Within the search box, type any portion of a call record (Date Called, Call Type, etc.) then click the magnifying glass.

12. Click the **Show All** button.

The window displays the following call information:

- **Call Type** – call type name.

- **Total Calls** – the total number of calls made.

- **Total Cost** – the total cost of calls.

13. **Total Call Duration** – the total duration of calls in minutes.

At the bottom of the list, are call charge totals. To view the details for each call type, click the **plus sign (+)** next to the call type name, to return to the default view, click the minus sign **(-)** next to the call type name.

You can export or print the call data by clicking on the Sharing tab at the top of the screen. There are 4 export formats:

- **PDF** – you can export the total report (expanded bands only or primary band) to a PDF file. Once selected the PDF file generates to your screen, you can save the file to any location.

14. **Excel** – you can export the total report (expanded bands only or primary band) to an Excel spreadsheet. Once selected, Excel opens with your report, you can save the file to any location.

- **Print** – you can send the entire report (expanded bands only or primary band) to a printer. Once selected the Print box displays allowing you to choose your printing options.

15. **Text** – you can export the total report (expanded bands only or primary bands) to a tab delimited text file. Once selected, the Select the location to save the Tab-delimited Text File box opens. Browse to the location, type the file name within the text box and click the Save button.

File Attachments

Please see Common Elements → File Attachments to learn more.

Deleting a Cisco Phone

It is important to note that when you delete a phone that has existing charges whether call, equipment or services, those need a billing end date. If you do not indicate a billing end date, CAIRS auto-populates the billing end date with the current date.

1. Click **Configured Items**.

2. In the **Navigation** pane, select Cisco Phones

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. Once the list populates, click on the phone you want to delete and perform one of the following options:

   - Within the Actions pane, click on the 'Delete Cisco Phone' link

6. Double click on the record to open the device details window, 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 phone. Click **Yes** within the box to continue or **No** to cancel the operation

Viewing Cisco Set Information

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** > **Cisco Sets**.

3. Depending on the amount of records 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 then click the magnifying glass.

    4. Click the **Show All** button.

5. The Cisco Phone list opens, displaying all existing sets.

6. Use the Views pane to sort the Configured Sets list. The following views are available:

    - Basic Lookup – displays the MAC Address and the Directory Number

    7. Simple List – displays basic set information such as MAC Address, End User, Device Pool, etc.

    - Accounting View – displays the directory number and basic accounting information such as Billing Start Date, Billing End Date, Account, etc.

    8. Connectivity View – displays basic set information plus the connectivity information

    - Equipment and Services View – displays basic set information plus any related equipment and services.

9. To select a different view, click the option button next to the selection. There are two ways to populate the list:

    - Within the search box, type any portion of a record and then click the magnifying glass.

    10. Click the **Show All** button.

11. If available, click the plus sign (+) next to the group to view the individual records.

12. Double-click the record to view the Cisco window.

AS5300 Sets

A few things need to be setup within CAIRS before you can view your complete inventory of AS5300 sets. First, you must create the switch with an SMA connection in switches. To learn more about creating a switch, please see the Switches chapter.

Next, you will need to perform a switch sync. The sync pulls all the telephone information from your switch to populate CAIRS. Once the sync is complete you will be able to view your complete AS5300 phone inventory and the related data.

Once you have the switch created and the sync done, you can start to perform adds, moves and changes for all your AS5300 sets.

Performing a Sync

Before you can start to perform any actions on your AS5300 phones, you will need to perform a sync. The sync duplicates the data you have in your AS5300 switch into the CAIRS database.

1. Click **Configured Items**.

2. In the **Navigation** pane, select AS5300 Phones

3. Within the Actions pane, click on the 'Resync from Switch' link

4. A box with the sync progress will open in the lower right-hand corner of your screen. Once the sync is complete, the box will close and your inventory will populate with the list.

5. Don't worry you can sync multiple times without losing any of the data that you have entered into CAIRS.

Set Data

Depending on your access rights to the switch, you may be able to load the information directly from the switch each time you access the set. However, if your access rights are restricted a sync can be performed and the data will be placed in a cache. This allows you to view that data without making changes. However, in some situations you may be able to connect to the switch and make changes. There are two buttons with the Set Data ribbon group that allow you to load data and possibly make changes.

- **Load Live Data** – click on this button to connect to the switch and load the set information. You will be able to edit the information once loaded

6. **Load Cached Data** – click on this button to load the set information from the cached data. The only fields that you will be able to edit are field specific to CAIRS. All switch related fields are read only.

**Within each switch there is a data caching setting. If you cannot see live data, please contact your CAIRS administrator.

Understanding the AS5300 Window

When you access a AS5300 set, it is a little different then a set device in Set Management. There are three panes of information: AS5300 Device Information, AS5300 Switch Data and Connectivity.

AS5300 Device Information

This pane displays the information that resides in the CAIRS database. You will see the switch name, domain and phone type.

AS5300 Switch Data

This pane displays the switch data relating to the set. There are three panes of sections of information; User/Directory Information, Personal Information and Other Information.

Connectivity

This pane allows you to associated connectivity with the set. As well as, accounts, equipment and services. As you click on the different tabs, the name of the pane changes. The default is to display the Connectivity of the set.

Configuring a New AS5300 Phone

1. Click **Configured Items**.

2. In the **Navigation** pane, select AS5300 Phones

3. There are two ways you can start to add a phone, with either option the General – AS5300 Phone window opens:

   - Within the toolbar directly above the **Navigation** pane, click the drop-down arrow next to **New**, then select AS5300 Phone.

4. Within the Actions pane, click Add New AS5300 Phone

5. In the Information from CAIRS pane, complete the following fields, required fields are marked with an asterisk (*):

   - **Switch Name *** - click on the dropdown arrow to access a list of the switched created in your database, from the list select the switch to add the phone to

6. **Domain *** - click on the dropdown arrow to access a list of the domains associated with your AS5300. The domains that appear in this list are populated when you perform the sync with the switch.

   - **Type *** - click on the dropdown arrow to access a list of the phone types associated with your AS5300. The types within this list come directly from the types created in your AS5300, this list populates when you perform the switch sync.

7. **AS5300 Port** – type in the port number for the set

   - **AS5300 Call Pickup Group** – type in the call pickup group for the set

8. **AS5300 Misc 1-5** – use these fields to enter in any additional information you would like to track regarding the set.

   - **Site** – click the drop-down arrow to access a list, then, select the set installation site. The site drop-down list displays the bottom-most site first. After the ~~ is the complete path to the site.

9. **Organization Name** – click the drop-down arrow to access a list, and then select the name of the organization. There can be three columns of information: org code, organization name and organization path. The org code is 3-character code used to identify the org, your administrator determines if this column is visible. The organization name column displays the lowest child organization name. The organization path displays the complete path to the selected org, this includes all parents and children. Once you select an organization, the complete path populates within the field.

- **Publishing** * – this field defaults to published meaning the phone number will appear as a listing in the printed and online directory. To change the listing, click the drop-down arrow to access a list, and then select one of the following publishing options:

  10. **Non-published** – if selected, this listing will not display in any printed or online directory.

  - **Classified** – if selected, this listing displays in the classified directory only.

  11. **Temporary** – if selected, this displays as a temporary listing.

  - **Alternate** – DO NOT USE, there is no Alternate Telephone number available for a AS5300 set.

12. Once you have the above fields completed the AS5300 Switch Data pane becomes available. There are several sections within this pane, you will need to complete all the required fields before you can save the set. All required fields are marked with an asterisk (*), depending on the set type the requirements may change:

- User Name/Directory Number - type in the user name or directory name related to the set

  13. Password & Confirm Password * – type in the password associated to the set, you will have to enter it twice for confirmation

- Service Set - click on the dropdown arrow to access a list of the service sets from the list select the service. A service set is a group of services available to a user. These are determined by the administrator of you AS5300

  14. First Name *

- Last Name *

  15. Email Address

- Business Phone

  16. Home Phone

- Cell Phone

  17. Pager

- Fax

18. Status * - this field defaults to Active, to change the set to inactive, click the dropdown arrow to access a list, from the list select Inactive

- Time Zone * - this field default to the Eastern Time Zone, click the dropdown arrow to access a list, from the list select you time zone. This list is in alphabetical order so you may have to scroll to find your time zone.

19. Locale * - this field defaults to English, to change the language associated to the set click on the dropdown arrow to access a list from the list select the appropriate language.

20. Once you have completed the information within this pane, it is a good idea to Save the information you have entered. Within the Action ribbon group, click on the Save button.

Set Connectivity

1. Click **Configured Items**.

2. In the **Navigation** pane, select AS5300 Phones

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. Within the list, double click on the AS5300 phone to access its detailed information.

6. Within the Connectivity pane you can assign the facilities associated to the set. There are two sections within the Facilities pane. The top portion allows you to assign a few basic items within Facilities, and the lower half allows you to assign the complete facilities package.

7. Within the top section, complete the following fields (required fields are marked with an asterisk (*):

- **Assigned Site** – click the drop-down arrow to access a list, from the list select the assigned site.

8. **Assigned Building** * – click the drop-down arrow to access a list, and then select the building name.

- **Alternate Location –** type in any alternate location information relating to the set. This field can appear in the 911 interface

9. **Directory Building Name** – this field auto-populates with the Directory Building Name that appears on the Building Record. The Directory Building name is defined as the common name for the building, for example, the assigned building name is 100 and the directory building name is Post Office. This field is read only.

- **Floor** – type the floor number, if applicable.

10. **Room** – type the room number, if applicable.

- **Jack** – type the jack number, if applicable.

11. **Dedicated Plant** – click the arrow to access a drop-down list, from the list select the type of dedication, it automatically defaults to Not Dedicated. You can change the selection to dedicate with port or dedicated without port. When you choose to dedicate, anytime you move or delete the device, the facilities remain in place and are unavailable to use in other situations.

- **Latitude/Longitude/Elevation –** type in the coordinates of where the phone is located. If used this information, will transfer in the 911 interface and display the terminal that is nearest the location of the phone.

These coordinates work in connection with the Nearest Building tab (if you do not see the tab, you will need to change the system setting 'Show Nearest Building Button in Facilities' to True). The buildings with the nearest coordinates will appear in the tab.

12. Within the lower section, when you click the first line (marked with an asterisk) the site and building name populate within the information you entered in the upper section.

13. Within the terminal name column, click the drop-down arrow to access a list, and then select the terminal name associated with the building. (If your building has only one terminal associated, this field automatically populates with that terminal name.)

14. If you do not see, the Connection Name line, click the plus sign (+) next to the site name. The following fields open to allow you to complete adding the facilities, complete the following fields (required fields are marked with an asterisk (*):

- **Connection Name** – click the drop-down arrow to access a list, and then select the set's connection.

15. **Path Number** – this field auto-populates with the next available path in the terminal. To change this selection, click the drop-down arrow to access a list and then select the set's path number.

- **Path Usage** – click the drop-down arrow to access a list, then, select the path usage type. This is a list that is pre-defined within Facilities and indicates how the path is being used, for example, data, voice, transmit, etc.

16. **Out Binding Post** or **Out Frame Location** – these fields auto-populate with number(s) corresponding to the path number. This information is defined within Facilities; each terminal is designed with either a Binding Post or Frame Location. This field is a Read Only field.

- **In Row, Block, Pin** – these fields auto-populate within number(s) corresponding to the path number. This information is defined within Facilities; each terminal is designed with either a Binding Post or Frame Location. This is a Read Only field.

17. At this point it is a good idea to save the information you entered so far, within the **Actions** ribbon group, click the **Save** button.

Account Management

The Account Management tab displays the different account numbers that are associated to the set. Each account number can be responsible for different charges.

At the top of the pane is a dropdown box, this box allows you to select the different buttons appearances on the set. The pane will change to display the appropriate account information.

There are 3 different types of charges you can associated to the set; one-time, recurring and call charges. For each charge type, you can associate a different account. This allows you to have up to 3 different accounts associated to the set.

Adding an account number

1. Click **Configured Items**.
2. In the **Navigation** pane, select AS5300 Phones
3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.
5. Within the list, double click on the phone to access its detailed information.
6. Within the lower portion of the Connectivity pane is the Account Management tab. If you are not already on the Account Management tab, click on the tab. The pane changes to display the accounts related to the different charge types for the set.
7. At the top of the pane is a Number dropdown list, click on the arrow to access a list of the telephone numbers of the set. From the list, select the number that you want to associate an account, the list will default to the primary telephone number.

! **Default from Primary Number** – If you place a checkmark in the box, all charges relating to any telephone number of the set will automatically be associated to the account related to the primary telephone number.

Include Inactive Accounts – this defaults to remain unchecked meaning that you are only going to see accounts that are active or that have a Billing End Date that has not occurred yet. If you check the box, all the accounts will appear within the list whether they have active charges or billed charges.

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8. Click the row marked with the asterisk to enter in a new account number for the equipment and services. Complete the following fields, required fields are marked with an asterisk (*):

   - **Charge Type*** – click the drop-down arrow to access a list, then select one of the following choices:
     9. **All Charges** – bills the account for all charges

- **Recurring Charges** - bills the account for only recurring charges

10. **One-time Charges** – bills the account for only one- time charges

- **Call Charges** – bills the account for charges related to call

11. **Site*** – once you click any of the drop-down lists, the site name auto-populates with the site selected on the General-Set Device window.

- **Subscriber Name** – click on the drop-down arrow to access a list, and from the list select the appropriate subscriber

12. **Organization –** if you have selected an account number associated to an organization, that organization name populates within the field. This is a read only field.

- **Account Number*** – click the drop-down arrow to access a list of the account numbers and their associated organizations. If an account number is associated to multiple organizations, the account number appears in the list multiple times, for example if account number 2424 is associated to three different organizations, there are three appearances of the account number within the drop-down. Each account number references the different organization name.

    From the list, select the account number and organization responsible for the charges.

! When you create an account number, you can assign it to an organization or to a subscriber; this designates the account as official or unofficial. If you select an account with an organization, it is most likely an Official Account. If you select an account where the organization is blank, it is most likely an Unofficial account and associated to a subscriber.

- **Billing Start Date*** – click the drop-down arrow to access a calendar, from the calendar select the date to start the billing. 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.

13. **Billing End Date** – click the drop-down arrow to access a calendar, from the calendar select the date to stop the billing for the equipment or service. 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. Within the Actions ribbon group, click Save (to save and stay) to continue working with the set, or click Save & Close (to save and exit) to return to the Set Management list.

Deleting an Account Number from a Set

1. Click **Configured Items**.

2. In the **Navigation** pane, select AS5300 Phones

3. Depending on the amount of records 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 then click the magnifying glass.

     4. Click the **Show All** button.

5. Within the list, double click on the phone to access its detailed information.

6. Within the lower portion of the Connectivity pane is the Account Management tab. If you are not already on the Account Management tab, click on the tab. The pane changes to display the accounts related to the different charge types for the set.

7. At the top of the pane is a Number dropdown list, click on the arrow to access a list of the telephone numbers of the set, from the list select the telephone to modify. The pane changes to display the account number associated to the telephone number.

! **Delete Date** When you are deleting an account you can manually set the Delete Date or Billing End Date. This allows you to set the end date in the future or past. If you do not fill out the billing end date, CAIRS will automatically stop the billing the date you delete the account from the set.

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8. Within the list, right click on the selector box next to the charge type, a small popup menu opens, within the box click **Delete**.

9. Once you click Delete, a message box appears verifying that you really want to delete the account. Click Yes within the box to continue or No to cancel the operation.

10. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with the set, or click **Save & Close** (to save and exit).

Equipment & Services

Please see Common Elements – Equipment & Services to learn more.

Show Related Orders and Troubles

Within this button, you can view the open or complete work orders or troubles relating to the set.

1. Click **Configured Items**.

2. In the **Navigation** pane, select AS5300 Phones

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. Within the list, double click on the phone to access its detailed information.

6. Within the **Show** ribbon group, click on the Show Related Orders and Troubles button.

7. A list of all associated work order and trouble tickets appear within the pane. The following information is displayed:

   - Work Order Number

8. Work Flow Name

   - Org Name

9. Site Name

   - Work Order Desc

10. Open Date

    - Current Status

11. By double clicking on the work order number, the work order opens allowing you to view the complete detailed information. Click on the x in the upper right-hand corner to close the work order and return to the phone.

Calls

To view the calls associated to the phone, click the Calls button within the Show ribbon group. Depending on the amount of calls associated to the phone, the list may not populate right away. To populate the list, complete one of the following:

- Within the search box, type any portion of a call record (Date Called, Call Type, etc.) then click the magnifying glass.

12. Click the **Show All** button.

The window displays the following call information:

- **Call Type** – call type name.

- **Total Calls** – the total number of calls made.

- **Total Cost** – the total cost of calls.

13. **Total Call Duration** – the total duration of calls in minutes.

At the bottom of the list, are call charge totals. To view the details for each call type, click the **plus sign (+)** next to the call type name, to return to the default view, click the minus sign **(-)** next to the call type name.

You can export or print the call data by clicking on the Sharing tab at the top of the screen. There are 4 export formats:

- **PDF** – you can export the total report (expanded bands only or primary band) to a PDF file. Once selected the PDF file generates to your screen, you can save the file to any location.

14. **Excel** – you can export the total report (expanded bands only or primary band) to an Excel spreadsheet. Once selected, Excel opens with your report, you can save the file to any location.

- **Print** – you can send the entire report (expanded bands only or primary band) to a printer. Once selected the Print box displays allowing you to choose your printing options.

15. **Text** – you can export the total report (expanded bands only or primary bands) to a tab delimited text file. Once selected, the Select the location to save the Tab-delimited Text File box opens. Browse to the location, type the file name within the text box and click the Save button.

File Attachments

Please see Common Elements → File Attachments to learn more.

Deleting an AS5300 Phone

It is important to note that when you delete a phone that has existing charges whether call, equipment or services, those need a billing end date. If you do not indicate a billing end date, CAIRS auto-populates the billing end date with the current date.

1. Click **Configured Items**.

2. In the **Navigation** pane, select AS5300 Phones

3. Depending on the amount of records 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 then click the magnifying glass.

    4. Click the **Show All** button.

5. Once the list populates, click on the phone you want to delete and perform one of the following options:

    - Within the Actions pane, click on the 'Delete AS5300 Phone' link

    6. Double click on the record to open the device details window, 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 phone. Click **Yes** within the box to continue or **No** to cancel the operation

Viewing AS5300 Set Information

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** > **AS5300 Phones**.

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. The AS5300 Phone list opens, displaying all existing sets.

6. Use the Views pane to sort the Configured Sets list. The following views are available:

   - Simple View

7. Accounting View

   - Connectivity View

8. Equipment and Services View

9. To select a different view, click the option button next to the selection. There are two ways to populate the list:

   - Within the search box, type any portion of a record and then click the magnifying glass.

10. Click the **Show All** button.

11. If available, click the plus sign (+) next to the group to view the individual records.

12. Double-click the record to view the AS5300 window.

NEC

This is the new section for the NEC phones

Set Management

In telephone system distribution, providing equipment for telephone users at various levels is a key service. The CAIRS software offers the choice of Set Templates for the set types available at your specific location.

The administrator (or someone authorized by the administrator) assigns Set Templates for each user group defined by profile or group profiles. User Profiles are the basis for assigning set types and features. For an explanation of User Profiles, see System Settings →Profiles.

Available set type features are determined by the features the set suppliers define as useable for each specific set type. Set suppliers may also specify set type locations where a feature can (or must) be placed. Unique Communications provides this information as a "core data import" during installation and provides updated information as necessary based on set supplier's feedback.

Configured Sets are sets currently within your database and configured according to the customer's request. In this section, you can select sets and modify them for a specific user or reassign them to a new user.

Unique Communications assists your site with building the Feature Packages that provide various feature combinations for each set device. These combinations relate to the different user levels based on their needs. Feature Packages are included in Set Templates prepared by the administrator with the assistance of the Unique Communications installer. Only the features Set Device suppliers have identified as compatible with specific Set Types are included in the choices for a Feature Package. This includes restrictions Set Device suppliers have determined regarding where the feature can be located on the Set Device.

Several menu options exist within Set Management with each option allowing you to either configure a new set or modify existing sets. You have the following available options:

- **Configured Sets** – manage all phones relating to set that all switch types except for CM6 and AS5300

13. **Directory** – search, view, and export directory information for each configured set.

- **Published Directory –** search, view, and export information relating to only published configured sets.

14. **Active Primary Published Directory –** search, view, and export information relating to primary telephone numbers on configured sets.

- **Multiline Hunt Groups** – manage your multiline hunt group members.

15. **Call Pickup Groups** – manage your call pickup groups.

- **Intercom Groups** – manage your intercom groups.

16. **Office Hunt Groups** – manage your office hunt groups.

- **Distribution Groups** – create your Distribution Groups and members.

17. **Set Templates** – design the set types allowed within each site.

- **Feature Packages** –manage the feature packages assigned to your various set types.

18. **Feature Key Templates** – manage features associated with the switch manufacturer and type.

- **Authorization Codes** – manage your authorization codes, if necessary.

Understanding the Set Management Window

The Set Management window has several information panes with each pane allowing you to perform a specific function relating to a part of the configured set. In addition to the panes, the ribbon at the top of the screen allows you to perform multiple functions for the configured set.

Ribbon Groups

Each ribbon group allows you to perform a set of functions for the configured set, for example, attach notes to the set, associate equipment, send your changes to the associated switch, 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 Set Management list.

19. **Delete** – click this button to delete the set device.

- **Save** – click this button to save the completed information and continue working within the set device.

20. **Save & New** – click this button to save the completed set information and to start adding a new set.

- **Refresh** – click this button to refresh the screen and apply recently changed items.

Show

View and modify the associated set information within the Show ribbon group, for example, view calls, set history, appearance, related orders and troubles, etc.

Launch

Here you can view the WOPR Script History for the set. This includes all scripts associated to the set and any associated messages. The second button within this ribbon group, Multiple Listings. This button displays all the subscribers related to the set.

Convert (EWSD Only)

Within the Convert ribbon group, you convert a set to a multiline hunt group. There is also a Convert ribbon group within a Multiline Hunt Group to change it to a regular set.

Run Time

Within the Run Time ribbon group, click the Go button to send the changes you just made to the switch for application to the set.

Notes

Within the Notes ribbon group, you can create a note associated with the set. When a note is attached to the set a small number icon is added to the notes button.

The process to add, modify and delete notes is same throughout CAIRS, we have consolidated notes into one sections of the manual. Please see Common Elements → Notes to learn more.

Attach

Within the Attach ribbon group, you can attach a file to the set device. Your CAIRS administrator pre-defines the attachable file types.

The process to attach notes to a record is same throughout CAIRS, we have consolidated file attachments into one sections of the manual. Please see Common Elements → File Attachments to learn more.

Status Bar

Directly below the ribbon is a Status Bar. The bar displays important information regarding the set, for example, if there are any pending scripts, if the set is assigned to a bad port, etc.

Configured Set Panes

When you double-click a configured set, the Set Management window opens to the Device Details. Within this window, there are four panes of information. Each pane contains certain set device information, for example, the facilities pane holds all the building, terminal and connection information.

In the upper-right-hand corner of each pane is a pushpin. By clicking the pushpin, you minimize that pane and enlarge the others. To reset the pane to its original position, click the pushpin again.

Device Properties Pane

This is the first pane you complete when adding a set. Within the Device Properties pane, you define where the set is located, what template the set is associated to, DSN Access, ring type, etc.

Button Properties Pane

From the Buttons Properties pane, you view detailed information relating to each button on the set. There are two columns within this pane; the left-hand column displays the list of buttons. The right-hand column displays the information for the highlighted button.

Facilities/Equipment & Services

At the bottom of the pane are two tabs, when you click on a tab the pane name changes to tab name. When you click a tab the pane changes to the display the associated information. The following tabs are available:

- **Facilities** - this is the default tab. It displays the set's building, connection, and connection path information.

- **Equipment and Services** – this tab displays the equipment and services associated to the set. At the top of the pane is a dropdown box that allows you to select what view you want, whether active, billed, installed, etc. There are two checkboxes allowing you select whether you want to view equipment, services, or both.

Account Management/Device Display Pane

At the bottom of the pane are two tabs, when you click a tab the pane changes to the display the associated information. The following tabs are available:

Device Details – this is the default tab. It displays the template of the set. This tab gives you a visual representation of what the set looks like in the switch environment as well as what the customer sees.

Account Management– this tab displays the account numbers responsible for the one-time, recurring and call charges relating to the set device.   At the top of the pane is a dropdown box that allows you to select the telephone number, this changes the information to display only the account number responsible for the selected telephone number.

Configuring a Set

Within this section, we will explain how to configure a complete set. This includes adding and removing features, telephone numbers, equipment, services, appearances, listings, and accounts.

Adding Set Information

21. Click **Configured Items**.

22. In the **Navigation** pane, click **Set Management** and then **Configured Sets**.

23. There are two ways you can start to add a new set, with either of the below options once selected the Set Management window opens to Device Properties:

- Within the toolbar directly above the **Navigation** pane, click the drop-down arrow next to **New**, then select **Set Management**.

24. Within the **Actions** pane, click **Add New Set Management**.

25. Within the **Device Properties** pane, complete the following information (required fields are marked with an asterisk (*):

- **Site*** – click the drop-down arrow to access a list, then, select the set installation site. The site drop-down list displays the bottom-most site first. After the ~~ is the complete path to the site.

26. **Switch Name** – click the drop-down arrow to access a list, and then select the switch associated with the site and set installation. The switches that display within the list are only those associated with the selected site.

27. Once the switch name is selected the fields after Template Name change to those specific to the switch. Within this section, we will cover the basic information, as if a switch were not present (required fields are marked with an asterisk (*):

- **Organization Name** – click the drop-down arrow to access a list, and then select the name of the organization. There can be three columns of information: org code, organization name and organization path. The org code is 3-character code used to identify the org, your administrator determines if this column is visible. The organization name column displays the lowest child organization

name. The organization path displays the complete path to the selected org, this includes all parents and children. Once you select an organization, the complete path populates within the field.

28. **Subscriber Name** – click the drop-down arrow to access a list, and then select the subscriber name responsible for the set.

- **Template Name** – click the drop-down arrow to access a list, and then select the template name associated with the set. The template displays in the Device Display pane in the lower-right-hand corner of the screen. If there are any features assigned to the template, they will automatically display on the button in the Button Properties pane. When you create the first number on the set, it is in the position of the primary number as indicated on the template.

29. **Set Type Name** – once you select a Template Name, this field auto-populates with the predefined set type name.

- **Set Name in Switch** – once you select a Template Name, this field auto-populates with the predefined set type name within the switch environment.

30. **Directory Number*** – click the drop-down arrow to access the Directory Number Plans table. There are three ways to populate the table:

- Click the drop-down arrow within the Number Plan field, and then select the plan. Once selected, either click the Next link to have CAIRS automatically select the next number in the sequence or click the **Show All** button to display a complete list of numbers. Within the list double-click the number, the table closes, and the number displays within the field.

31. Within the Search textbox, type the number or portion of the number and then click the magnifying glass. When the list populates, double-click the number. The table closes, and the number displays within the field.

- Within the lower pane, click the **Click Here** link to view all the numbers. When the list populates, double-click the number. The table closes, and the number displays within the field.

32. **Port Name (TN, LEN)** – click the drop-down arrow to access the **Port Groups** table. There are three ways to populate the table:

- Click the drop-down arrow within the **Port Groups** field, and then select the plan. Once selected, either click the **Next** link to have CAIRS automatically select the next number in the sequence or click the **Show All** button to display a complete list of ports. Within the list, double-click the number. That table closes, and the number displays within the field.

33. Within the **Search** textbox, type the number or portion of the port number and then click the magnifying glass. When the list populates, double-click the number. The table closes, and the number displays within the field.

- Within the lower pane, click the **Click Here** link to view all port numbers. When the list populates, double-click the number, the table closes, and the number displays within the field.

In the lower right-hand corner of the port selection box, is an 'Include Dedicated Plant' checkbox. This remains checked to include all the ports that are available within your switch whether they are associated to a dedicated plant record or not. Uncheck the box to show only the records that are not associated to a dedicated plant record. To learn more about Dedicated Plant please see Set Facilities – Dedicated Plant.

- **Active or Suspended** – defaults to Active indicating you are creating an active set.

34. **Class of Service Name** – click the drop-down arrow to access a list, and select the set's class of service.

- **Class of Restriction Name** – click the drop-down arrow to access a list, and select the set's class of restriction.

35. **Trouble Restoration Priority** - type the trouble restoration priority number, 1 to 99, for the set. When your help desk initiates a trouble ticket on this circuit, CAIRS uses this field to determine the priority, 1 is the most important, while 99 is the least important.

- **Set Misc 1-20** – use these fields for typing in any miscellaneous set information.

36. At this point, you should save your progress. Within the **Actions** ribbon group, click the **Save** button.

Set Facilities

37. Within the Facilities\E & S\Accounts pane, click the Facilities tab. There are two sections within the Facilities pane. The top portion allows you to assign a few basic items within Facilities, and the lower half allows you to assign the complete facilities package.

38. Within the top section, complete the following fields (required fields are marked with an asterisk (*):

- **Assigned Site** – populates with the site chosen in the Device Properties pane.

39. **Assigned Building** * – click the drop-down arrow to access a list, and then select the building name.

- **Alternate Location –** type in any alternate location information relating to the set. This field can appear in the 911 interface

40. **Directory Building Name** – this field auto-populates with the Directory Building Name that appears on the Building Record. The Directory Building name is defined as the common name for the building, for example, the assigned building name is 100 and the directory building name is Post Office. This field is read only.

- **Floor** – type the floor number, if applicable.

41. **Room** – type the room number, if applicable.

- **Jack** – type the jack number, if applicable.

42. **Dedicated Plant** – click the arrow to access a drop-down list, from the list select the type of dedication, it automatically defaults to Not Dedicated. You can change the selection to dedicate with port or dedicated without port. When you choose to dedicate, anytime you move or delete the device, the facilities remain in place and are unavailable to use in other situations.

- **Latitude/Longitude/Elevation –** type in the coordinates of where the phone is located. If used this information, will transfer in the 911 interface and display the terminal that is nearest the location of the phone.

These coordinates work in connection with the Nearest Building tab (if you do not see the tab, you will need to change the system setting 'Show Nearest Building Button in Facilities' to True). The buildings with the nearest coordinates will appear in the tab.

43. Within the lower section, when you click the first line (marked with an asterisk) the site and building name populate with the information you entered in the upper section.

44. Within the terminal name column, click the drop-down arrow to access a list, and then select the terminal name associated with the building. (If your building has only one terminal associated, this field automatically populates with that terminal name.)

45. If you do not see, the Connection Name line, click the plus sign (+) next to the site name. The following fields open to allow you to complete adding the facilities, complete the following fields (required fields are marked with an asterisk (*):

- **Connection Name** – click the drop-down arrow to access a list, and then select the set's connection.

46. **Path Number** – this field auto-populates with the next available path in the terminal. To change this selection, click the drop-down arrow to access a list and then select the set's path number.

- **Path Usage** – click the drop-down arrow to access a list, then, select the path usage type. This is a list that is pre-defined within Facilities and indicates how the path is being used, for example, data, voice, transmit, etc.

47. **Out Binding Post** or **Out Frame Location** – these fields auto-populate with number(s) corresponding to the path number. This information is defined within Facilities; each terminal is designed with either a Binding Post or Frame Location. This field is a Read Only field.

- **In Row, Block, Pin** – these fields auto-populate within number(s) corresponding to the path number. This information is defined within Facilities; each terminal is designed with either a Binding Post or Frame Location. This is a Read Only field.

48. At this point it is a good idea to save the information you entered so far, within the **Actions** ribbon group, click the **Save** button.

49. You can continue to add-in cross connect buildings, terminals, and connection information for the set device by entering in another site, building name, and terminal.

50. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with this set, or click **Save & Close** (to save and exit) to return to the Set Management list.

51. Although you have created the set and saved it within your database, you have not created the appearance within the switch. To do so, click the **Go** button within the **Run Time** ribbon group.

Deleting Set Information

Before deleting a set, you must make sure that no other set is dependent upon the primary button. If another set is dependent, a message box displays with the button number of the dependent telephone number.

It is important to note that when you delete a set that has existing charges whether call, equipment or services need a billing end date. If you do not indicate a billing end date, CAIRS auto-populates the billing end date with the current date.

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Configured Sets**.

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. The Configured Sets list opens, displaying all existing sets. Double-click the set to modify.

   The Set Management window opens.

6. Within the **Buttons Properties** window, select the primary appearance or main listed telephone number for the set. Deleting this button deletes the set from CAIRS.

7. Within the **Actions** ribbon group, click the **Delete** button.

8. Once you click Delete, a message box displays verifying that you really want to delete the entire set. Click **Yes** within the box to continue or **No** to cancel the operation.

9. Once you click Yes, the Scripts window opens. Click the plus sign (+) next to the script name and complete the fields. Once the fields are complete, you have the following choices:

   - **Schedule** – click the schedule field within the top line. Click the drop-down arrow to access a calendar and from the calendar click the date to select, once clicked the date displays in the field (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 time (12:00 am) also populates in the box. To change the time, click the hour, minute or am/pm to type the new time. Then click the Continue button.

10. **Continue** – click the Continue button to delete the Set Device in CAIRS and send the script to the switch to delete it from switch database.

- **Skip** – click the Skip button to delete the Set Device in CAIRS but not in the switch. When you click Skip, a message box displays verifying that you really want to skip running the scripts, within the box click **Yes** to continue or **No** to return to the Scripts window.

11. **Cancel** – click the Cancel button to abort the operation.

12. When you click continue, a Script Progress box displays displaying the progress of the script executing within the switch.

Suspending a Set

Within the Device Properties pane on the Device Details ribbon group, you can suspend a set if your switch type allows for suspending a set. This allows the set to remain in your database and the switch without having to delete and re-add in the future. Within the Device Properties pane, find the Active or Suspended field, within the drop-down list, then select Suspended.

It is important to note that if there is equipment or service charges associated with the set, you need to suspend those as well. The Active or Suspended field only changes the set information within the database and the switch it does not affect billing. There are two ways to suspend the charges associated with the set; first, you can delete the associated equipment and services. If you do delete, you will have to re-add all associated equipment and services when you reactivate the set. Alternatively, you can access the account and suspend the account. This stops all charges from being billed to the account. Keep in mind, that if there are more than one set devices associated with the account, those will also be suspended.

Re-activating a Set

You can activate a set that you have previously set to suspended. Within the Device Properties pane, find the Active or Suspended field, within the drop-down list, and then select **Active.**

Depending on how you dealt with the equipment and services when you suspended the set, you will need to either re-add the equipment and services. Alternatively, you will need to access the account and change the status to active.

Set Facilities – Dedicated Plant

Dedicated plant allows you to leave connections and paths associations to a room and jack without having a device associated. When you create a device and you add a room and jack, you can make that dedicated. Dedicated means that the connection and paths associated to the room and jack until you remove them. Even if you remove the set, the connections stay in place and cannot be used for another assignment until the room and jack are removed.

There are two types of dedicated plant incorporated into CAIRS: Dedicated without Port and Dedicated with Port. The first type, Dedicated without Port, is the one we are all familiar with, this dedication includes room, jack, connections, and paths.

The second type, Dedicated with Port, goes one-step further and includes the port number. This means that the port number is dedicated to the connections, paths, room, and jack. If you have previously selected a port within the device properties, the dedicated plant port overrides your selection.

When you add a new device, by selecting the room and the jack, the Load Dedicated Plant button becomes available and once clicked, automatically loads the complete connectivity.

Loading Dedicated Plant to a Set Device

1. Click **Configured Items**.

2. In the **Navigation pane,** click **Set Management** > **Configured Sets.**

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. The Configured Sets list opens, displaying all existing sets. Double-click the set to modify.

   The Set Management window opens.

6. Within the Facilities pane, click the **Dedicated Plant** tab (located in the line between the top and bottom sections).

7. Within the list, find the correct record; this includes the item number or name, site, building name, floor, room, jack, dedicated plant and port.

8. There are two ways to add the record to the set:

   - Double-click the record.

9. Click the record to highlight then click the **Load Dedicated Plant** button in the upper right-hand corner of the pane.

   With either procedure the assigned building, floor, room, and jack populate in the top section of the pane.

10. To view the complete cross connection information, click the View tab.

11. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with this set, or click **Save & Close** (to save and exit) to return to the Set Management list.

Editing Dedicated plant

After you have loaded a dedicated plant connection, you can edit the connection record.

1. Within the Facilities pane, click the **Edit** tab.

2. Within the bottom section, make the necessary changes to the record.

3. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with this set, or click **Save & Close** (to save and exit) to return to the Set Management list.

Making the connection path a dedicated plant

You can designate any connection record that you have created as dedicated plant. All dedicated plant records need to include a room and jack. Once you have your complete cross connection information in place, within the Dedicated Plant column, click the drop-down arrow to access a list, and then select one of the following options:

- **Not Dedicated** – this is the default selections, this means that once the device is removed from the database, the connection, path, and port are available to use elsewhere.

4. **Dedicated with Port** – when selected you are including the port in the dedication

- **Dedicated without Port** – when selected you are dedicating the connection, path, room and jack

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

Set Facilities – Nearest Building

The Nearest Building tab displays the buildings that are nearest to the coordinates listed in the upper pane of facilities. This tab displays the buildings that are nearest to the assigned building based on the latitude, longitude and elevation. Based on distance the buildings that are nearest appear at the top of the list.

The coordinates are useful in the 911 interface. They will transfer into the file to provide a 911 system with not only the assigned building but also the surrounding buildings. This is most useful for VoIP phones.

Set Buttons – Telephone Numbers

Add a Telephone Number to a Button

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Configured Sets**.

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. The Configured Sets list opens, displaying all existing sets. Double-click the set to modify.

The Set Management window opens.

6. There are two sections within the **Buttons Properties** pane, the left section displays a list of the buttons associated with the set, and this includes all buttons types. The right section displays the information associated with the highlighted button.

7. Within the left-hand section, highlight the button to which the telephone number will be added. Within the right-hand section, a list of links display. Click the **Add Number** link.

8. The pane changes to allow you to add the information relating to the button, complete the following button information (required fields are marked with an asterisk (*)):

! The fields that display within your Button Properties pane may differ from those listed below. The fields displayed are determined the switch selected within the Device Properties pane. Below is a list of the basic information for adding a telephone number to a button.

- **Appearance Type** – this field defines the appearance of the telephone number. The field auto-populates with one of the following options:

    9. **Single** – this designates that the telephone number displays on this set once

    - **Multiple Primary and Multiple Secondary** – these fields work together to describe the telephone listing that displays on the button, if multiple primary is listed, there are two appearances of the same telephone number on the set, the second appearance is listed as multiple secondary. For example, if 2160017 is listed on button 5 and 10, the button listing that was added first is designated Multiple Primary, the other button is designated as Multiple Secondary.

10. **Directory Number*** – click the field to access the Directory Number Plans table. There are three ways to populate the table:

    - Click the drop-down arrow within the Number Plan field, and then select the plan. Once selected, either click the Next link to have CAIRS automatically select the next number in the sequence or click the Show All button to display a complete list of numbers. Within the list double-click the number, the table closes, and the number displays within the field.

    11. Within the Search textbox, type the number or portion of the number and then click the magnifying glass. When the list populates, double-click the number. The table closes, and the number displays within the field.

    - Within the lower pane, click the **Click Here** link to view all the numbers. When the list populates, double-click the number. The table closes, and the number displays within the field.

12. **Trouble Priority** – type the trouble restoration priority number, 1 to 99 (1 is the most important, while 99 is the least important), for the set. CAIRS uses this field to determine the priority when you initiate a trouble ticket on this set.

- **Yearly Audit Date** – click the field to access a drop-down arrow. Once clicked a calendar displays. From the calendar, select the date to audit the button/set. 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.

13. **Install Date** – click the field to access a drop-down arrow. Once clicked, a calendar displays. From the calendar, select the date to install the button/set. To change the date, click the field to access a drop-down 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.

- **Personnel** – type the name of the person assigned to the phone.

14. **Job Description** – type the job description for the person using this set.

- **Official Symbol** – type the office symbol.

15. **Contact Phone Number** – type the contact telephone number for the person using this set.

- **Key Word –** type a name or description that allows your operators to perform a quick search on the telephone number. For example, if the telephone number belongs to the Library you would type Library into this field for an easier 411 search.

16. **Publishing** – click the drop-down arrow to access a list, and then select one of the following publishing options:

  - **Published** – if selected, this listing displays in any printed or online directory.

  17. **Non-published** – if selected, this listing will not display in any printed or online directory.

  - **Classified** – if selected, this listing displays in the classified directory only.

  18. **Temporary** – if selected, this displays as a temporary listing.

  - **Alternate** – if selected, the Alternate Number displaying in the Alt Number field is shown in place of the original number in both the printed and online directories.

19. **Alt Number** – type the alternate telephone number for the publishing.

- **Directory Misc 1 -10** – use these fields for any miscellaneous directory information.

20. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with this set, or click **Save & Close** (to save and exit) to return to the Set Management list.

21. Although you have created the set and saved it within your database, you have not created the appearance within the switch. To do so, click the **Go** button within the **Run Time** ribbon group.

Delete a Telephone Number from a Button

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Configured Sets**.

3. Depending on the amount of records 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 then click the magnifying glass.

    4. Click the **Show All** button.

5. The Configured Sets list opens, displaying all existing sets. Double-click the set to modify.

    The Set Management window opens.

6. There are two sections within the **Buttons Properties** pane, the left section displays a list of the buttons associated with the set, and this includes all buttons types. The right section displays the information associated with the highlighted button.

7. Within the left-hand section, highlight the button to delete. Within the right-hand section, a list of links displays. Click the **Delete Button** link**.**

8. A message box displays verifying that you really want to delete the information from the button.

! Be aware that after you click yes on the next step, there is no undo button. Make sure that you really want to delete the information.

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9. Click **Yes** within the box to continue or **No** to cancel the operation.

10. Although you have deleted the appearance off the set and saved it within your database, you have not deleted the appearance within the switch. To do so, click the **Go** button within the **Run Time** ribbon group.

Set Buttons - Features

Adding a Feature to a Button

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Configured Sets**.

3. Depending on the amount of records 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 then click the magnifying glass.

    4. Click the **Show All** button.

5. The Configured Sets list opens, displaying all existing sets. Double-click the set to modify.

The Set Management window opens.

6. There are two sections within the **Buttons Properties** pane, the left section displays a list of the buttons associated with the set, and this includes all buttons types. The right section displays the information associated with the highlighted button.

7. Within the left-hand section, highlight the button to add a feature onto, within the right-hand section a list of links displays, click the **Add Feature** link.

8. Within the right-hand section, the Features field displays. Double-click the field to open the Switch Features window, within the window the following columns of information define the characteristics of the feature, the information is Read Only:

    -   **Select** – a checkmark in the column indicates that you are adding the feature to the set

! Your CAIRS administrator or switch technician defines the characteristics from each feature available for each switch.

    -   **Feature Name** – displays the common feature name.

    9. **Manufacturer Feature Name** – displays the code used within the switch environment.

    -   **Switch Type** – displays the switch name

    10. **Category** – displays the category assigned to the feature

    -   **Add Feature Code** – displays the information sent to the switch when this feature is added to a set.

    11. **Delete Feature Code** – displays the information sent to the switch when the feature is deleted from a set.

    -   **Hybrid Digital** – (EWSD only) a checkmark is field indicates that this feature is a hybrid digital

    12. **Add Sort Order** –this field displays an add position for the feature.

    -   **Delete Sort Order** –this field displays the delete position for the feature.

13. Within the **Select** column, click the box to insert a checkmark to add the feature to the set.

14. If you do not readily find your feature, you can search for a feature by typing in the name or portion of the name within the **Search Parameter** field and then clicking the magnifying glass.

15. Once the feature displays, click in the select column to insert a checkmark. Click the **Ok** button to close the Switch Features window. The Add Features Prompts pop-up opens. Within the pop-up, complete any required values, if necessary.

! **Save Values as Defaults** – The Save Values as Defaults checkbox is designed to make the process of adding a feature to a phone easier. Often time, the values that you complete

are the same for each feature that you add to a set. When you place a checkmark in the box, CAIRS saves the values for all fields, so the next time you add a feature the values populate automatically.

! Alternatively, you can have a little more control and use the button. When you click the button, the fields that are completed save as your default, so the next time the field is in the list, the values populate automatically. Any field that is left blank, are defaulted to blank and require the user to enter in the information.

16. Within the Add Feature Prompts pop-up, click the **Continue** button to finish adding the feature or click the **Cancel** button.

    The feature name populates in the field and on the button within the Device Properties pane.

17. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with this set, or click **Save & Close** (to save and exit) to return to the Set Management list.

18. Although you have added the feature to the set and saved it within your database, you have not created the appearance within the switch. To do so, click the **Go** button within the **Run Time** ribbon group.

Delete a Feature from a Button

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Configured Sets**.

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. The Configured Sets list opens, displaying all existing sets. Double-click the set to modify.

   The Set Management window opens.

6. Within the **Buttons Properties** windows, select the button to delete.

7. Within the bottom portion of the pane, click the **Delete Button** link.

8. A message box displays verifying that you really want to delete the information from the button. Click **Ye**s within the box to continue or **No** to cancel the operation.

9. The Delete Feature Prompts pop-up opens, within the pop-up, complete any required values, if necessary. Click the **Continue** button to finish deleting the feature or click the **Cancel** button.

! **Save Values as Defaults** – The Save Values as Defaults checkbox is designed to make the process of adding a feature to a phone easier. Often time, the values that you complete are the same for each feature that you add to a set. When you place a checkmark in the box, CAIRS saves the values for all fields, so the next time you add a feature the values populate automatically.

Alternatively, you can have a little more control and use the button. When you click the button, the fields that are completed save as your default, so the next time the field is in the list, the values populate automatically. Any field that is left blank, are defaulted to blank and require the user to enter in the information.

10. Although you have deleted the appearance off the set and saved it within your database, you have not deleted the appearance within the switch. To do so, click the **Go** button within the **Run Time** ribbon group.

Account Management

The new account management option is available in version 14.

The Account Management tab displays the different account numbers that are associated to the set. Each account number can be responsible for different charges.

At the top of the pane is a dropdown box, this box allows you to select the different buttons appearances on the set. The pane will change to display the appropriate account information.

There are 3 different types of charges you can associated to the set; one-time, recurring and call charges. For each charge type, you can associate a different account. This allows you to have up to 3 different accounts associated to the set.

Account Management

1. Click Configured Items.
2. In the **Navigation** pane, select **Set Management** > **Configured Sets**.
3. Depending on the amount of records 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 then click the magnifying glass.
4. Click the **Show All** button.
5. The Configured Sets list opens, displaying all existing sets. Double-click the set to modify.
6. The Set Management window opens.
7. Within the lower portion of the Device Properties/Account Management pane is the Account Management tab. If you are not already on the Account Management tab, click on the tab. The pane changes to display the accounts related to the different charge types for the set.

8. At the top of the pane is a Number dropdown list, click on the arrow to access a list of the telephone numbers of the set. From the list, select the number that you want to associate an account, the list will default to the primary telephone number.

! **Default from Primary Number** – If you place a checkmark in the box, all charges relating to any telephone number of the set will automatically be associated to the account related to the primary telephone number.

Include Inactive Accounts – this defaults to remain unchecked meaning that you are only going to see accounts that are active or that have a Billing End Date that has not occurred yet. If you check the box, all the accounts will appear within the list whether they have active charges or billed charges.

9. Click the row marked with the asterisk to enter in a new account number for the equipment and services. Complete the following fields, required fields are marked with an asterisk (*):

- **Charge Type*** – click the drop-down arrow to access a list, then select one of the following choices:

  - **All Charges** – bills the account for all charges

  10. **Recurring Charges** - bills the account for only recurring charges

  - **One-time Charges** – bills the account for only one- time charges

  11. **Call Charges** – bills the account for charges related to call

- **Site*** – once you click any of the drop-down lists, the site name auto-populates with the site selected on the General-Set Device window.

- **Subscriber Name** – click on the drop-down arrow to access a list, and from the list select the appropriate subscriber

- **Organization –** if you have selected an account number associated to an organization, that organization name populates within the field. This is a read only field.

- **Account Number*** – click the drop-down arrow to access a list of the account numbers and their associated organizations. If an account number is associated to multiple organizations, the account number appears in the list multiple times, for example if account number 2424 is associated to three different organizations, there are three appearances of the account number within the drop-down. Each account number references the different organization name.

  From the list, select the account number and organization responsible for the charges.

! When you create an account number, you can assign it to an organization or to a subscriber; this designates the account as official or unofficial. If you select an account with

an organization, it is most likely an Official Account. If you select an account where the organization is blank, it is most likely an Unofficial account and associated to a subscriber.

- **Billing Start Date*** – click the drop-down arrow to access a calendar, from the calendar select the date to start the billing. 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.

- **Billing End Date** – click the drop-down arrow to access a calendar, from the calendar select the date to stop the billing for the equipment or service. 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.

12. Within the Actions ribbon group, click Save (to save and stay) to continue working with the set, or click Save & Close (to save and exit) to return to the Set Management list.

Deleting an Account Number from a Set

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** > **Configured Sets**.

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. The Configured Sets list opens, displaying all existing sets. Double-click the set to modify.

6. The Set Management window opens.

7. Within the lower portion of the Device Properties/Account Management pane is the Account Management tab. If you are not already on the Account Management tab, click on the tab. The pane changes to display the accounts related to the different charge types for the set.

8. At the top of the pane is a Number dropdown list, click on the arrow to access a list of the telephone numbers of the set, from the list select the telephone to modify. The pane changes to display the account number associated to the telephone number.

! **Delete Date** When you are deleting an account you can manually set the Delete Date or Billing End Date. This allows you to set the end date in the future or past. If you do not fill out the billing end date, CAIRS will automatically stop the billing the date you delete the account from the set.

9. Within the list, right click on the selector box next to the charge type, a small popup menu opens, within the box click **Delete**.

10. Once you click Delete, a message box appears verifying that you really want to delete the account. 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 set, or click **Save & Close** (to save and exit).

Equipment & Services

Each set can have multiple pieces of equipment or services associated to it. Since adding, modifying, deleting and viewing equipment and services is the same throughout CAIRS, we have consolidated the process into one section of the manual. Please see Common Elements – Equipment & Services to learn how to more.

It is important to remember that if you are billing for any equipment or services that you also associate an account number for the related charges.

Calls

To view the calls associated to the set, click the Calls button within the Show ribbon group. Depending on the amount of calls associated to the set, the list may not populate right away. To populate the list, complete one of the following:

- Within the search box, type any portion of a call record (Date Called, Call Type, etc.) then click the magnifying glass.

12. Click the **Show All** button.

The window displays the following call information:

- **Call Type** – call type name.

- **Total Calls** – the total number of calls made.

- **Total Cost** – the total cost of calls.

13. **Total Call Duration** – the total duration of calls in minutes.

At the bottom of the list, are call charge totals. To view the details for each call type, click the **plus sign (+)** next to the call type name, to return to the default view, click the minus sign **(-)** next to the call type name.

You can export or print the call data by clicking on the Sharing tab at the top of the screen. There are 4 export formats:

- **PDF** – you can export the total report (expanded bands only or primary band) to a PDF file. Once selected the PDF file generates to your screen, you can save the file to any location.

14. **Excel** – you can export the total report (expanded bands only or primary band) to an Excel spreadsheet. Once selected, Excel opens with your report, you can save the file to any location.

- **Print** – you can send the entire report (expanded bands only or primary band) to a printer. Once selected the Print box displays allowing you to choose your printing options.

15. **Text** – you can export the total report (expanded bands only or primary bands) to a tab delimited text file. Once selected, the Select the location to save the Tab-delimited Text File box opens. Browse to the location, type the file name within the text box and click the Save button.

Appearances

This section allows you to view and designate a directory number as a primary listing. This button works in conjunction with the Button Properties pane on the Device Details screen. When you highlight a button within the Button Properties pane, the information within the Appearance screen changes to reflect the appearance of the highlighted number and the primary button.

Viewing Appearances

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management**, > **Configured Sets**.

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. The Configured Sets list opens, displaying all existing sets. Double-click the set to view.

6. Within the **Show** ribbon group, click the upper half of the **Appearances** button.

7. The screen changes to display the following Read Only information:

    - **Primary Number**

8. **Port**

    - **Button Number**

9. **Button Type**

    - **Directory Number**

10. **Is Primary Appearance**

Assigning an Appearance as a Primary Number

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** > **Configured Sets**.

3. Depending on the amount of records 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 then click the magnifying glass.

   4. Click the **Show All** button.

5. The Configured Sets list opens, displaying all existing sets. Double-click the set to view.

6. Within the **Show** ribbon group, click the upper half of the **Appearances** button.

7. The list of appearances populates. Highlight the telephone number to display as the primary listing.

8. Within the **Show** ribbon group, click the lower half of the **Appearances** button to access a drop-down list. From the list, select **Set Selected as Primary**.

9. A checkmark now displays in the **Is Primary Appearance** column for the selected number.

10. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with the set device, or click **Save & Close** (to save and exit) to return to the Set Management list.

Show Related Orders and Troubles

Within this button, you can view the open or complete work orders or troubles relating to the set.

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** and then **Configured Sets**.

3. Before the Configured Set list populates, you must either:

   • Within the search box, type any portion of the record and then click the magnifying glass.

   4. Click the **Show All** button.

5. The Configured Sets lists opens to the right, displaying all existing sets. Double-click the set to view.

6. Within the **Show** ribbon group, click on the Show Related Orders and Troubles button.

7. A list of all associated work order and trouble tickets appear within the pane. The following information is displayed:

   • Work Order Number

8. Work Flow Name

   • Org Name

9. Site Name

- Work Order Desc

10. Open Date

- Current Status

11. By double clicking on the work order number, the work order opens allowing you to view the complete detailed information. Click on the x in the upper right hand corner to close the work order and return to the set.

WOPR Script History

Viewing Script History of a Configured Set

When a set is added, modified, or deleted, CAIRS sends scripts to the switch making those changes display within the switch environment. Once the script is finished, you can view the details for the completed actions.

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** > **Configured Sets**.

3. Depending on the amount of records 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 then click the magnifying glass.

   4. Click the **Show All** button.

5. The Configured Sets list opens, displaying all existing sets. Double-click the set to view. The Set Management window opens.

6. Within the **Launch** ribbon group, click the **WOPR Script History** button.

7. The Configured Set Script History opens and all scripts run on the set display within this list. Pay close attention to the status column to know what scripts complete successfully or unsuccessfully.

8. Click the plus sign (+) next to the order number to view a complete list of the values sent with the script.

Multiple Listings

You can use Multiple Listings to track the subscribers assigned to a single telephone number. You must first create the set device and then you can add the multiple subscribers to the listing. This is helpful in the event that you want to publish a directory, when printed; each subscriber has the same telephone number listed.

Viewing Multiple Listings

1. Click **Configured Items**.

2. In the N**avigation** pane, select **Set Management** > **Configured Sets**.

3. Depending on the amount of records 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 then click the magnifying glass.

    4. Click the **Show All** button.

5. The Configured Sets list opens, displaying all existing sets. Double-click the set to view.

    The Set Management window opens.

6. Within the **Launch** ribbon group, click the **Multiple Listings** button.

    The screen changes to display all the Subscriber and/or Job Descriptions associated with the set device. The screen also indicates whether the publishing status of the listing whether published, non-published, classified, temporary, or alternate.

Adding a Multiple Listing

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** > **Configured Sets**.

3. Depending on the amount of records 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 then click the magnifying glass.

    4. Click the **Show All** button.

5. The Configured Sets list opens, displaying all existing sets. Double-click the set to view.

    The Set Management window opens.

6. Within the **Launch** ribbon group, click the **Multiple Listings** button.

7. Click the row marked with an asterisk (*), to add new items and complete the following information (required fields are marked with an asterisk (*):

    - **Subscriber Name** – click the drop-down arrow to access a list, and then select the subscriber name.

    8. **Job Description** – type the job description.

    - **Published*** – click the drop-down arrow to access a list from the list select the publishing option:

        9. **Published** – if selected, this listing displays in any printed or online directory.

        - **Non-published** – if selected this listing does not displays in any printed or online directory.

        10. **Classified** – if selected this listing displays in only the classified directory.

        - **Temporary** – if selected this displays as a temporary listing.

11. **Alternate** – if selected, the Alternate Number displaying in the Alt Number field is shown in place of the original number in both printed and online directories.

- **Room** – type the room number.

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

Deleting a Multiple Listing

1. Click **Configured Items**.

2. In the N**avigation** pane, select **Set Management** > **Configured Sets**.

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. The Configured Sets list opens, displaying all existing sets. Double-click the set to view.

   The Set Management window opens.

6. Within the **Launch** ribbon group, click the **Multiple Listings** button.

7. Within the Multiple Listings list, right-click the selector box next to the subscriber name, a small pop-up menu opens, within the box click **Delete**.

8. Once you click Delete, a message box displays verifying that you really want to delete the listing. Click **Yes** within the box to continue or **No** to cancel the operation.

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

9. If you do not want to delete a listing, right-click the record to access a pop-up menu, from the pop-up, click **Undelete**.

10. Once you select Undelete, a message box displays verifying that you really want to keep the record. 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 set device, or click **Save & Close** (to save and exit) to return to the Set Management list.

Convert

This ribbon group displays when the set and switch support Multiline Hunt Groups. We currently support Multiline Hunt Groups on the EWSD, SL100 and CS2100 switch types.

To learn more about adding a Multiline Hunt Group and Hunt Group Members please see the complete section on Multiline Hunt Groups.

Set Device Notes

Please see Common Elements → Notes to learn more.

Set Device File Attachments

Please see Common Elements → File Attachments to learn more.

Switch Communications

There are two parts to every Add, Move, or Change that you make to a set. The first part is to make the Add, Move, or Change and save it to the CAIRS database. The second part is to communicate the Add, Move, or Change to the switch database.

When Unique representative's setup your CAIRS database, they also setup a set of scripts. A script sends the necessary information from the CAIRS database to the switch database. After you save the information into your CAIRS database, click the Go button within the Run Time ribbon group. A small pop-up window opens; within the window is a list of scripts. By clicking the plus sign (+) next to the script name, you can view the additional values required before the script can be sent to the switch. A value represents information that the switch needs to properly add, move, or change the information within the switch database.

Although most of the values auto-populate from the information you entered within the Set Device window, you may be required to enter a value, simply click the field, and type the necessary information. Once all the required fields are completed, you have four choices for sending the scripts to the switch:

1. **Schedule** – click the schedule field within the top line. Click the drop-down arrow to access a calendar and from the calendar click the date to select, once clicked the date displays in the field (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 time (12:00 am) also populates in the box. To change the time, click the hour, minute or am/pm to type the new time. Then click the Continue button.

2. **Continue** – click the Continue button to send the script to the switch.

3. **Skip** – click the Skip button to make the changes within the CAIRS database but not in the switch.

4. **Cancel** – click the Cancel button to abort the operation.

Sending Information to the Switch

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** and then **Configured Sets**.

3. Depending on the amount of records 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 then click the magnifying glass.

   4. Click the **Show All** button.

5. The Configured Sets list opens, displaying all existing sets. Double-click the set to modify.

   The Set Management window opens.

6. Within the Run Time ribbon group, click the **Go** button.

   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. Once all the required fields are completed, you have four choices:

   • **Run Unattended** – click this button to have WOPR run your scripts when it is available, your request will be run in the order it was received.

9. **Continue** – click the Continue button to send the script to the switch.

   • **Skip** – click the Skip button to make the changes within the CAIRS database but not in the switch. When you click Skip, a message box displays verifying that you really want to skip running the scripts, within the box click **Yes** to continue or **No** to return to the Scripts window.

   10. **Cancel** – click the Cancel button to abort the operation.

11. After you click your selection, the window closes. To view whether a script was completed, click the WOPR Script History button. Pay close attention to the Status column to verify that your script ran successfully.

12. If the script failed, a message displays in the Error Message column.

Scheduling Switch Communications

You can schedule your scripts to run at any time. To do so, complete the following steps:

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** >**Configured Sets**.

3. Depending on the amount of records 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 then click the magnifying glass.

   4. Click the **Show All** button.

5. The Configured Sets list opens, displaying all existing sets. Double-click the set to modify.

   The Set Management window opens.

6. Within the **Run Time** ribbon group, click the **Go** button.

   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 (required fields are marked with an asterisk (*).

8. Click the schedule field within the top line, click the drop-down arrow to access a calendar and from the calendar click the date to select, once clicked the date displays in the field (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 time (12:00 am) also populates in the box. To change the time, click the hour, minute or am/pm to type the new time.

    The date and time display in the Schedule field.

9. Click the **Continue** button. Just below the ribbon is a yellow status line. The line displays a message if the set has any scripts pending submission to the switch. When the scheduled date and time occur the scripts run automatically.

10. To view whether a script was completed, click the **WOPR Script History** button. Pay close attention to the Status column to verify that your script ran successfully.

    If the script failed, a message displays in the Error Message column.

Viewing Set Information

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** > **Configured Sets**.

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. The Configured Sets list opens, displaying all existing Configured Sets.

6. Use the Views pane to sort the Configured Sets list. The following views are available:

    - **Basic Lookup** – this is the default view, the list provides only the directory number and the port number. The view was designed to load set data quicker on slower networks.

7. **Simple List** – the list provides basic set information such as building name, primary number, site, etc.

    - **Detailed List** – this is provides several columns of information for each set such as, organization, class of service, port, connectivity, etc.

8. **Configured Set** – displays a few basic set details plus all 20 set miscellaneous fields

    - **Configured Set Switch** – displays the switch, button number, button type and a few switch specific fields such as COS, COR, display name, etc.

9. **Configured Line Multiples** – displays the multiple appearances of each primary number

- **Call Pickup Group** – displays the directory number plus the call pickup name, call pickup description and CPU options.

10. **Configured Set Switch Hunt Group** – provides a list of hunt groups for each switch

- **Deleted Set History –** provides a list of the sets that have been deleted from your database

11. **Suspended Numbers –** provides a list of sets that are currently suspended within your database

- **Configured Base Set –** provides a list of the sets that are incomplete or those sets that do not have a primary button.

12. **Custom View -** this selection allows you to create a custom view by dragging and dropping column headers to create a line display.

- **Miscellaneous List –** this list is a duplicate of the Simple List with the Set Misc fields added.

13. To select a different view, click the option button next to the selection. There are two ways to populate the list:

- Within the search box, type any portion of a record and then click the magnifying glass.

14. Click the **Show All** button.

15. If available, click the plus sign (+) next to the group to view the individual records.

16. Double-click the record to view the Set Management window.

Directory

The Directory provides users with a quick resource to view the subscriber information associated with a set device. The information within this list is read-only, however, if you double-click any record the Set Management window opens allowing you to make changes.

Viewing Directory Information

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** > **Directory**.

3. Before the Directory list populates, you must either:

- Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. There are four views to choose from when viewing directory information:

- **Simple List** – this is the default view

6. **View Detailed** – provides a list of with more detailed information

7. To view the complete set information, double-click any listing.

Exporting Directory Information

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** > **Directory**.

3. Before the Directory list populates, you must either:

   - Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. Within the toolbar at the top of the screen, click the drop-down arrow next to **Export**. There are seven options to choose from, the options that you would most likely use are the following:

   - **Excel (All levels)** – exports all directory information to an Excel spreadsheet. If you have several records in your database, this procedure may take some time.

   6. **Excel (Multiple Files)** – exports each set into a separate file. When you select this option, the Browse For Folder pop-up opens, within the box select the location of where you want to save the files to, and then click the Ok button. The files are created and saved in the specified location.

   - **PDF (All levels)** – exports all directory information to a PDF file. If you have several records in your database, this procedure may take some time.

7. The file opens onto you screen allowing you to save or modify the file in the appropriate program.

Published Directory

Published Directory allows your operators a quick resource to view only the telephone numbers designated as published within your database. The information within this list is read-only, however, if you double-click any record the Set Management window opens allowing you to make changes.

Viewing Published Directory Information

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** > **Published Directory**.

3. Before the Directory list populates, you must either:

   - Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. To view the complete set information, double-click any listing.

Exporting Published Directory Information

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** > **Published Directory**.

3. Before the Directory list populates, you must either:

    • Within the search box, type any portion of the record and then click the magnifying glass.

    4. Click the **Show All** button.

5. Within the toolbar at the top of the screen, click the drop-down arrow next to **Export**. There are seven options to choose from, the options that you would most likely use are the following:

    • **Excel (All levels)** – exports all directory information to an Excel spreadsheet. If you have several records in your database, this procedure may take some time.

    6. **Excel (Multiple Files)** – exports each set into a separate file. When you select this option, the Browse For Folder pop-up opens, within the box select the location of where you want to save the files to, and then click the Ok button. The files are created and saved in the specified location.

    • **PDF (All levels)** – exports all directory information to a PDF file. If you have several records in your database, this procedure may take some time.

7. The file opens onto you screen allowing you to save or modify the file in the appropriate program.

Active Primary Published Directory

The Active Primary Published Directory displays all primary telephone numbers. The telephone number designated as a Single or Multiple Primary appearance types appear within this directory. This means that any button on the set in any location designated as those two types appear within this list.

Viewing Directory Information

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** > **Active Primary Published Directory**.

3. Before the Directory list populates, you must either:

    • Within the search box, type any portion of the record and then click the magnifying glass.

    4. Click the **Show All** button.

5. To view the complete set information, double-click any listing.

Exporting Directory Information

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** > **Active Primary Published Directory**.

3. Before the Directory list populates, you must either:

   - Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. Within the toolbar at the top of the screen, click the drop-down arrow next to **Export**. There are seven options to choose from, the options that you would most likely use are the following:

   - **Excel (All levels)** – exports all directory information to an Excel spreadsheet. If you have several records in your database, this procedure may take some time.

6. **Excel (Multiple Files)** – exports each set into a separate file. When you select this option, the Browse For Folder pop-up opens, within the box select the location of where you want to save the files to, and then click the Ok button. The files are created and saved in the specified location.

   - **PDF (All levels)** – exports all directory information to a PDF file. If you have several records in your database, this procedure may take some time.

7. The file opens onto you screen allowing you to save or modify the file in the appropriate program.

Multiline Hunt Groups

A Multiline Hunt Group consists of numbers (called Members) that can forward calls to each other. The members use a position variable to determine a ringing pattern, going from 0 to 1 to 2 to … and back to 0. The first member of the group is assigned a position variable of 0 (in some cases 1); all other members are assigned the next number in the sequence. A member with a position variable of 0 will forward to the member with a position variable of 1, and a member with a position variable of 1 will forward to the member with a position variable of 2, and so forth. If the first member of the group is busy, the switch hunts the group until a member answers the call.

You first define the group, or the first member. After you create the groups, you can add members.

We currently support Multiline Hunt Groups on the EWSD, SL100, and CS2100 switch types.

Groups

Adding a Multiline Hunt Group

When you add a multiline hunt group you are performing two actions in one, you are adding a new set device into the database and creating the new multiline hunt group. The set starts the new group and becomes the first member. CAIRS assigns this set to Hunt Group Position of 1. When you add subsequent member to this new group, the second member is given the position of 2 and the next member added to the group is given position 3, and so forth. This position sequence gives the forwarding pattern for the group.

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** > **Multiline Hunt Group**.

3. In the **Actions** pane, click **Add New Multiline Hunt Group Management**.

    The Set Management window opens.

4. Within the **Device Properties** pane, configure the following fields (required fields are marked with an asterisk (*):

    - **Site*** – click the drop-down arrow to access a list, then, select the set installation site. The site drop-down list displays the bottom-most site first. After the ~~ is the complete path to the site.

5. **Switch Name** – click the drop-down arrow to access a list, from the list select the switch. If you are using ASI this is the switch that CAIRS will communicate with to install the set. The switches displayed in the list are only those associated to the selected site.

6. Once the switch name is selected, the fields after Template Name change to those specific to the switch. Within this section, we will cover the basic information, as if a switch were not present. Complete the following fields as necessary:

    - **Organization** – click the drop-down arrow to access a list from the list select the name of the organization. The organization drop-down list displays the bottom-most organization first. After the ~~the complete path to the selected organization displays. Each level of the organizational tree is separated by a >.

        Once you select an organization, the complete path populates within the field.

    - **Subscriber Name** – click the drop-down arrow to access a list, and then select the subscriber name responsible for the set.

7. **Template Name** – click the drop-down arrow to access a list, and then select the template name associated with the set. The template displays in the Device Display pane in the lower-right-hand corner of the screen. Once you select a template name, you will notice that features pre-assigned to the template display within the lower half of the pane. When you create the first number on the set, it is in the position of the primary number as indicated on the template.

    Once you select a Template Name, an Add Feature Prompts pop-up displays. Depending on your site, each template may come with a set of standard features.

This pop-up allows you to view the standard features as well as define additional feature values.

- **Set Type Name** – once you select a Template Name, this field auto-populates with the predefined set type name.

8. **Set Name in Switch** – once you select a Template Name, this field auto-populates with the predefined set type name within the switch environment.

- **Directory Number* – c**lick the drop-down arrow to access the Directory Number Plans table. There are three ways to populate the table:

  o Click the drop-down arrow within the Number Plan field, and then select the plan. Once selected, either click the Next link to have CAIRS automatically select the next number in the sequence or click the **Show All** button to display a complete list of numbers. Within the list, double-click the number, the table closes, and the number displays within the field.

  9. Within the Search textbox, type the number or portion of the number and then click the magnifying glass. When the list populates, double-click the number, the table closes, and the number displays within the field.

  o Within the lower pane, click the **Click Here** link to view all the numbers. When the list populates, double-click the number, the table closes, and the number displays within the field.

- **Port** – click the field to access the **Port Groups** table. There are three ways to populate the table:

  10. Click the drop-down arrow within the **Port Groups** field, and then select the plan. Once selected, either click the **Next** link to have CAIRS automatically select the next number in the sequence or click the **Show All** button to display a complete list of ports. Within the list, double-click the number, the table closes, and the number displays within the field.

  - Within the **Search** textbox, type the number or portion of the port number and then click the magnifying glass. When the list populates, double-click the number, the table closes, and the number displays within the field.

  11. Within the lower pane, click the **Click Here** link to view all port numbers. When the list populates, double-click the number, the table closes, and the number displays within the field.

- **Active or Suspended** – defaults to Active indicating you are creating an active set.

12. **Class of Service Name** – click the drop-down arrow to access a list, and then select the set's class of service.

- **Class of Restriction Name** – click the drop-down arrow to access a list, and then select the set's class of restriction.

13. **User Misc 1-20** – use these fields for typing in any miscellaneous set information.

14. At this point, you should save your progress. Within the **Actions** ribbon group, click the **Save** button.

Multiline Hunt Group

15. Within the lower portion of the Facilities pane, click on the Multiline Hunt Group tab, complete the following fields, required fields are marked with an asterisk (*):

- **Hunt Group Name *** – type the name of the hunt group

16. **Hunt Group Type** – type the group type

- **Description** – type a brief description of the hunt group

17. **CX Group** – type the Centrex Group Data

- **Ring Type** – type the ring type

18. Again, you should save your progress, within the Actions ribbon group, click the **Save** button.

Set Facilities

19. Within the lower portion of the Multiline Hunt Group pane, click on the Facilities tab, there are two sections within the Facilities pane. The top portion allows you to assign the site and building information, and the lower half allows you to assign the set a terminal, connection, and path information.

20. Within the top section, complete the following, required fields are marked with an asterisk (*):

- **Assigned Site** – this field auto-populates with the site chosen in the Device Properties pane.

21. **Assigned Building *** – click the drop-down arrow to access a list, and then select the building name.

- **Directory Building Name** – this field auto-populates with the Directory Building Name that appears on the Building Record. You can change the name by clicking the field and typing the new information. If you change the field here, it does <u>not</u> change the name anywhere else.

22. **Floor** – type the floor number, if applicable.

- **Room** – type the room number, if applicable.

23. **Jack** – type the jack number, if applicable.

- **Dedicated Plant** – click the arrow to access a drop-down list, from the list select the type of dedication, it automatically defaults to Not Dedicated. You can change the selection to Dedicated with Port or Dedicated without Port. When you choose to dedicate, anytime you move or delete the device, the facilities remain in place and are unavailable to use in other situations.

24. When you click the first line (marked with an asterisk) of the lower section, the site and building name populate within the information you entered in the upper section. Within the terminal name, click the drop-down arrow to access a list, and then select

the terminal name associated with the building. (If your building has only one terminal associated, this field automatically populates with that terminal name.)

25. Click the plus sign (+) next to the site name, the following fields open to allow you to complete adding the facilities, complete the following fields, required fields are marked with an asterisk (*):

- **Connection Name** – click the drop-down arrow to access a list, and from the select the set's connection.

26. **Path Number** – this field auto-populates with the next available path in the terminal, you can change this selection, click the drop-down arrow to access a list, and select the set's path number.

- **Path Usage** – click the drop-down arrow to access a list, and then select the path usage type. This is a list that is pre-defined within Facilities and indicates how the path is being used, for example, data, voice, transmit, etc.

27. **Out Binding Post** or **Out Frame Location** – these fields auto-populate with number(s) corresponding to the path number. This information is defined within Facilities; each terminal is designed with either a Binding Post or Frame Location. This field is Read Only.

- **In Row, Block, Pin** – these fields auto-populate within number(s) corresponding to the path number. This information is defined within Facilities; each terminal is designed with either a Binding Post or Frame Location. This field is Read Only.

28. At this point it is a good idea to save the information you entered so far, within the Actions ribbon group, click the **Save** button.

29. You can continue to add-in cross connect buildings, terminals, and connection information for the set device by entering in another site, building name, and terminal.

30. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with this set, or click **Save & Close** (to save and exit) to return to the Set Management list.

Button Properties

31. Within the **Buttons Properties** pane, complete the following button information, if applicable:

- **Appearance Type** – this field defines the appearance of the telephone number. The field auto-populates with one of the following options:

32. **Single** – this designates that the telephone number displays on this set once

- **Multiple Primary and Multiple Secondary** – these fields work together to describe the telephone listing that displays on the button, if multiple primary is listed, there are two appearances of the same telephone number on the set, the second appearance is listed as multiple secondary. For example, if 2160017 is listed on button 5 and 10, the button listing that was added first is

designated Multiple Primary, the other button is designated as Multiple Secondary.

33. **Directory Number*** – this field auto-populates with the information you chose in the Device Properties pane.

- **Trouble Priority** – type the trouble restoration priority number, 1 to 99 (1 is the most important, while 99 is the least important), for the set. CAIRS uses this field to determine the priority when you initiate a trouble ticket on this set.

34. **Yearly Audit Date** – click the field to access a drop-down arrow, once clicked a calendar displays, from the calendar select the date to audit the button/set. 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.

- **Install Date** – click the field to access a drop-down arrow, once clicked, a calendar displays. From the calendar, select the date to install the button/set. To change the date, click the field to access a drop-down 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.

35. **Personnel** - type the name of the person assigned to the phone.

- **Job Description** – type the job description for the person using this set.

36. **Official Symbol** – type the office symbol.

- **Contact Phone Number** – type the contact telephone number for the person using this set.

37. **Key Word –** type a name or description that allows your operators to perform a quick search on the telephone number. For example, if the telephone number belongs to the Library you would type Library into this field for an easier 411 search.

- **Publishing** – click the drop-down arrow to access a list, then select one of the following publishing options:

38. **Published** – if selected, this listing displays in any printed or online directory.

- **Non-published** – if selected, this listing will not display in any printed or online directory.

39. **Classified** – if selected, this listing displays in the classified directory only.

- **Temporary** – if selected, this displays as a temporary listing.

40. **Alternate** – if selected, the Alternate Number displaying in the Alt Number field is shown in place of the original number in both the printed and online directories.

- **Directory Misc 1**-**10** – use these fields for any miscellaneous directory information.

41. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with this set, or click **Save & Close** (to save and exit) to return to the Set Management list.

42. Although you created the Multiline Hunt Group and saved it within your database, you have not created the group within the switch. To do so, click the **Go** button within the **Run Time** ribbon group. To learn about the processes that occur when you click the buttons please refer to the Switch Communication section.

! Remember that to complete the set, you need to associate an account and add the necessary equipment and services.

Deleting a Multiline Hunt Group

There are two things to know when you are deleting a multiline hunt group. First, all the members of the group need to be reassigned or deleted from the group. CAIRS will not allow a group with more than one member to be deleted. Second, when can not remove the remaining set from the hunt group, you must delete the entire set from the database.

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** > **Multiline Hunt Groups**.

3. The Multiline Hunt Groups list opens.

! In the Navigation pane there is a 'Delete Multiline Hunt Group Management' link, it will not actually delete the group. You will however, receive a message that you can not delete the gourp from here you must access the set to delete.

4. Double-click the set to open the Set Management window.

5. Within the Actions ribbon group, click the Delete button.

6. Once you click Delete, a message box displays verifying that you really want to delete the entire set. Click Yes within the box to continue or No to cancel the operation.

7. Once you click Yes, the Scripts window opens. 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 (required fields are marked with an asterisk (*).

- **Schedule** – click the schedule field within the top line, click the drop-down arrow to access a calendar, from the calendar select 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 and time (12:00 am) populate in the box. To change the time, click the hour, minute or am/pm to type the new time. Then click the Continue button.

8. **Continue** – click the **Continue** button to delete the Set Device in CAIRS and send the script to the switch to delete it from switch database.

- **Skip** – click the **Skip** button to delete the Set Device in CAIRS but not in the switch. When you click Skip, a message box displays verifying that you really want to skip running the scripts, within the box click **Yes** to continue or **No** to return to the Scripts window.

9. **Cancel** – click the **Cancel** button to abort the operation.

10. When you click continue, a Script Progress box displays displaying the progress of the script executing within the switch.

Members

When you add a member to a group, you have two choices; you can add a new set device and then add it as a member. Alternatively, you can add an existing set as a member to a group.

Adding a Multiline Hunt Member (New Set Device)

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** > **Multiline Hunt Groups**.

3. In the **Actions** pane, click **Add New Multiline Hunt Group Management**.

   The Set Management window opens.

4. Within the **Device Properties** pane, configure the following fields (required fields are marked with an asterisk (*):

   - **Site*** – click the drop-down arrow to access a list, then, select the set installation site. The site drop-down list displays the bottom-most site first. After the ~~ is the complete path to the site. Each site level is separated by a >.

5. **Switch Name** – click the drop-down arrow to access a list, from the list select the switch. If you are using ASI this is the switch that CAIRS will communicate with to install the set. The switches displayed in the list are only those associated to the selected site.

   Once the switch name is selected the fields after Template Name change to those specific to the switch. Within this section, we will cover the basic information, as if a switch were not present (required fields are marked with an asterisk (*) :

   - **Organization** – click the drop-down arrow to access a list from the list select the name of the organization. The organization drop-down list displays the bottom-most organization first. After the ~~the complete path to the selected organization displays. Each level of the organizational tree is separated by a >.

     Once you select an organization, the complete path populates within the field.

   - **Subscriber Name** – click the drop-down arrow to access a list, and then select the subscriber name responsible for the set.

6. **Template Name** – click the drop-down arrow to access a list, and then select the template name associated with the set. The template displays in the Device Display pane in the lower-right-hand corner of the screen. Once you select a

template name, you will notice that features pre-assigned to the template display within the lower half of the pane. When you create the first number on the set, it is in the position of the primary number as indicated on the template.

Once you select a Template Name, an Add Feature Prompts pop-up displays. Depending on your site, each template may come with a set of standard features. This pop-up allows you to view the standard features as well as define additional feature values.

- **Set Type Name** – once you select a Template Name, this field auto-populates with the predefined set type name.

7. **Set Name in Switch** – once you select a Template Name, this field auto-populates with the predefined set type name within the switch environment.

- **Primary Button Number** – if you are adding this number as an appearance on the set, this field populates with the telephone number of the primary listing

8. **Directory Number*** – click the drop-down arrow to access the Directory Number Plans table. There are three ways to populate the table:

   o Click the drop-down arrow within the Number Plan field, and then select the plan. Once selected, either click the Next link to have CAIRS automatically select the next number in the sequence or click the **Show All** button to display a complete list of numbers. Within the list, double-click the number, the table closes, and the number displays within the field.

   9. Within the Search textbox, type the number or portion of the number and then click the magnifying glass. When the list populates, double-click the number, the table closes, and the number displays within the field.

   o Within the lower pane, click the **Click Here** link to view all the numbers. When the list populates, double-click the number, the table closes, and the number displays within the field.

- **Port** – click the field to access the **Port Groups** table. There are three ways to populate the table:

   10. Click the drop-down arrow within the **Port Groups** field, and then select the plan. Once selected, either click the **Next** link to have CAIRS automatically select the next number in the sequence or click the **Show All** button to display a complete list of ports. Within the list, double-click the number, the table closes, and the number displays within the field.

- Within the **Search** textbox, type the number or portion of the port number and then click the magnifying glass. When the list populates, double-click the number, the table closes, and the number displays within the field.

   11. Within the lower pane, click the **Click Here** link to view all port numbers. When the list populates, double-click the number, the table closes, and the number displays within the field.

- **Active or Suspended** – defaults to Active indicating you are creating an active set.

12. **Class of Service Name** – click the drop-down arrow to access a list, and then select the set's class of service.

- **Class of Restriction Name** – click the drop-down arrow to access a list, and then select the set's class of restriction.

13. **User Misc 1-20** – use these fields for typing in any miscellaneous set information.

14. At this point, you should save your progress. Within the **Actions** ribbon group, click the **Save** button.

Multiline Hunt Group Member

15. Within the **Convert** ribbon group, click the drop-down arrow to access a list. From the list, select **Multiline Hunt Group Member**.

16. The screen changes to add the Multiline Hunt Group pane. Within the pane, complete the following fields:

- **Hunt Group Name*** – click the drop-down arrow to access a list, and then select the hunt group name.

17. **Position*** – this field displays as the next available position in the hunt group. For example, if this set is the first member, then the position number will be 2. (1 is always given to the set that started the group and is considered as the Multiline Hunt Group). If this set is the second member, then the position number will be 3, and so forth. Click the field to type the new position within the hunt group.

18. Again, you should save your progress, within the Actions ribbon group, click the Save button.

Set Facilities

19. Within the Facilities\E & S\Accounts pane, click the Facilities tab. There are two sections within the Facilities pane. The top portion allows you to assign the set a few basic items within Facilities, and the lower half allows you to assign the set a complete facilities package.

20. Within the top section, complete the following fields (required fields are marked with an asterisk (*)):

- **Assigned Site** – populates with the site chosen in the Device Properties pane.

21. **Assigned Building** * – click the drop-down arrow to access a list, and then select the building name.

- **Floor** – type the floor number, if applicable.

22. **Directory Building Name** – this field auto-populates with the Directory Building Name that appears on the Building Record. You can change the name by clicking the field and typing the new information. If you change the field here, it does <u>not</u> change the name anywhere else.

- **Room** – type the room number, if applicable.

23. **Jack** – type the jack number, if applicable.

- **Dedicated Plant** – click the arrow to access a drop-down list, from the list select the type of dedication, it automatically defaults to Not Dedicated. You can change the selection to Dedicated with Port or Dedicated without Port. When you choose to dedicate, anytime you move or delete the device, the facilities remain in place and are unavailable to use in other situations.

24. When you click the first line (marked with an asterisk) of the lower section the site and building name populate within the information you entered in the upper section. Within the terminal name, click the drop-down arrow to access a list, and then select the terminal name associated with the building. (If your building has only one terminal associated, this field automatically populates with that terminal name.)

25. Click the plus sign (+) next to the site name, the following fields open to allow you to complete adding the facilities, complete the following fields required fields are marked with an asterisk (*)):

- **Connection Name** – click the drop-down arrow to access a list, and from the select the set's connection.

26. **Path Number** – this field auto-populates with the next available path in the terminal, you can change this selection, click the drop-down arrow to access a list, and select the set's path number.

- **Path Usage** – click the drop-down arrow to access a list, and then select the path usage type. This is a list that is pre-defined within Facilities and indicates how the path is being used, for example, data, voice, transmit, etc.

27. **Out Binding Post** or **Out Frame Location** – these fields auto-populate with number(s) corresponding to the path number. This information is defined within Facilities; each terminal is designed with either a Binding Post or Frame Location. This field is Read Only.

- **In Row, Block, Pin** – these fields auto-populate within number(s) corresponding to the path number. This information is defined within Facilities; each terminal is designed with either a Binding Post or Frame Location. This field is Read Only.

28. At this point it is a good idea to save the information you entered so far, within the Actions ribbon group, click the Save button.

29. You can continue to add-in cross connect buildings, terminals, and connection information for the set device by entering in another site, building name, and terminal.

30. Within the **Actions** ribbon group, click the **Save** button (save and stay) to continue working with this set or click the **Save & Close** button (save and exit).

Button Properties

31. Within the **Buttons Properties** pane, complete the following button information, if applicable:

- **Appearance Type** – this field defines the appearance of the telephone number. The field auto-populates with one of the following options:

32. **Single** – this designates that the telephone number displays on this set once

- **Multiple Primary and Multiple Secondary** – these fields work together to describe the telephone listing that displays on the button, if multiple primary is listed, there are two appearances of the same telephone number on the set, the second appearance is listed as multiple secondary. For example, if 2160017 is listed on button 5 and 10, the button listing that was added first is designated Multiple Primary, the other button is designated as Multiple Secondary.

33. **Directory Number*** – this field auto-populates with the information you chose in the Device Properties pane.

- **Trouble Priority** – type the trouble restoration priority number, 1 to 99 (1 is the most important, while 99 is the least important), for the set. CAIRS uses this field to determine the priority when you initiate a trouble ticket on this set.

34. **Yearly Audit Date** – click the field to access a drop-down arrow, once clicked a calendar displays, from the calendar select the date to audit the button/set. 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.

- **Install Date** – click the field to access a drop-down arrow, once clicked a calendar displays, from the calendar select the date to install the button/set. To change the date, click the field to access a drop-down 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.

35. **Job Description** – type the job description for the person using this set.

- **Official Symbol** – type the office symbol.

36. **Contact Phone Number** – type the contact telephone number for the person using this set.

- **Key Word –** type a name or description that allows your operators to perform a quick search on the telephone number. For example, if the telephone number belongs to the Library you would type Library into this field for an easier 411 search.

37. **Publishing** – click the drop-down arrow to access a list, then select one of the following publishing options:

- **Published** – if selected, this listing displays in any printed or online directory.

38. **Non-published** – if selected, this listing will not display in any printed or online directory.

- **Classified** – if selected, this listing displays in the classified directory only.

39. **Temporary** – if selected, this displays as a temporary listing.

- **Alternate** – if selected, the Alternate Number displaying in the Alt Number field is shown in place of the original number in both the printed and online directories.

40. **Directory Misc 1-10** – use these fields for any miscellaneous directory information.

41. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working within this set, or click **Save & Close** (to save and exit) to return to the Set Management list.

42. Although you created the Multiline Hunt Group and saved it within your database, you have not created the group within the switch. To do so, click the **Go** button within the **Run Time** ribbon group. To learn about the processes that occur when you click the buttons please refer to the Switch Communication section.

Adding an Existing Set as a Multiline Hunt Member

1. Click **Configured Items**.

2. In the N**avigation** pane, select **Set Management** > **Configured Sets**.

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. The Configured Sets list opens, displaying all existing sets. Double-click the set to view.

   The Set Management window opens.

6. Within the **Convert** ribbon group, click the drop-down arrow to access a list. From the list, select **Multiline Hunt Group Member**.

7. The screen changes to add the Multiline Hunt Group pane. Within the pane, complete the following fields:

   - **Hunt Group Name*** – click the drop-down arrow to access a list, and then select the hunt group name.

8. **Position*** – this field displays as the next available position in the hunt group. For example, if this set is the first member, then the position number will be 2. (1 is always given to the set that started the group and is considered as the Multiline Hunt Group). If this set is the second member, then the position number will be 3, and so forth. Click the field to type the new position within the hunt group.

9. Within the **Actions** ribbon group, click the **Save** button (save and stay) to continue working with this set or click the **Save & Close** button (save and exit).

Deleting a Multiline Hunt Member

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** > **Multiline Hunt Groups**.

   The Multiline Hunt Members list opens, displaying all members and groups.

   The Multiline Hunt Group Member is designated with position numbers other than 1.

3. Double-click the Hunt Group member to delete.

   The Set Management window opens.

4. Within the **Actions** ribbon group, click the **Delete** button.

5. Once you click Delete, a message box displays verifying that you really want to delete the hunt group member. Click **Yes** within the box to continue or **No** to cancel the operation.

6. Once you click Yes, the Scripts window opens. 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 (required fields are marked with an asterisk (*):

   - **Schedule** – click the schedule field within the top line, click the drop-down arrow to access a calendar, from the calendar select 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 and time (12:00 am) populate in the box. To change the time, click the hour, minute or am/pm to type the new time. Then click the Continue button.

7. **Continue** – click the **Continue** button to delete the member in CAIRS and send the script to the switch to delete the member from the group in the switch database.

   - **Skip** – click the **Skip** button to delete the member in CAIRS but not in the switch. When you click Skip, a message box displays verifying that you really want to skip running the scripts, within the box click **Yes** to continue or **No** to return to the Scripts window.

8. **Cancel** – click the **Cancel** button to abort the operation.

9. When you click continue, a Script Progress box displays displaying the progress of the script executing within the switch.

Call Pickup Groups

A call pickup group is a group of members that can answer incoming calls to any number within their group. The numbers in a call pickup group are physically located in close proximity so their users can hear the lines ring. Once a call pickup group is established, you can add members.

When you access a Call Pickup Group there are two panes of information the top pane displays the call pickup group general information such as switch name, call pickup name and description. The lower pane displays a list of the members that belong to the call pickup group.

Call Pickup Group Views

There are two different view options with Call Pickup Groups. The Simple list is the default view, this view displays the switch name, call pickup name and description. The alternate is the Member Detail view, this view shows the same information as the simple view with the addition of the directory number, button number, port name, CPU Options and site.

Groups

Adding a Call Pickup Group

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** > **Call Pickup Groups**.

3. In the **Actions** pane, click the **Add New Call Pick Up Group** link.

4. The General – Call Pickup Group window opens. Configure the following fields (fields marked with an asterisk (*) are required):

   - **Switch Name*** – click the drop-down arrow to access a list, from the list select the switch. If you are using ASI this is the switch that CAIRS will communicate with to create the Call Pickup Group. The switches displayed in the list are only those associated to the selected site.

5. **Call Pickup Name*** – type the new call pickup group name.

   - **Description** – type a brief call pickup group description.

6. Within the **Actions** ribbon group, click **Save & New** (to save and stay) to reset the screen and continue adding new call pickup groups, or **Save & Close** (to save and exit) to return to the Set Management list.

Deleting a Call Pickup Group

To delete a call pickup group, all members of the group must first be deleted or be reassigned to a different group. (Please refer to "Deleting a Member from a Call Pickup Group. CAIRS offers two ways to delete a Call Pickup Group:

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** > **Call Pickup Groups**.

3. The Call Pickup Groups list opens, displaying all existing call pickup groups.

4. There are two ways to delete a Call Pickup Group:

   - Highlight the group name within the list and click the **Delete Call Pickup Group** link within the **Actions** pane.

5. Double-click the group name. The Call Pickup Group 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 delete the call pickup group. Click **Yes** within the box to continue or **No** to cancel the operation.

Members

Adding a Member into a Call Pickup Group

1. Add Members once the call pickup group is established.

2. Click **Configured Items**.

3. In the **Navigation** pane, click **Set Management** and then **Configured Sets**.

1. Depending on the amount of records 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 then click the magnifying glass.

   2. Click the **Show All** button.

3. The Configured Sets list opens, displaying all existing sets. Double-click the set to modify.

   The Set Management window opens.

4. Within the **Device Properties** pane, find the **Call Pickup Name** field. Click the drop-down arrow to access a list, and then select the new Call Pickup Group.

5. Within the **Actions** ribbon group, click the **Save** button (save and stay) to continue working with this set or click the **Save & Close** button (save and exit).

6. Although you have added the set to a Call Pickup Group within your database, you have not created the appearance within the switch. To do so, click the **Go** button within the **Run Time** ribbon group. To learn about the processes that occur when you click the buttons please refer to the Switch Communications section.

Viewing Members of a Call Pickup Group

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** >**Call Pickup Groups**.

3. The Call Pickup Groups list opens, displaying all existing call pickup groups. Double-click the group to view.

4. The Call Pickup Group window opens displaying the selected group in detail.

5. The Members pane displays a complete list of the numbers that belong to the call pickup group. The following read only information displays:

   - Directory Number

   6. Button Number

   - Group Name

   7. CPU Options

Deleting a Member from a Call Pickup Group

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** >**Configured Sets**.

3. The Configured Sets list opens, displaying all existing sets. Double-click the set to modify.

   The Set Management window opens.

4. Within the **Device Properties** pane, find the **Call Pickup Name** field. Click the drop-down arrow to access a list, and then select the blank line at the top of the list to remove the Call Pickup Group.

5. Within the **Actions** ribbon group, click the **Save** button (save and stay) to continue working with this set or click the **Save & Close** button (save and exit).

6. Although you have deleted the appearance off the set and saved it within your database, you have not deleted the appearance within the switch. To do so, click the **Go** button within the **Run Time** ribbon group. To learn about the processes that occur when you click the buttons please refer to the Switch Communication section.

Intercom Groups

Intercom Group is an added set button feature allowing group members to send messages or to call each other. You must first create the group, then members you can add members.

When you access an Intercom Group there are two panes of information the top pane displays the intercom group general information such as switch name, intercom name and description. The lower pane displays a list of the members that belong to the intercom group.

Groups

Adding an Intercom Group

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** >**Intercom Groups**.

3. In the **Actions** pane, click the **Add New Intercom Group** link.

4. The General – Intercom Group window opens. Configure the following fields (required fields are marked with an asterisk (*):

   - **Switch Name*** – click the drop-down arrow to access a list, from the list select the switch. If you are using ASI this is the switch that CAIRS will communicate with to create the Intercom Group. The switches displayed in the list are only those associated to the selected site.

   5. **Intercom Name*** – type the new Intercom name.

   - **Description** – type a brief Intercom description.

6. Within the **Actions** ribbon group, click **Save & New** (to save and stay) to reset the screen to continue adding new intercom groups, or click **Save & Close** (to save and exit).

Deleting an Intercom Group

To delete an intercom group, you need to delete or re-assign all of its members of the group. Please refer to the "Deleting an Intercom Member" section.)

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** > **Intercom Groups**.

3. The Intercom Groups list opens, displaying all existing groups.

4. There are two ways to delete an Intercom Group:

   - Highlight the group within the list and click the **Delete Intercom Group** link within the **Actions** pane.

5. Double-click the group within the list. The Intercom window opens. Within the **Actions** group, click the **Delete** button.

6. Once you click Delete, a message box displays verifying that you really want to delete the group. Click **Yes** within the box to continue or **No** to cancel the operation.

Members

Adding a Member into an Intercom Group

Once you create an Intercom Group, you can add members into the group. Add members by configuring the set and then add the intercom group feature onto the set.

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** and then **Configured Sets**.

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. The Configured Sets list opens, displaying all existing sets. Double-click the set to modify.

   The Set Management window opens.

6. Within the **Button Properties** pane, select the button position.

   There are two sections within the Buttons Properties pane, the left section displays a list of the buttons associated with the set, and this includes all buttons types. The right section displays the information associated with the highlighted button.

7. Within the left-hand section, highlight the button to add a feature onto, within the right-hand section a list of links displays, click the **Add Intercom Group** link.

8. Within the pane, complete the following fields (required fields are marked within an asterisk (*):

- **Intercom Name *** – click the drop-down arrow to access a list, then select the name of the Intercom Group to add the set to.

9. **Intercom Address** – type the Intercom Group address.

- **Features -** Double-click the field to open the Switch Features window, within the window find the feature to add to the button, click the box in the select to insert a checkmark. When you are finished adding features, clcik on the OK button.

10. Within the **Actions** ribbon group, click the **Save** button (save and stay) to continue working with this set or click the **Save & Close** button (save and exit). Although you have added the set to an Intercom Group within your database, you have not created the appearance within the switch. To do so, click the **Go** button within the **Run Time** ribbon group.

Viewing Members of an Intercom Group

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management** > **Intercom Groups**.

3. The Intercom Groups list opens, displaying all existing groups. Double-click the group to view.

4. The Intercom Group window opens displaying the selected group in detail.

5. The Members pane displays a complete list of the numbers that belong to the call intercom group. The following read only information displays:

- Directory Number

6. Button Number

- Group Name

7. Intercom Address

Deleting a Member from an Intercom Group

Deleting a member removes the set device from the intercom group. You are essentially deleting the intercom group feature from the set device.

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Configured Sets**.

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. The Configured Sets list opens, displaying all existing sets. Double-click the set to modify.

6. There are two sections within the **Buttons Properties** pane, the left section displays a list of the buttons associated with the set, and this includes all buttons types. The right section displays the information associated with the highlighted button.

7. Within the left-hand section, highlight the button to delete.

8. Within the bottom portion of the right-hand pane, click the **Delete Button** link.

9. A message box displays verifying that you really want to delete the information from the button. Click **Yes** within the box to continue or **No** to cancel the operation.

10. Within the **Actions** ribbon group, click the **Save** button (save and stay) to continue working with this set or click the **Save & Close** button (save and exit).

11. Although you have deleted the appearance off the set and saved it within your database, you have not deleted the appearance within the switch. To do so, click the **Go** button within the **Run Time** ribbon group. To learn about the processes that occur when you click the buttons please refer to the Switch Communication section.

Office Hunt Groups

An Office Hunt group consists of numbers (called Members) that can be forwarded to each other. Each group uses a combination of a forward number and position. Each member has a designated forwarding number, when the first number does not answer an incoming call, the call forwards to the next member, if that member does not answer; the switch forwards the call to the next member until the call is answered. In addition, an office hunt group creates a ringing pattern; the position indicates when the member receives a call.

You first define the group, or the first member. After the group is created, you add members into the group.

Groups

Adding an Office Hunt Group

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Office Hunt Groups**.

3. In the **Actions** pane, click the **Add New Office Hunt Group** link.

   The General – Office Hunt Group window opens. Configure the following fields (required fields are marked with an asterisk (*) :

   • **Site*** – click the drop-down arrow to access a list, and then select the site.

4. **Switch Name*** – click the drop-down arrow to access a list, from the list select the switch. If you are using ASI this is the switch that CAIRS will communicate with to create the Office Hunt Group. The switches displayed in the list are only those associated to the selected site.

   • **Office Hunt Name*** – type the new call pickup group name.

5. **Description** – type a brief office hunt group description.

6. Within the **Actions** ribbon group, click **Save & New** (to save and stay) to reset the screen to continue adding new hunt groups or click **Save & Close** (to save and exit).

Deleting an Office Hunt Group

To delete an Office Hunt Group, you must first delete all of its members. (Please refer to the "Deleting an Office Hunt Member" section.) CAIRS offers two ways to delete an office hunt group:

1. Click **Configured Items**.
2. In the **Navigation** pane, click **Set Management** > **Office Hunt Groups**.
3. The **Office Hunt Groups** list opens, displaying all existing groups.
4. There are two ways to delete an **Office Hunt** group:

   - Highlight the group with the list and click the **Delete Office Hunt Group** link within the **Actions** pane.

5. Double-click the name. The Office Hunt Group 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 delete the group. Click **Yes** within the box to continue or **No** to cancel the operation.

Members

Adding an Office Hunt Member

You can add numbers as group members once an Office Hunt group is established. Each member has a designated forwarding number to create a ring circle.

1. Click **Configured Items**.
2. In the **Navigation** pane, click **Set Management** > **Office Hunt Groups**.
3. The Office Hunt Group list opens, displaying all existing office hunt groups. Double-click the group name to add members.
4. The Office Hunt Group window opens displaying the selected group information.
5. Within Show ribbon group, click the lower half of the Members button to access a drop-down menu, then select **Add Member.** The Office Hunt Group Member pop-up opens. Configure the following fields (required fields are marked with an asterisk (*):

   - **Number*** – if this member is the first one being added to this group, this field is empty, click the field to access the Directory Number Plans table. There are three ways to populate the table:

     o Click the drop-down arrow within the Number Plan field, and then select the plan. Once selected, either click the Next link to have CAIRS automatically select the next number in the sequence or click the **Show All** button to display a complete list of numbers. Within the list, double-click the number, the table closes, and the number displays within the field.

6. Within the Search textbox, type the number or portion of the number and then click the magnifying glass. When the list populates, double-click the number, the table closes, and the number displays within the field.

o Within the lower pane, click the **Click Here** link to view all the numbers. When the list populates, double-click the number, the table closes, and the number displays within the field.

! If there are existing members in the group, CAIRS auto populates this field with previous forwarding, for example, if you are adding position 5, this field populates with the forwarding number for position 4.

- **Forward Number*** – click the field to access the Directory Number Plans table. There are three ways to populate the table:

  o Click the drop-down arrow within the Number Plan field, and then select the plan. Once selected, either click the Next link to have CAIRS automatically select the next number in the sequence or click the **Show All** button to display a complete list of numbers. Within the list, double-click the number, the table closes, and the number displays within the field.

  7. Within the Search textbox, type the number or portion of the number and then click the magnifying glass. When the list populates, double-click the number, the table closes, and the number displays within the field.

  o Within the lower pane, click the **Click Here** link to view all the numbers. When the list populates, double-click the number, the table closes, and the number displays within the field.

- **Position*** **–** this field is auto populated by CAIRS. For the first member of a group, the position defaults to 1 and the next member added is #2 and so forth. If you wish to change the position number, click the field and type the new number.

Once you click Yes, the Scripts window opens. Once you click Yes, the Scripts window opens. 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 (required fields are marked with an asterisk (*)):

- **Schedule** – click the schedule field within the top line, click the drop-down arrow to access a calendar, from the calendar select 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 and time (12:00 am) populate in the box. To change the time, click the hour, minute or AM/PM, to type the new time, then click the **Continue** button.

8. **Continue** – click the **Continue** button to send the script to the switch to complete the action immediately. If you click Continue, a Script Progress pop-up opens this displays the progress and completion of the script within the switch.

- **Skip** – click the **Skip** button to add the member within CAIRS but not in the switch. When you click Skip, a message box displays verifying that you really

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want to skip running the scripts, within the box click **Yes** to continue or **No** to return to the Scripts window.

9. **Cancel** – click the **Cancel** button to abort the operation.

10. Within the Office Hunt Group Member pop-up, click the Ok button to return to the General – Office Hunt Group window.

11. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with this set, or click **Save & Close** (to save and exit) to return to the Set Management list.

Deleting an Office Hunt Member

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Office Hunt Groups**.

3. The Office Hunt Group list opens, displaying all existing office hunt groups. Double-click the group name with the member you wish to delete.

4. The Office Hunt Group window opens displaying the selected group information.

5. Go to the **Show** ribbon group and click the **Members** button.

6. The Office Hunt Group Members pane opens and displays all members within this group. There are two ways to delete a member:

   - Click the member to delete, once the selected the member record is highlighted, within the **Show** ribbon group and click the lower half of the **Members** button to access drop-down menu, then select **Delete Member**.

   7. Right-click the record selector box next to the number, 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 member. Click **Yes** within the box to continue or **No** to cancel the operation.

9. The Switch Request window opens. If you would like to send the deleted information to the switch, click the Yes button. Once you click Yes, the Scripts window opens. 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 (required fields are marked with an asterisk (*):

   - **Schedule** – click the schedule field within the top line, click the drop-down arrow to access a calendar, from the calendar select 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 and time (12:00 am) populate in the box. To change the time, click the hour, minute or am/pm to type the new time. Then click the Continue button.

   10. **Continue** – click the **Continue** button to send the script to the switch to complete the action immediately. If you click Continue, a Script Progress pop-up opens this displays the progress and completion of the script within the switch.

- **Skip** – click the **Skip** button to add the member within CAIRS but not in the switch. When you click Skip, a message box displays verifying that you really want to skip running the scripts, within the box click **Yes** to continue or **No** to return to the Scripts window.

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

Distribution Groups

A Distribution Group works similar to a queue or ring group but is different from a Call Pickup Group in that the switch determines who receives the next call. The member who receives the call is generally the person who has been idle the longest amount of time and who is not currently on a call.

This menu option is a little different from any other in that you are not creating the group to send to the switch, you are creating the group name within the CAIRS database. Once you create the group, each set you want to include in the group needs to have the ACD feature assigned to a button. Once you send the scripts to the switch to add the feature onto the set(s), your next step is to perform a Data Sync. This synchronizes the groups from the switch database to those within the CAIRS database, thereby adding the members into the group.

When you access a Distribution Group there are two panes of information the top pane displays the distribution group general information such as name, switch name and distribution type. The lower pane displays a list of the members that belong to the distribution group.

Groups

Adding a New Distribution Group

1. Click **Configured Items**.
2. In the **Navigation** pane, click **Set Management** > **Distribution Groups**.
3. In the **Actions** pane, click the **Add New Distribution Group** link.
4. The General – Distribution Groups window opens. There are two panes of information; Group and Members. The Group pane allows you to define the group details, whereas the Members pane allows you to view the set devices that belong to the group.
5. Within the Group pane, complete the following fields (required fields are marked with an asterisk (*)):

- **Name*** – type the Distribution Group name.

6. **Switch Name*** – click the drop-down arrow to access a list, from the list select the switch. If you are using ASI this is the switch that CAIRS will communicate with to create the Distribution Group. The switches displayed in the list are only those associated to the selected site.

- **Distribution Type –** type in the distribution type into the field, for example, ACD or UCD.

7. Within the **Actions** ribbon group, click the **Save** button (save and stay) to continue working with this Distribution Group or click the **Save & Close** button (save and exit).

Deleing an Distribution Group

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Distribution Groups**.

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. There are two ways to delete a Distribution Group:

- Highlight the group within the list and click the **Delete Distribution Group** link within the **Actions** pane.

6. Double-click the name. The Distribution Group window opens. 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 group. Click **Ye**s within the box to continue or **No** to cancel the operation.

Members

Adding Distribution Group Members

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Configured Sets**.

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. The Configured Sets list opens, displaying all existing sets. Double-click the set to modify.

The Set Management window opens.

6. There are two sections within the **Buttons Properties** pane, the left section displays a list of the buttons associated with the set, and this includes all buttons types. The right section displays the information associated with the highlighted button.

7. Within the left-hand section, highlight the button to add a feature onto, within the right-hand section a list of links displays, click the **Add Feature** link.

8. Within the right-hand section, the Features field displays. Double-click the field to open the Switch Features window and within the window find feature that provide the for the distribution group. If you do not readily find the feature, you can search for a feature by typing in the name or portion of the name within the **Search Parameter** field and then clicking the magnifying glass. Once the feature displays, click in the select column to insert a checkmark.

9. Within the Select column, select the checkbox to, this inserts a checkmark, to indicate that you want to add the feature to the set.

10. Click the **Ok** button to close the Switch Features window. The Add Features Prompts pop-up opens. Within the pop-up, complete the following information:

   - **ACD Number** – type the name or the number of the ACD group.

   11. **CLID** – type the Calling Line ID.

   - **Position** – type the set's position number.

12. Click the **Continue** button to finish adding the feature or click the **Cancel** button.

   The feature name populates in the field and on the button within the Device Properties pane.

13. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue adding members, or click **Save & Close** (to save and exit) to return to the Set Management list.

14. Although you have added the feature to the set and saved it within your database, you have not created the appearance within the switch. To do so, click the **Go** button within the **Run Time** ribbon group. To learn about the processes that occur when you click the buttons please refer to the Switch Communication section.

Viewing Members of a Distribution Group

1. Click **Configured Items**.

2. In the **Navigation** pane, select **Set Management > Distribution Groups**.

3. The Distribution Groups list opens, displaying all existing groups. Double-click the group to view.

4. The Distribution Group window opens displaying the selected group in detail.

5. The Members pane displays a complete list of the numbers that belong to the distribution group. The following read only information displays:

   - Position

6. Directory Number

   - Port Name

7. Button Number

- Is Primary

Deleting Distribution Group Members

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Configured Sets**.

3. Depending on the amount of records 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 then click the magnifying glass.

    4. Click the **Show All** button.

5. The Configured Sets list opens, displaying all existing sets. Double-click the set to modify.

    The Set Management window opens.

6. Within the **Buttons Properties** windows, highlight the button that has the Automatic Call Distribution feature on it.

7. Within the bottom portion of the right-hand section, click the **Delete Button** link.

8. A message box displays verifying that you really want to delete the information from the button. Click **Ye**s within the box to continue or **No** to cancel the operation.

9. Although you have deleted the appearance off the set and saved it within your database, you have not deleted the appearance within the switch. To do so, click the **Go** button within the **Run Time** ribbon group. To learn about the processes that occur when you click the buttons please refer to the Switch Communication section.

Set Templates

Set Templates are created to simulate what a set looks like in the CAIRS database, the switch database and what the person using the phone sees. The templates can work in conjunction with the Set Type Management Utility; however, you do not need to create templates (to learn more about the Set Type Management Utility see System Admin -> Set Type Management). The purpose of the Set Template is to combine the set types with feature key packages and/or feature key maps.

The templates and the set types you create can work together to give your users an accurate picture of what is one the set. This allows for more accurate troubleshooting because your users see what your customer sees.

Adding a Set Template

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Set Templates**.

3. There are two ways to add a Set Templates:

- Within the toolbar directly above the **Navigation** pane, click the drop-down arrow next to **New**. From the list, select **Set Templates**.

4. Within the **Actions** pane, click **Add New Set Templates.**

5. With either option, the Set Templates window opens. Complete the following fields to add the template (required fields are marked with an asterisk (*):

- **Template Name*** – type the template name which should be the name a user is most familiar with, for example M5216, Censet, Analog, etc.

6. **Set Type Name*** – click the drop-down arrow to access a list, and then select the set type name.

- **Set Name in Switch*** – type the name of the set within the switch environment.

7. **Switch Name** – click the drop-down arrow to access a list, and then select the switch name.

- **Feature Key Map** – click the drop-down arrow to access a list, and then select the Feature Key Map associated with this set.

8. **Feature Package** – click the drop-down arrow to access a list, and then select the Feature Package associated with this set.

- **Addon Name in Switch** – type the addon name as it displays in the switch, if applicable.

9. Within the **Actions** ribbon group, click **Save & New** (to save and stay) to continue adding new templates, or click **Save & Close** (save and exit) to return to the Set Templates list.

Deleting a Set Template

A template that is associated with any existing set device cannot be deleted. You must first delete or reassign the sets in order to delete the template. If the template is associated with a set device, CAIRS notifies the user that it cannot be deleted.

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Set Templates**. Click the template name to delete.

3. The Set Templates list opens, displaying all existing templates.

4. There are three ways to delete a template:

- Highlight the template name within the list and within the **Actions** pane click the **Delete Set Templates** link.

5. Highlight the template name and within the toolbar directly above the **Navigation** pane, click the red **X**.

- Double-click the template name. The Set Templates 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 delete the Set Templates. Click **Yes** within the box to continue or **No** to cancel the operation.

Modifying a Set Template

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Set Templates**.

3. The Set Templates list opens, displaying all existing Set Templates. Double-click the Set Templates needing modification.

4. The Set Templates window opens. Modify the data in any of the fields visible on this screen required fields are marked with an asterisk (*): (refer to the section "Adding a Set Template" for more information on the use of these fields)

    - **Template Name** * – the data in this field can be modified, but not deleted entirely, as it is a required field.

5. **Set Type Name** * – the data in this field can be modified, but not deleted entirely, as it is a required field.

    - **Set Name in Switch** * – the data in this field can be modified, but not deleted entirely, as it is a required field.

6. **Switch Name** – click the drop-down arrow to access a list, then select the switch name

    - **Feature Key Map** – click the drop-down arrow to access a list, and then select the Feature Key Map associated with this set.

7. **Feature Package** – click the drop-down arrow to access a list, and then select the Feature Package associated with this set.

    - **Addon Name In Switch** – type the Addon name as it displays in the switch, if applicable.

8. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with this set, or click **Save & Close** (to save and exit) to return to the Set Templates list.

Feature Packages

You can create a set of features that are standard for each type of switch that you use. These packages can then be associated with a set device to add the set of features with one-step. This is a two-step process, you first create the package, and then you assign features to the package.

In order for you to add Feature Package into your database, you must first create your switch.

Creating a Feature Packages

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Feature Packages**.

3. In the **Actions** pane, select **Add New Feature Packages**.

4. The General Feature Packages window opens.

5. Complete the following information for the Feature Package (required fields are marked with an asterisk (*):

   - **Feature Package** * – type the feature package name, for example, Analog, ISDN, VTC, etc.

6. **Switch Name*** – click the drop-down arrow to access a list, and then select the switch name.

   - **Category*** – click the drop-down arrow to access a list, then select the feature package category, for example, Digital, Analog, ISDN, etc.

7. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue creating feature packages, or click **Save & Close** (to save and exit) to return to the Feature Package list.

Deleting a Feature Package

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Feature Packages**.

3. The Feature Packages list opens, displaying all feature packages. There are three ways to delete a feature package:

   - Highlight the feature package within the list and within the **Actions** pane click the **Delete Feature Package** link.

   4. Highlight the feature package and within the toolbar directly above the **Navigation** pane, click the red **X**.

   - Double-click the feature package name, Feature Package window opens. Within the **Configuration** ribbon group, click the **Features** button.

5. Once you click Delete, a message box displays verifying that you really want to delete the feature package. Click **Yes** within the box to continue or **No** to cancel the operation

Adding/Deleting a Feature to a Feature Package

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Feature Packages**.

3. The Feature Packages list opens, displaying all existing feature packages. Double-click the package.

4. The Feature Package window opens. Within the **Configuration** ribbon group, click the **Features** button.

5. A list of all available features for the selected switch display with the following information:

   - **Select** – a checkmark indicates the feature is assigned to the feature package.

   6. **Feature Name** – displays the common feature name.

   - **Manufacturer Feature Name** – displays the code used within the switch environment.

   7. **Add Feature Code** – displays the information sent to the switch when this feature is added to a set.

   - **Delete Feature Code** – displays the information sent to the switch when the feature is deleted from a set.

   8. **Hybrid Digital** – (EWSD only)

   - **Add Sort Order** –this field allows you to place an add position onto the feature, for example if this feature is dependent on another feature to be added first, the sort order would have to be higher. Click the field to type the appropriate sort order.

   9. **Delete Sort Order** –this field allows you to place a delete position onto the feature, for example if this feature is dependent on another feature to be deleted first, the sort order would have to be higher. Click the field to type the appropriate sort order

10. Click the box within the **Select** column to insert a checkmark and add the feature to the package.

11. Click the column to remove the checkmark to delete the feature from the package.

12. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue adding/deleting features, or click **Save & Close** (to save and exit) to return to the Feature Packages list.

Feature Key Templates

A Feature Key Template works differently than a feature package, in that you assign features to a particular button within the template. When you create the set device and assign the template, the feature auto-assign to the appropriate buttons.

In order for you to add Feature Key Templates into your database, you must first create your switch. Each switch can have multiple feature key templates.

Creating a Feature Key Template

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Feature Key Templates**.

3. A list of the switches displays, each of the switches allow you to create a Feature Key Template, double-click the switch name.

4. The Feature Key Template window opens. Click the field with an asterisk to start adding a Feature Key Map, and type the Feature Key Map name. Once you start typing, a new line displays at the top to allow you to continue adding templates. This name displays in the drop-down list associated with the Feature Key Map field.

5. Click the plus sign (+) next to the name to configure the following fields (required fields are marked with an asterisk (*):

   - **Button Number*** – type the number of the button position for the feature.

6. **Button Type*** – click the drop-down arrow to access a list, then select one of the following button types:

   - **Standard**

7. **Softkey**

   - **Previous Standard Button Group**

8. **Next Standard Button Group**

   - **Previous Softkey Button Group**

9. **Next Softkey Button Group**

   - **Button Label**

10. **Activator** – click the field to insert a checkmark indicating the feature includes an activator, for example, a pulse dial tone when you have voice mail.

    - **Indicator** – click the field to insert a checkmark indicating the feature includes an indicator light on the set device; for example, when voice mail is present a light on the phone blinks.

11. **Group Number** – type the feature group number.

    - **Ignore on Install*** – click the field to insert a checkmark indicating that you want CAIRS to ignore sending the feature to the switch upon installation.

12. **Addon Number** – type the number of the add-on that relates to the button position

    - **Manufacturer Feature Name*** – click the drop-down arrow to access a list, and then select the feature to place on the button.

13. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue creating templates, or click **Save & Close** (to save and exit) to return to the Feature Packages list.

Modifying a Feature Key Template

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Feature Key Templates**.

3. Within the **Feature Key Templates** list, double-click the switch you want to modify.

4. The Feature Key Template window opens. Click the plus sign (+) next to the Feature Key Map name to view the button feature assignments. Within the list, make any necessary modifications.

5. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue modifying the template, or click **Save & Close** (to save and exit) to return to the Feature Key Templates list.

Deleting a Feature Key Template

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Feature Key Templates**.

3. Within the **Feature Key Templates** list, double-click the switch you want to modify.

4. The Feature Key Template window opens. Within the list of Feature Key Maps, right-click the selector box next to the name, a small pop-up menu opens, within the box click **Delete**.

5. Once you click Delete, a message box displays verifying that you really want to delete the template. Click **Yes** within the box to continue or **No** to cancel the operation.

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

6. If you do not want to delete a template, right-click the record to access a pop-up menu. From the pop-up, click **Undelete**.

7. 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.

8. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue deleting templates, or click **Save & Close** (to save and exit) to the Feature Key Templates list.

Delete a Feature from a Feature Key Template

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Feature Key Templates**.

3. Within the **Feature Key Templates** list, double-click the switch you want to modify.

4. The Feature Key Template window opens. Click the plus sign (+) next to the Feature Key Map name to view the button feature assignments.

5. Within the list of button feature assignments, right-click the selector box next to the button number. A small pop-up menu opens, within the box click **Delete**.

6. Once you click Delete, a message box displays verifying that you really want to delete the feature. Click **Yes** within the box to continue or **No** to cancel the operation.

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

7. If you do not want to delete a feature, right-click the record to access a pop-up menu. From the pop-up, click **Undelete**.

8. 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.

9. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue deleting features, or click **Save & Close** (to save and exit) to return to the Feature Key Templates list.

Authorization Codes

Within Authorization Codes, you can track the codes used by your subscribers or organizations to an account number. Thereby allowing you to bill for call charges incurred while using the code. Due to security concerns, this section of the software may be visible to only those involved with the distribution and billing of call charges.

Please be aware that when you are adding an authorization code to a subscriber or unofficial account, the only place to view the association is within Authorization Codes. However, if you associate an authorization code to an official account, you can view the associated code by accessing the Auth Code button within the Show ribbon group.

Adding/Modifying/Deleting

Adding an Authorization Code

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Authorization Codes**.

3. Within the **Actions** pane, click the **Add New Authorization Codes** link.

4. The General – Authorization Code window opens. Complete the following fields (required fields are marked with an asterisk (*)):

   - **Authorization Code*** – if you have auto-numbering activated this field populate with Auto (to learn more see System Admin -> System Settings -> Auto Number Setup). Alternatively, you can click the field to type the code.

   5. **Switch Name** – click the drop-down arrow to access a list, then select the switch name

   - **Account Number *** – click the drop-down arrow to access a list of account number, from the select the select the appropriate number.

     When you open the account number drop-down, there are four columns of information. The first displays whether the account number is official or unofficial. The three remaining columns determine the charge types for the account, whether one-time, recurring, and/or call charges.

- **Organization Name** – click the drop-down arrow to access a list from the list select the name of the organization. The organization drop-down list displays the bottom-most organization first. After the ~~the complete path to the selected organization displays. In the example below, we selected Documentation, which is a child to Development and Unique. Each level of the organizational tree is separated by a >.

Once you select an organization, the complete path populates within the field.

- **Subscriber Name –** click the drop-down arrow to access a list, and then select the subscriber.

6. **Class of Service Name** – click the drop-down arrow to access a list, and then select the COS.

- **Class of Restriction Name** – click the drop-down arrow to access a list, and then select the COR.

7. **Class of Service** – click the drop-down arrow to access a list, then select the COS Number

- **Class of Restriction** – click the drop-down arrow to access a list, then select the COR Number

8. **Months Before Reuse** – type a number between 1 and 12 to indicate the number of months that have to pass before the authorization code is usable.

- **Expiration Date** – click the field to access a drop-down calendar and from the calendar select the date the authorization code expires. To change the date, click the field to access a drop-down 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.

9. **Miscellaneous 1 – 5** – type any additional authorization code information.

- **Sent to Switch** – this field defaults to include a checkmark that indicates once you save the record to the CAIRS database, the appropriate scripts run to add the authorization, and related information to the switch database.

10. **Withdraw From Switch** – this fields defaults to include a checkmark to indicate that once you delete the record from the CAIRS database, the appropriate scripts run to delete the code from the switch database.

11. Within the **Actions** ribbon group, click **Save & New** to continue adding authorization codes, or **Save & Close** (to save and exit) to return to the Authorization code list.

Modifying an Authorization Code

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Authorization Codes**.

3. Depending on the amount of records you have within your database, the list may not readily populate. To populate the list, perform one of the following actions:

4. If the list of Authorization Codes does not populate, either:

   - Within the search box, type the Authorization Code or portion of the code and then click the magnifying glass.

   5. Click the **Show All** button.

6. Click the Authorization Code to modify. The Authorization Code window opens.

7. Within the list, find the field to modify. If the field contains a drop-down arrow, select the new information from the list. If you click the field and a cursor becomes available, type the new information.

8. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue modifying or, **Save & Close** to return to the Authorization Code list.

Deleting and Authorization Code

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** > **Authorization Codes**.

3. Depending on the amount of records 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 the Authorization Code or portion of the code and then click the magnifying glass.

   4. Click the **Show All** button.

5. The Authorization Code list opens, displaying all codes. There are three ways to delete an authorization code:

   - Highlight the code in the list and within the **Actions** pane click the **Delete Authorization Codes** link.

   6. Highlight the code and within the toolbar directly above the **Navigation** pane, click the red **X**.

   - Double-click the code and the Authorization Code window opens. 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 code. Click **Yes** within the box to continue or **No** to cancel the operation.

! **Viewing Deleted Authorization Codes** After you delete an authorization code, you can access a list of all delete codes by clicking the option button next the Delete Authorization Codes within the Views pane. A list appears within the pane displaying basic authorization code information as well as the username of the person who deleted the code and the date they deleted the code.

Switch Communications

Sending the Authorization Code to the Switch

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** and then **Authorization Codes**.

3. Depending on the amount of records 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 the Authorization Code or portion of the code and then click the magnifying glass.

    4. Click the **Show All** button.

5. Click the Authorization Code to modify. The Authorization Code window opens.

6. Within the Run Time ribbon group, click the **Go** button.

    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. Once all the required fields are completed, you have three choices:

    - **Continue** – click the Continue button to send the script to the switch.

    9. **Skip** – click the Skip button to make the changes within the CAIRS database but not in the switch. When you click Skip, a message box displays verifying that you really want to skip running the scripts, within the box click **Yes** to continue or **No** to return to the Scripts window.

    - **Cancel** – click the Cancel button to abort the operation.

10. After you click your selection, the window closes. To view whether a script was completed, click the **WOPR Script History** button. Pay close attention to the Status column to verify that your script ran successfully.

    If the script failed, a message displays in the Error Message column.

Scheduling Switch Communications

You can schedule your scripts to run at any time. To do so, complete the following steps:

1. Click **Configured Items**.

2. In the **Navigation** pane, click **Set Management** and then **Authorization Codes**.

3. Depending on the amount of records 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 the Authorization Code or portion of the code and then click the magnifying glass.

   4. Click the **Show All** button.

5. Click the Authorization Code to modify. The Authorization Code window opens.

6. Within the **Run Time** ribbon group, click the **Go** button.

   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 (required fields are marked with an asterisk (*).

8. Click the schedule field within the top line, click the drop-down arrow to access a calendar and from the calendar click the date to select, once clicked the date displays in the field (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 time (12:00 am) also populates in the box. To change the time, click the hour, minute or am/pm to type the new time.

   The date and time display in the Schedule field.

9. Click the **Continue** button. The scripts run at the designated date and time.

10. To view whether a script was completed, click the **WOPR Script History** button. Pay close attention to the Status column to verify that your script ran successfully.

    If the script failed, a message displays in the Error Message column.

Configured Items-Circuits

The Circuits Section offers the capability to track Circuits (cairs.net defines a circuit as any communication service that does not produce a dial tone) and their related segments. Circuits include items such as: (1) computer circuits, (2) data circuits, (3) fire alarms, (4) burglar alarms, (5) signaling circuits, (6) radio loops, and other forms of signal transmission.

A circuit may have more than one related circuit part and circuit parts have many different names including: (1) segments, (2) legs, and (3) drops. Cairs.net refers to all these parts as circuit "segments" to simplify the terminology. Cairs.net also uses the terms connections and paths for Circuits or segments to indicate the transmission of a signal. A signal provides information regarding what action occurred, where the action occurred, or what set off a specific alarm as programmed at your location.

In the Circuits Section, you have the capability to add main Circuits with their associated segments as well as track the necessary information for all your Circuits. Examples of necessary information include: (1) site, (2) building, (3) connections, (4) paths, (5) alternate names, and (6) equipment information. All this information is required to determine the identity and location of any alarm or signal.

! Cairs.net will always treat the circuit in the following manner:

One Path Circuit -Transmit: a circuit using one wire path to send information from one end to another is referred to as the "Transmit Path."

Two Path Circuit - Receive: a circuit using two wires paths is a "Transmit and Receive" circuit. The first path of wires transmits and the second path receives. Cairs.net always considers the first path the "Transmit" path.

Three Path Circuit - Control: a three-path circuit is a combination of transmit and receive paths, plus a third path of wires used for a "Control" path. For this type of circuit, the first path transmits, the second path receives, and the third is the control path.

Four Path Circuit: a four-path circuit is a combination of transmit and receive paths, plus a third and fourth path used as the first and second "Control" paths.

Circuit Types

Before you add circuits into your database, you need to build the types of circuits that your site installs.

Managing Circuit Types

1. Click the Configured Items menu.

1. In the **Navigation** pane, click **Circuits**.

2. You have two alternatives for Managing Circuit Types:

    - On the toolbar directly above the **Navigation** pane, click the **Manage Circuit Types** button.

    - Within the **Action** pane, click the **Manage Circuit Types** link.

3. With either option, the Manage Circuit Types window opens.

Adding

4. In the **Circuit Type*** list pane, click the top row, marked with an asterisk (*) to add a new record.

2. Type the new circuit type name.

5. To add another type, click the **Save** button and repeat steps 4 and 5, as necessary.

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

Modifying

6. Click the field to modify and type the new information.

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

Deleting

7. There are two ways to select the circuit type to delete:

    - Right-click the record selector box (located just left of the name) and click **Delete**.

    - Highlight the name in the list and within the **Actions** ribbon group click the **Delete** button.

8. Once you click Delete, a message box opens verifying that you really want to delete the type. Click **Yes** within the box to continue or **No** to cancel the operation.

5. Once selected, cairs.net draws a line through the circuit type allowing you to delete multiple types at the same time.

9. If you do not want to delete the circuit type, right-click the record and click **Undelete**.

6. Once you select Undelete, a message box opens verifying that you really want to keep the type. Click **Yes** within the box to continue or **No** to cancel the operation.

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

Managing Circuit Name Templates

You can develop plans, similar to Number Plans, to determine how you name your circuits. You will first create a template and when your users select the template, cairs.net will automatically populate the circuit name.

Adding a Circuit Name Template

1. Click the Configured Items menu.

2. In the **Navigation** pane, click **Circuits**.

3. You have two alternatives for Managing Circuit Name Templates:

   - On the toolbar directly above the **Navigation** pane, click the **Manage Circuit Name Templates** button.

   - Within the **Action** pane, click the **Manage Circuit Name Templates** link.

4. With either option, the Manage Circuit Name Templates window opens. In list pane, click the top row, marked with an asterisk (*) to add a new record, complete the following fields (required fields are marked within an asterisk(*)):

   - **Circuit Name * -** type the name of the circuit name template

   - **Circuit Name Prefix * -** type the prefix for the circuit name, when the user selects this template, the information within this field will always appear at the beginning of the circuit name

   - **Circuit Name Starting Number * -** type the starting number for the circuits

   - **Circuit Name Ending Number * -** type the ending number for the circuits

   - **Circuit Name Suffix** – type the suffix for the circuit name, when the user selects this template, the information within this field will always appear at the end of the circuit name

   - **Circuit Name Last Number Used –** this field displays the last number within the template that was used to name a circuit.

5. To add another type, click the **Save** button and repeat steps 4 and 5, as necessary.

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

Deleting a Circuit Name Template

1. Click the **Configured Items** menu.

2. In the **Navigation** pane, click **Circuits**.

3. You have two alternatives for Managing Circuit Name Templates :

- On the toolbar directly above the **Navigation** pane, click the **Manage Circuit Name Templates** button.

- Within the **Action** pane, click the **Manage Circuit Name Templates** link.

4. With either option, the Manage Circuit Name Templates window opens.

5. There are two ways to select the circuit name template to delete:

   - Right-click the record selector box (located just left of the name) and click **Delete**.

   - Highlight the name in the list and within the **Actions** ribbon group click the **Delete** button.

6. Once you click Delete, a message box opens verifying that you really want to delete the template. Click **Yes** within the box to continue or **No** to cancel the operation.

7. Once selected, cairs.net draws a line through the circuit name template allowing you to delete multiple templates at the same time.

8. If you do not want to delete the circuit name template, right-click the record and click **Undelete**.

9. Once you select Undelete, a message box opens verifying that you really want to keep the template. Click **Yes** within the box to continue or **No** to cancel the operation.

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

Understanding the Circuit Window

Each ribbon group allows you to perform a set of functions for the circuit, for example, attach files, associate segments, add alternate names, etc.

Ribbon Groups

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 Circuit list.

- **Delete** – click this button to delete the circuit

- **Save** – click this button to save the completed information and continue working within the circuit.

- **Save & New** – click this button to save the completed circuit information and to start adding a circuit.

- **Refresh** – click this button to refresh the screen and apply recently changed items.

Show

View and modify the associated circuit information within the Show ribbon group, for example, manipulate alternate names, view related orders and troubles, etc.

Segments

Add, modify and delete segments related to the main circuit.

Attach

Within the Attach ribbon group, you can attach a file to the circuit. Your cairs.net administrator pre-defines the attachable file types.

Circuit Panes

Segments

Within this pane you can view the segments related to the circuit. When you double click any row the Segment window opens allowing you modify any of the segments information.

Account for Equipment and Services

This pane allows you to associate account numbers responsible for charges incurred from the equipment and services related to the circuit.

Equipment and Services

This pane displays the equipment and services associated to the circuit. At the top of the pane is a dropdown box that allows you to select what view you want, whether active, billed, installed, etc. There are two checkboxes allowing you select whether you want to view equipment, services, or both.

Configuring a Main Circuit

When you configure a circuit, you will first add the main circuit into the cairs.net database. Onto that main circuit, you can then add equipment, services, account numbers, and circuit segments.

Adding a Main Circuit

1. Click the **Configured Items** menu.

2. In the **Navigation** pane, click **Circuits**.

3. There are two ways to add a circuit:

   - On the toolbar directly above the **Navigation** pane, click the drop-down arrow next to **New**. From the list, select **Circuit**.

   - Within the **Actions** pane, click the **Add New Circuit** link.

4. With either option, the General Circuit window opens. Complete the following information for the circuit (required fields are marked with an asterisk (*)):

- **Circuit Name*** – type the alphanumeric circuit name, typically the most familiar name for the circuit user.

! **Use Name Template -** If you want to use the circuit name template, click on the Use Name Template button within the Show ribbon group. The Select a circuit name plan to determine the circuit name popup opens, within the list double click on the appropriate template. The popup closes and the Circuit Name auto-populates within the Circuit Name field.

- **Circuit Type*** – click the drop-down arrow to access a list and from the list, the circuit type.
- **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. Each site level is separated by a >.
- **Organization Name**– click the drop-down arrow to access a list from the list, select the name of the organization. The organization drop-down list displays the bottommost organization first. After the ~~ the complete path to the selected organization displays. Each level of the organizational tree is separated by a >. Once you select an organization, the complete path populates within the field.
- **Subscriber Name** – click the drop-down arrow to access a list, from the list select the subscriber name responsible for the circuit.
- **TCO** – click the drop-down arrow to access a list and from the list, select the Telephone Control Officer (TCO).
- **Circuit Description** – type detailed circuit description.
- **Default Needed Paths*** – type the number of paths in the circuit.
- **Trouble Restoration Priority*** – type the trouble restoration priority number, 1 to 99, for the circuit. When your help desk initiates a trouble ticket on this circuit, cairs.net uses this field to determine the priority, 1 is the most important, while 99 is the least important.
- **Bandwidth** – type the bandwidth for the circuit
- **User Misc 1-20** – use these fields for any miscellaneous circuit information.
- **Official (Required)*** – this field defaults to a checkmark to indicate that the circuit is used for official business only, click the field to remove the checkmark to indicate that the circuit is used for unofficial business.
- **Notes** – type any additional circuit notes.

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

Modifying a Main Circuit

1. Click the **Configured Items** menu.

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2. In the **Navigation** pane, click **Circuits**.

3. Before the Circuit list populates, you must either:

   - Within the search box, type any portion of the record, then click the magnifying glass.

   - Click the **Show All** link.

4. The Circuit lists, displaying all existing circuits. Double-click the circuit to modify.

5. With either option, the General Circuit window opens. Make any necessary modifications.

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

Deleting a Main Circuit

Before you can delete a main circuit, you must remove all circuit segments.

1. Click the **Configured Items** menu.

2. In the **Navigation** pane, click **Circuits**.

3. Before the Circuit list populates, you must either:

   - Within the search box, type any portion of the record, then click the magnifying glass.

   - Click the **Show All** link.

4. The Circuit lists, displaying all existing circuits. There are two ways to delete a main circuit:

   - Within the list, click the circuit to highlight. Within the **Actions** ribbon group, click the **Delete Circuit** link.

   - Double-click the circuit to delete, the General – Circuit window opens. Within the **Actions** ribbon group, click **Delete**.

5. Once you click Delete, a message box opens verifying that you really want to delete the entire **circuit**. Click **Yes** within the box to continue or **No** to cancel the operation.

Viewing Circuits

1. Click the **Configured Items** menu.

2. In the **Navigation** pane, click **Circuits**.

3. Before the Circuit list populates, you must either:

   - Within the search box, type any portion of the record, then click the magnifying glass.

   - Click the **Show All** link.

4. The Circuit lists, displaying all existing circuits. Use the Views pane to sort the Circuit list. The following views are available:

- **Simple List**
- **Alternate Names**
- **Circuit By Active Account**
- **Circuit Segment By Location**
- **Circuit Segment Connectivity**
- **Detail List**

5. To select a different view, click the option button next to the selection. There are two ways to populate the list:

- Within the search box, type any portion of a record and then click the magnifying glass.
- Click the **Show All** button.

6. If available, click the plus sign (+) next to the group to view the individual records.

7. Double-click the record to view the Circuit window

Accounts for Equipment and Services

You can associate a few different account numbers to a circuit for the different charge types associated with your equipment and services. For example, you can a separate account numbers for recurring and one-time charges. Alternatively, you can have one account number for all charges associated with the equipment and services.

Adding an Account for Equipment and Services

1. Click the **Configured Items menu**.

2. In the **Navigation** pane, click **Circuits**.

3. Before the Circuit list populates, you must either:

- Within the search box, type any portion of the record, then click the magnifying glass.
- Click the **Show All** link.

4. The Circuit lists, displaying all existing circuits. Double-click the circuit to modify.

5. The General-Circuit window opens.

6. Within the Accounts for Equipment and Services pane, click the row marked with the asterisk to enter in a new account number for the equipment and services. Complete the following fields, required fields are marked with an asterisk (*):

- **Charge Type*** – click the drop-down arrow to access a list, then select one of the following choices:

  - **Both One Time and Recurring Charges** – bills the account for all one time and recurring charges

- **Recurring Charges** - bills the account for only recurring charges

- **One-time Charges** – bills the account for only one- time charges

- **Site*** – once you click any of the drop-down lists, the site name auto-populates with the site selected on the General-Circuit Device window.

- **Subscriber Name** – click on the drop-down arrow to access a list, and from the list select the appropriate subscriber

- **Organization –** if you have selected an account number associated to an organization, that organization name populates within the field. This is a read only field.

- **Account Number*** – click the drop-down arrow to access a list of the account numbers and their associated organizations. If an account number is associated to multiple organizations, the account number appears in the list multiple times, for example if account number 2424 is associated to three different organizations, there are three appearances of the account number within the drop-down. Each account number references the different organization name.

  From the list, select the account number and organization responsible for the charges.

! When you create an account number, you can assign it to an organization or to a subscriber; this designates the account as official or unofficial. If you select an account with an organization, it is most likely an Official Account. If you select an account where the organization is blank, it is most likely an Unofficial account and associated to a subscriber.

- **Billing Start Date*** – click the drop-down arrow to access a calendar, from the calendar select the date to start the billing. 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.

- **Billing End Date** – click the drop-down arrow to access a calendar, from the calendar select the date to stop the billing for the equipment or service. 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 Save (to save and stay) to continue working with the circuit, or click Save & Close (to save and exit) to return to the Circuit list.

Deleting an Account

1. Click the **Configured Items menu**.

2. In the **Navigation** pane, click **Circuits**.

3. Before the Circuit list populates, you must either:

- Within the search box, type any portion of the record, then click the magnifying glass.

- Click the **Show All** link.

4. The Circuit lists, displaying all existing circuits. Double-click the circuit to modify.

5. The General-Circuit window opens.

6. Within the Accounts for Equipment and Services pane, right click on the selector box next to the charge type, a small popup menu opens, within the box click **Delete**.

7. Once you click Delete, a message box appears verifying that you really want to delete the account. Click Yes within the box to continue or No to cancel the operation.

8. Once selected, cairs.net draws a line through the item allowing you to delete multiple items at once.

9. If you do not want to delete an item, right-click the record to access a popup menu, from the popup, click **Undelete**.

10. Once you select Undelete, a message box appears verifying that you really want to keep the account. 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 circuit, or click Save & Close (to save and exit) to return to the Circuit list.

Equipment & Services

Please see Common Elements – Equipment & Services to learn more.

Alternate Circuit Names

Each circuit can have several names associated, often times, a site names a circuit different then the vendor providing the service. The Alternate Circuit Names allows you to quickly access circuits by being able to search on your names as well as those provided by vendors.

Adding Alternate Circuit Names

1. Click the **Configured Items menu**.

2. In the **Navigation** pane, click **Circuits**.

3. Before the Circuit list populates, you must either:

   - Within the search box, type any portion of the record, then click the magnifying glass.

   - Click the **Show All** link.

4. The Circuit lists, displaying all existing circuits. Double-click the circuit to modify.

5. The General-Circuit window opens. Within the **Show** ribbon group, click the **Alternate Names** button.

6. Click the **Alternate Name** field, marked with an asterisk, to activate the field. Type the desired name into the field along with a description.

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

Deleting an Alternate Name

1. Click the **Configured Items menu**.

2. In the **Navigation** pane, click **Circuits**.

3. Before the Circuit list populates, you must either:

   - Within the search box, type any portion of the record, then click the magnifying glass.

   - Click the **Show All** link.

4. The Circuit lists, displaying all existing circuits. Double-click the circuit to modify.

5. The General-Circuit window opens. Within the **Show** ribbon group, click the **Alternate Names** button.

6. Within the list of names, right click on the selector box next to the name to delete, a popup menu opens, within the box click **Delete**.

7. Once you click Delete, a message box appears verifying that you really want to delete the alternate name. Click Yes within the box to continue or No to cancel the operation.

8. Once selected, cairs.net draws a line through the name allowing you to delete multiple names at once.

9. If you do not want to delete the name, right-click the record to access a popup menu, from the popup, click **Undelete**.

10. Once you select Undelete, a message box appears verifying that you really want to keep the name. 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 circuit, or click Save & Close (to save and exit) to return to the Circuit list.

Show Related Orders and Troubles

Within this button you can view the open or complete work orders or troubles relating to the circuit.

1. Click the **Configured Items menu**.

2. In the **Navigation** pane, click **Circuits**.

3. Before the Circuit list populates, you must either:

   - Within the search box, type any portion of the record, then click the magnifying glass.

   - Click the **Show All** link.

4. The Circuit lists, displaying all existing circuits. Double-click the circuit to view.

5. Within the **Show** ribbon group, click on the Show Related Orders and Troubles button.

6. A list of all associated work order and trouble tickets appear within the pane. The following information is displayed:

- **Work Order Number**

- **Work Flow Name**

- **Org Name**

- **Site Name**

- **Work Order Desc**

- **Open Date**

- **Current Status**

By double clicking on the work order number, the work order opens allowing you to view the complete detailed information. Click on the x in the upper right-hand corner to close the work order and return to the circuit.

File Attachments

Please see Common Elements → File Attachments to learn more.

Configuring Circuit Segments

A circuit can have more than one related circuit part. Circuit parts are called by many different names such as, segments, legs, drops, etc. Cairs.net refers to these parts as circuit "segments."

Adding a Circuit Segment

1. Click the **Configured Items** menu.

2. In the **Navigation** pane, click **Circuits**.

3. Before the Circuit list populates, you must either:

- Within the search box, type any portion of the record, then click the magnifying glass.

- Click the **Show All** link.

4. The Circuit lists, displaying all existing circuits. Double-click the circuit to modify.

5. The General-Circuit window opens. Within the Segments ribbon group, click the **New** button.

6. The Segment window opens. Within the top pane complete the following information (required fields are marked with an asterisk (*)):

- **Circuit Name*** – this field auto-populates with the main circuit name.

- **Number** – type the circuit segment number.

- **Local Circuit ID** – type the local circuit identification, whether it is a number or name or a combination.

- **Organization Name*** – click the drop-down arrow to access a list from the list, select the name of the organization. The organization drop-down list displays the bottommost organization first. After the ~~ the complete path to the selected organization displays. Each level of the organizational tree is separated by a >. Once you select an organization, the complete path populates within the field.

- **Description** – type the circuit segment description.

- **Bandwidth** – type the bandwidth.

- **Segment Miscellaneous 1-5** – use these fields to enter any miscellaneous information for the circuit segment.

- **DB Gain** – type the number that represents the amount of gain or loss the circuit experiences when the signal is passed through the segment. This number can represent a gain or a loss, to show a loss place a dash (-).

Segment Facilities

7. There are two sections within the Connectivity pane. The top portion allows you to assign the segment a few basic items within Facilities, and the lower portion allows you to assign the segment a complete facilities package.

8. Within the top section, complete the following fields (required fields are marked with an asterisk (*)):

- **Assigned 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. Each site level is separated by a >.

- **Assigned Building*** – click the drop-down arrow to access a list and from the list, select the building name.

- **Alternate Location –** type in any alternate location information relating to the set. This field can appear in the 911 interface

- **Directory Building Name** – this field auto-populates with the Directory Building Name that appears on the Building Record. The Directory Building name is defined as the common name for the building, for example, the assigned building name is 100 and the directory building name is Post Office. This field is read only.

- **Floor** – type the floor number, if applicable.

- **Room** – type the room number, if applicable.

- **Jack** – type the jack number, if applicable.

- **Dedicated Plant** – click the arrow to access a drop-down list, from the list select the type of dedication, it automatically defaults to Not Dedicated. You can change

the selection to dedicate with port or dedicated without port. When you choose to dedicate, anytime you move or delete the device, the facilities remain in place and are unavailable to use in other situations.

9. Within the lower section, when you click the first line (marked with an asterisk) the site and building name populate within the information you entered in the upper section.

10. Within the terminal name column, click the drop-down arrow to access a list and from the list, and then select the terminal name associated with the building. (If your building has only one terminal associated, this field automatically populates with that terminal name.)

11. If you do not see, the Connection Name line, click the plus sign (+) next to the site name. The following fields open to allow you to complete adding the facilities, complete the following fields (required fields are marked with an asterisk (*):

- **Connection Name** – click the drop-down arrow to access a list, and then the segment's connection.

- **Path Number** – this field auto-populates with the next available path in the terminal. To change this selection, click the drop-down arrow to access a list and select the segment's path number.

- **Path Usage** – click the drop-down arrow to access a list and from the list, select the path usage type. This is a list that is pre-defined within Facilities and indicates how the path is being used, for example, data, voice, transmit, etc.

- **Out Binding Post** or **Out Frame Location** – these fields auto-populate with number(s) corresponding to the path number. This information is defined within Facilities; each terminal is designed with either a Binding Post or Frame Location. This field is read only.

- **In Row, Block, Pin** – these fields auto-populate with number(s) corresponding to the path number. This information is defined within Facilities; each terminal is designed with either a Binding Post or Frame Location. This is a read only field.

12. At this point it is a good idea to save the information you entered so far. Within the **Actions** ribbon group, click the **Save** button.

13. You can continue to add-in cross connect buildings, terminals, and connection information for the segment by entering in another site, building name, and terminal.

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

Deleting a Circuit Segment

1. Click the **Configured Items** menu.

2. In the **Navigation** pane, click **Circuits**.

3. Before the Circuit list populates, you must either:

- Within the search box, type any portion of the record, then click the magnifying glass.

- Click the **Show All** link.

4. The Circuit lists, displaying all existing circuits. Double-click the circuit to modify.

5. The General-Circuit window opens.

6. Within the Segments pane, double-click the segment you want to delete.

7. The Segment window opens.

8. Within the **Actions** ribbon group, click **Delete**.

9. Once you click Delete, a message box opens verifying that you really want to delete the segment. Click **Yes** within the box to continue or **No** to cancel the operation.

10. Although the segment is already deleted, if any other changes were made you will need to save. Within the **Actions** ribbon group, click **Save** (to save and stay) or click **Save & Close** (to save and exit).

Segment Accounts for Equipment and Services

Often times a segment may need to be billed separately for the equipment and/or services associated. Within each segment you can associate an account that will override the selection you made for the main circuit.

Adding an Account for Equipment and Services

1. Click the **Configured Items** menu.

2. In the **Navigation** pane, click **Circuits**.

3. Before the Circuit list populates, you must either:

- Within the search box, type any portion of the record, then click the magnifying glass.

- Click the **Show All** link.

4. The Circuit lists, displaying all existing circuits. Double-click the circuit to modify.

5. The General-Circuit window opens.

6. Within the Segments pane, double-click the segment you want to delete.

7. The Segment window opens.

8. Within the Override Circuit Accounts for Equipment and Services pane, click the row marked with the asterisk to enter in a new account number for the equipment and services. Complete the following fields, required fields are marked with an asterisk (*):

- **Charge Type*** – click the drop-down arrow to access a list, then select one of the following choices:

- **Both One Time and Recurring Charges** – bills the account for all one time and recurring charges

- **Recurring Charges** - bills the account for only recurring charges

- **One-time Charges** – bills the account for only one- time charges

- **Site*** – once you click any of the drop-down lists, the site name auto-populates with the site selected on the General-Circuit Device window.

- **Organization –** if you have selected an account number associated to an organization, that organization name populates within the field. This is a read only field.

- **Account Number*** – click the drop-down arrow to access a list of the account numbers and their associated organizations. If an account number is associated to multiple organizations, the account number appears in the list multiple times, for example if account number 2424 is associated to three different organizations, there are three appearances of the account number within the drop-down. Each account number references the different organization name.

  From the list, select the account number and organization responsible for the charges.

! When you create an account number, you can assign it to an organization or to a subscriber; this designates the account as official or unofficial. If you select an account with an organization, it is most likely an Official Account. If you select an account where the organization is blank, it is most likely an Unofficial account and associated to a subscriber.

- **Billing Start Date*** – click the drop-down arrow to access a calendar, from the calendar select the date to start the billing. 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.

- **Billing End Date** – click the drop-down arrow to access a calendar, from the calendar select the date to stop the billing for the equipment or service. 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 Save (to save and stay) to continue working with the segment, or click Save & Close (to save and exit) to return to the Circuit.

Deleting an Account

1. Click the **Configured Items** menu.

2. In the **Navigation** pane, click **Circuits**.

3. Before the Circuit list populates, you must either:

- Within the search box, type any portion of the record, then click the magnifying glass.

- Click the **Show All** link.

4. The Circuit lists, displaying all existing circuits. Double-click the circuit to modify.

5. The General-Circuit window opens.

6. Within the Segments pane, double-click the segment you want to delete.

7. The Segment window opens.

8. Within the Override Circuit Accounts for Equipment and Services pane, right click on the selector box next to the charge type, a small popup menu opens, within the box click Delete.

9. Once you click Delete, a message box appears verifying that you really want to delete the account. Click Yes within the box to continue or No to cancel the operation.

10. Once selected, cairs.net draws a line through the item allowing you to delete multiple items at once.

11. If you do not want to delete an item, right-click the record to access a popup menu, from the popup, click Undelete.

12. Once you select Undelete, a message box appears verifying that you really want to keep the account. 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 working with the segment, or click Save & Close (to save and exit) to return to the Circuit.

Segment Equipment & Services

Please see Common Elements→ Equipment & Services to learn more.

File Attachments

Please see Common Elements → File Attachments to learn more.

Configured Items – Cell Phone

Within **Cell Phone,** you have the ability to track all non-switch related telephone numbers. This allows you to track information relating to the phone for billing purposes. Often times

these phones are government issued; therefore, the related information will not appear within Directory.

In order for you to assign a cell phone or non-switch related telephone numbers into the database your administrator needs to create a commercial number plan. Refer to System Admin → Number Plan for more information.

Managing Cell Phone Types

Before you add cell phones into your database, you need to build the types of cell phones that your site issues.

Cell Phone Type

1. Click the **Configured Items** menu.
1 In the **Navigation** pane, click **Cell Phone.**

   There are two ways to manage your cell phone types:

   - Within the toolbar, click the **Manage Cell Phone Types** button.
   1 Within the Action pane, click the **Manage Cell Phone Types** link.

Adding a Cell Phone Type

2. With either option, the **Manage Cell Phone Types** window opens. In the **Cell Phone Type** list pane, click the top row, marked with an asterisk (*) to add a new record.
2 Type the name of the new cell phone type.
3. To add another type, click the **Save** button and repeat steps 4 and 5, as necessary.

Modifying a Cell Phone Type

4. Click on any existing cell phone type and enter the new information.

Delete a Cell Phone Type

5. There are two ways to select the cell phone type to delete:

   - Right-click the record selector box (located just left of the cell phone type name) then click **Delete.**

   2 Highlight the name in the list and within the **Actions** ribbon group, click the **Delete** button.

6. Once you click Delete, a message box displays verifying that you really want to delete the type. Click **Yes** within the box to continue or **No** to cancel the operation.

   Once selected, cairs.net draws a line through the cell phone type allowing you to delete multiple types at
      once.

7. If you do not want to delete the cell phone type, right-click the record and click **Undelete.**

8. Once you select Undelete, a message box displays verifying that you really want to keep the type. 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) to continue adding cell phone types, or click **Save & Close** (to save and exit) to return to the **Cell Phone** list.

Cell Phone Configuration

Adding a Cell Phone

1. Click the **Configured Items** menu.

2. In the **Navigation** pane, click **Cell Phone.**

3. There are two ways to add a Cell Phone:

   - Within the toolbar directly above the Navigation pane, click the drop-down arrow next to New. From the list, select Cell Phone.

   3 Within the **Actions** pane, click **Add Cell Phone**.

   With either option, the **General – Cell Phone** window opens.

4. There are four panes of information relating to the cell phone:

   - **Cell Phone Information** – displays basic cell phone information

   4 **Accounts for Equipment and Services** – displays the account numbers responsible for charges incurred from the equipment and services associated to the set.

   - **Accounts for Calls** - display the account number responsible for the call charges associated with cell phone. At the top of the pane is a dropdown box that allows you to select the telephone number, this changes the information to display the account number responsible for the associated with that telephone number.

   5 **Equipment and Services** – displays the equipment and services associated to the cell phone. At the top of the pane is a dropdown box that allows you to select what view you want, whether active, billed, installed, etc. There are two checkboxes allowing you select whether you want to view equipment, services, or both.

5. Within the Cell Phone Information pane, complete the following information (required fields are marked with an asterisk (*****)):

   - **Telephone Number *** - type the telephone number.

   6 **Site *** - click the drop-down arrow to access a list and from the list select the set installation 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 >.

- **Cell Phone Type *** - click the drop-down arrow to access a list, from the list select the cell phone type.

7 **Sim Number** – type the sim number related to the cell phone.

- **PIN Number** – type the PIN number related to the cell phone.

8 **Vendor Name** – click the drop-down arrow to access a list, from the list select the cell phone vendor.

- **Service Provider Name** – click the drop-down arrow to access a list, from the list select the cell phone service provider.

9 **Publishing Option *** - click the drop-down arrow to access a list, from the list select one of the following publishing options:

  - **Published** – if selected, this listing appears in any printed or online directory.

  10 **Non-published** – if selected, this listing will not appear in any printed or online directory.

  - **Classified** – if selected, this listing appears in the classified directory only.

  11 **Temporary** – if selected, this appears as a temporary listing.

  - **Alternate** – if selected, the Alternate Number appearing in the Alt Number field is shown in place of the original number in both the printed and online directories.

12 **Organization** – click the drop-down arrow to access a list from the list select the name of the organization. The organization drop-down list displays the bottom-most organization first. After the ~~ the complete path to the selected organization appears. In the example below, we selected Documentation, which is a child to Development and Unique. Each level of the organizational tree is separated by a >.
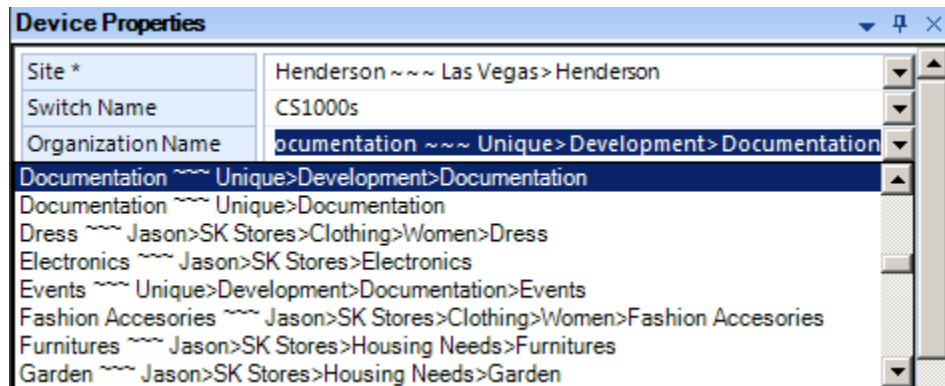
Once you select an organization, the complete path populates within the field.

- **Subscriber Name** – click the drop-down arrow to access a list, from the list select the subscriber name responsible for the cell phone.

13 **Job Title** – type the job title of the cell phone user

- **Order Number** – type the order number (this is a text field that can be used to enter in any information regarding the cell phone)

14 **Purchase Order Number** – type the purchase order number for the cell phone

- **Cell Misc 1 – 15** – type any miscellaneous information for the cell phone

15 **Cell Date 1-5** – an administrator can customize the field names to allow you to enter in date specific information.

6. Once you have completed the required fields, within the **Actions** ribbon group, click **Save** (to save and stay) to continue adding cell phones, or click **Save & Close** (to save and exit) to return to the **Cell Phone** list.

Deleting a Cell Phone

It is important to note that when you delete a cell phone that has existing charges whether call, equipment or services need a billing end date. If you do not indicate a billing end date, cairs.net auto-populates the billing end date with the current date.

1. Click the **Configured Items** menu.

2. In the **Navigation** pane, click **Cell Phone.**

3. Before the **Cell Phone** list populates, you must either:

- Within the search box, type any portion of the record and then click the magnifying glass.

16 Click the **Show All** button.

The **Cell Phone** lists opens, displaying all existing phones.

4. There are three ways to delete a cell phone:

- Highlight the phone in the list and within the **Actions** pane click the **Delete Cell Phone** link.

17 Highlight the code and within the toolbar directly above the **Navigation** pane, click the red **X.**

- Double-click the code and the **Cell Phone** window opens. Within the **Actions** ribbon group, click the **Delete** button.

5. Once you click Delete, a message box displays verifying that you really want to delete the record. Click **Yes** within the box to continue or **No** to cancel the operation.

Modifying a Cell Phone

1. Click the **Configured Items** menu.

2. In the **Navigation** pane, click **Cell Phone.**

3. Before the **Cell Phone** list populates, you must either:

- Within the search box, type any portion of the record and then click the magnifying glass.

18 Click the **Show All** button.

> The **Cell Phone** lists opens, displaying all existing phones.

4. Double-click the phone to modify. The **General – Cell Phone** window opens. Make any necessary changes to any field.

5. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue modifying cell phone types, or click **Save & Close** (to save and exit) to return to the **Cell Phone** list.

Calls

If the cell phone you are currently viewing is responsible for call charges, you can view a summary of the charges incurred by the phone. To view the calls associated to the phone, click the Calls button within the **Show** ribbon group. The window displays the following information for each call type:

- **Call Type –** call type name.

6. **Total Calls –** the total number of calls made.

- **Total Cost –** the total cost of calls.

7. **Total Duration –** the total duration of call in minutes.

- **Total Minutes –** the total duration of calls in hours, minutes, and seconds.

At the bottom of the list is a total for all call charges. To view the details for each call type, click the plus sign **(+)** next to the call type name. To return to the default view, click the minus sign **(-)** next to the call type name.

All calls that are associated with a cell phone have to be inputted through the Vendor Media Input system.

Account Management

The Account Management tab displays the different account numbers that are associated to the set. Each account number can be responsible for different charges.

At the top of the pane is a dropdown box, this box allows you to select the different buttons appearances on the set. The pane will change to display the appropriate account information.

There are 3 different types of charges you can associated to the set; one-time, recurring and call charges. For each charge type, you can associate a different account. This allows you to have up to 3 different accounts associated to the set.

Adding an Account Number

1. Click the **Configured Items** menu.

2. In the **Navigation** pane, select **Cell Phone**.

3. Before the **Cell Phone** list populates, you must either:

    - Within the search box, type any portion of the record and then click the magnifying glass.

      19 Click the **Show All** button.

      The **Cell Phone lists** opens, displaying all existing phones.

4. Double-click the phone to modify. The **General – Cell Phone** window opens.

5. The Account Management pane displays a list of the accounts and charges types associated to the cell phone.   At the top of the pane is a Number dropdown list, click on the arrow to access a list of the telephone numbers of the set. From the list, select the number that you want to associate an account to, the list will default to the primary telephone number.

! **Default from Primary Number** – If you place a checkmark in the box, all charges relating to any telephone number of the set will automatically be associated to the account related to the primary telephone number.

Include Inactive Accounts – this defaults to remain unchecked meaning that you are only going to see accounts that are active or that have a Billing End Date that has not occurred yet. If you check the box, all the accounts will appear within the list whether they have active charges or billed charges.

6. Click on the row marked with an asterisk to enter in a new account number for the cell phone, complete the following fields, required fields are marked with an asterisk (*):

    - **Charge Type*** – click the drop-down arrow to access a list, then select one of the following choices:

      20 **All Charges** – bills the account number for recurring, one-time and call charges

- **Recurring Charges** - bills the account for only recurring charges

21 **One-time Charges** – bills the account for only one- time charges

- **Default for Call Charges** – if you assign any telephone numbers to a button, this is the default account number that incurs the call charges.

22 **Site*** – once you click any of the drop-down lists, the site name auto-populates with the site selected in the Cell Phone Information pane.

- **Organization –** if you have selected an account number associated to an organization, that organization name populates within the field. This is a read only field.

23 **Account Number*** – click the drop-down arrow to access a list of the account numbers and their associated organizations. If an account number is associated to multiple organizations, the account number appears in the list multiple times, for example if account number 2424 is associated to three different organizations, there are three appearances of the account number within the drop-down. Each account number references the different organization name.

From the list, select the account number and organization responsible for the charges.

! When you create an account number, you can assign it to an organization or to a subscriber; this designates the account as official or unofficial. If you select an account with an organization, it is most likely an Official Account. If you select an account where the organization is blank, it is most likely an Unofficial account and associated to a subscriber.

- **Billing Start Date*** – click the drop-down arrow to access a calendar, from the calendar select the date to start the billing. 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.

24 **Billing End Date** – click the drop-down arrow to access a calendar, from the calendar select the date to stop the billing for the equipment or service. 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 Save (to save and stay) to continue working with the cell phone, or click Save & Close (to save and exit) to return to the Cell Phone list.

Deleting an Account Number from a Cell Phone

1. Click the **Configured Items** menu.

2. In the **Navigation** pane, select **Cell Phone**.

3. Before the **Cell Phone** list populates, you must either:

- Within the search box, type any portion of the record and then click the magnifying glass.

25 Click the **Show All** button.

The **Cell Phone lists** opens, displaying all existing phones.

4. Double-click the phone to modify. The General – Cell Phone window opens.

5. The Account Management pane displays a list of the accounts and charges types associated to the cell phone.   At the top of the pane is a Number dropdown list, click on the arrow to access a list of the telephone numbers of the set. From the list, select the number that you want to associate an account to, the list will default to the primary telephone number.

6. Within the pane, find the account to delete and right click on the selector box next to the charge type, a small popup menu opens, within the box click Delete.

7. Once you click Delete, a message box appears verifying that you really want to delete the account. Click Yes within the box to continue or No to cancel the operation.

8. Once selected, cairs.net draws a line through the item allowing you to delete multiple items at once.

9. If you do not want to delete an item, right-click the record to access a popup menu, from the popup, click Undelete.

10. Once you select Undelete, a message box appears verifying that you really want to keep the account. 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 cell phone, or click Save & Close (to save and exit).

Equipment & Services

Please see Common Elements → Equipment & Services to learn more.

File Attachments

Please see Common Elements → File Attachments to learn more.

Configured Items - Assigned Inventory

Within Assigned Inventory, you can view and export the equipment that is associated to a set device, circuit, cell phone, work order, organization, account, and/or subscriber. All information contained within this list is read only.

There are a few different views that you can choose from to group the list by a common element. For example, when you select site, all the assigned equipment of Henderson is grouped under one heading. The following views are available:

- **Simple List**
12. **Bill From Date**
- **Bill To Date**
13. **Item Number or Name**
- **Account Number**
14. **Equipment Name**
- **Item Type**
15. **Site**
- **Custom View**

By clicking on the option button next to a view, you can group the list based on the selected information.

Once you generate your report, you can export the information into a PDF, Excel, text file, or send the information to be printed.

Find Equipment or Services with no related account

Within the Action pane, click on the Find equipment or service with no related account link. Cairs.net run through your entire database to find any configured item that had a one-time, recurring or call charge associated that does not have an associated account number. Once it finds them, an additional window opens with the Item Number or Name, Item Type, and the message of what charge type, charge amount, install date and a brief message.

Configured Items – Accounting Entries

Within Account Entries, you can view the configured items associated to the account and the related charge types. When you access a record, you can modify the account for equipment and services as well as the equipment and services associated to the item.

You can search for a particular item to view or you can view all items by clicking the Show All link. The following information displays for the item number or name:

- Item Number or Name – displays the telephone number, circuit name, etc.

26 Item Type – displays the item type for example, Organization, Cell Phone Number, Telephone, Circuit Segment, etc.

- Item Delete Date – displays the date the item was deleted from the account. The item still appears in the list; however, no charges are incurred.

27 Account Number – displays the account number

- Site – displays the site name

28 Organization Name and Path – displays the organization name and the entire organization path

- Billing Start and End Date – displays the date the account started to incur charges and the date the charges ended

29 Charge Type – displays the charge type the account is responsible for, there are four types: Call Charges, One Time, Recurring, and Both One Time and Recurring Charges.

- Customer Code – displays the customer code associated to the account. A customer code allows accounts to be assigned to number or configured items and changed as s group. When a change is made to the customer code all associated account are also changed.

By double clicking on any record you open the Assigned Accounts and Equipment window, this window allows you to view and modify accounts, equipment and services related to the item number or name. Within the Related Item Action ribbon group, you can click the Open Item button to open the appropriate window whether a set device, circuit, subscriber, etc.

Viewing Related Components

1. Click the Configured Items menu.

2. In the Navigation pane, select Accounting Entries

3. Before the Assigned Accounts list populates, you must either:

   - Within the search box, type any portion of the record, whether account number, telephone number, etc and then click the magnifying glass.

     30 Click the Show All button.

4. The Assigned Accounts list opens, displaying the account matching your search criteria.

5. The list displays the following information:

   - Item Number or Name

     31 Item Type

   - Item Delete Date

     32 Account Number

   - Site

     33 Organization Name and Path

   - Billing Start and End Date

     34 Charge Type

   - Customer Code

6. An item may appear in the list more than once depending on the different charge types. For example, if the account is responsible for one-time and call charges, the item appears twice within the list.

7. To view more detail, double click on the record to open the Assigned Accounts and Equipment window. This window allows you to associate additional equipment and services to the component.

Modifying/Adding/Deleting the Accounts for Equipment and Services

1. Click the Configured Items menu.

2. In the Navigation pane, select Accounting Entries

3. Before the Assigned Accounts list populates, you must either:

   - Within the search box, type any portion of the record, whether account number, telephone number, etc and then click the magnifying glass.

     35 Click the Show All button.

4. The Assigned Accounts list opens, displaying the account matching your search criteria. Double click the record to open the Assigned Accounts and Equipment window.

5. There are three panes of information; the top pane displays the configured item details. The middle pane is the Accounts for Calls pane, this displays the accounts

associated with the item. The bottom pane displays the equipment and services associated to the item number or name.

6. Within the Accounts for Calls pane, you can add a new account to the item number or name by clicking the row marked with the asterisk and complete the following fields, required fields are marked with an asterisk (*):

- **Charge Type*** – click the drop-down arrow to access a list, then select one of the following choices:

    36 **All Charges** – bills the account number for recurring, one-time and call charges

    - **Recurring Charges** - bills the account for only recurring charges

    37 **One-time Charges** – bills the account for only one- time charges

    - **Default for Call Charges** – if you assign any telephone numbers to a button, this is the default account number that incurs the call charges.

! If you choose to assign an account number as a default for call charges, you can still assign separate account numbers for certain buttons. The selections within the Accounts for Calls tab overrides the selection made within this pane.

- **Site*** – once you click any of the drop-down lists, the site name auto-populates with the site selected in the Cell Phone Information pane.

    38 **Account Number*** – click the drop-down arrow to access a list of the account numbers and their associated organizations. If an account number is associated to multiple organizations, the account number appears in the list multiple times, for example if account number 2424 is associated to three different organizations, there are three appearances of the account number within the drop-down. Each account number references the different organization name.

    From the list, select the account number and organization responsible for the charges.

! When you create an account number, you can assign it to an organization or to a subscriber; this designates the account as official or unofficial. If you select an account with an organization, it is most likely an Official Account. If you select an account where the organization is blank, it is most likely an Unofficial account and associated to a subscriber.

- **Organization –** if you have selected an account number associated to an organization, that organization name populates within the field. This is a read only field.

    39 **Billing Start Date*** – click the drop-down arrow to access a calendar, from the calendar select the date to start the billing. 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.

- **Billing End Date** – click the drop-down arrow to access a calendar, from the calendar select the date to stop the billing for the equipment or service. 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. You can perform one more function; you can delete the account number by right clicking the record selector button next to the Charge Type to access a popup menu. From the menu select delete. When asked if you really want to delete the row click yes to continue or no to cancel the operation.

8. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with the assigned account, or click **Save & Close** (to save and exit) to return to the Assigned Account list.

Modifying/Adding the Equipment and Services

1. Click the Configured Items menu.

2. In the Navigation pane, select Accounting Entries

3. Before the Assigned Accounts list populates, you must either:

   - Within the search box, type any portion of the record, whether account number, telephone number, etc and then click the magnifying glass.

     40 Click the Show All button.

4. The Assigned Accounts list opens, displaying the account matching your search criteria. Double click the record to open the Assigned Accounts and Equipment window.

5. Within the Equipment and Services pane make any necessary changes to the existing information.

6. Alternately, you can add a new equipment or services to the item number or name by clicking the row marked with the asterisk and complete the following fields, required fields are marked with an asterisk (*):

   - **Equipment or Service Type*** – click the drop-down arrow to access a list, from the list select the equipment type. The following three columns of information display for each equipment type:

     o **Equipment or Service Types** – displays the name of the equipment or service

     1 **Is Service Type** – a checkmark indicates that the type is a service

     o **Allow Cost Adjustment** – a checkmark indicates that the you can adjust the cost of the equipment or service

     Within the list, select the equipment or service type.

   - **Equipment Name*** – click the drop-down arrow to access a list, from the list select the equipment name.

- **Part Name*** – click the drop-down arrow to access a list and select the equipment part name.

41 **Site** – once you click any of the drop-down lists, the site name auto-populates with the site selected in the Cell Phone Information pane

- **Serial Number*** – this field may auto-populate after you select a part name, it may either contain None or Generate Automatically, if these are contained within the field do not change the selection. However, if the field is blank click the drop-down arrow to access a list, and select the appropriate serial number

42 **Quantity** – this field auto-populates with a pre-determined quantity amount. To change, click the field and type the new information.

- **One Time Cost** – this field auto-populates with the equipment's one-time charge.

43 **Recurring Cost** – this field auto-populates with the equipment's recurring charge.

- **Total One Time Cost** – displays the total one-time cost for the equipment item.

44 **Total Recurring Cost** – displays the total recurring cost for the equipment item.

! At the bottom of the list of equipment, there is a totals line. This line displays the total for one-time and recurring charges for all the equipment items within the list.

- **Install Date* –** this field auto-populates with today's date. To change the date click the field to access a drop-down arrow, once clicked a calendar appears, from the calendar select the date to install the new equipment, this is the date the charges start to appear for billing purposes. 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.

45 **Delete Date** – click the field to access a drop-down arrow, once clicked a calendar appears, from the calendar select the date to delete the piece of equipment. To change the date, click the field to access a drop-down 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.

- **Location –** type the equipment location.

46 **Last Recurring Bill Date –** this field indicates the last date the piece of equipment generated a bill.

1. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue adding equipment to the item name or number, or click **Save & Close** (to save and exit) to return to the Assigned Account list.

Deleting Equipment or Services

1. Click the Configured Items menu.

2. In the Navigation pane, select Accounting Entries

3. Before the Assigned Accounts list populates, you must either:

    -   Within the search box, type any portion of the record, whether account number, telephone number, etc and then click the magnifying glass.

    47 Click the Show All button.

4. The Assigned Accounts list opens, displaying the account matching your search criteria. Double click the record to open the Assigned Accounts and Equipment window.

5. Within the Equipment and Services pane, find the equipment or service to delete and click the selector box next to the equipment or service type, a small pop-up menu opens, within the box click **Delete**.

6. Once you click Delete, a message box displays, within the box there are two choices:

    -   **Set Delete Date as today** – use this to attach today as the delete date. When CES runs, it deletes the item from the item number or name and the billing will end as of today's date.

    48 **Remove the row permanently** – use this to delete the item permanently from the set, this deletes the item from the item number or name without a delete date attached. This selection prevents prorated billing for the last month of use. Once you click ok, the item is removed from the Equipment and Services pane.

    -   **Cancel** – this selection cancels the entire delete operation and returns you to item number or name.

7. Click the appropriate option button, and then click Ok to continue, or Cancel to stop the operation. If you have selected Set Delete Date as today, today's date populates within the Delete Date field.

8. To complete the deletion, within the Actions ribbon group, click Save (to save and stay) to continue working with the assigned account, or click Save & Close (to save and exit) to return to the Assigned Account list.

Viewing Equipment or Services

There are several options available when viewing the equipment and services related to a record. At the top of the Equipment and Services pane is a dropdown box click on the arrow to select the statue that you want to view, you can choose from one of the following statuses:

-   **Active Charges** – displays a list of the active equipment and services in your billing cycle. This will be mostly recurring charges. After charges are billed, they will be moved to the inactive charges list.

49 **Inactive Charges** – displays a list of the equipment and services that have been billed for, this will be mostly one-time charges.

- **Installed** – displays a list of the equipment and services that has not been deleted. If you do not do any sort of billing this list will be the same as the active charges list.

50 **Deleted** – displays a list of equipment and services that have been deleted, with a delete date on the record. Any equipment or service that was deleted permanently (with no delete date) will not appear in any list as it no longer appears in the system.

- **All** – displays a list of the equipment and services related to the record regardless of status.

Next to the status dropdown box are two checkboxes, one for equipment the other for services. They are both checked to indicate that you want to see both equipment and services within the list. To only view equipment or services click on the box to remove the appropriate checkmark, the list changes to display your selection.

Configured Items - Land Radio

You can now manage your Land Mobile Radio within cairs.net. You can use Land Radio to track all your wireless communication system devices that are used in vehicles or are portable. Examples of these are walkie-talkies, two way radios, etc.

Just like other devices in cairs.net, you can associate accounts, equipment and services. However, there will be no connectivity associated with the devices.

Land Radio Types

Before you begin to add your Land Radios you need to add in your types. These types can be walkie-talkies, two way radios, etc.

Managing a Radio Type

1. Click the Configured Items menu.

1. In the **Navigation** pane, click **Land Radio**.

2. You have two alternatives for Managing Land Radio Types:

   - On the toolbar directly above the **Navigation** pane, click the **Manage Land Radio Types** button.

   1. Within the **Action** pane, click the **Manage Land Radio Types** link.

3. With either option, the Manage Land Radio Types window opens.

Adding

4. In the **Manage Land Radio Type*** list pane, click the top row, marked with an asterisk (*****) to add a new record.

2. Type the new radio type name.

5. To add another type, click the **Save** button and repeat steps 4 and 5, as necessary.

Modifying

6. Click the field to modify and type the new information.

Deleting

7. There are two ways to select the land radio type to delete:

   - Right-click the record selector box (located just left of the name) and click **Delete**.

   2. Highlight the name in the list and within the **Actions** ribbon group click the **Delete** button.

8. Once you click Delete, a message box opens verifying that you really want to delete the type. Click **Yes** within the box to continue or **No** to cancel the operation.

3. Once selected, cairs.net draws a line through the type allowing you to delete multiple types at the same time.

9. If you do not want to delete the type, right-click the record and click **Undelete**.

4. Once you select Undelete, a message box opens verifying that you really want to keep the type. Click **Yes** within the box to continue or **No** to cancel the operation.

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

Configuring a Land Radio

Adding a Land Radio

1. Click the **Configured Items** menu.

2. In the **Navigation** pane, click **Land Radio**.

3. There are two ways to add a Land Radio

   - On the toolbar directly above the **Navigation** pane, click the drop-down arrow next to **New**. From the list, select **Land Radio**.

   3. Within the **Actions** pane, click the **Add New Land Radio** link.

4. With either option, the General-Land Radio window opens. There are 3 panes of information; Land Radio Information, Equipment & Services and Account Management. For this section we will focus on the Land Radio Information pane, this pane displays the detailed information for your radios.

5. Within the pane, complete the following fields, required fields are marked with an asterisk (*):

- Radio Serial Number * - type in the serial number for the radio
1. Radio Part Number – type in the part number for the radio
- Radio Frequency – type in the radio frequency
2. Radio Type – click on the dropdown arrow to access a list of the radio types you created, from the list click on the type to associate to the radio. The radio type appears in the field.
- Building Name * - click on the dropdown arrow to access a list of buildings, from the list click on the building to associate to the radio. The building name appears in the field.
3. Alternate Location – type in the alternate location for the radio
- Room – type in the room number

The next several fields provide you the means to track detailed information regarding your LMRs, you can complete as many or as few of the fields as you want:

- Cage
4. Condition
- Commodity Code
5. DoDAAC
- Dra
6. Radio Manufacturer
- Radio Model Number
7. Radio Description
- Asset Type
8. Radio User Name
- Radio User Phone
9. Radio User Email
- Organization Name
10. Radio Memo
- Radio Network
11. Radio Transit

- Radio Receive

12. PWCS Equipment Type

- Trunk Capable

13. Classification Code

- Radio Vehicle

14. Radio Misc 1-5

6. Once you have completed all the necessary fields, within the **Actions** ribbon group, click the **Save** button (save and stay) to continue working with this radio or click the **Save & Close** button (save and exit) to return to the Land Radio list.

Deleting a Land Radio

1. Click the **Configured Items** menu.

2. In the **Navigation** pane, click **Land Radio**.

3. Depending on the amount of records you have in 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, then click the magnifying glass.

   15. Click the **Show All** link.

4. The Land Radio list opens displaying all existing radios. There are two ways to delete a radio:

   - Within the list, click the Radio to highlight. Within the **Actions** ribbon group, click the **Delete Land Radio** link.

   16. Double-click the radio to delete, the General – Land Radio window opens. Within the **Actions** ribbon group, click **Delete**.

5. With either option, once you click Delete, a message box opens verifying that you really want to delete the entire radio. Click **Yes** within the box to continue or **No** to cancel the operation.

6. Within the **Actions** ribbon group, click the **Save** button (save and stay) to continue working with this radio or click the **Save & Close** button (save and exit) to return to the Land Radio list.

Account Management

The Account Management tab displays the different account numbers that are associated to the radio. Each account number can be responsible for different charges.

There are 3 different types of charges you can associated to the radio; all charges, one-time, recurring charges. For each charge type, you can associate a different account. This allows you to have up to 3 different accounts associated to the set.

Adding an Account

1. Click the **Configured Items** menu.

2. In the **Navigation** pane, click **Land Radio**.

3. Depending on the amount of records you have in 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, then click the magnifying glass.

   17. Click the **Show All** link.

4. The Land Radio list opens displaying all existing radios. Double-click the radio to open the General – Land Radio window opens.

5. Within the Account Management pane, click the row marked with the asterisk to enter in a new account number for the equipment and services. Complete the following fields, required fields are marked with an asterisk (*):

   - **Charge Type*** – click the drop-down arrow to access a list, then select one of the following choices:

     4. **Both One Time and Recurring Charges** – bills the account for all one-time and recurring charges

     - **Recurring Charges** - bills the account for only recurring charges

     5. **One-time Charges** – bills the account for only one- time charges

   - **Site*** – click on the drop-down arrow to access a list, from the list click on the site to associate to the equipment or services

   6. **Subscriber Name** – click on the drop-down arrow to access a list, and from the list select the appropriate subscriber

   - **Organization –** if you have selected an account number associated to an organization, that organization name populates within the field. This is a read only field.

   7. **Account Number*** – click the drop-down arrow to access a list of the account numbers and their associated organizations. If an account number is associated to multiple organizations, the account number appears in the list multiple times, for example if account number 2424 is associated to three different organizations, there are three appearances of the account number within the drop-down. Each account number references the different organization name.

      From the list, select the account number and organization responsible for the charges.

! When you create an account number, you can assign it to an organization or to a subscriber; this designates the account as official or unofficial. If you select an account with an organization, it is most likely an Official Account. If you select an account where the organization is blank, it is most likely an Unofficial account and associated to a subscriber.

- **Billing Start Date*** – click the drop-down arrow to access a calendar, from the calendar select the date to start the billing. 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. **Billing End Date** – click the drop-down arrow to access a calendar, from the calendar select the date to stop the billing for the equipment or service. 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. Within the **Actions** ribbon group, click the **Save** button (save and stay) to continue working with this radio or click the **Save & Close** button (save and exit) to return to the Land Radio list.

Deleting an Account

1. Click the **Configured Items** menu.

2. In the **Navigation** pane, click **Land Radio**.

3. Depending on the amount of records you have in 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, then click the magnifying glass.

   18. Click the **Show All** link.

4. The Land Radio list opens displaying all existing radios. Double-click the radio to open the General – Land Radio window opens.

5. Within the Account Management pane, right click on the selector box next to the charge type, a small popup menu opens, within the box click **Delete**.

6. Once you click Delete, a message box appears verifying that you really want to delete the account. Click Yes within the box to continue or No to cancel the operation.

7. Once selected, cairs.net draws a line through the item allowing you to delete multiple items at once.

8. If you do not want to delete an item, right-click the record to access a popup menu, from the popup, click **Undelete**.

9. Once you select Undelete, a message box appears verifying that you really want to keep the account. Click **Yes** within the box to continue or **No** to cancel the operation.

10. Within the **Actions** ribbon group, click the **Save** button (save and stay) to continue working with this radio or click the **Save & Close** button (save and exit) to return to the Land Radio list.

Equipment & Services

Please see Common Elements – Equipment & Services to learn more.

File Attachments

Please see Common Elements → File Attachments to learn more.

Hardware

You can now manage your Hardware within CAIRS. You can use Hardware to track anything from your network switches to servers to routers to laptops, etc.

Just like other devices in CAIRS, you can associate accounts, equipment and services. However, there will be no connectivity associated with the devices.

Hardware Types

Before you begin to add your hardware you need to add in your types. These types can be things like servers, routers, laptops, etc.

Managing a Hardware Type

1. Click the Configured Items menu.

2. In the **Navigation** pane, click **Hardware**.

3. You have two alternatives for Managing Hardware Types:

   - On the toolbar directly above the **Navigation** pane, click the **Manage Hardware Types** button.

- Within the **Action** pane, click the **Manage Hardware Types** link.

4. With either option, the Manage Hardware Types window opens.

<u>Adding</u>

5. In the **Manage Hardware Type** list pane, click the top row, marked with an asterisk (*) to add a new record.

6. Type the new hardware type name.

7. To add another type, click the **Save** button and repeat steps 4 and 5, as necessary.

<u>Modifying</u>

8. Click the field to modify and type the new information.

<u>Deleting</u>

9. There are two ways to select the hardware type to delete:

- Right-click the record selector box (located just left of the name) and click **Delete**.

- Highlight the name in the list and within the **Actions** ribbon group click the **Delete** button.

10. Once you click Delete, a message box opens verifying that you really want to delete the type. Click **Yes** within the box to continue or **No** to cancel the operation.

11. Once selected, CAIRS draws a line through the type allowing you to delete multiple types at the same time.

12. If you do not want to delete the type, right-click the record and click **Undelete**.

13. Once you select Undelete, a message box opens verifying that you really want to keep the type. 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) or click **Save & Close** (to save and exit).

Configuring Hardware

Adding a Hardware

1. Click the **Configured Items** menu.

2. In the **Navigation** pane, click **Hardware**.

3. There are two ways to add a Hardware

- On the toolbar directly above the **Navigation** pane, click the drop-down arrow next to **New**. From the list, select **Hardware**.

- Within the **Actions** pane, click the **Add New Hardware** link.

4. With either option, the General-Hardware window opens. There are 3 panes of information; Hardware Information, Equipment & Services and Account

Management. For this section we will focus on the Hardware Information pane, this pane displays the detailed information for your hardware.

5. Within the pane, complete the following fields, required fields are marked with an asterisk (*):

- Hardware Identifier * - this is the only required field, type-in the name or identifier of the hardware you want to track

- Hardware Purchase Date – click on the field to access a dropdown calendar, from the calendar select the purchase date of the hardware. By clicking the right or left arrows you can move forward or backward a month at a time.

- Hardware Type – click the field to access a dropdown menu, from the menu select the hardware type.

- Vendor Name – click the field to access a dropdown menu, from the menu select the vendor. The vendor list populates from

- Organization Name

- Site

- Hardware Manufacturer

- Hardware Model Number

- Hardware Model Description

- Hardware User Name

- Hardware User Phone

- Hardware User Email

- Hardware Memo

- Hardware Date 1-3

- Hardware Misc 1-5

6. Once you have completed all the necessary fields, within the **Actions** ribbon group, click the **Save** button (save and stay) to continue working with this record or click the **Save & Close** button (save and exit) to return to the Hardware list.

Deleting a Hardware

1. Click the **Configured Items** menu.

2. In the **Navigation** pane, click **Hardware**.

3. Depending on the amount of records you have in 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, then click the magnifying glass.

- Click the **Show All** link.

4. The Hardware list opens displaying all existing records. There are two ways to delete a record:

    - Within the list, click the record to highlight. Within the **Actions** ribbon group, click the **Delete Hardware** link.

    - Double-click the record to delete, the General – Hardware window opens. Within the **Actions** ribbon group, click **Delete**.

5. With either option, once you click Delete, a message box opens verifying that you really want to delete the hardware. Click **Yes** within the box to continue or **No** to cancel the operation.

6. Within the **Actions** ribbon group, click the **Save** button (save and stay) to continue working with this record or click the **Save & Close** button (save and exit) to return to the Hardware list.

Account Management

The Account Management tab displays the different account numbers that are associated to the hardware. Each account number can be responsible for different charges.

There are 3 different types of charges you can associated to the hardware; all charges, one-time, recurring charges. For each charge type, you can associate a different account. This allows you to have up to 3 different accounts associated to the set.

Adding an Account

1. Click the **Configured Items** menu.

2. In the **Navigation** pane, click **Hardware**.

3. Depending on the amount of records you have in 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, then click the magnifying glass.

    - Click the **Show All** link.

4. The Hardware list opens displaying all existing records. Double-click the record to open the General – Hardware window opens.

5. Within the Account Management pane, click the row marked with the asterisk to enter in a new account number for the equipment and services. Complete the following fields, required fields are marked with an asterisk (*):

    - **Charge Type*** – click the drop-down arrow to access a list, then select one of the following choices:

        - **Both One Time and Recurring Charges** – bills the account for all one-time and recurring charges

- **Recurring Charges** - bills the account for only recurring charges
- **One-time Charges** – bills the account for only one- time charges
- **Site*** – click on the drop-down arrow to access a list, from the list click on the site to associate to the equipment or services
- **Subscriber Name** – click on the drop-down arrow to access a list, and from the list select the appropriate subscriber
- **Organization –** if you have selected an account number associated to an organization, that organization name populates within the field. This is a read only field.
- **Account Number*** – click the drop-down arrow to access a list of the account numbers and their associated organizations. If an account number is associated to multiple organizations, the account number appears in the list multiple times, for example if account number 2424 is associated to three different organizations, there are three appearances of the account number within the drop-down. Each account number references the different organization name.

  From the list, select the account number and organization responsible for the charges.

! When you create an account number, you can assign it to an organization or to a subscriber; this designates the account as official or unofficial. If you select an account with an organization, it is most likely an Official Account. If you select an account where the organization is blank, it is most likely an Unofficial account and associated to a subscriber.

- **Billing Start Date*** – click the drop-down arrow to access a calendar, from the calendar select the date to start the billing. 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.
- **Billing End Date** – click the drop-down arrow to access a calendar, from the calendar select the date to stop the billing for the equipment or service. 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. Within the **Actions** ribbon group, click the **Save** button (save and stay) to continue working with this record or click the **Save & Close** button (save and exit) to return to the Hardware list.

Deleting an Account

1. Click the **Configured Items** menu.
2. In the **Navigation** pane, click **Hardware**.
3. Depending on the amount of records you have in 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, then click the magnifying glass.

- Click the **Show All** link.

4. The Hardware list opens displaying all existing records. Double-click the hardware to open the General – Hardware window opens.

5. Within the Account Management pane, right click on the selector box next to the charge type, a small popup menu opens, within the box click **Delete**.

6. Once you click Delete, a message box appears verifying that you really want to delete the account. Click Yes within the box to continue or No to cancel the operation.

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

8. If you do not want to delete an item, right-click the record to access a popup menu, from the popup, click **Undelete**.

9. Once you select Undelete, a message box appears verifying that you really want to keep the account. Click **Yes** within the box to continue or **No** to cancel the operation.

10. Within the **Actions** ribbon group, click the **Save** button (save and stay) to continue working with this record or click the **Save & Close** button (save and exit) to return to the Hardware list.

Equipment & Services

Please see Common Elements – Equipment & Services to learn more.

File Attachments

Please see Common Elements → File Attachments to learn more.

Standard Sets

The primary purpose of Standard Sets is to allow for the separation of directory management, accounting, phone book, and connectivity, which can now be done through Standard Directory, from the management of set devices, which is now done through Standard Sets. This data can all still be managed through the set device in Standard Sets, but with the choice of simpler management through Standard Directory. Another primary purpose of Standard Sets is to provide an organized layout of set devices, with CAIRS-specific data and switch-specific data separated, and to show data that is specific and relevant to the switch selected for each set. The long-term goal of Standard Sets is to create a single location where all sets are managed in CAIRS.

Standard Sets are a little different from Configured Sets. In Configured Sets, all the fields whether switch or CAIRS related are placed in panes related to parts of the set. For example, in a Configured Set the Device Properties pane holds CAIRS specific data like Site, Organization, Subscriber, etc, the pane also holds switch specific data like LEN, COS, COR, etc.

In Standard Sets the switch data and the CAIRS data are separated into panes or tabs. For example, Customer Accounting will hold all the CAIRS specific fields related to billing for the set. Whereas, the Button Details pane will hold both the CAIRS Standard Directory record and switch-specific data in other tabs. In the case of the NEC 3C switch, these tabs include NEC specific fields related to directory number, NEC address, NEC Station Address. In the case of the Cisco, there will be a tab showing the Cisco Directory fields.

All standard sets will still contain CAIRS data related to Accounting, Equipment, Services, Connectivity and Features.

Another key difference is Set Templates. If you have ever built a set template in Configured Sets you know that the process is somewhat time consuming. We have taken this opportunity to streamline the process and make it easier. You can now build a set and create or update the template with the click of a button.

System Setup

In order to use Standard Sets, there is a bit of a setup that needs to occur. Just like in any other section of CAIRS, you need to have your sites and building created.

The next thing that needs to be setup is the switch. Currently, standard sets are only associated to the NEC and Cisco switches. When you create either of these switches, you will also need to setup the number plans and sync schedule. The syncs will help to populate a lot of the dropdowns that will be needed when you are adding/modifying a set.

It is a good idea to create your Set Templates. Templates allow you to determine a set of standards for each set including switch-specific field values, images, features, etc.

There are a few system settings that should be reviewed as well. First is "Connectivity Required". This determines if you are going to use connectivity for sets. If set to true, connectivity will be required for all new devices. If set to false, connectivity will not be required for any device in your database.

The next setting is "Connectivity for Standard Sets", this setting allows you to determine where the connectivity for the set will reside either with the set, the directory record or both. It is recommended that you not use both, you should either choose the set or the directory record. If you choose Set, the connectivity will be linked to the set. If you choose directory record, the connectivity will be linked to the telephone number. When building global reports, it is easier to report on connectivity if all of the data is associated with either the Standard Directory or the Standard Set, but not both.

Setting up Standard Directory in Number Plans is not required, but strongly recommended. The Standard Directory sync creates a range of numbers based on a number plan. The number plan acts a link between the standard directory and the switch that is related to the number plan. When setting up the number plans you will select your link options, it is recommended that you 'Sync All Numbers'. This syncs all numbers within the number plan with standard directory.

Before you can begin to create sets and set templates, you need to build in at least one Set Type. Set Types can be created from scratch, although not recommended or you can import them through the Core Data Import. With either option, a Unique Representative will run the import or create the set types. In case you need to add another set type, please call our Support Team to have them walk you through the process.

Set Templates

There are a couple of ways to create a template. First, you can open an existing set that has all the characteristics of the template that you want to create and click on the create template button. This is by far the most easy and convenient way to create a template. The second way it to open a new set, select all the characteristics of the set and then click on the create template button. This is a little more time consuming but still pretty easy!

Creating from an Existing Set

1. Within the list of all the Standard Sets, find the one that matches the characteristics of the template that you want to create.

2. Double click on the record to open the set

3. Within the Set Template ribbon group, click on the Create Template button.

4. A box opens allowing you to name the template, type-in the name.

5. Once entered, click on the Ok button.

6. Your template is now available and ready to use.

Creating a New Template

If any existing set just doesn't have quite all the information that you want to include in your template you can create one from scratch.

1. Click Configured Items.

2. In the Navigation pane, click Standard Sets → Standard Set Device

3. To start, we will deal with all the panes that have switch related information. Within the Actions pane, click on the Add New Standard Set Device

4. The Standard Sets window opens. Complete the fields as necessary for the template.

5. Once completed, click on the Create Template button.

6. A box opens allowing you to name the template, type-in the name.

7. Once entered, click on the Ok button.

8. Your template is now available and ready to use.

Using a Template

When you are creating a new set, you will be able to use any of the templates that you have built simply by selecting the template from the Set Template field. After you have selected the switch name, the templates associated to the switch will appear in the Set Template Field. Set Templates are also filtered by Set Type if a Set Type is selected. After you select the template, all associated fields will populate. If you don't choose a Set Type, the Set Type will be filled out based on the Set Template selected. Complete any other required fields and Save the new set.

Updating a Template

At any time, you can make changes to the template. After you have selected the template, make any necessary changes and click on the Update Template button in the Set Template ribbon group. Any changes made will be saved.

Deleting a Template

You can delete a template at any time. After you have selected the template, click on the Delete Template button in the Set Template ribbon group. You will be asked to verify that you really want to delete the template, click Ok to delete the template. When a Set Template is deleted, it will be deleted from all other Standard Sets.

Running a Sync

After you have the basic backbone, i.e sites, building, switch number built its time to run the sync. The sync will communicate with the switch to populate your database with the sets as well as populating the following menu options:

For NEC 3C switches

- 3C Device
- 3C Station
- 3C Address
- 3C Profile
- 3C User
- 3C Pickup Group
- 3C Emergency Group
- 3C Telephony Area
- 3C Zone
- 3C LAN

For Cisco Switches

- Cisco Phone
- Cisco Directory

If needed, you can go into each menu option and add, modify or delete a record. Please keep in mind that if you do make changes, they will only be reflected in the CAIRS database, the information is not synced back to the switch.

A good thing to use these menu options for is reporting. Each option has a Global Reporting button in the Show ribbon group. This allows you to build custom reports that provide you with the information that you need. To learn more about building reports, please see Global Reporting.

Sync Schedule

Most of the time, when changes are made to a set you will save the changes and CAIRS will communicate those changes to the switch based on a schedule. Most syncs are performed during times with less activity, generally during the late evening to early morning hours. The sync schedule works in connection with the CES process to sync on the correct schedule.

A few notes about the sync schedule…

Multiple schedules can be created for the same switch. This can allow for a daily schedule to sync changes made in the switch and weekly schedules to sync changes in CAIRS or vice versa.

If you are going to create multiple schedule it is a good idea to create a brand-new sync record instead of creating multiple schedules in one record.

After you have created the switch and the connection, you will now create the schedule.

Creating the Sync Schedule

1. Click the Switches menu.

2. In the Navigation pane, click VoIP Switch Sync → Sync Schedule

3. Within the Actions pane, click on the Add New Switch Sync Schedule Main link. Then General window opens.

4. Within the Information pane, complete the following fields (required fields are marked with and asterisk (*)):

   - Switch Name – click on the dropdown arrow to access a list of the switches that are in your database, from the list click on the appropriate switch

   - Sync Schedule – there are 3 options:

     - Use CES Sync Process Schedule – this selection will run the sync each time the CES process is set to run. This is not the most ideal selection as the CES process can run as often as every 60 seconds. However, this option can be feasible if the CES process schedule is changed to a reasonable time interval. This option can be easier for sites with only one switch, or sites that want all switches to run in the same timeframe.

     - Use Custom Schedule – this is the ideal selection as you will get to create the schedule for when the sync will run. This is selection works with the CES process in that CES will look at the schedule and run when the schedule indicates.

     - Disabled – only use this option to completely disable this schedule. It is a good idea to disable instead of delete!

   - Sync On Demand – this selection determines whether users will be able to click on the Sync Now button. You can with Enable allowing users to sync or disable not allowing them to sync.

   - Sync Switch Change – this selection determines what will be done with local data when the sync occurs, there are 4 options:

     - Ignore Local Changes and Overwrite from Switch – This is the default option. When the switch sync runs, any changes made in CAIRS are overwritten with the information currently in the switch for the specified data. This option should only be used if all changes are being managed in the switch and never in CAIRS.

     - Ignore Local Changes but Preserve Data – (Currently for NEC 3C Only) When the switch sync runs, any changes in CAIRS will stay in place. This option is useful if changes from CAIRS are sent to the switch using a different sync schedule. For example, there may be a weekly sync to bring changes

from the switch into CAIRS (with this option set), and a separate daily sync to bring changes from CAIRS into the switch (with a different value for Sync Local Changes that actually would update the switch with data from CAIRS). This option may also be used to temporarily prevent local changes from updating the switch while still allowing syncs to update CAIRS data from the switch.

- Sync Local Changes When Requested – (Currently for NEC 3C Only) When the switch sync runs, any switch information that an authorized user specified as ready to sync by clicking either "Sync Now" or "Sync Later" from a switch-specific record, such as a set device, would be updated in the switch. Other changes in CAIRS would not be updated until an authorized user specifies that those records should be synced. However, those changes will be preserved in CAIRS until they are ready to be synced.

- Sync All Local Changes Automatically - (Currently for NEC 3C Only) When the switch sync runs, all changes in CAIRS will update the switch. Switch-specific records that are specifically scheduled to sync later will still not be synced until the specified date and time requested.

- Description – enter in the description of the sync.

5. At this point it is a good idea to save your progress, within the Actions ribbon group click on the Save button.

6. Now it is time to create the actual schedule, within the Custom Schedule ribbon group, click on the Create Custom Schedule button. The Recurring Schedule window opens. There are three sections within the window:

- Start Time

- Recurrence Pattern

- Recurrence Range

7. First, let's determine the Start Time, this is the time of day the sync will start to run. It is a good idea to start the sync when there is not a lot of people using CAIRS. Click on the dropdown arrow to access a list of time, from the list select time. The times list is in half hour increments.

8. To change the time, simply click into the field and type in a new time. The time needs to be entered in the HH:MM AM or PM format.

9. Next is the recurrence pattern, first let's determine the frequency. When you choose a frequency whether daily, weekly, monthly or yearly, the recurrence selections change.

- Daily – there are two selections. Every # day – you choose the number of days between the sync or Every Weekday.

- Weekly – first you will choose how many weeks are in-between the sync, this defaults to 1. Next, you will choose what day of the week, this defaults to the current day

- Monthly – when you select monthly, you get a few different selections:
  - Days: you determine what day of the month and the number of months in-between

    **If you choose the 31st of every month, for those months ending in 30 days the sync will occur on the 30th.
  - On the – you will determine on which weekday whether 1st, 2nd, 3rd, 4th or last and the number of months in-between.
- Yearly – the first selection to make is how many years in-between the sync, this defaults to 1. There are two additional selections:
  - Month – you choose what month and day of the month. From the first dropdown, choose the month and then type in the day. This defaults to your current month.
  - On the – you determine which weekday of the month whether 1st, 2nd, 3rd, 4th or last. For example, on the second Tuesday of every May.

10. The last step is to determine the Recurrence Range, this tells CAIRS when to start and stop syncing. Within the Start dropdown select the date that the syncs will start.

11. Next is the end date, you can either choose to select no end date or select a date to end the syncs. To select a date, click on the half arrow buttons to move forward/reverse one month at a time. To select another date, click on the full arrow button to access a calendar, from there select the future.

12. When you have completed your selections, click on the OK button. The schedule now appears in the Custom Schedule pane.

13. If any adjustments need click on the Manage Custom Schedule button.

14. When finished working with the sync schedule, click on the Save & Close button within the Actions ribbon group.

Standard Sets

Understanding the Standard Sets Window

When you first access a Standard Set, there is a lot going on. There are several panes of information, most panes will either contain information specific to the switch or to CAIRS. Let's first talk about the panes that are related to CAIRS information:

- Standard Set Device – this is the only pane that will contain information for both CAIRS data and switch data
- Customer Accounting/Equipment & Service
- Connectivity
- Set Image

- Notes

Next let's talk about the panes that are related to information directly received from the switch

- Standard Set Device – this is the only pane that will contain information for both CAIRS data and switch data

- Device Details

- Buttons

- Button Details

- Features

- Button Feature Pick List

You can customize the look of this screen very easily. Within Form Layout menu, within the top menu bar, you can create different layout or restore to the default layout. You also hide panes that you know you are not going to be needing, for example many sites do not associate equipment & services, so that pane can be hidden from all layouts.

Another option is to drag all the panes into one and create tabs at the bottom of the window. You can drag and drop the tabs to be in the order that you wish.

Adding a Standard Set

1. Click Configured Items.

2. In the Navigation pane, click Standard Sets → Standard Set Device

3. To start, we will deal with all the panes that have switch related information. Within the Actions pane, click on the Add New Standard Set Device

4. The first pane we will complete is the Standard Set Device, complete the following fields (required fields are marked with an asterisk (*)):

   - Switch Name * - click on the dropdown arrow to access a list of switches, from the list select the appropriate switch

   - Set Template Name - click on the dropdown arrow to access a list of set templates, from the list select the appropriate template

After you select your set template, the image for the set will display in the Set Image pane. Once numbers and features are assigned to the set you will see the appropriate listing on each button. This pane is for viewing purposes only.

   - Set Type Name * - click on the dropdown arrow to access a list of set types, from the list select the appropriate set

   - Set Device Identifier * - this defaults to (Automatic by Switch Type), the set template determines the value of this field.

- Site – click on the dropdown arrow to access a list, then, select the set site. The site dropdown list displays the bottom-most site first. After the ~~ is the complete path to the site.

- Organization Name – click the drop-down arrow to access a list, and then select the name of the organization. There can be three columns of information: org code, organization name and organization path. The org code is 3-character code used to identify the org, your administrator determines if this column is visible. The organization name column displays the lowest child organization name. The organization path displays the complete path to the selected org, this includes all parents and children. Once you select an organization, the complete path populates within the field.

- Standard Set Misc 1 -5 - use these fields for typing in any miscellaneous set information.

5. Once you complete the information in this pane, you will move onto the Device Details pane. There are 4 tabs of information contained within Device Details. Most of the fields within each pane will auto-populate, however you will have to complete a few fields within the 3C Device pane, the following field are available (required fields are marked with an asterisk (*)):

- Switch Name – this will auto-populate with the switch name that you select from the previous pane

- NEC Set Type or User Agent Description - this will auto-populate with the switch name that you select from the previous pane

- MAC Address – type in the MAC address. Often times your administrators will create a mask for this field, so all MAC addresses are entered in the same manner.

- NEC Device Name – this field will auto-populate with the MAC address of the set

- NEC Device Type - this will auto-populate with the switch name that you select from the previous pane

- NEC LAN Name - click on the dropdown arrow to access a list of LAN Names, from the list select the appropriate LAN

- NEC Device Configured – click the field to insert a checkmark into the field to indicate the device is configured in the switch.

- NEC Device Software Version – type in the software version of the device

- NEC Device Description - this will auto-populate with the switch name that you select from the previous pane

Adding a Number to the Set

6. Before you can save the set, you must first assign a directory number to the set. In the Buttons pane you will see a list of the buttons that are on this particular set, these buttons are determined by the set templates. If you do not pick a button first, the number will automatically be assigned to button 1.

7. To assign a number to a button, click on the button and within the Button Actions ribbon group, click on Add Number.

8. The number pick list popup opens you can either click the Show All link or type the number or a portion of the number in the text box to search for the number to add to the set. Once found, click on the number within the list to add to the set.

9. When you add a number to the set, you can go to the Button Details pane to view and complete more information on the

10. The first tab, Standard Directory has some basic CAIRS information in it, complete the following fields (required fields are marked with an asterisk (*)):

    - Standard Directory Number * - this auto-populates with the number you just assigned to the set

    - Number Plan Name – click on the dropdown arrow to access a list of the number plans

    - Directory Number – one the number plan is selected, the numbers available will appear in this dropdown. Click on the dropdown arrow to access a list of the directory numbers, from the list select the number to associated to the set.

    - Site – click on the dropdown arrow to access a list, then, select the set site. The site dropdown list displays the bottom-most site first. After the ~~ is the complete path to the site.

    - Organization Name – click the drop-down arrow to access a list, and then select the name of the organization. There can be three columns of information: org code, organization name and organization path. The org code is 3-character code used to identify the org, your administrator determines if this column is visible. The organization name column displays the lowest child organization name. The organization path displays the complete path to the selected org, this includes all parents and children. Once you select an organization, the complete path populates within the field.

    - Standard Set Misc 1 -5 - use these fields for typing in any miscellaneous set information.

11. There will be additional tabs in the Button Details pane, at a minimum you will see the 3C Address and 3C Station Address tabs. If you have added a subscriber to the set you will also see the subscriber tab, this will contain the complete details for the subscriber.

12. The 3C Address tab contains the following information, most fields are auto-populated however you can change the information if necessary (required fields are marked with an asterisk (*)):

    - Switch Name *

    - NEC Address Type *

    - NEC Address Number *

    - NEC Address First & Last Name

- NEC Address Category *
- NEC Address Behavior *
- NEC Address Show in Phonebook *
- NEC Address Mailbox Name
- NEC Address Aware of IVR *
- NEC Address AA Permissions *
- NEC Address Recording Type *
- NEC Address Assigned *
- NEC Address Primary *
- NEC User Domain Name
- NEC Profile Name

13. The 3C Station Address tab contains the following information, most fields are auto-populated however you can change the information if necessary:

- NEC Station Address is Primary Address *
- NEC Station Address is Owner *
- NEC Station Address Do Not Disturb *
- NEC Station Address Message Waiting *
- NEC Station Address Group Priority

14. At this point it is a good idea to save your progress, within the Actions pane, click on the Save button. This saves your set and allows you to keep working.

Adding Features to a Set

There are two type of features related to a set, Button Feature and Device Features. Button features are things like Speed Dial, Call Hold, etc. Device Details are things like Voicemail, Call Forwarding, etc.

There are 3 panes involved when adding a feature to a set. They are Buttons, Features and Button Feature Pick List.

The Feature Pick List pane displays a complete list of the features you can assign to the set, this information is read only.

1. Within the Buttons pane, highlight the button to add the feature onto. Next you will click on the Features pane. You will notice in the first line, the button number appears, you can change the number by simply clicking on the dropdown arrow and selecting a new button number.

2. The next dropdown you will click on is the Button Features dropdown, this list contains the complete list of features that can be assigned to the set. From the list

select the appropriate feature. Depending on the feature selected there may be additional fields to complete.

3. To add a feature to the device, click on the line under Device Features. From the dropdown, select the feature to add to the device.

4. Once you have the feature assigned to the buttons, click on the Save button within the Actions ribbon group. This will save your changes and allow you to continue working with the set.

Removing a Feature

1. To remove a feature from a button, find the feature within the Features pane, to the right-hand side of the pane you will see a red circle for each feature that is on the set. Find the feature and click on the circle to remove the feature.

2. Within the Actions ribbon group, click on the Save button within the Actions ribbon group. This will save your changes and allow you to continue working with the set.

Subscribers

You can add and existing subscriber or create a new subscriber for your set.

Adding an Existing Subscriber

1. Within the Button Actions ribbon group, click on the Add Existing Subscriber button. The Subscriber Pick List opens.

2. You can either search for a subscriber by typing in any portion of the name into the textbox and then click on the magnifying glass or click on the Show All button.

3. Once the subscriber record is located, double click on the record to add it to the set. You will find the complete subscriber details within the Button Details tab.

4. Before you can save the record, there are a few fields that may need to be populated. When you click the subscriber name in the Button Details pane, there are 3 sub-tabs that appear. The first is the subscriber details.

5. The second tab is 3C User, this tab contains the specific details for this subscriber within the 3C. Most fields will auto-populate; however, you may need to complete some fields, (required fields are marked with an asterisk (*)):

    - Switch Name *
    - NEC User Domain Name *
    - NEC User First & Last Name *
    - NEC User Sync with PDC
    - NEC User Phonetic First & Last Name *
    - NEC Profile Name *
    - NEC User Administrator

- NEC User Licensed

- NEC User Licensed Mailbox User

6. The last tab is the 3C User Address Settings. There are no required field in this tab and most fields will auto-populate based on the set template.

7. Once your subscriber is added, you can save your progress. Within the Actions ribbon group, click on the Save button within the Actions ribbon group. This will save your changes and allow you to continue working with the set.

Adding a New Subscriber

1. When you click on the Add New Subscriber button within the Button Actions ribbon group, the General – Subscriber window opens. For a new subscriber complete the required fields (if you need more information please see Configured Sets – Subscribers). Once complete click on the Save & Close button.

2. The subscriber is added to the set. Please make sure to follow the above steps 4-6 before saving the set again.

Remove a subscriber

1. To remove a subscriber, click on the subscriber name within the Button Details pane and then click on the Remove Subscriber button within the Button Actions ribbon group.

2. Within the Actions ribbon group, click on the Save button within the Actions ribbon group. This will save your changes and allow you to continue working with the set.

3. The subscriber is removed from the set only. The subscriber will remain in the database until you delete the subscriber from the subscriber record.

Customer Accounting

An account or accounts can be associated to the set for billing purposes. You can assign up to 3 account numbers, one for each charge type: One-time, call and recurring charges. To add an account number, complete the following steps:

1. Click the row marked with the asterisk to enter in a new account number. Complete the following fields, required fields are marked with an asterisk (*):

- **Charge Type*** – click the drop-down arrow to access a list, then select one of the following choices:

  - **All Charges** – bills the account for all charges

  - **Recurring Charges** - bills the account for only recurring charges

  - **One-time Charges** – bills the account for only one- time charges

  - **Call Charges** – bills the account for charges related to call

- **Site*** – once you click any of the drop-down lists, the site name auto-populates with the site selected on the General-Set Device window.

- **Subscriber Name** – click on the drop-down arrow to access a list, and from the list select the appropriate subscriber

- **Organization –** if you have selected an account number associated to an organization, that organization name populates within the field. This is a read only field.

- **Account Number/Customer Code*** – click the drop-down arrow to access a list of the account numbers and their associated organizations. If an account number is associated to multiple organizations, the account number appears in the list multiple times, for example if account number 2424 is associated to three different organizations, there are three appearances of the account number within the drop-down. Each account number references the different organization name.

    From the list, select the account number and organization responsible for the charges.

! When you create an account number, you can assign it to an organization or to a subscriber; this designates the account as official or unofficial. If you select an account with an organization, it is most likely an Official Account. If you select an account where the organization is blank, it is most likely an Unofficial account and associated to a subscriber.

- **Billing Start Date*** – click the drop-down arrow to access a calendar, from the calendar select the date to start the billing. 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.

- **Billing End Date** – click the drop-down arrow to access a calendar, from the calendar select the date to stop the billing for the equipment or service. 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.

2. There are a few selections at the top of the pane that you should pay special attention to, they are:

- Number – If you have multiple number assigned to the set, you can associate a different set of account numbers to each button. Click on the dropdown arrow to access a list of numbers from the number select the one to associate the account number to.

- Default from Primary Number – If you place a checkmark in the box, all charges relating to any telephone number of the set will automatically be associated to the account related to the primary telephone number.

- Include Inactive Accounts – this defaults to remain unchecked meaning that you are only going to see accounts that are active or that have a Billing End Date that has not occurred yet. If you check the box, all the accounts will appear within the list whether they have active charges or billed charges.

3. Within the Actions ribbon group, click on the Save button within the Actions ribbon group. This will save your changes and allow you to continue working with the set.

Remove an Account Number

Ideally an account number should never be removed from a set, the Billing End Date should be set to remove the account association. You will only be able to delete an account completely if there have been no charges associated to the account on this set. In the case that you need to remove an account completely from a set follow these steps:

1. Within the Account Management pane, right click on the selector box next to the charge type, a small popup menu opens, within the box click **Delete**.

2. Once you click Delete, a message box appears verifying that you really want to delete the account. Click Yes within the box to continue or No to cancel the operation.

3. Within the Actions ribbon group, click on the Save button within the Actions ribbon group. This will save your changes and allow you to continue working with the set.

Equipment & Services

Various pieces of equipment or services can be associated to the set. Each may have a particular one-time or recurring charge associated to it. In this case, it would be best if you associate an account number before associating any equipment or services.

Since adding, modifying, deleting and viewing equipment and services is the same throughout CAIRS, we have consolidated the process into one section on the manual. Please see Common Elements – Equipment & Services to learn how to more.

Connectivity

There are a few system settings that deal with connectivity. If you site has chosen to ignore connectivity all together, the connectivity pane will no longer be visible. If you have chosen to associate connectivity to set, the minimum requirement is a Building. You can however assign the set from the switch all the way to the jack in the assigned building.

1. There are two sections within the Facilities pane. The top portion allows you to assign a few basic items within Facilities, and the lower half allows you to assign the complete facilities package.

2. Within the top section, complete the following fields (required fields are marked with an asterisk (*):

   - **Assigned Site** – click the drop-down arrow to access a list, from the list select the assigned site.

   - **Assigned Building** * – click the drop-down arrow to access a list, and then select the building name.

   - **Network Device Identifier –** click the dropdown arrow to access a list, from the list select the network device to associate to the set, if applicable. If a network

device and port are selected, the Network tab will show a diagram of how this set device is connected to the data network.

- **Device Port Number –** click the dropdown arrow to access a list, from the list select the port number the set is assigned to on the network device, if applicable.

- **Alternate Location –** type in any alternate location information relating to the set. This field can appear in the 911 interface

- **Directory Building Name** – this field auto-populates with the Directory Building Name that appears on the Building Record. The Directory Building name is defined as the common name for the building, for example, the assigned building name is 100 and the directory building name is Post Office. This field is read only.

- **Floor** – type the floor number, if applicable.

- **Room** – type the room number, if applicable.

- **Jack** – type the jack number, if applicable.

- **Connectivity Misc 1**-3 - use these fields for typing in any miscellaneous connection information

- **Dedicated Plant** – click the arrow to access a drop-down list, from the list select the type of dedication, it automatically defaults to Not Dedicated. You can change the selection to Dedicated with Port or Dedicated without Port. When you choose to dedicate, anytime you move or delete the device, the facilities remain in place and are unavailable to use in other situations.

- **Latitude/Longitude/Elevation –** If you happen to know your GPS coordinates you can type them into the appropriate fields. However, a simply way to enter in the coordinates is to click on the 'Add GPS Location' button in the Location ribbon group. This will populate the fields with the appropriate information. If used this information, will transfer in the 911 interface and display the terminal that is nearest the location of the phone.

These coordinates work in connection with the Nearest Building tab (if you do not see the tab, you will need to change the system setting 'Show Nearest Building Button in Facilities' to True). The buildings with the nearest coordinates will appear in the tab.

- **Connection Sequence** – if you are using the 911 interface you can determine the sort order or sequence of which building information will be sent to your 911 system. This defaults to 0, if you have more than one location enter in the sequence number.

- **Include in 911 –** click on the dropdown arrow access a menu from the menu select one of the following:
  - **Default**
  - **Always**
  - **Never**

3. Within the lower section, when you click the first line (marked with an asterisk) the site and building name populate with the information you entered in the upper section. If the building only has 1 terminal the name of the terminal will also auto-populate.

4. If there is more than one terminal, click the drop-down arrow to access a list, and then select the terminal name associated with the building.

5. If you do not see, the Connection Name line, click the plus sign (+) next to the site name. The following fields open to allow you to complete adding the facilities, complete the following fields (required fields are marked with an asterisk (*):

   - **Connection Name** – click the drop-down arrow to access a list, and then select the set's connection.

   - **Path Number** – this field auto-populates with the next available path in the terminal. To change this selection, click the drop-down arrow to access a list and then select the set's path number.

   - **Path Usage** – click the drop-down arrow to access a list, then, select the path usage type. This is a list that is pre-defined within Facilities and indicates how the path is being used, for example, data, voice, transmit, etc.

   - **Out Binding Post** or **Out Frame Location** – these fields auto-populate with number(s) corresponding to the path number. This information is defined within Facilities; each terminal is designed with either a Binding Post or Frame Location. This field is a Read Only field.

   - **In Row, Block, Pin** – these fields auto-populate within number(s) corresponding to the path number. This information is defined within Facilities; each terminal is designed with either a Binding Post or Frame Location. This is a Read Only field.

6. Within the Actions ribbon group, click on the Save button within the Actions ribbon group. This will save your changes and allow you to continue working with the set.

A few notes about connectivity…

When viewing a set, the connectivity pane will default to the View tab. To make edits to the connectivity, click on the Edit tab. Complete any modifications, be sure to click the Save button when complete.

The Network tab displays a visual representation of the connectivity from the set back to the MDF. The red lines in-between each box show where exactly the cable is connected too in the next terminal.

If you are using Dedicated Plant, instead on going through the process of creating the connectivity from scratch, you can use this tab to assign connectivity. Simply find the correct building, room, jack combo and double click on the row. If connectivity is already in place you will be asked if you want to remove the existing and replace with the dedicated plant. Click Yes to continue or Cancel.

The Imported Data By Path provides information on how the connectivity was imported when a Unique Communication Representative created your initial database.

History

Please see Common Elements → History to learn more.

Orders and Troubles

Please see Common Elements → Orders and Troubles to learn more.

Notes

You can add notes to the set to keep a more accurate record of changes that were made to the set. Before you started adding notes it is a good idea to add some note categories. These categories help to group the notes based on a common element. For example, Subscriber Update, Feature Mods, Button Config, etc. To learn more about adding note categories, please see Common Elements → Managing Note Categories.

Since the process to adding, modifying, deleting and viewing notes is the same throughout CAIRS, we have consolidated the process into one section on the manual. Please see Common Elements → Notes to learn more.

Attach

Before you can attach files to a set, your CAIRS administrator must determine the allowable file types and size. Please contact your CAIRS administrator if you are unable to attach files.

There are two different types of files that you can attach to a record, the first button allows you to attach a regular file. These files follow the record and other users are able to see them. Although, this is convenient, if changes need to be made to the file, the file will have to be saved and then re-attached.

The second file attachment type allows you to attach a link to a file that is in a shared location. The benefit of this file attachment is that when changes are made to the file there is no need to reattach the file. The disadvantage is that all CAIRS users have to have access to the shared file location.

Since the process to add, modify, delete and view file attachments is the same throughout CAIRS, we have consolidated the process into one section on the manual. Please see Common Elements → File Attachments to learn more.

Sync

As we talked about before, most of the time after you create the set you will save the information and CAIRS will communicated your changes to the switch at a scheduled time. The sync schedule is determined by your CAIRS administrators. There are 3 buttons that you need to be aware of within each set.

1. Sync – the main purpose of this button is to let CAIRS know that this set is ready to be synced and to run the sync if the user selects to Sync Now

- The top portion of the window allows you to determine when the sync will occur, you can either select Sync Now or Sync Later. If you choose later, the set will be synced based on the sync schedule. If the set needs to be synced for sometime in the future, you can set a schedule here to sync at a later date and time.

- The next selection is how you want to deal with local changes. There are 3 options Update Switch with Changes – this selection will update the switch with all the changes made in CAIRS

  o Keep Local Changes – skip Switch Update – this selection will keep just the CAIRS data

  o Overwrite Local Changes from Switch – this selection will take all changes that exist in the switch and overwrite the CAIRS data

- The lower panes contain the information that will be communicated to the switch. If this is a brand-new set, the New Value column will be the only one populated. If you are modifying a set, the old values will display as well as the new value.

- To complete the sync process, click on the Ok button.

When you are back at the set you will notice a solid yellow line underneath the ribbon. This line gives you the status of any changes and whether they have been synced with the switch.

2. Cancel Sync – this will completely cancel the sync and no information will be communicated to the switch or from the switch

3. Delete Schedule – There are two options below this selection, they are Schedule Delete and Delete Pending Sync.

- Schedule Delete - This selection brings up the Sync Scheduler to allow you to create a new schedule to delete the current set device.

- Cancel Pending Delete – this is a failsafe that allows you to cancel a delete schedule. This will only cancel up until the sync is complete and the record gets deleted.

Standard Directory

The purpose of standard directory is to allow users to assign accounting and connectivity to a telephone number that is outside the scoop of the number plan. When you are creating a number in Standard Directory, the number will only appear here it will not show up in other sections of CAIRS.

The listings within Standard Directory are not directly related to a switch however, listings can contain switch specific data. All the numbers that are within your Standard Sets will appear in the Standard Directory.

Understanding the Standard Directory Window

When you first access a Standard Directory listing, there are several panes of information. If you have worked in CAIRS you will recognize most of the panes. Here is a brief description of each of the panes:

- Directory – this contains basic directory information such as number, site, organization, etc.

- Accounting – this is where you will assign the different accounts to the listing

- Equipment & Service – here you can associate both equipment and services to the listing

- Connectivity – this is where you will assign all the connectivity required for the listing, this includes site, building, connections, etc.

- Phone Book – if you want this listing to be included in the Phone Book, this is the information that will appear

- Related Sets – if this set has come from Standard Sets, this pane contains the switch specific data such as Device Name, IP Address, etc.

- Notes – here you can create notes for additional listing information

You can customize the look of this screen very easily. In the top menu bar, the Form Layout menu option allows you to create different layout or restore to the default layout. You also hide panes that you know you are not going to be needing, for example many sites do not associate equipment & services, so that pane can be hidden from all layouts.

Another option is to drag all the panes into one and create tabs at the bottom of the window. You can drag and drop the tabs to be in the order that you wish.

Add a New Standard Directory Listing

1. Click Configured Items.

2. In the Navigation pane, click Standard Sets → Standard Directory

3. In the Directory Pane complete the following fields (required fields are indicated by a asterisk *):

   - Standard Directory Number * – this field will default to (Automatic by Number Plan), this means that you will be required to select a Number Plan Name and a Directory Number before saving the record. If you do not want to associate to a number plan, you can type the number into the field.

   - Number Plan Name – click on the dropdown arrow to access a list of number plans, from the list select the appropriate number plan.

   - Directory Number – once your number plan is select the available number for that plan will appear in this dropdown list. Click on the dropdown arrow to access a list of the number available, from the list select the appropriate directory number

   - Site – click on the dropdown arrow to access a list, then, select the set site. The site dropdown list displays the bottom-most site first. The second column displays the complete path to the site.

   - Organization Name – click the drop-down arrow to access a list, and then select the name of the organization. Depending on your System Settings, the dropdown box can include several columns of information, at a minimum the dropdown will include the organization name and the path. It can include other fields such as account, org code, customer code, etc. Once you select an organization, the complete path populates within the field.

   - Standard Directory Misc 1-5 - use these fields for typing in any miscellaneous set information.

Facilities

4. Before you can save this listing, you will need to complete the required fields within the Connectivity pane. Within the Connectivity pane, complete the following fields (required fields are marked with an asterisk *):

   - **Assigned Site** – click the drop-down arrow to access a list, from the list select the assigned site.

- **Assigned Building** * – click the drop-down arrow to access a list, and then select the building name.

- **Network Device Identifier –** click the dropdown arrow to access a list, from the list select the network device to associate to the listing, if applicable. If a network device and port are selected, the Network tab will show a diagram of how this listing is connected to the data network.

- **Device Port Number –** click the dropdown arrow to access a list, from the list select the port number the listing is assigned to on the network device, if applicable.

- **Alternate Location –** type in any alternate location information relating to the listing. This field can appear in the 911 interface

- **Directory Building Name** – this field auto-populates with the Directory Building Name that appears on the Building Record. The Directory Building name is defined as the common name for the building, for example, the assigned building name is 100 and the directory building name is Post Office. This field is read only.

- **Floor** – type the floor number, if applicable.

- **Room** – type the room number, if applicable.

- **Jack** – type the jack number, if applicable.

- **Connectivity Misc 1**-3 - use these fields for typing in any miscellaneous connection information

- **Dedicated Plant** – click the arrow to access a drop-down list, from the list select the type of dedication, it automatically defaults to Not Dedicated. You can change the selection to Dedicated with Port or Dedicated without Port. When you choose to dedicate, anytime you move or delete the listing, the facilities remain in place and are unavailable to use in other situations.

- **Latitude/Longitude/Elevation –** If you happen to know your GPS coordinates you can type them into the appropriate fields. If used, this information will transfer in the 911 interface and display the terminal that is nearest the location of the phone.

These coordinates work in connection with the Nearest Building tab (if you do not see the tab, you will need to change the system setting 'Show Nearest Building Button in Facilities' to True). The buildings with the nearest coordinates will appear in the tab.

- **Connection Sequence** – if you are using the 911 interface you can determine the sort order or sequence of which building information will be sent to your 911 system. This defaults to 0, if you have more than one location enter in the sequence number.

- **Include in 911 –** click on the dropdown arrow access a menu from the menu select one of the following:

- **Default**

- **Always**

- **Never**

5. Within the lower section, when you click the first line (marked with an asterisk) the site and building name populate with the information you entered in the upper section. If the building only has 1 terminal the name of the terminal will also auto-populate.

6. If there is more than one terminal, click the drop-down arrow to access a list, and then select the terminal name associated with the building.

7. If you do not see, the Connection Name line, click the plus sign (+) next to the site name. The following fields open to allow you to complete adding the facilities, complete the following fields (required fields are marked with an asterisk (*):

- **Connection Name** – click the drop-down arrow to access a list, and then select the listing's connection.

- **Path Number** – this field auto-populates with the next available path in the terminal. To change this selection, click the drop-down arrow to access a list and then select the listing's path number.

- **Path Usage** – click the drop-down arrow to access a list, then, select the path usage type. This is a list that is pre-defined within Facilities and indicates how the path is being used, for example, data, voice, transmit, etc.

- **Out Binding Post** or **Out Frame Location** – these fields auto-populate with number(s) corresponding to the path number. This information is defined within Facilities; each terminal is designed with either a Binding Post or Frame Location. This field is a Read Only field.

- **In Row, Block, Pin** – these fields auto-populate within number(s) corresponding to the path number. This information is defined within Facilities; each terminal is designed with either a Binding Post or Frame Location. This is a Read Only field.

8. Now you are finally able to save this listing, within the Actions ribbon group, click on the Save button. This will save your changes and allow you to continue working with the listing.

Deleting a Standard Directory Listing

There are few ways you can delete a directory listing from your database. Keep in mind that this does not affect your Standard Sets in any way, these listing are separate.

1. Click Configured Items.

2. In the Navigation pane, click Standard Sets → Standard Directory

3. To populate the list you can either search for a listing or click on the Show All link.

4. Once the list populates, find the listing that you want to delete, click on the number to highlight

5. Within the Actions pane, click on the Delete Standard Directory

6. When asked "Are you sure you want to delete the selected standard directory?", click on the Yes button.

7. The listing will be removed from the list and the database.

<u>**Alternatively**</u>

1. Click Configured Items.

2. In the Navigation pane, click Standard Sets → Standard Directory

3. To populate the list you can either search for a listing or click on the Show All link.

4. Once the list populates, find the listing that you want to delete, double click on the listing to open the record

5. Within the Actions ribbon group, click on the Delete button

6. When asked "Are you sure you want to delete the selected record?", click on the Yes button.

7. The listing will be removed

Customer Accounting

An account or accounts can be associated to the listing for billing purposes. You can assign up to 3 account numbers, one for each charge type: One-time, call and recurring charges. To add an account number, complete the following steps:

1. Click the row marked with the asterisk to enter in a new account number. Complete the following fields, required fields are marked with an asterisk (*):

   - **Charge Type*** – click the drop-down arrow to access a list, then select one of the following choices:

     - **All Charges** – bills the account for all charges

     - **Recurring Charges** - bills the account for only recurring charges

     - **One-time Charges** – bills the account for only one- time charges

     - **Call Charges** – bills the account for charges related to call

   - **Site*** – once you click on the charge type field, if you have selected a site in the Directory pane, this field will auto-populate with the site name. If there was not a site selected, click the dropdown arrow to access a list of sites, from the list select the site that matches the site in the connectivity pane.

   - **Subscriber Name** – click on the drop-down arrow to access a list, and from the list select the appropriate subscriber

   - **Organization –** if you selected an organization in the Directory pane, this field will auto-populate with the selected organization. If there was no organization selected, click the dropdown arrow to access a list of organizations, from the list select the organization.

- **Account Number/Customer Code*** – if the organization is already associated to an account, the account number will auto-populate in the field. If it is not associated, click the drop-down arrow to access a list of the account numbers and their associated organizations. If an account number is associated to multiple organizations, the account number appears in the list multiple times, for example if account number 2424 is associated to three different organizations, there are three appearances of the account number within the drop-down. Each account number references the different organization name.

  From the list, select the account number and organization responsible for the charges.

- **Billing Start Date*** – click the drop-down arrow to access a calendar, from the calendar select the date to start the billing. 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.

- **Billing End Date** – click the drop-down arrow to access a calendar, from the calendar select the date to stop the billing for the equipment or service. 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.

2. There are a few selections at the top of the pane that you should pay special attention to, they are:

- Number – If you have multiple number assigned to the set, you can associate a different set of account numbers to each button. Click on the dropdown arrow to access a list of numbers from the number select the one to associate the account number to.

- Include Inactive Accounts – this defaults to remain unchecked meaning that you are only going to see accounts that are active or that have a Billing End Date that has not occurred yet. If you check the box, all the accounts will appear within the list whether they have active charges or billed charges.

3. Within the Actions ribbon group, click on the Save button within the Actions ribbon group. This will save your changes and allow you to continue working with the set.

Remove an Account Number

Ideally an account number should never be removed from a set, the Billing End Date should be set to remove the account association. You will only be able to delete an account completely if there have been no charges associated to the account on this listing. In the case that you need to remove an account completely from a listing follow these steps:

1. Within the Account Management pane, right click on the selector box next to the charge type, a small popup menu opens, within the box click **Delete**.

2. Once you click Delete, a message box appears verifying that you really want to delete the account. Click Yes within the box to continue or No to cancel the operation.

3. Within the Actions ribbon group, click on the Save button within the Actions ribbon group. This will save your changes and allow you to continue working with the listing.

Equipment & Services

Various pieces of equipment or services can be associated to the listing. Each may have a particular one-time or recurring charge associated to it. In this case, it would be best if you associate an account number before associating any equipment or services.

Since adding, modifying, deleting and viewing equipment and services is the same throughout CAIRS, we have consolidated the process into one section on the manual. Please see Common Elements – Equipment & Services to learn how to more.

Phone Book

The Phone Book pane displays the information as it will appear in the actual Phone Book. There is a lot of information within this pane that can be populated to make your phone book very detailed. This pane will contain both listing information and switch related information, if the set is from Standard Sets.

Often times, several people share one office with one directory listing. The phone book section allows you to create multiple entries for each person that uses the listing. Once you click on the row marked with an asterisk, you will notice a new row has appeared at the top of the list to add more entries.

Adding a Phone Book Listing

1. Within the Phone Book pane, click on the row marked with an asterisk, this row is used to add new records.

2. You will notice that any fields that appear in other panes that are populated will auto-populate in the appropriate column.

3. Since most of the fields are self-explanatory, we will cover just the required fields for each phone book entry:

- Sort Order - this field defaults to 0, (telephone numbers are listed in numerical order). To have this record display at the top of the list, type a **1** in this field. You can number each record according to position within the list from 1 to 999.

- Publish Listing – this defaults to contain a checkmark meaning that the entry will appear in the phone book, click the box to remove the checkmark to indicate that this listing is non-published

- Print Organization Code - this defaults to contain a checkmark meaning that the org code will appear in the phone book, click the box to remove the checkmark to remove the org code

- The next few required fields are used if you want to export the phone book and import into a third-party product
  - Print Building Number
  - Trailing Digit Count
  - Font Bold/Underline/Italic
  - Indent Level
  - Blank Lines Above

4. Once you have completed your necessary fields, within the Actions pane click on the Save button to save your changes and continue working within the listing.

Deleting a Phone Book Entry

1. Within the Phone Book pane, right click on the entry that you want to delete to access a popup menu.
2. From the menu, select Delete.
3. When asked "Would you like to Delete the Selected Row?" Click Yes
4. A white line is drawn through the entry to allow you to delete multiple entries at once.
5. Once complete, click on the Save button in the Actions ribbon group. The entry is removed from the pane.

Related Sets

If this listing is part of your Standard Sets, this pane will contain some of the switch related information. The information in this pane is read only.

Notes

You can add notes to the set to keep a more accurate record of changes that were made to the set. Before you started adding notes it is a good idea to add some note categories. These categories help to group the notes based on a common element. For example, Subscriber Update, Feature Mods, Button Config, etc. To learn more about adding note categories, please see Common Elements → Managing Note Categories.

Since the process to adding, modifying, deleting and viewing notes is the same throughout CAIRS, we have consolidated the process into one section on the manual. Please see Common Elements → Notes to learn more.

Network Devices

Within Configure Items or Facilities → Network Devices you can manage all of your network devices and their associated ports. Network devices can be such things as your ethernet hubs, patch panels, etc. Each device can have multiple ports of various types, we will discuss this in a bit. They can also be associated to accounts for billing purposes. You can track a lot of information for each one such as MAC address, IOS, location, GPS coordinates, active ports, available ports, etc.

When a network device is associated to a configured item, a graphical display of the connectivity is shown to the jack. This will include all building, cables, paths/strands and ports.

Ports

It is important to understand how CAIRS connects your network devices together. CAIRS manages connections just like you would in a real terminal, one port is connected to another port via a cable, whether that be in the same terminal or to a different building or to an ethernet hub on someone's desk. Each port is connected with a 'house cable', don't panic, we are not asking you start tracking your house cable. CAIRS will deal with your house cable behind the scenes so you don't have to! If you are going to connect ports between buildings or other terminals, selecting a connection group/path is available however, it is optional.

We all know that all network devices have ports of various types. To help simplify this, in CAIRS we have created 4 distinct port modes: Trunk, Access, Mixed and Patch. The mode determines the specific function of the port. When you create a network device you will be assigning a start and end port number for one or more of the port modes. Each of these 4 port modes has a set of rules for how it can connect to other ports:

- Truck – can only be connected to access ports
4. Access – can be connected to trunk ports, jacks, or other connected items
- Mixed – can be used as a trunk or access port. Once connected, this port can only be used once.
5. Patch – this port allows for 2 connections, one trunk and one access connection

Let's go one-step further and talk about Device Port Types. When you create the network device and you assign a set of ports for the 4 modes we talked about above, those ports have to be assigned a port type.   The port type is basically the physical connection between the port, or for lack of a better term; the cable type used to connect them together. For example, a port type can be ethernet, fiber, GBIC, etc. Just like port modes, these port types have various rules on what they can connect to. For example, an ethernet port type cannot connect to a fiber port type. In this case, you can use an adapter to change the ethernet cable into fiber to connect the ports together.

Network Device Port Types

The first things we need to setup are your device port types. Remember, these are the physical connection types between each port. The port types are a general category, they can be things like ethernet, fiber, SFP, GBIC, etc.

Managing Device Port Types

1. Click the **Configured Items or Facilities** menu.

2. In the **Navigation** pane, click **Network Devices**.

3. There are two ways to manage your network device port types:

    - Within the toolbar directly above the **Navigation** pane, click the **Manage Network Device Port Types** button.

    1. Within the **Actions** pane, click the **Manage Network Device Port Types** link.

4. With either option, the Manage Device Types window opens.

! If you are unable to view the Actions pane, you may need to use the scroll bar to reveal the menu choices on the right side of the Navigation pane, or using your mouse point at the Separation bar, and when the up/down arrow displays, right-click the line and hold it to pull the line down.

Adding a Network Device Port Type

5. Click the field marked with an asterisk (*). To add a new record, complete the following fields (required fields are marked within an asterisk (*)):

    - **Network Device Port Type*** - type in the name of the port type for example fiber, ethernet, GBIC, etc.

6. To add another type, click the **Save** button and repeat step 5, as necessary.

Deleting a Network Device Port Type

7. There are two ways to select the type to delete:

    - Right-click the record selector box (located just left of the name) to access a popup menu, from the menu click **Delete**.

2. Highlight the name in the list and within the A**ctions** ribbon group click the **Delete** button.

8. Once you click Delete, a message box displays verifying that you really want to delete the type. Click **Yes** within the box to continue or **No** to cancel the operation.

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

10. If you do not want to delete the network device type, right-click the record to access a pop-up menu. From the pop-up, click **Undelete**.

11. Once you select Undelete, a message box displays verifying that you really want to keep the type. 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 network device port types, or click **Save & Close** (to save and exit) to return to the Network Device list.

Network Device Types

The next thing to setup is all your network device types. These are basically general categories for your network devices. For example, 16 port network switch, 12 port ethernet switch, 24 port patch panel, etc.   Your site will have multiple network devices of the same types. Each device type will have a specific set of ports that can be used.

Manage Network Device Types

1. Click the **Configured Items or Facilities** menu.

2. In the **Navigation** pane, click **Network Devices**.

3. There are two ways to manage your network device types:

   - Within the toolbar directly above the **Navigation** pane, click the **Manage Network Device Types** button.

   3. Within the **Actions** pane, click the **Manage Network Device Types** link.

4. With either option, the Manage Device Types window opens.

! If you are unable to view the Actions pane, you may need to use the scroll bar to reveal the menu choices on the right side of the Navigation pane, or using your mouse point at the Separation bar, and when the up/down arrow displays, right-click the line and hold it to pull the line down.

Adding a Network Device Type

5. Click the field marked with an asterisk (*) to add a new record, complete the following fields (required fields are marked within an asterisk (*)):

   - **Device Type Name*** - type in the name of the device, for example 16 port network hub, Cisco 2960, etc.

4. **Device Type OID –** type in the SNMP OID or object identifier for this device types. If this is unknown, leave the field blank

- **Device Type Vendor –** type in the vendor, if known. This is a text field so you can type in Unknown Vendor, Multiple Vendors, etc.

5. **Default Trunk Port Type –** click on the field to access a dropdown list, from the list select the port types (i.e. coax, copper, ethernet)

A few notes about ports…

A device can have up to all four port types (trunk, access, mixed or patch).

Port number cannot overlap. If the trunk port range is 1-15, then the next set of ports must start at 16.

- **Default Start/End Trunk Port –** this determines the first and last trunk port number in the range for this port mode, type in the first and last port numbers into the appropriate fields.

6. **Default Access Port Type -** click on the field to access a dropdown list, from the list select the port types (i.e. coax, copper, ethernet)

- **Default Start/End Access Port -** this determines the first and last access port number in the range for this port mode, type in the first and last port numbers into the appropriate fields.

7. **Default Mixed Port Type -** click on the field to access a dropdown list, from the list select the port types (i.e. coax, copper, ethernet)

- **Default Start/End Mixed Port -** this determines the first and last mixed port number in the range for this port mode, type in the first and last port numbers into the appropriate fields.

8. **Default Patch Port Type -** click on the field to access a dropdown list, from the list select the port types (i.e. coax, copper, ethernet)

- **Default Start/End Patch Port -** this determines the first and last patch port number in the range for this port mode, type in the first and last port numbers into the appropriate fields.

9. **Device Type Description –** use this field to type in a description or use this field for any miscellaneous information regarding the network device type.

Any of the port types (i.e. coax, copper, ethernet) can be changed once the device type is associated to the actual network device on an individual basis.

6. To add another type, click the **Save** button and repeat step 5, as necessary.

Deleting a Network Device Type

7. There are two ways to select the type to delete:

- Right-click the record selector box (located just left of the name) to access a popup menu, from the menu click **Delete**.

10. Highlight the name in the list and within the A**ctions** ribbon group click the **Delete** button.

8. Once you click Delete, a message box displays verifying that you really want to delete the type. Click **Yes** within the box to continue or **No** to cancel the operation.

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

10. If you do not want to delete the network device type, right-click the record to access a pop-up menu. From the pop-up, click **Undelete**.

11. Once you select Undelete, a message box displays verifying that you really want to keep the type. 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 network device types, or click **Save & Close** (to save and exit) to return to the Network Device list.

Network Device Adapter Types

As we talked about before, adapters help to connect mismatched ports. For example, you cannot connect an ethernet port to a fiber port without an adapter. The adapters can be generic, for example; Ethernet to Fiber or you can get more specific for example; Cisco GBIC Network Adapter. When you are using an adapter, it is important to also use the serial number as adapter can be expensive.

Manage Adapter Types

1. Click the **Configured Items or Facilities** menu.

2. In the **Navigation** pane, click **Network Devices**.

3. There are two ways to manage your network device adapter types:

    - Within the toolbar directly above the **Navigation** pane, click the **Manage Network Device Adapter Types** button.

    11. Within the **Actions** pane, click the **Manage Network Device Adapter Types** link.

4. With either option, the Manage Network Device Adapter Types window opens.

! If you are unable to view the Actions pane, you may need to use the scroll bar to reveal the menu choices on the right side of the Navigation pane, or using your mouse point at the Separation bar, and when the up/down arrow displays, right-click the line and hold it to pull the line down.

Adding a Network Device Adapter Type

5. Click the field marked with an asterisk (*) to add a new record, complete the following fields (required fields are marked within an asterisk (*)):

- **Network Device Adapter Type*** - type in the name of the adapter type, this can be general or a specific model

12. **Media Type** * - click the field to access the dropdown list, from the list select the media type. This is the type of cable that is used to connect the adapter to the ports. This is the same list you will access when selecting your network device port types.

- **WAN Port Type** * **-** click the field to access the dropdown list, from the list select the WAN Port Type. This is the matching port type on the network device. This is the same list you will access when selecting your network device port types.

6. To add another type, click the **Save** button and repeat step 5, as necessary.

Deleting a Network Device Adapter Type

7. There are two ways to select the adapter to delete:

- Right-click the record selector box (located just left of the name) to access a popup menu, from the menu click **Delete**.

13. Highlight the name in the list and within the A**ctions** ribbon group click the **Delete** button.

8. Once you click Delete, a message box displays verifying that you really want to delete the adapter. Click **Yes** within the box to continue or **No** to cancel the operation.

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

10. If you do not want to delete the adapter, right-click the record to access a pop-up menu. From the pop-up, click **Undelete**.

11. Once you select Undelete, a message box displays verifying that you really want to keep the adapter. 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 network device port types, or click **Save & Close** (to save and exit) to return to the Network Device list.

Network Devices

Ok, now that we have built all the parts that make up the network devices, let create a new network device. These devices will be used to make the network connections. There are four panes of information:

- Device Properties – this pane displays the details about the device such as device name, MAC address, building, site, etc.

14. Ports – once you select a device type this pane will automatically populate with the ports for the device.

- Notes – if a user has entered in any notes related to the device they will appear in this pane.

15. Accounts for Equipment & Services – this pane displays the different accounts for related and equipment

- Equipment & Services – if there are any associated pieces of equipment or services related to the device they are listed here.

Adding a Network Device

1. Click the **Configured Items or Facilities** menu.
2. In the **Navigation** pane, click **Network Devices**.
3. Within the Actions pane, click the Add Network Device link.
4. The General - Network Device window opens.
5. Within the Device Properties pane, complete the following fields (required fields are marked with an asterisk (*)):

- Device Type Name * - click on the field to access a dropdown list, from the list select the network device type. These are the devices that you created under Manage Network Device Types. Once selected the ports will automatically populate in the Ports pane.

If you accidentally select the wrong device type, simply click the dropdown arrow again and re-select the proper device. When doing so, you will be asked if you want to replace the ports, click Yes to replace or no to cancel the operation.

- Network Device Identifier * - type in the unique identifier for this network device. No two network devices can be named the same each one has to be unique!

16. Network Device Name – type in the device name, this can be the same as the identifier or it can be a more common name that is easier to understand. Even though this field is not required it is highly recommended that you complete the device name.

- Network Device MAC Address – if applicable, type in the MAC Address.

17. Network Device Serial Number – if applicable, type in the serial number for the device

- Site – even though this field is not required, when you are managing port connections the site is required to find network devices. Click on the dropdown arrow to access a list, from the list select the site. The site dropdown list displays the bottom-most site first. After the ~~ is the complete path to the site.

18. Building Name – click on the dropdown arrow to access a list, from the list select the building name. Even though the field is not required here, when you are creating your port connections later, you will need the building to find the available network devices and connections.

- Terminal Name – click on the dropdown arrow to access a list, from the list select the terminal name. It is helpful later when you are creating your port connections to have a terminal to refine the list when you are searching for network devices in a building. We all know some buildings may have several terminals, so being able to refine the list is can save time.

19. Floor – type in the floor location

- Room – type in the room location

20. Cubicle – type in the cubicle location

- Wing – if the building has multiple wings, use this field to enter in the wing name and/or number

21. Latitude/Longitude/Elevation – if you are in the same physical location as the network device, you can use the Add GPS Locator button (in the ribbon) to populate these fields. Alternately, you can type the coordinates into the appropriate field.

If you have access to a mobile device that has GPS location services turned on you can use the compass app to find you longitude, latitude and elevation. You still must be in the same physical location as the network device.

- Organization Name – click the drop-down arrow to access a list and from the list, select the name of the organization. The organization drop-down list displays the bottom-most organization level first. After the ~~ the complete path to the selected organization displays. Each level of the organizational tree is separated by a >. Once you select an organization, the complete path populates within the field.

22. IP Address – type in the IP address of the network device

- The next set of fields only pertain to you if you have our VoIP Discovery module, these fields will populate once a network scan is completed:

23. Subnet Mask

- Begin/End IP Range

24. Device Version

- IOS Version

25. SNMP Version/Community/User Name

- SNMP Authentication Protocol * - this field defaults to Unknown

26. SNMP Authentication Password

- SNMP Privacy Protocol* - this field defaults to Unknown

27. SNMP Privacy Password

- IPv6 Address

28. NPA Network Provider Access

- LLDP Link Layer Discovery Protocol Enabled

29. PON Passive Optical Network Device Type

- CDP Cisco Directory Protocol Enabled

30. Location Field Mask Delimiter/Spaces/JSON/Regex

6. At this point it is a good idea to save your network device, within the Actions ribbon group, click on the Save button.

7. Once you selected the Device Type Name, the ports will automatically appear in the ports pane. This pane displays the following information:

- Network Device Port Type - Ethernet, Coax, Fiber, etc.

31. Device Port Type Mode – Trunk, Access, Mixed or Patch

- Device Port Number – 1, 2, 3, etc.

32. Device Port Name – Port 1, Port 2, Port 3, etc. These Device Port Names can be renamed by clicking in the field any typing in the name of the port

- Device Port Is Working – a checkmark indicates that the port is working. Click on the field to remove the checkmark to indicate a bad port

33. Device Port is Reserved – this field default to unchecked meaning the port is ready to use. A checkmark indicates the port is reserved.

- Device Port Description – this contains any miscellaneous information regarding the port

8. If you have made any further modifications to the device, make sure you save your changes.

Adding a Port Range

Often times a module is connected to an existing network device to add additional ports. The 'Add Port Range' button allows you to add more ports onto the device.

1. Within the Manage Range ribbon group, click on the Add Port Range button

2. The Add Port Range popup opens, complete the following fields:

- Port Mode – click on the dropdown arrow to access a list from the list select the port mode, the following selections are available:

34. Access

- Trunk

35. Patch

- Mixed

36. Unknown

- Port Type – click on the dropdown arrow to access a list from the list the port type (for example: ethernet, fiber, etc.)

---

37. Start Port Number – type in the first port number for the range

- Total Ports – type in the total number of ports to be added

38. Is Working – this field defaults to include a checkmark indicating that all the ports you are adding are working. Click on the field to remove the checkmark indicating that the ports are not working, this field can be modified at any time.

- Is Reserved – this defaults to remain empty, to insert a checkmark to reserve the ports, click on the field.

39. Description – use this field to enter in any miscellaneous or descriptive text regarding the ports

3. When the fields are complete, click on the Add Range in the lower right-hand corner of the popup.

4. The new range will appear in the Ports pane below the existing list.

5. Within the Actions ribbon group, click on the Save button to continue working with the device or the Save & Close button to return to the list.

Notes

You can add notes to the network device to keep a more accurate record of changes that were made to the device. Before you started adding notes it is a good idea to add some note categories. These categories help to group the notes based on a common element. For example, Port Modification, GPS Update, etc. To learn more about adding note categories, please see Common Elements → Managing Note Categories.

Since the process of adding, modifying, deleting and viewing notes is the same throughout CAIRS, we have consolidated the process into one section on the manual. Please see Common Elements → Notes to learn more.

Attach

Before you can attach files to a network device, your CAIRS administrator must determine the allowable file types and size. Please contact your CAIRS administrator if you are unable to attach files.

There are two different types of files that you can attach to a record, the first button allows you to attach a regular file. These files follow the record and other users are able to see them. Although, this is convenient, if changes need to be made to the file, the file will have to be saved and then re-attached.

The second file attachment type allows you to attach a link to a file that is in a shared location. The benefit of this file attachment is that when changes are made to the file there is no need to reattach the file. The disadvantage is that all CAIRS users have to have access to the shared file location.

Since the process to add, modify, delete and view file attachments is the same throughout CAIRS, we have consolidated the process into one section on the manual. Please see Common Elements → File Attachments to learn more.

Accounts for Equipment & Service

An account or accounts can be associated to the device for billing purposes. You can assign up to 3 account numbers, one for each charge type: One-time, call and recurring charges.

Adding an Account Number

1. Click the row marked with the asterisk to enter in a new account number. Complete the following fields, required fields are marked with an asterisk (*):

   - **Charge Type*** – click the drop-down arrow to access a list, then select one of the following choices:

     40. **All Charges** – bills the account for all charges

     - **Recurring Charges** - bills the account for only recurring charges

     41. **One-time Charges** – bills the account for only one- time charges

     - **Call Charges** – bills the account for charges related to call

   42. **Site*** – once you click any of the drop-down lists, the site name auto-populates with the site selected in the Device Properties pane. If there was not a site selected, click the dropdown arrow to access a list, and from the list select the site for the device.

   - **Subscriber Name** – click on the drop-down arrow to access a list, and from the list select the appropriate subscriber

   43. **Organization –** if you have selected an organization in the device properties pane, the organization name will auto-populate here. If not, click the dropdown arrow to access a list, and from the list select the organization name.

   - **Account Number*** – click the drop-down arrow to access a list of the account numbers and their associated organizations. If an account number is associated to multiple organizations, the account number appears in the list multiple times, for example if account number 2424 is associated to three different organizations, there are three appearances of the account number within the drop-down. Each account number references the different organization name.

     From the list, select the account number and organization responsible for the charges.

! When you create an account number, you can assign it to an organization or to a subscriber; this designates the account as official or unofficial. If you select an account with an organization, it is most likely an Official Account. If you select an account where the organization is blank, it is most likely an Unofficial account and associated to a subscriber.

   - **Billing Start Date*** – click the drop-down arrow to access a calendar, from the calendar select the date to start the billing. 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.

44. **Billing End Date** – click the drop-down arrow to access a calendar, from the calendar select the date to stop the billing for the equipment or service. 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.

2. Within the Actions ribbon group, click on the Save button within the Actions ribbon group. This will save your changes and allow you to continue working with the device.

Equipment & Services

Various pieces of equipment or services can be associated to the network device. Each may have a particular one-time or recurring charge associated to it. In this case, it would be best if you associate an account number before associating any equipment or services.

Since adding, modifying, deleting and viewing equipment and services is the same throughout CAIRS, we have consolidated the process into one section on the manual. Please see Common Elements – Equipment & Services to learn how to more.

Manage Port Connections

After you create all your network devices it is time to connection them all together. This is where port connections come into play. Port Connections allow you to connect your Access ports with your trunk ports. You can also associate adapters to connections.

In order for you to see your network devices here, each device must be associated to a site and building. Terminals are optional.

When you open up the Manage Network Connections window, there are three different columns. In the Access port column, you will be selecting the service that is coming into the device. The Manage Connections column allows you to select adapters and or associate a connection. The Trunk port column allows to you select the service that is leaving the device and going to a set/circuit/other piece of equipment or to another location.

Creating a Port Connection

1. Click the **Configured Items or Facilities** menu.

2. In the **Navigation** pane, click **Network Devices**.

3. There are two ways to create a port connection:

   - Within the toolbar directly above the **Navigation** pane, click the **Manage Port Connections** button.

   45. Within the **Actions** pane, click the **Manage Port Connections** link.

4. With either option the Manage Network Connection window opens.

5. Here we will work from left column to the right column to complete the connection. In the Access Ports column, all the sites that are in your database will appear. To start click on the site.

6. The list changes to display all of the buildings associated to the site, click on the appropriate building name.

7. Once the building is selected, all terminals and network devices assigned into the building appear in the column.

8. Click on the terminal to further refine the list, if no terminals are displayed you can click on the network device to displays a list of access ports.

A few notes about each port. Each port is contained in its own cell. When a port is connected the port connection indicator (the small icon to the very right of the cell) turns from green to blue. Also, when connected the name of the trunk port that the access port is connected to appears in the lower left-hand corner of the cell.

If a port is reserved the small icon will be orange.

If the port is bad the small icon will be red.

9. To select the port, click on the appropriate cell within the Access Port column. The selected port now appears in the first box of the Manage Connection column.

10. Next you will select the trunk port, you will notice that when you selected the site and building in the Access Port column, those same selections were made in the Trunk Ports column.

If you are connecting the access port to another building, click on the red X within the Building cell to return to the building list. From the list select the appropriate building.

11. Within the list of trunk port, you may see both network devices as well as jacks. To connect to a jack, find the jack within the list and click on the appropriate cell. The jack information will now appear in the trunk port box of the middle column.

12. If you are connecting to a network device, click on the device name to access a list of the ports. From the list, click on the appropriate port. The port name will now appear in the trunk port box of the middle column.

13. At this point, it is a good idea to save your connection. Within the center pane, click on the Save Connection button in the lower right-hand corner of the pane.

Searching for a Port

Instead of searching through the entire list of sites, building or devices every time you want to make a network connection you can use the search feature. At the very top of either the Access or Trunk Ports pane, there is a text box. Within the box, type in any portion of the record you would like to find, as things match, they will appear within the list.

Adding an adapter

In certain situations, you may need to use an adapter to connect ports together. As we talked about earlier, only same port types can be connected together, for example, you cannot connect an ethernet port to a fiber port. In this situation an adapter would need to be used. Previously, we built all your adapters into the database.

Each adapter included the type, media type and WAN port type. The media type is essentially the type of cable being used to connect the ports together. The WAN port type is the matching port type in the network device.

1. After you have selected your access port, it is time to select your trunk port. When you select a trunk port and click on the Save Connection button, if your ports are not compatible a message box notifies you that they cannot be connected together.

2. In this case, an adapter would need to be used. You can select an adapter on either the access port side, trunk port side or both.

3. Within the Manage Connections column, the adapter field is directly below the assigned port box. Click on the adapter dropdown arrow to display a list of the available adapters and their port and media types. This information is helpful to determine what adapter should be used for this particular connection.

4. Directly below the adapter field, is the serial number textbox. It is a good idea to enter a serial number into the field for accurate tracking.

5. When completed, click on the Save Connection button.

Adding a Connection

Often times your network connections may not be in the same building so you will need to connect with a cable and pair. In order for a connection to occur between two network devices in two buildings, the same cable must be assigned to a terminal in both buildings.

When you select the building in either the Access or Trunk Port panes, the available connection groups will display in the Manage Connection column. To view the paths associated with the connection click on the appropriate cell.

When the path list displays, there are a few things to note. First, if a path is already connected the small icon to the right of the cell will be blue, if the path is available for use the small icon will be green. If the path is connected, the connection information displays in the lower left-hand corner of the cell.

To use a connection and path, click on the appropriate connection name to display the paths. Within the list, click on the path to assign. The assigned path will display directly below the connection name above the path list.

To remove a path, click on the red 'X' in right-hand side of the cell.

To remove the connection, click on the red 'X' in right-hand side of the cell.

Filters

In the lower portion of the Manage Connections window there are several checkboxes that you can use to filter the amount of information you see in the columns. The first is the Sync Access Port Filters, this defaults to a checkmark to indicate that if you select a site and building in the Access Port column, the same site and building will display in the Trunk Port column. After you have selected the building, CAIRS automatically removes the checkmark to allow you to select different network devices.

The next set of filters are for your Port Connections. The following filters are available:

- Connected – the default is to include a checkmark to include all ports that are connected. To remove connected ports from the list, remove the checkmark.

46. Available – the default is to display all available ports, when the checkbox is removed all available ports will be removed from the list and you are left with just the assigned ports.

- Reserved – the default is to display only the ports that are unreserved and available to use. To view only the reserved ports, click on the box to insert a checkmark. If any ports are reserved, they will appear within the column.

47. display the ports that you designated as reserved when you created the network device. To display the only the not reserved ports, remove the checkmark

- Not Reserved - the default is to display the ports that are not reserved. To display the only the reserved ports, remove the checkmark

48. Working – the default is to display all the working ports. To remove working ports from the list, remove the checkmark

- Bad – the list defaults to display only the ports that are working, to view the bad ports, click on the box to insert a checkmark.

49. Locked/Unlocked – these selections are still in programming, it will be available in a later release

The next filters are for the Jack Connections. The two filters available are In Use and Not in Use. The default is to include all jacks whether in use or not is use, to remove either selection remove the checkmark.

The final set of filters are for the Connection Paths. The two filters available are In Use and Not in Use. The default is to include all jacks whether in use or not is use, to remove either selection remove the checkmark.

Assigning Network Devices

Within the Connectivity pane of any configured item within CAIRS, you can assign them to the network. This allows you to see an actual diagram of the connections between buildings, terminals, ports and jacks.

To view the network diagram to show how the device is connected to the network, click on the Network tab in the lower portion of the Facilities pane. There maybe 2 or more columns

of information depending on the amount of connections you have for the configured item (Standard Sets, Cisco Sets, Avaya Sets, NEC Sets, Configured Sets, or Circuits).

To assign connectivity with a network device

1. There are two sections within the Facilities pane. The top portion allows you to assign a few basic items within Facilities, and the lower half allows you to assign the complete facilities package.

2. Within the top section, complete the following fields (required fields are marked with an asterisk (*):

   - **Assigned Site** – click the drop-down arrow to access a list, from the list select the assigned site.

   50. **Assigned Building** * – click the drop-down arrow to access a list, and then select the building name.

   - **Network Device Identifier –** click the dropdown arrow to access a list, from the list select the network device to associate to the configured item. If a network device and port are selected, the Network tab will show a diagram of how this configured item is connected to the data network.

   51. **Device Port Number –** click the dropdown arrow to access a list, from the list select the port number the configured item is assigned to on the network device.

   - **Alternate Location –** type in any alternate location information relating to the configured item. This field can appear in the 911 interface

   52. **Directory Building Name** – this field auto-populates with the Directory Building Name that appears on the Building Record. The Directory Building name is defined as the common name for the building, for example, the assigned building name is 100 and the directory building name is Post Office. This field is read only.

   - **Floor** – type the floor number

   53. **Room** – type the room number

   - **Jack** – type the jack number

   54. **Connectivity Misc. 1**-3 - use these fields for typing in any miscellaneous connection information

   - **Dedicated Plant** – click the arrow to access a drop-down list, from the list select the type of dedication, it automatically defaults to Not Dedicated. You can change the selection to Dedicated with Port or Dedicated without Port. When you choose to dedicate, anytime you move or delete the device, the facilities remain in place and are unavailable to use in other situations.

   55. **Latitude/Longitude/Elevation –** if you happen to know your GPS coordinates you can type them into the appropriate fields. However, a simply way to enter in the coordinates is to click on the 'Add GPS Location' button in the Location ribbon group. This will populate the fields with the appropriate information. If

used this information, will transfer in the 911 interface and display the terminal that is nearest the location of the phone.

These coordinates work in connection with the Nearest Building tab (if you do not see the tab, you will need to change the system setting 'Show Nearest Building Button in Facilities' to True). The buildings with the nearest coordinates will appear in the tab.

- **Connection Sequence** – if you are using the 911 interface you can determine the sort order or sequence of which building information will be sent to your 911 system. This defaults to 0, if you have more than one location enter in the sequence number.

56. **Include in 911 –** click on the dropdown arrow access a menu from the menu select one of the following:

- **Default**

57. **Always**

- **Never**

3. Within the lower section, when you click the first line (marked with an asterisk) the site and building name populate with the information you entered in the upper section. If the building only has 1 terminal the name of the terminal will also auto-populate.

4. If there is more than one terminal, click the drop-down arrow to access a list, and then select the terminal name associated with the building.

5. If you do not see, the Connection Name line, click the plus sign (+) next to the site name. The following fields open to allow you to complete adding the facilities, complete the following fields (required fields are marked with an asterisk (*):

- **Connection Name** – click the drop-down arrow to access a list, and then select the configured item's connection.

58. **Path Number** – this field auto-populates with the next available path in the terminal. To change this selection, click the drop-down arrow to access a list and then select the configured item's path number.

- **Path Usage** – click the drop-down arrow to access a list, then, select the path usage type. This is a list that is pre-defined within Facilities and indicates how the path is being used, for example, data, voice, transmit, etc.

59. **Out Binding Post** or **Out Frame Location** – these fields auto-populate with number(s) corresponding to the path number. This information is defined within Facilities; each terminal is designed with either a Binding Post or Frame Location. This field is a Read Only field.

- **In Row, Block, Pin** – these fields auto-populate within number(s) corresponding to the path number. This information is defined within Facilities; each terminal is designed with either a Binding Post or Frame Location. This is a Read Only field.

6. Within the Actions ribbon group, click on the Save button within the Actions ribbon group.

7. To view the connectivity, click on the Network Tab in the lower portion of the Facilities pane. The pane will show a graphical display of how the configured item is connected to the network device.

Orders/Troubles

The Orders and Troubles menu is the primary location for many telephone and data system tasks. From this menu, you create and complete work orders, manage information relating to set devices, circuits, subscribers, and accounts and create/complete trouble tickets relating to set device and circuit repairs and maintenance.

Through this menu option, users can track work orders in several different ways and view the history of completed or cancelled work orders.

A work order consists of one or more Work Flows. A work flow is basically the process the work order goes through from start to finish. Each Work Flow contains two parts, the work centers, and time frames.

A work center is much like an Inbox/basket in that it holds a set of data components you need to complete before the Work Order can be sent to the next work center and time frame. Examples of work centers are: Directory, Inside Plant, Outside Plant, QA, etc.

Each work center is assigned into a time frame; a time frame allows the work flow to progress sequentially. This means the work from one work center needs to be complete before the work order can continue within the work flow. If two work centers are in the same time frame, they can be worked on concurrently. Once this Work Order enters the time frame, both work centers can access and complete their work at the same time (with respect to Open Record Management).

In the following example, the Order Issuer and Directory Information are assigned into Time Frame 1, Inside and Outside Plant are assigned into Time Frame 2, and so on.

- Work Center 1 - Order Issuer
- Work Center 2 - Directory Information

Time Frame 1

- Work Center 3 - Inside Plant
- Work Center 4 - Outside Plant

Time Frame 2

- Work Center 5 - QA

Time Frame 3
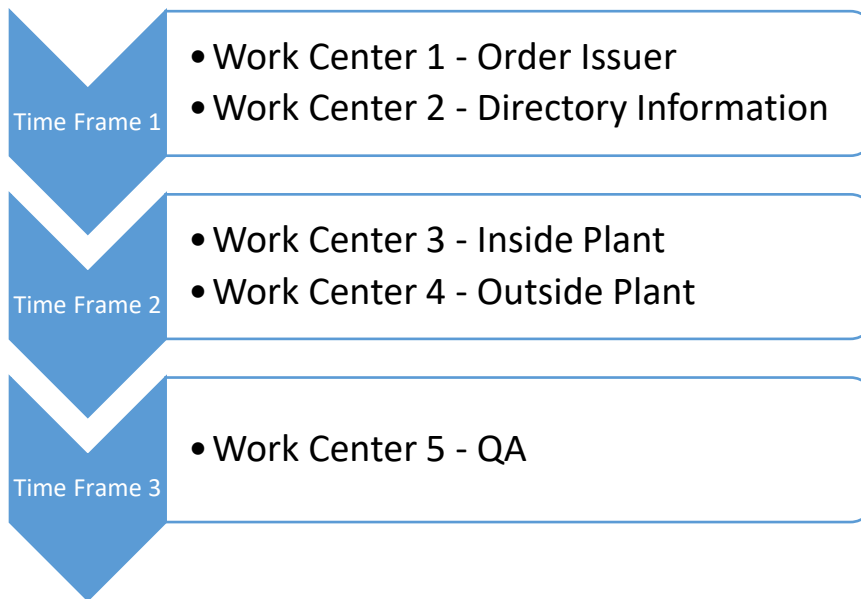
Assigned to each work center are one or more data components. A data component is the information you are manipulating with the work order. There are eight different data components:

- **Subscribers**

- **Authorization Code**

- **Circuit**

- **Land Radio**

- **Hardware**

- **Standard Set Device**

- **Standard Set Import Project**

- **Account**

- **General Task**

- **Cell Phone**

- **Set Device**

- **AS5300 Sets**

- **Cisco Sets**

- **Set Device (EWSD)**

Remember, when a data component is added to a work center, the required fields for the component must be completed before the work order can be sent to the next work center.

! Open Record Management is important in the work order process. When one person is accessing the work order, they own it; meaning, if another person tries to open it and make

changes, CAIRS will notify them that the work order is currently opened by another user (the user name is displayed) and any changes they have made might not be saved to the record.
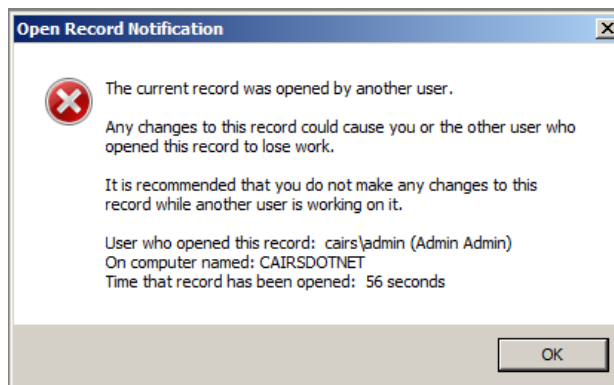
Menu Options

The **Orders/Troubles** menu has five options:

- **Orders** –create, modify, and view work orders within the database.

    - **My Work Center Orders** – provides a list of work orders currently assigned to a work center to which you have access.

    8. **Orders Assigned to Me** – provides a list of the work orders assigned or sent to you by another user.

    - **Orders Created By Me** – provides a list of the work orders that you created.

    9. **Held Orders** – provides a list of work orders currently on hold.

    - **All Active Orders** – provides a list of all open work orders within your system.

    10. **Order History** – provides a list of cancelled or completed work orders within your system.

- **Troubles** – allows you to view, create, and modify trouble tickets within the database.

    - **My Work Center Troubles** – provides a list of trouble tickets currently assigned into a work center you have privileges to access.

    11. **Troubles Assigned to Me** - provides a list of trouble tickets assigned or sent to you by another user.

    - **Troubles Created By Me** – provides a list of the trouble tickets that you created.

    12. **Held Troubles** – provides a list of trouble tickets currently on hold.

    - **All Active Troubles** – provides a list of all open trouble tickets within your system.

13. **Trouble History** – provides a list of trouble tickets cancelled or completed within your system.

- **General Orders** – allows you to view, create and modify general orders with sub work orders

    - **All Active General Orders** – provides a list of the open general work orders within your system. This section allows you to create sub work orders.

    - **General Order History –** provides a list of the cancelled or completed general work orders within your system.

- **General Tasks** – allows you to create tasks relating to your work orders or trouble tickets.

- **Preventive Maintenance Jobs** – allows you to set schedules for preventative maintenance, for example, setting reminders to backup your database

- **Reports –** there are four different reports that you can view and export to multiple formats.

    - **All Orders and Troubles** – displays a list of all the work order/troubles within your system, this includes open, completed and cancelled.

    14. **All Orders and Troubles By Directory Number** – displays a list of the work orders/troubles within your system based on telephone number, this report includes open, completed and cancelled work orders.

    - **All Orders and Troubles By Circuit** - displays a list of the work orders/troubles within your system based on circuit name, this report includes open, completed and cancelled work orders.

    15. **All Portal Requests** – displays a list of work orders/troubles with your system that were submitted via the Subscriber Portal, this includes open, completed and cancelled work orders.

    - **Equipment and Service By Category –** this report works in connection with the report category associated to an equipment type, when you run this report all equipment associated to a work order that have a category display within the report

    16. **Remedy Interface –** CAIRS can received work orders from Remedy to process through the work flow, when the work order is complete a status will be sent to Remedy

There are a few items that need to be completed before you can start to work through a work order. The first two are creating your work order categories and managing your note categories.

Work Order Categories

A work order category allows you to group your work orders together based on your own characteristics. Examples of categories can be add, move, delete, change or telephone,

circuit, subscriber, etc. When you are viewing your work orders, you can specifically search on a category and view just the work orders within the category. The work order category is an optional field.

Managing Work Order Category

1. Click the **Orders/Troubles** menu.

2. Within the **Navigation** pane, click **Orders** and then **All Active Orders**.

3. You have two alternatives for managing your work order categories:

   - Within the toolbar directly above the **Navigation** pane, click the **Manage Work Order Categories** button.

   4. Within the **Action** pane, click the **Manage Work Order Categories** link.

5. With either option, the Manage Work Order Categories window opens.

Adding

6. In the **Work Order Categories** list pane, click the top row, marked with an asterisk **(*)** to add a new record.

7. Type in the name of the category

8. You can add multiple categories by clicking on the row marked within an asterisk **(*).**

Deleting

9. There are two ways to select the category to delete:

   - Right-click the record selector box (located just left of the name) and click **Delete**.

   10. Highlight the name in the list and within the **Actions** ribbon group click the **Delete** button.

11. Once you click Delete, a message box opens verifying that you really want to delete the type. Click **Yes** within the box to continue or **No** to cancel the operation.

12. Once selected, CAIRS draws a line through the type allowing you to delete multiple types at the same time.

13. If you do not want to delete the type, right-click the record and click **Undelete**.

14. Once you select Undelete, a message box opens verifying that you really want to keep the type. Click **Yes** within the box to continue or **No** to cancel the operation.

15. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with work order categories, or **Save & Close** (to save and exit) to return to the **All Active Orders** list.

Managing Note Categories

Before you start to add notes, it is a good idea to add some categories. These categories allow you to group your notes based on a common element. For instance, you can have note categories called: Add New Set, Modify Circuit, Modify Account, etc.

1. Click the **Orders/Troubles** menu.

2. Within the **Navigation** pane, click **Orders** and then **All Active Orders**.

3. A list of the open orders populates. If you have a large number of active work orders, the list may not populate. To populate the list, do one of the following:

   • Within the search box, type any portion of the record and then click the magnifying glass.

   4. Click the **Show All** button.

5. Once the list opens, double-click the order number. A work order window opens.

6. Within the Notes pane, click on the Manage Categories link

Alternatively, from the Orders →any sub-menu you can click on the Manage Note Categories link within the Actions pane.

Adding

7. The Manage Note Categories popup opens. Click the row with an asterisk (*) to add a new category to the list and type the name.

8. Once you start typing in the category, a new row with an asterisk (*) displays at the top of the list allowing you to add multiple categories at once.

Deleting

9. To delete a category, right click on the record selector box next to the category name to access a popup menu, from the menu click Delete.

10. 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. Once selected, a line is drawn through the name, allowing you to delete multiple items at once.

11. If you do not want to delete the category, right-click the record again and click **Undelete**.

12. Once you select Undelete, a message box displays verifying that you really want to keep the category. 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 working with the categories, or click **Save & Close** (to save and exit) to return to the Work Order.

Work Order Views

Within the Views pane, you can sort your work order list based on certain characteristics. For example, you can view all the active work orders relating to a site. The default or simple list displays all work orders starting with the most recently created work order first. The following views are available:

- Basic List
- Simple List
- Show Items with Circuit Names
- Show Items with Phone Numbers
- Work Flow Custom Fields
- Notes
- Equipment and Services
- Work Center Name
- Current Status
- Site

- Building Name
- Switch Name
- Subscriber Last Name
- Organization Name
- Contact Name
- Contact Phone
- TCO Group
- Resource Mgr
- Custom Summary

When you click the option circle next to a selection, the list changes to group your work orders based on the common characteristic. For example, if you select Building, all work orders assigned to building 1 are grouped together; building 2 are together and so on. For each group, you can click the plus sign next to the group name to view the work orders within the grouping.

Understanding the Work Order Details Screen

The Work Order – [New Work Order] window has several panes. First is the ribbon at the top of the window, which allows you to perform actions on the work order, choose data components, generate reports etc. Within the panes below the ribbon, you will actually create and manage the work order.

Ribbon Groups

Each of the ribbon groups allows you to perform certain functions within the work order (Example: Attach a file; reject the work order, etc.).

Actions

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

- **Save & Close** – click this button to save the completed information and return to the Order/Troubles list.

- **Delete** – click this button to delete the work order. This differs from cancel in that there will not be a record of this Work Order within your database.

- **Save** – click this button to save the information you have completed and remain within the Trouble Ticket.

- **Refresh** – click this button to add newly saved information to the work order window.

Show

There are two views within the work order details screen, **Order** and **Order Log.** The Order view is the default view and displays the detailed work order information, work centers, and configured components. The alternate view, Order Log, displays a list of actions for this work order. The Order Log view displays the Activity Log which includes two information panes; the top pane contains the activity date, work center name, order status, work center status and activity note. When you highlight any action within the top pane, the lower pane displays the detailed information for the completed action.

The Contact Info button displays the related contact details for the Subscriber or TCO that you selected in the Adjustable Fields pane.

The Packages button allows you to view the sub-work orders related to the order. If this work order was submitted via Subscriber Portal, you can view the package details here.

History provides the user with a timeline of the actions taken on the work order. The main window provides a basic list of the actions and by double-clicking the action; a pop-up opens with a detailed action description.

Launch

The Launch ribbon group allows you to perform action relating to work order packages submitted through Subscriber Portal.

Data Components

Each of the data components allows you to manage items in the database. The available components differ depending on the type of work order, work center needs, and user privileges. The following data components are available:

- **Subscriber** – allows you to add, modify, or delete a subscriber

- **Authorization Code** – allows you to add, modify, or delete authorization codes

- **Circuit** – allows you to add, modify, or delete a main circuit and circuit segments

- **Land Radio –** allows you to add, modify and delete wireless communication devices such as walkie-talkies

- **Hardware** – allows you to add, modify and delete hardware such as routers

- **Standard Set Device** – allows to add, modify and delete device within Standard Sets

- **Standard Set Import Project** – allows you to create a work order associated to a standard set import project

- **Account** – allows you to associate accounting/billing information to a set device, circuit, or subscriber

- **General Task** – allows you to manage work order and/or trouble tickets tasks

- **Cell Phone** – allows you to add, modify, or delete cell phones

- **Set Device** – allows you to add, modify, or delete analog, digital, or IP set in your database

- **AS5300 Sets -** allows you to add, modify, or delete sets associated to your AS5300

- **Cisco Sets –** allows you to add, modify, or delete sets associated to your Cisco switches

- **Set Device (EWSD)** – allows those with an EWSD Switch to add, modify, or delete sets.

Each Data Component button is segmented (depending on your screen size the button may not be segmented and may only contain a drop-down arrow). When you click the lower portion of the button, a drop-down list displays with menu options to add, search or drop. The search option allows you to search for an existing component to associate to the work order. The Set Device button has two search options:

- **Search for Existing Primary Devices** – displays a list of the primary button information for all set devices

- **Search Existing Devices** – displays a list of all telephone numbers associated to a set device and their button number

The Drop option allows you remove a configured component from a work order without having to delete the entire order. Keep in mind this only drops the information from the work order, if it is an existing component, it remains within the database.

Order Actions

There are several work order actions available within this ribbon group:

- **Send To** – send a work order on to a specific person within the next work center.

- **Send Back** – send the work order back to a specific person within a previous work center.

- **Assign To** – assign the work order to a specific person within the current work center.

- **Cancel Order** – cancel the work order at any point.

- **Put on Hold** – place a work order on hold allowing you to reserve items within the database without having to commit the information. Once you place a hold on a work order, the button name changes to Remove (from Hold) allowing you to remove the hold and continue processing the order.

- **Optional Work Centers** – if the administrator has selected some work centers as optional for the work order, you can click the field to access a drop-down list of the optional work centers.
- **Switch Ticket Type** – allows you to switch the work order to a trouble ticket with an open status. This does not change the work flow; it simply moves the work order to the trouble ticket list.

Reporting

Custom reports allow you to print work order information on a form designed by your CAIRS administrator. Your administrator creates cells in a form and associates them to certain fields within the work order. When you choose the report, the fields from the work order populate the cells to create a complete printable form.

Attach

Attach a file to a work order within this ribbon group. Your CAIRS administrator pre-defines eligible file types.

Work Order Panes

There are several panes below the ribbon; each pane contains specific information for the work order. Within these panes, you work through the entire work flow process. The seven panes of information are (for a detailed description of the pane see the appropriate section below):

- **Basic Information**
- **Adjustable Fields**
- **Other Fields**
- **Portal Work Order Info**
- **Description**
- **Work Flow, Work Notes and Equipment and Services**
- **Components**

After you create a work order, CAIRS adds a solid yellow line directly below the ribbon, containing the work order status, the active work center name, the name of the person that the previous user sent the work order to, and any additional notes.

Basic Information and Adjustable Fields Pane

When you first enter the Work Order – [New Work Order] window, the Basic Information pane contains the only available fields. Once you select the work flow the remainder of the pane become available, plus the Adjustable and Other Fields panes. Within the Basic Information pane, you can create a work order number (or have one auto-generated), an alternate number and a due date.

The Adjustable Fields pane allows you to enter the work order location and contact information.

The Other Fields pane displays the work order's status information. Each time the status of the work order changes the information within this pane updates.

After completing the required fields within these three panes, the Create Order button becomes available. Once clicked, the work flow displays within the Work Flow pane. Throughout your work order's process, the button label changes to reflect the specific action you are completing. For example, when the information is complete in a work center or you are ready to close the work order, the button label reads 'Complete Work Center.'

The Portal Request pane displays the information entered by the subscriber when they created the work order on the Subscriber Portal website. The information that is populated here will also be visible in the Adjustable Fields pane in the Portal Request field.

The Description pane allows the user to enter in a complete work order description and remains available as the Work Order moves through the workflow. The information that is populated here will also be visible in the Adjustable Fields pane in the Description field.

The Portal Request and the Description field can be restricted to read only access based on profile. When you right click on the Adjustable Fields pane, the customization menu pops up, scroll down and click on Customize. In the Customize Display popup, select the profile that you are customizing, within the Column Properties pane click the Read Only column to insert a checkmark. You can select multiple profiles within the 'Profiles to Update' pane. Once saved the selected profiles will only be able to read the fields. To learn more about Customizing, please see "Getting Started".

Work Flow Pane

At the bottom of the pane are three tabs: Work Flow, Equipment and Services, and Work Notes. The Work Flow tab allows you to view the complete work flow. The Equipment and Services tab allows you to view, add, and delete equipment and/or services related to the work order. The Work Notes tab allows you to attach a note to the work order.

Once you create a work order, the complete work flow displays within the lower left-hand pane (if the work flow is not visible click the Work Flow tab located in the lower portion of the pane). The work flow starts at the top of the pane and flows to the bottom. Each time frame is indicated with a solid blue line that displays the time frame number. Each work center within the time frame is contained within a box with the work center name in the pink line at the top of the box. A green arrow displays to the left of the active work center. Within each work center are the available data components, in the example below the Subscriber component is the only one available with the Directory Work Center.

Notice that there are two additional work centers within the above work flow, Inside Plant and QA. Once you complete the required fields within the Directory work center, the work order can be sent to the next timeframe and work center. Once sent, the Directory work center turns to Not Active and the Inside Plant work center becomes active. You continue the same process until the work order reaches the final timeframe where you can complete the work order.

The Equipment and Services tab allows you to view all equipment and/or services related to the work order. In addition, you can add or delete equipment or services related to the work order. If there are any charges related to the equipment or service, the account number located in the Adjustable Fields pane incurs all charges.

The Work Notes tab allows you to add, view, modify, and delete notes relating to the work order.

Configured Components Pane

Once all the required fields within a data component are complete and saved, a tab for the component displays in the lower right-hand pane. Each component type displays as a new tab. In the example below, there are two components for the work order, Set Devices and Cell Phone. Within the Set Device tab, notice that there are two columns; this indicates that the work order is configuring two different set devices. Each new component of the same type displays as a new column within the tab.
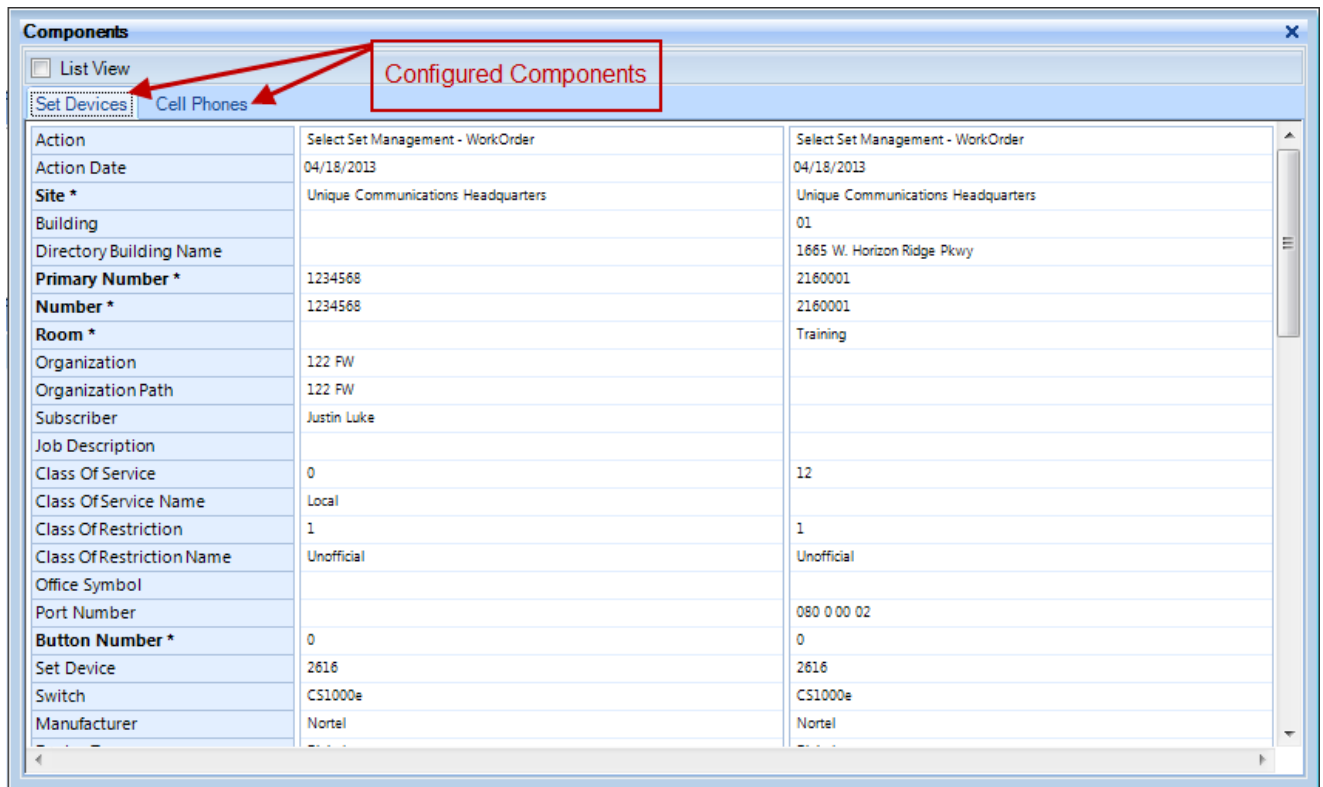
At the top of the pane is the List View checkbox, a check in this box changes the view to display the configured components in a list.

To view the information for a component, click the tab and use the scroll bar to view the details. If your permissions allow, you can modify the information. To do so, double-click any field within the pane and/or column. The component screen opens allowing you to change the appropriate information. However, if the work order is in a work center that does not have access to the data component, the information is read-only.

A Work Order – Start to Finish

Creating a Work Order

1. Click the **Orders/Troubles** menu.
2. Within the **Navigation** pane, click **Orders** and then **All Active Orders**.
3. There are two ways to create a new work order:

   - Within the toolbar directly above the Navigation pane, click the drop-down arrow next to New. From the list, select Work Order.

4. Within the Actions pane, click the **Create New Work Order** link.
5. The Work Order – [New Work Order] window opens

6. In the **Basic Information** pane, click the **Work Flow** drop-down arrow to access a list of workflows. From the list, select the workflow.

7. After selecting the workflow, the Order Number and the Due Date field become available. Depending on how your administrator has designed your work flow, the fields may auto-populate. However, if the fields are blank, complete them by:

- Order Number – type-in an alphanumeric order number.

8. Alt Order Number – type-in an alphanumeric alternate order number.

- Due Date – this field may auto-populate with a date as determined by the Days to Completion field within the Work Flow Setup. You can change the date and time by clicking on the field to type in the due date and time.

9. In addition, the Adjustable Fields, Other Fields, Portal Request, and Description panes become available.

10. Within the **Adjustable Fields** pane, complete the following information (required fields are marked with an asterisk (*):

- 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 level first. After the ~~ is the complete path to the site. Each site level is separated by a >.

11. Description – if your profile permissions allow you can type in a description for the work order here or in the Description pane. This field may remain active and editable throughout the work order process.

- Building Name – click the drop-down arrow to access a list and from the list, select the building name. This is the physical location of where to install, move, or modify the component.

12. Switch Name – click the drop-down arrow to access a list and from the list, select the switch name associated with the new component(s).

- Organization Name – click the drop-down arrow to access a list and from the list, select the name of the organization. The organization drop-down list displays the bottom-most organization level first. After the ~~ the complete path to the selected organization displays. Each level of the organizational tree is separated by a >. Once you select an organization, the complete path populates within the field.

13. Subscriber Name – click the drop-down arrow to access a list and from the list, select the name of the subscriber associated with the new component(s). If you select a subscriber that is associated to an organization and/or a TCO, those fields will automatically populate with the associated information. However, if you have previously selected an organization it will not overwrite your selection.

- Customer Code – click the drop-down arrow to access a list of the Customer Codes within your database, from the list select the code to associate to the work order.

14. Account Number – click the drop-down arrow to access a list and from the list select the account number for the new component(s). The list of accounts displays not only the account number but also the account type, one-time, recurring or call charges and organization.

- Contact Name – type the name of the contact for this work order.

15. Contact Phone – type the telephone number for the contact for this work order.

- TCO – click the drop-down arrow to access a list of the TCO Groups within your database, from the list select the group to associate to the work order. This field must be populated if you want your subscribers to see the TCO when viewing the work order through the Subscriber Portal.

16. Work Order Category – click the drop-down arrow to access a list and select the work order category. After the order creation, you can change the work order category, if necessary.

- Portal Request – if the work order was requested via the portal, this is the description the user entered. This field appears here as well as in its own pane because you can restrict editing based on profile.

The Portal Request pane displays the information entered by the subscriber when they created the work order on the Subscriber Portal website.

The Description pane allows the user to enter in a complete work order description and remains available as the Work Order moves through the workflow.

The Portal Request and the Description field can be restricted to read only access based on profile. When you right click on the Adjustable Fields pane, the customization menu pops up, scroll down and click on Customize. In the Customize Display popup, select the profile that you are customizing, within the Column Properties pane click the Read Only column to insert a checkmark. You can select multiple profiles within the 'Profiles to Update' pane. Once saved the selected profiles will only be able to read the fields. To learn more about Customizing, please see "Getting Started".

- Order Misc 1 – 30 - use these fields to enter in any additional information regarding the work order.

17. The Other Fields pane is read-only. This pane displays information regarding the status of the work order; the following information is displayed:

- Created By - this field remains blank until you generate the work order at which time the field populates with your user name. Once you generate the work order, this field name changes to Created By. When anybody views the work order within your system, their user name displays in this field.

18. Open Date – auto-populates with the current date. When viewing the work order, this field displays the open date of the work order.

- Close Date – remains blank until a user closes the work order at which time this field populates with the work order's close or cancel date.

19. Current Status*– auto-populates to Open. When viewing the work order, this field displays the work order status. You may see one of the following statuses:

  - o **Open**
  - o **Closed**
  - o **On Hold**
  - o **Reviewed**
  - o **Cancelled**
  - o **Complete**
  - o **Not Active**
  - o **Pending Sent Back**

- Current Time Frame * – displays the time frame number the work order is currently in.

20. User Name & Last Opened By – this field remains blank until you generate the work order at which time the field populates with your user name. Once you generate the work order, this field name changes to Last Opened By. When anybody views the work order, their user name displays in this field.

- Last Activity Date & Last Opened – this field remains blank until you generate the work order, at which time the field populates with the current date and time. Once you generate the work order, this field name changes to Last Opened. When the work order is viewed or any changes are made, this field displays the date and time those actions were saved.

21. Hold Date – this field remains blank until you place the work order on hold, if applicable. Once you place the work order on hold, the date the hold is placed on the order displays in this box.

22. The Portal Request pane populates with information submitted via the Subscriber Portal.

23. Click the **Description** field to type a Work Order description. Within this field be as descriptive as possible as all users with access to the Work Order can view this field. You can access and modify the field any time during the work order process.

24. Once the required information is complete within the upper pane, click the **Create New Order** button. The order is created and the workflow, order

number and due date are grayed out. The open date, last opened by and last opened fields are completed with the appropriate information.

25. To exit the work order, click on the Save & Close button within the Actions ribbon group. If your access rights permit you may be able to continue working with the work order. To learn what to do now, see the 'It's Created, What Happens Now?' section.

It's Created, What Happens Now?

You have created the work order now what? Well, the rest of the work order process greatly depends on your access rights. With that in mind we will explain everything like you are an administrator and have access to everything.

Once the order is created it is sent into the first-time frame, you will see that the time frame is available within the Work Flow pane. Depending on how your work flows have been built each time frame can consist of data components and/or custom fields. When a time frame is associated to a data component that particular button becomes available within the ribbon. There are essentially two options when dealing with components, you can either add a new component or add an existing component.

Adding a New Component

As we just talked about, you created your order and your data component is available, to add a new component (meaning the device does not already exist in your database) complete the following steps:

1. There are two ways to add a new component:

    • Click the upper portion of the data components button

    2.   Click the lower portion of the button to access a drop-down list. From the list, select Add.

  3. With either search or add the General component window opens. Complete the required fields (the fields marked with an asterisk (*) for the data component. Within the Actions ribbon group, click the Save & Close button to return to the work order.

4. Back at the work order screen, the complete data component displays in the lower right-hand pane.

5. Every time you complete a new component, a new tab displays behind the first with the name of the component, if you add two of the same data component types, a new column displays within the tab. For example, if you are adding two set devices, there will be two columns within the Set Device tab.

6. If you are able to different components to the work order, each will appear as a new tab in the Components pane.

7. Alternatively, if you just want to see a list of the components, click on the checkbox next to List View in the Components pane.

8. To access the device that you have just associated to the work order, double click anywhere on the tab within the Components pane. The device window opens, if you make any changes to the device be sure to click the Save & Close button before returning to the work order.

9. Once you have completed your work within the work center and you are ready to send the order on, click the Complete Work Center button within the Basic Info pane.

10. The work order moves to the next center. Notice that a complete checkbox now displays directly above completed work centers.
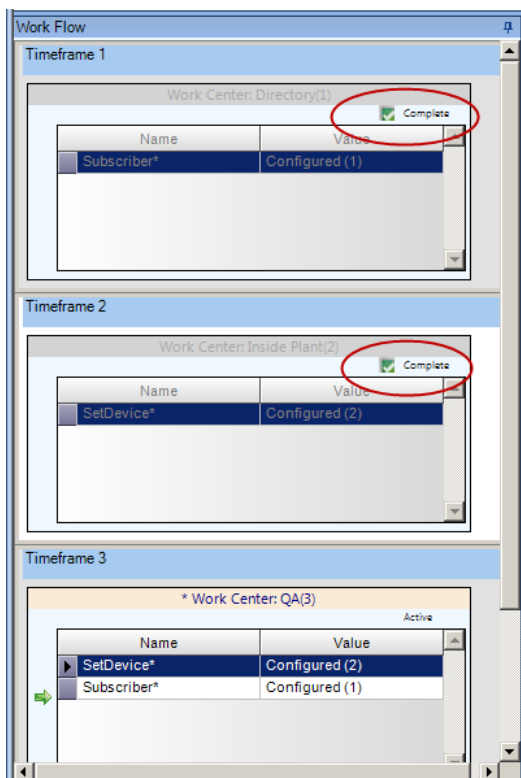
11. Once the work order has moved through all the centers, the last work center can close the order.

12. To close the order, click the Complete Work Center button. A message displays saying 'That was the last work center, do you want to close this work order too?' Click Yes to continue or No to cancel.

13. The work order window closes and you are returned to the Orders list.

Adding an Existing Component

As we just talked about, you created your order and your data component is available, to add an existing component (meaning the device already exist in your database) complete the following steps:

1. To add an existing device, click on the lower portion of the data component button to access a menu, from the menu select 'Search Existing…'

! The Set Device button has two additional search options: **Search for Existing Primary Devices** (displays a list of the primary button information for all set devices) and **Search Existing Devices** (displays a list of all telephone numbers associated to a set device and their button number).

2. The Component Search pop-up opens. There are two ways to populate the information within the list:

- Within the search box, type the name, number, or portion of the name or number and then click the magnifying glass.

3. Click the **Show All** button.

4. When you have located the component, double-click the row. A message box displays verifying that you have added the component to the order and asks if you want to add another. To add another component, click **Yes** within the box. To return to the work order, click **No**.

! If you add an existing component to the work order before you complete any fields within the Adjustable Fields pane, CAIRS will auto-populate those fields that appear in both areas.

! If the component is already associated to another work order, you will be asked if you still want to attach the component to the new order. Click Yes to attach or double click on the work order number to view the existing work order.

5. The search window closes and you are back at the work order.

6. Within the lower right-hand corner, the associated components populate within the tabs. Each different component displays as a new tab. If you add more than one component of the same type, each component displays as a separate column within the tab.

7. Alternatively, if you just want to see a list of the components, click on the checkbox next to List View in the Components pane.

8. To access the device that you have just associated to the work order, double click anywhere on the tab within the Components pane. The device window opens, if you make any changes to the device be sure to click the Save & Close button before returning to the work order.

9. Once you have completed your work within the work center and you are ready to send the order on, click the Complete Work Center button within the Work Order Info pane.

10. The work order moves to the next center. Notice that a complete checkbox now displays directly above completed work centers.
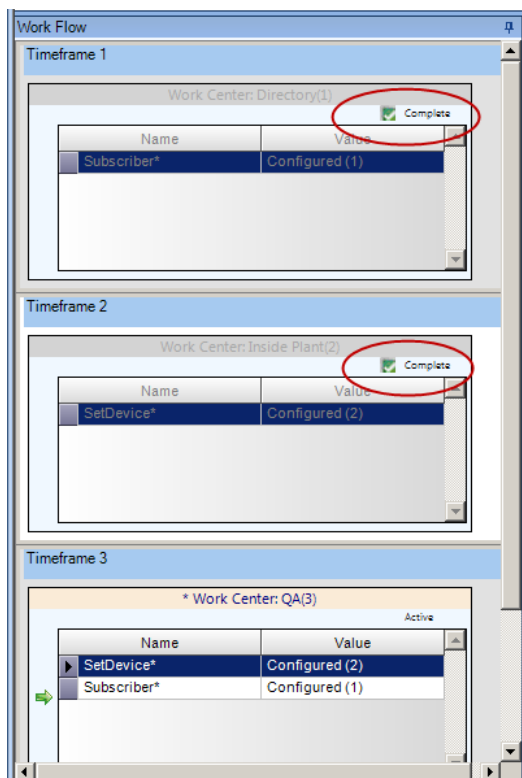
11. Once the work order has moved through all the centers, the last work center can close the order.

12. To close the order, click the Complete Work Center button. A message displays saying 'That was the last work center, do you want to close this work order too?' Click Yes to continue or No to cancel.

13. The work order window closes and you are returned to the Orders list.

Work Order Custom Fields

Custom Fields are a variety of field types that an administrator can add into work centers that need to be completed before the work order can move onto the next center. These fields are used to provide additional work order information, measure work order progress, provide specific data, etc. They can be a required field.

Within the work center, the custom fields are listed after the data components that need to be completed before the work flow can move onto the next work center. In the work flow below, there is a custom field in each of the work centers.

To complete the fields, click on field and complete the field. A field can be a textbox, calendar, yes/no or dropdown list.

Associating Equipment and/or Services to a Work Order

At times, there is a need to associate equipment or a service directly to a work order. Equipment or Services can only be added after you have created the work order.

When you create the Work Order, you can associate an Account Number within the Adjustable Fields pane. This is the account number CAIRS uses to bill the equipment and service charges to, this will only pertain to the work order. At any time during the work order process, you can add an account number to the work order by clicking on the drop-down arrow in the account number field within the Adjustable Fields pane.

Since adding, modifying, deleting and viewing equipment and services is the same throughout CAIRS, we have consolidated the process into one section on the manual. Please see Common Elements – Equipment & Services to learn how to more.

Work Notes

Before you started adding notes it is a good idea to add some note categories. These categories help to group the notes based on a common element. For example, Update Ticket, Remove Component, etc. To learn more about adding note categories, please see Common Elements → Managing Note Categories.

Since the process to adding, modifying, deleting and viewing notes is the same throughout CAIRS, we have consolidated the process into one section on the manual. Please see Common Elements → Notes to learn more.

Closing the Work Order

Once all of the work centers have been completed in each time frame, you can close the work order. When you are at the last work center and click on the 'Complete Work Center' button, you will get the following message:
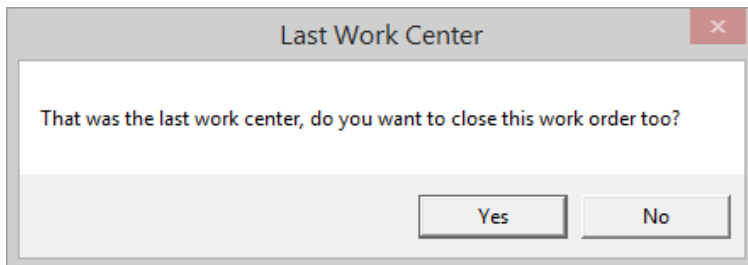
Click Yes to continue closing the order or No to cancel. Once you click yes, the work order is closed and you can view the complete order in 'Order History'.

Show Ribbon Group

Within the Show ribbon group, the Order and Order Log buttons allow you to change how you view the work order information. As well as viewing the history of actions performed on the work order.

Order Log

The log provides you with a location to view the activity that occurred on the work order. It provides such information as the action, user name, status, etc.

Viewing a Work Order's Activity

1. Click the **Orders/Troubles** menu.

2. Within the **Navigation** pane, click **Orders** and then **All Active Orders**.

3. The list of open work order populates.

4. Within the list, double-click the order to access.

5. Within the **Show** ribbon group, click the **Order Log** button. The log shows every action completed on the work order.

6. Within the Order Log, the following information is displayed:

- SrcCode

7. Activity Date

- Activity Note

8. User Name

- Order Status

9. Work Center Name

- Work Center Status

10. Component Name

11. To return to the work order, within the **Show** ribbon group, click the **Order** button.

Contact Info

The Contact Info button becomes available after you have created the work order. The details within the button relate the Subscriber and the TCO that you selected within the Adjustable Fields pane of the work order. There are two panes of information. The pane on the left-hand side relates to the Subscriber that you associated to the work order. The pane of the right displays the details for the TCO that are related to the subscriber that you associated to the work order. This information is read only.

Packages

Work Orders submitted through Subscriber Portal work a little differently than the standard work order. Instead of a standard work order, they are Configuration Packages. Each configuration package includes the following information:

- **Work Order Type** – indicates whether the package is for a set device, circuit, cell phone, authorization code or general task

- **Work Order Action** – indicates what type of action the subscriber is requesting either add, modify, or delete

- **Work Flow Name** – indicates the associated work flow within CAIRS

- **Approval Requirements** – indicates if the request requires approval from a Resource Manager

- **Sites and/or Organizations** – indicates what site and/or organization can submit the request.

- **Related Equipment and/or Services** – indicates the necessary equipment and/or services related to the request and the associated cost.

Each configuration package is submitted into CAIRS as a General Work Order. If approval is not needed the work order is created and in the first work center. If the package requires approval, your Resource Manager will need to approve the request before it can start the work order process.

Once started, a few things are different. You will notice that the Portal Request pane and the Portal ribbon group become available. The Portal Request pane displays the work request description that the subscriber entered into the website. The Packages button, within the Portal ribbon group, allows you to view the complete package details submitted by the subscriber. There are two panes of information, the upper pane displays the package details, such information as Package Name, Package Type, Approval Status, Request Notes, etc. The lower pane displays any Package Fields, these are custom fields that are related to the configuration package.

History

History provides the user with a timeline of the actions completed on the work order. To learn more please see Common Elements → History.

Launch Ribbon Group

The Launch ribbon group allows you to create sub work orders associated to a general work order or work order package. Within this ribbon group, you can perform certain functions on the group of orders, such as, put on hold, release from hold, cancel, etc.

The functionality of this button will only become available for General Work Orders.

Please refer to the General Work Orders section to learn more about how this ribbon group functions.

Data Components Ribbon Group

When you enter a work center, there will be one or more data components (as assigned by your CAIRS administrator) ready for completion. Each of the data components allows you to manipulate a particular item within your database. The available components differ depending on the type of work order, work center needs, and user privileges. The following data components are available:

- **Subscriber** – allows you to add, modify, or delete a subscriber
- **Authorization Code** – allows you to add, modify, or delete authorization codes
- **Circuit** – allows you to add, modify, or delete a main circuit and circuit segments
- **Land Radio –** allows you to add, modify and delete wireless communication devices such as walkie-talkies
- **Hardware** – allows you to add, modify and delete hardware such as routers
- **Standard Set Device** – allows to add, modify and delete device within Standard Sets (NEC sets only)
- **Standard Set Import Project** – allows you to create a work order associated to a standard set import project (NEC sets only)
- **Account** – allows you to associate accounting/billing information to a set device, circuit, or subscriber
- **General Task** – allows you to manage work order and/or trouble tickets tasks
- **Cell Phone** – allows you to add, modify, or delete cell phones
- **Set Device** – allows you to add, modify, or delete analog, digital, or IP set in your database
- **AS5300 Sets -** allows you to add, modify, or delete sets associated to your AS5300

- **Cisco Sets –** allows you to add, modify, or delete sets associated to your Cisco switches
- **Set Device (EWSD)** – allows those with an EWSD Switch to add, modify, or delete sets.

When you click the components button, CAIRS opens the general screen for that component. Once the component is open, complete the necessary fields, required fields must be completed before the component can be saved and the work order can move to the next work center. All configured components display within the Configured Components pane in the lower right-hand corner of the work order screen.

Alternatively, if you just want to see a list of the components instead of the tabs, click on the checkbox next to List View in the Components pane.

Each of the Data Component buttons is segmented (depending on your screen size the button may not be segmented but may only contain a drop-down arrow); when you click the lower portion of the button a drop-down list displays. For each component there is a search option, this allows you to search for an existing component to associate to the work order. The Set Device button has two search options:

- **Search for Existing Primary Devices** – displays a list of the primary button information for all set devices
- **Search Existing Devices** – displays a list of all telephone numbers associated to a set device and their button number

Adding a New Data Component

1. Click the **Orders/Troubles** menu.
2. Within the **Navigation** pane, click **Orders** and then **All Active Orders**.
3. A list of the open orders populates. If you have a large number of active work orders, the list may not populate. To populate the list, do one of the following:
   - Within the search box, type any portion of the record and then click the magnifying glass.
   4. Click the **Show All** button.
5. Once the list opens, double-click the order number.
6. A work order window opens.
7. Within the **Data Components** ribbon group, click an available button of the component to add to the work order.
8. The General – Component window opens.
9. Complete the required fields, and click the **Save & Close** button within the **Actions** ribbon group, to return to the order.
10. Within the lower right-hand corner, the configured components populate with tabs. Each different component displays as a new tab. If you add more than one

component of the same type, each component displays as a separate column within the tab.

11. Alternatively, if you just want to see a list of the components, click on the checkbox next to List View in the Components pane.

12. If you are completing the work center (if all the required fields for the component are complete) and you are ready to send the work order to the next center, click the **Complete Work Center** button, within the **Work Order Info** pane.

13. If you are still working within the work center, click the **Save** (save and stay) button or the **Save & Close** (save and exit) button within the **Actions** ribbon group.

Searching for Existing Data Components

Each of the Data Component buttons is segmented (depending on your screen size the button may not be segmented but may only contain a drop-down arrow) when you click the lower portion of the button a drop-down list displays. For each component there is a search option, this allows you to search for an existing component to associate to the work order. The Set Device button has two search options:

- **Search for Existing Primary Devices** – displays a list of the primary button information for all set devices

- **Search Existing Devices** – displays a list of all telephone numbers associated to a set device and their button number

Complete the following to search for an existing component:

1. Click the **Orders/Troubles** menu

2. Within the Navigation pane, click Orders and then All Active Orders.

3. A list of the open orders populates. If you have a large number of active work orders, the list may not populate. To populate the list, do one of the following:

    - Within the search box, type any portion of the record and then click the magnifying glass.

    4. Click the Show All button.

5. Once the list opens, double-click the order number. A work order window opens.

6. Within the **Data Components** ribbon group, click the arrow to access a drop-down menu. From the menu, select the **Search** option.

7. The Component Search pop-up opens. There are two ways to populate the information within the list:

    - Within the search box, type the name, number, or portion of the name or number and then click the magnifying glass.

    8. Click the **Show All** button.

9. When you have located the component, double-click the row. A message box displays verifying that you have added the component to the order and asks if you

want to add another. To add another component, click **Yes** within the box. To add only one component and return to the work order, click **No**

! If the component you have selected is already attached to a work order or trouble ticket you will get a notification like the one below. You can decide if you still want to attach the component, by clicking Yes, you are attaching the component to this work order. Click No to return to the Component Search box without attaching the component to the work order.
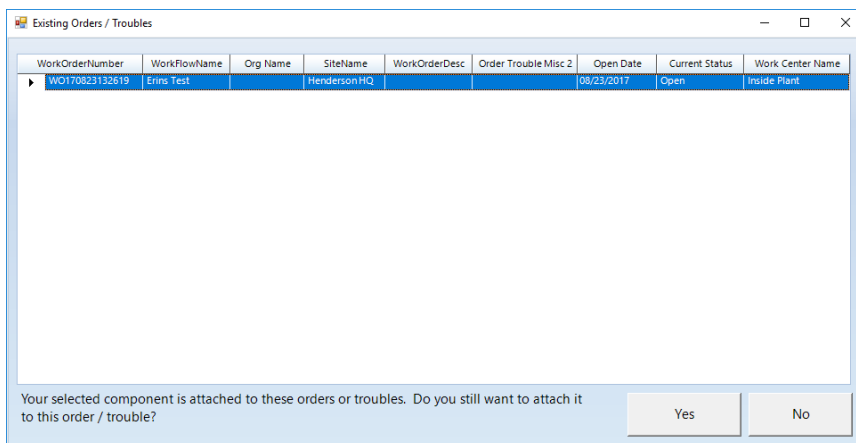
10. After you click No and after adding one or more components, the search window closes and you are back at the work order.

11. Within the lower right-hand corner, the configured components populate with tabs. Each different component displays as a new tab. If you add more than one component of the same type, each component displays as a separate column within the tab.

12. Alternatively, if you just want to see a list of the components, click on the checkbox next to List View in the Components pane.

13. If you are completing the work center (if all the required fields for the component are complete) and you are ready to send the work order to the next center, click the **Complete Work Center** button, within the **Work Order Info** pane.

14. If you are still working within the work center, click the **Save** (save and stay) button or the **Save & Close** (save and exit) button within the **Actions** ribbon group

Dropping a Component

Often times you may need to remove a configured component from a work order without having to delete the entire order. From the drop-down menu for each data component there is a drop option. This option allows you to drop any configured component from the work order. Keep in mind this only drops the information from the work order, so if you have saved the component, it remains within the database.

! It is important to remember that when you drop a component from a work order you are simply removing the association to the order. Since you have previously saved the

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information for the component, it remains within the database. If you truly want to remove the component from your database, you will need to delete the component.

1. Click the **Orders/Troubles** menu.

2. Within the **Navigation** pane, click **Orders** and then **All Active Orders**.

3. A list of the open orders populates. If you have a large number of active work orders, the list may not populate. To populate the list, do one of the following:

   - Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. Once the list opens, double-click the order number. A work order window opens.

6. Within the **Data Components** ribbon group, click the arrow of the component that you want to drop to access a drop-down menu.

7. From the menu, select the **Drop** option.

8. A window with the configured components for the work order opens. Within the list, highlight the component to remove from the work order.

9. Within the upper right-hand corner of the window, click **Drop Selected Component**. Be aware, there is no undo button; once you click the button, you completely remove the component from the work order.

10. The component is removed and no longer displays in the lower right-hand pane of the work order.

11. If you are completing the work center (if all the required fields for the component are complete) and you are ready to send the work order to the next center, click the **Complete Work Center** button, within the **Work Order Info** pane.

12. If you are still working within the work center, click the **Save** (save and stay) button or the **Save & Close** (save and exit) button within the **Actions** ribbon group.

Order Actions Ribbon Group

Within the Order Actions ribbon group, you can perform several different actions to the work order. For example, you can send a work order to a particular person within the next work center.

Send To

The Sent To action allows you to send a work order to a person who has access to the current or next work center. When a work order is sent to you, you can view those orders through Orders →My Work Center Orders.

Sending a Work Order to a User

1. Click the **Orders/Troubles** menu.

2. Within the **Navigation** pane, click **Orders** and then **All Active Orders**.

3. A list of the open orders populates. If you have a large number of active work orders, the list may not populate. To populate the list, do one of the following:

   - Within the search box, type any portion of the record and then click the magnifying glass.

     4. Click the **Show All** button.

5. Once the list opens, double-click the order number. A work order window opens.

6. Within the **Order Actions** ribbon group, click the **Send To** button. A drop-down field opens displaying the next available work center(s) within the workflow.

7. Mouse over the top of a work center name, a list of users with access to that work center displays. From the list, select the name of the person to send the work order to, you will see the first name, last name and user name display.

8. A message box displays allowing you to type in the reason you are sending the work order onto the particular user. Once the message is complete, click the **Ok** button.

9. If sending the work order to a person is the current work center, click the Save & Close button to send the work order onto the person.

10. If you are sending the work order to a person in the next basket, the current work center will need to be completed first. Make sure all required fields for the associated data components are complete and click the **Complete Work Center** button within the **Work Order Info** pane.

11. If you have access to the next work center, the order remains open. Within the **Actions** ribbon group, click the **Save & Close** (save and exit) button to return to the work order list.

Viewing a Work Order Sent to You

1. Click the **Orders/Troubles** menu.

2. Within the Navigation pane, click Orders and then My Work Center Orders.

3. Depending on the number of orders assigned to you, the list may not populate right away. To populate the list, do one of the following:

   - Within the search box, type any portion of the record and then click the magnifying glass.

     4. Click the **Show All** button.

5. The Orders in My Work Centers list populates with a list of work orders that another user sent to you.

6. To access the work order, double-click the order number. The Work Order window opens.

7. Directly below the ribbon is a yellow line. Within the line, notice that your user name displays in the Attn: field and the reason for sending the work order to you displays in the Note field.

Send Back (Rejecting)

When a person in a previous work center is missing or enters in incorrect information, you can send the work order back or reject it to a particular work center. By sending a work order back, you are making that work order go through all the previous work centers. For example, if you send a work order back to the first work center, it will have to go through all work centers again before the work order is closed.

Sending a Work Order Back to a Work Center

1. Click the **Orders/Troubles** menu.

2. Within the **Navigation** pane, click **Orders** and then **All Active Orders**.

3. A list of the open orders populates. If you have a large number of active work orders, the list may not populate, there are two ways to populate the list:

    -   Within the search box, type any portion of the record and then click the magnifying glass.

    4. Click the **Show All** button.

5. Once the list opens, double-click the order number. A work order window opens.

6. Within the **Order Actions** ribbon group, click the **Send Back** button. A drop-down field opens displaying the previous work center(s) within the workflow.

7. Mouse over the top of a work center name. A list of users with access to the work center displays. From the list, select the name of the person to send the work order back to, you will see the first name, last name and user name display.

8. A message box displays allowing you to type the reason you are sending the work order back to the user, once the message is complete, click the **OK** button.

9. The work order saves and closes and you are returned to the Orders list.

Assign To

The Assign To option allows you to assign this work order to a person who has access to the current work center. Once you assign it to the person, they can view the work orders assigned to them through Orders →Orders Assigned to Me.

Assigning a Work Order

1. Click the **Orders/Troubles** menu**.**

2. Within the **Navigation** pane, click **Orders** and then **All Active Orders**.

3. A list of the open orders populates. If you have a large number of active work orders, the list may not populate. To populate the list, do one of the following:

- Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. Once the list opens, double-click the order number. A work order window opens.

6. Within the **Order Actions** ribbon group, click the **Assign To** button. A drop-down field opens displaying the current work center within the workflow.

7. Mouse over the top of a work center name, a list of users with access to the work center displays. From the list, select the name of the person to assign the work order to, you will see the first name, last name and user name display.

8. A message box displays allowing you to type any key issues regarding the work order. Once the message is complete, click the **OK** button.

9. The work order window remains open; to complete the process, click the **Save & Close** button within the **Actions** ribbon group.

Viewing a Work Order Assigned to You

1. Click the **Orders/Troubles** menu.

2. Within the **Navigation** pane, click **Orders** and then **Orders Assigned to Me**.

3. Depending on the number of orders assigned to you, the list may not populate right away. To populate the list, do one of the following:

- Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. The My Orders list populates with a list of work orders that another user sent directly to you.

6. To access the work order, double-click the order number. The Work Order window opens.

7. Directly below the ribbon is a yellow line. Within the line, notice that your user name displays in the attn field and the reason for sending the work order to you displays in the note field.

Put On Hold and Remove From Hold

You may need to place a work order on hold for various reasons. When you hold a work order, the work order will not affect any due dates that you have in place. Once you put a work order on hold, the order is moved from the Active Work Orders list and placed in the Held Orders list.

Holding a Work Order

1. Click the **Orders/Troubles** menu.

2. Within the **Navigation** pane, click **Orders** and then **All Active Orders**.

3. A list of the open orders populates. If you have a large number of active work orders, the list may not populate. To populate the list, do one of the following:

- Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. Once the list opens, double-click the order number. A work order window opens.

6. Within the **Order Actions** ribbon group, click the **Put On Hold** button.

7. A message box displays allowing you to enter a reason why the work order is going on hold. Type the reason and click the **OK** button. The work order window closes.

8. To view a list of work orders currently on hold, click **Orders** and then **Held Orders.**

Viewing a Held Order

1. Click the **Orders/Troubles** menu.

2. Within the **Navigation** pane, click **Orders** and then **Held Orders**.

3. Depending on the number of orders assigned to you, the list may not populate right away. To populate the list, do one of the following:

- Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. The Held Orders list populates with a list of work orders on hold.

6. To access the work order, double-click the order number. The Work Order window opens.

7. Directly below the ribbon is a yellow line, within the line, notice that the status has changed to OnHold with the reason the work order is on hold. Once you remove the work order from hold, the status changes to Open.

Releasing a Held Work Order

1. Click the **Orders/Troubles** menu.

2. Within the **Navigation** pane, click **Orders** and then **Held Orders**.

3. A list of the open orders populates. If you have a large number of active work orders, the list may not populate. To populate the list, do one of the following:

- Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. Once the list opens, double-click the order number. A work order window opens.

6. Within the **Order Actions** ribbon group, click the **Remove From Hold** button.

7. A message box displays to allow you to enter a reason for removing the hold, entering a reason is optional. Type the reason and click the **OK** button.

8. The work order opens to the work center that was open when the order was held.

9. Within the **Actions** ribbon group, click the **Save** (save and stay) button to continue working with the order or click the **Save & Close** (save and exit) button to return to the Work Order list.

Cancel Order

You can cancel a work order at any time during the work flow. However, if you have components associated to the work order, they remain in your database. In order to change or remove the configured components you must access them through each menu item.

Cancelling a Work Order

1. Click the **Orders/Troubles** menu.

2. Within the **Navigation** pane, click **Orders** and then **All Active Orders**.

3. A list of the open orders populates. If you have a large number of active work orders, the list may not populate. To populate the list, do one of the following:

   • Within the search box, type any portion of the record and then click the magnifying glass.

   4. Click the **Show All** button.

5. Once the list opens, double-click the order number. A work order window opens.

6. Within the **Order Actions** ribbon group, click the **Cancel Order** button.

7. If you have configured components for the work order, a message box displays informing you that cancelling the work order will not change the status of the configured components. Even if you cancel the work order, the configured components remain in your database.

8. Within the box, click **Yes** to continue cancelling the work order or **No** to return to the work order, remove/delete the configured component, and then cancel the work order.

9. Once you click **Yes**, a text box displays allowing you to enter in a reason for cancelling. Type the reason and click the **OK** button.

10. To view the cancelled work order, click Orders then **Order History**.

Optional Work Centers

When your administrator creates your workflows, they can designate certain work centers as optional for that workflow. With the Optional Work Centers button, you can add work centers into the work flow.

Viewing/Adding an Optional Work Centers

1. Click the **Orders/Troubles** menu.

2. Within the **Navigation** pane, click **Orders** and then **All Active Orders**.

3. A list of the open orders populates. If you have a large number of active work orders, the list may not populate. To populate the list, do one of the following:

  - Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. Once the list opens, double-click the order number. A work order window opens.

6. Within the **Order Actions** ribbon group, click the **Optional Work Centers** button.

7. A box opens with a list of all the optional work centers.

8. Within the box, click on the selector box next to each work center that you want add into the work order.
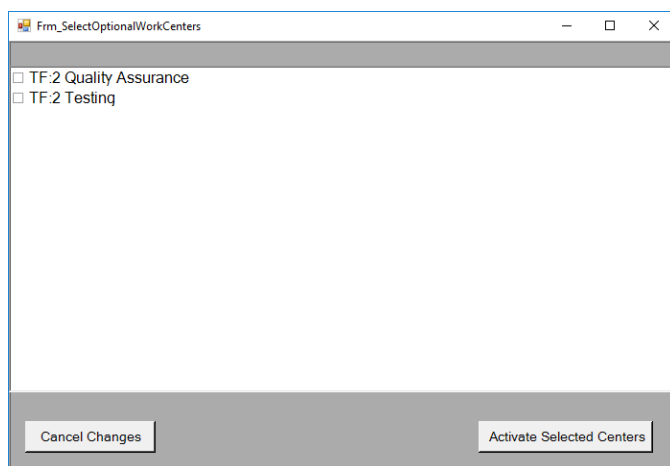
9. Once they are selected, click on the Activate Selected Centers button in the lower right-hand corner of the box. Alternatively, click on the Cancel Changes button to not add any optional work centers into the work flow.

10. The work centers are added, you can view them within the Work Flow pane.

11. Within the **Actions** ribbon group, click the **Save** (save and stay) button to continue working with the order or click the **Save & Close** (save and exit) button to return to the Work Order list.

Removing a Work Center

You can remove any work center from a work order. This allows your site to create one work order for all actions that you can perform within your database. For example, you can create one work flow that can be used to add, move, change, and delete a set device. With the ability to remove a work center from a work flow, you can manipulate the work flow as it progresses from start to finish.

1. Click the **Orders/Troubles** menu.

2. Within the **Navigation** pane, click **Orders** and then **All Active Orders**.

3. A list of the open orders populates. If you have a large number of active work orders, the list may not populate. To populate the list, do one of the following:

- Within the search box, type any portion of the record and then click the magnifying glass.
- Click the **Show All** button.

4. Once the list opens, double-click the order number.

5. Within the Work Flow pane, right click the work center to remove from the work flow, a pop-up opens, within the pop-up, click the Remove Work Center selection.

6. A message box opens verifying that you really want to remove the work center from the work flow. Click **Yes** to continue or **No** to cancel the operation.

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

Switching a WO to a TT

You can switch a work order to a trouble ticket by clicking the **Switch Ticket Type** button, this does not change the work flow it simply moves the order from the work order section to the trouble ticket section. There is a button in Trouble Tickets that allows you to move the order back into work orders.

1. Click the **Orders/Troubles** menu.

2. Within the **Navigation** pane, click **Orders** and then All Active Orders.

3. A list of the open orders populates. If you have a large number of active work orders, the list may not populate. To populate the list, do one of the following:

- Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. Once the list opens, double-click the order number. A work order window opens.

6. Within the **Order Actions** ribbon group, click the Switch Ticket Type button.

7. Once clicked the work order window closes and you are returned to the Orders list.

! Remember that this does not change the work order or work centers for the Order, it simply moves the order to the Troubles list. You still have to complete the requirements for the initial work flow selected.

8. To view the order just switched, click Troubles → All Active Troubles.

Custom Reporting

The Custom Reporting ribbon group allows you to print the work order information on a form designed by you. The form is created by your CAIRS administrators within System Admin → Custom Report Templates. When you click the Custom Report button, a

selection box opens allowing you to select the report template to print with the work order information.

Generating a Custom Report

1. Click the **Orders/Troubles** menu.

2. Within the **Navigation** pane, click **Orders** and then **All Active Orders**.

3. A list of the open orders populates. If you have a large number of active work orders, the list may not populate. To populate the list, do one of the following:

   - Within the search box, type any portion of the record and then click the magnifying glass.

     4. Click the **Show All** button.

5. Once the list opens, double-click the order number. A work order window opens.

6. Within the Reporting ribbon group, click the Custom Report button. The Select Report Template window opens, within the list find the template to use, click on the name to highlight.

7. Within the lower portion of the window, click the Generate Report button.

8. The report opens in the appropriate program allowing you to save, print or send.

Attach Ribbon Group

Before you can attach files to a work order, your CAIRS administrator must determine the allowable file types and size. Please contact your CAIRS administrator if you are unable to attach files.

There are two different types of files that you can attach to a record, the first button allows you to attach a regular file. These files follow the record and other users are able to see them. Although, this is convenient, if changes need to be made to the file, the file will have to be saved and then re-attached.

The second file attachment type allows you to attach a link to a file that is in a shared location. The benefit of this file attachment is that when changes are made to the file there is no need to reattach the file. The disadvantage is that all CAIRS users have to have access to the shared file location.

Since the process to add, modify, delete and view file attachments is the same throughout CAIRS, we have consolidated the process into one section on the manual. Please see Common Elements → File Attachments to learn more.

Viewing a Work Order

Within the Navigation pane, there are five different choices on how to view all work orders. You can view open, closed and/or cancelled work orders within your database. The five available options are:

- **My Work Center Orders** – provides a list of work orders currently assigned into a work center that you have permission to view and work orders that have sent to you by another user.

- **Orders Assigned to Me** – provides a list of work orders assigned to you by another user from a previous work center.

- **Order Created By Me –** provides a list of the work orders that you created.

- **Held Orders** – provides a list of work orders currently on hold.

- **All Active Orders** – provides a list of all open work orders

- **Order History** – provides a list of cancelled or completed work orders, pay close attention to the Current Status column to see if the work order was completed or cancelled.

Each of the above options displays some basic work order information, to view the complete details double click on any work order number.

Order History

Within Order History, you can view all work orders that have been completed or cancelled within your database. The list provides some basic work order information, it is important to pay close attention to the Status column, this will tell you whether the work order was completed or cancelled.

By double clicking on any work order, you can view the complete work order. This is read only information; however, you export the information or create a custom report.

Reopening

Often times, a work order may be closed before the work is completed. In this case, you can reopen the work order, instead of creating a new one. When you access the work order within History, the button used to create and complete the work center is now used to reopen the Work Order.

Reopening a Work Order

1. Click the **Orders/Troubles** menu.
2. Within the **Navigation** pane, click **Orders** and then **Order History**.
3. A list of closed or cancelled work orders populates. If you have a large number of work orders, the list may not populate. To populate the list, do one of the following:

- Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. Find the order within the list and double-click it to open the work order details window.

6. Within the **Work Order Info** pane, click the **Reopen Work Order** button to change the order status to **Active**.

7. The order opens to the last Work Center and Time Frame.

8. You can send the Work Order to a previous work center and time frame by using the Send Back button within the Order Actions ribbon group.

9. Click the **Save** button, to save and stay or the **Save & Close** button to return to the Orders list.

10. The Work Order now displays within the **All Active Orders** list.

Trouble Tickets

The Trouble Ticket process is the same as the work order process. Each Trouble Ticket contains a work flow with work centers, time frames and data components.

Through this menu option, users can track Trouble Tickets in several different ways and view the history of completed or cancelled Trouble Tickets.

The approach to the troubles system is slightly different from the approach used in CAIRS 32. In CAIRS, we use Work Flows; this is the process the Trouble Ticket goes through from start to finish. Each Work Flow contains two parts, the work centers, and time frames.

A work center is much like an in-box/basket in that it holds a set of data components you need to complete before the Trouble Ticket can be sent to the next work center and time frame. Examples of work centers are: Directory, Inside Plant, Outside Plant, QA, etc.

Each work center is assigned into a time frame; a time frame allows the work flow to progress sequentially. This means the work from one work center needs to be complete before the Trouble Ticket can continue within the work flow. If two work centers, are in the same time frame they can be worked on concurrently. Once this Trouble Ticket enters the time frame, both work centers can access and complete their work at the same time (with respect to open record management).

! Open Record Management is important in the Trouble Ticket process. When one person is accessing the Trouble Ticket, they own it, meaning, if another person tries to open and make changes to the ticket, CAIRS will notify them that the Trouble Ticket is currently opened by another user (the user name is displayed) and that if any changes are made they might not be saved to the record.
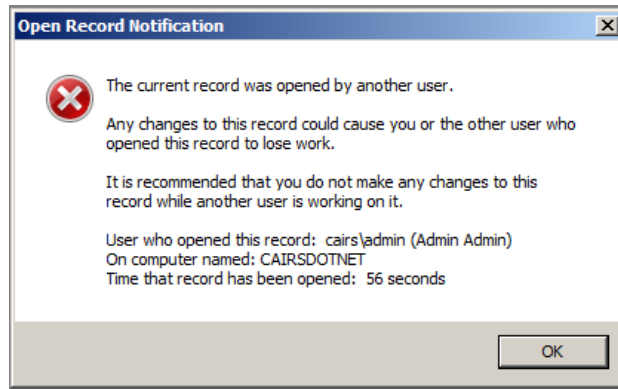
In the following example, the trouble issuer and directory information are assigned into Time Frame 1, Inside and Outside Plant are assigned into Time Frame 2, and so on.
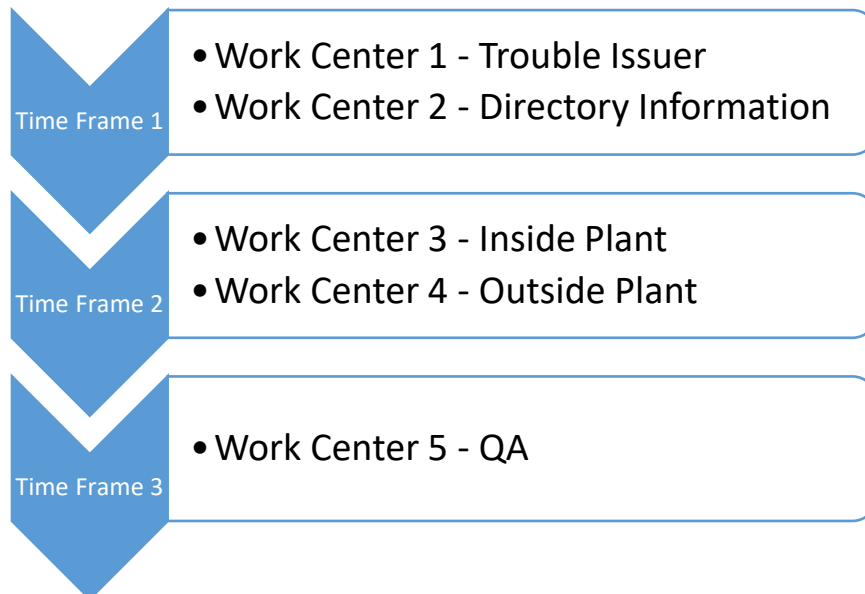
Assigned to each work center are one or more data components. A data component is the information you are working on for this Trouble Ticket. There are eight different data components:

- **Subscribers**

- **Authorization Code**

- **Circuit**

- **Account**
- **General Task**
- **Cell Phone**
- **Set Device**
- **Set Device (EWSD)**

When a data component is added to a work center, the required fields for the component must be completed before the work order can be sent to the next work center.

Menu Options

The following menu options are available within Troubles:

- **Troubles** – allows you to view, create, and modify Trouble Tickets within the database.

    - **My Work Center Troubles** – provides a list of Trouble Tickets currently assigned into a work center you have privileges to access.

    11. **Troubles Assigned to Me** - provides a list of Trouble Tickets assigned or sent to you by another user.

    - **Troubles Created By Me** – provides a list of the Trouble Tickets that you created.

    12. **Held Troubles** – provides a list of Trouble Tickets currently on hold.

    - **All Active Troubles** – provides a list of all open Trouble Tickets within your system.

    13. **Trouble History** – provides a list of Trouble Tickets cancelled or completed within your system.

Work Order Categories

Before you can create any Trouble Tickets, you need to create your categories. A category allows troubles to be separated based on a variety of user-defined characteristics. The categories that you create within Orders also display within this list and vice-versa. This allows you to use the same categories for orders and Trouble Tickets. See Orders →Work Order Categories to learn how to add, modify, and delete a category.

Trouble Ticket Views

Within the Views pane, you can sort your trouble ticket list based on certain characteristics. For example, you can view all the active troubles relating to a site. The default or simple list displays all tickets starting with the most recently created ticket first. The following views are available:

- Simple List
- Building Name

- Show Items with Circuit Names
- Show Items with Phone Numbers
- Work Flow Custom Fields
- Notes
- Equipment & Services
- Work Center Name
- Status
- Site

- Switch Name
- Subscriber Last Name
- Organization Name
- Contact Name
- Contact Phone
- TCO Group
- Resource Mgr
- Custom Summary

When you click the option circle next to a selection, the list changes to group your tickets based on the common characteristic. For example, if you select Building, all tickets associated to building 1 are grouped together; building 2 are together and so on. For each group, you can click the plus sign next to the group name to view the tickets within the grouping.

Understanding the Trouble Ticket Details Screen

The Trouble Ticket – [New Trouble Ticket] window has several panes. The ribbon at the top of the window allows you to perform actions on the ticket: choose data components, generate reports, etc. The panes below the ribbon, allow you to create and manage the ticket.

Ribbon Groups

Each ribbon group allows you to perform certain functions within the trouble (Example: Attach a file; Reject the trouble, etc.).

Actions

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

- **Save & Close** – click this button to save the completed information and return to the Order/Troubles list.
- **Delete** – click this button to delete the Trouble Ticket. This differs from cancel in that there will not be a record of this Trouble Ticket within your database.
- **Save** – click this button to save the information you have completed and remain within the Trouble Ticket.
- **Refresh** – click on this button to add newly saved information to the work order window.

Show

There are two views within the Trouble Ticket details screen, **Trouble** and **Trouble Log.** The Trouble view is the default view and displays the detailed ticket information, work centers, and configured components.

The alternate view, **Order Log,** displays a list of actions for this Trouble Ticket. The Trouble Log view displays the Activity Log which includes two information panes; the top pane contains the activity date, work center name, ticket status, work center status and activity note. When you highlight any action within the top pane, the lower pane displays the detailed information for the completed action.

The Contact Info button displays the related contact details for the Subscriber or TCO that you selected in the Adjustable Fields pane.

The Packages button allows you to view the sub-tickets related to the main ticket. If this trouble ticket was submitted via the Subscriber Portal, you can view the package details here. History provides the user with a timeline of the actions taken on the ticket. The main window provides a basic list of the actions and by double-clicking the action; a pop-up opens with a detailed action description.

Launch

The Launch ribbon group allows you to perform action relating to trouble ticket packages submitted through Subscriber Portal.

Portal

The Portal ribbon group allows you to accept packages or Trouble Tickets submitted through Subscriber Portal.

Data Components

Each of the data components allows you to add or modify a particular item in the database. The available components differ depending on the type of Trouble Ticket, work center needs, and user privileges. The following data components are available:

- **Subscriber** – allows you to add, delete, and modify a database subscriber.
- **Authorization Code** – allows you to add, delete, and modify authorization codes.
- **Circuit** – allows you to add, delete, and modify a main circuit and circuit segments.
- **Land Radio –** allows you to add, modify and delete in your wireless communication devices such as walkie-talkie
- **Account** – allows you to associate accounting/billing information to a set device, circuit, or subscriber.
- **General Task** – allows you to manage work order and/or trouble tickets tasks.
- **Cell Phone** – allows you to add, delete, and modify cell phones.
- **Set Device** – allows you to add, delete, and modify an analog, digital, and IP set into the database.

- **AS5300 Sets -** allows you to add, delete, and modify sets associated to your AS5300
- **Cisco Sets –** allows you to add, delete and modify sets associated to your Cisco switches
- **Set Device (EWSD)** – allows those with an EWSD Switch to add, delete, and modify sets.

Each Data Component button is segmented (depending on your screen size the button may not be segmented but may only contain a drop-down arrow), when you click the lower portion of the button, a drop-down list displays. For each component there is a search option, this allows you to search for an existing component to associate to the ticket. The Set Device button has two search options:

- **Search for Existing Primary Devices** – displays a list of the primary button information for all set devices
- **Search Existing Devices** – displays a list of all telephone numbers associated to a set device and their button number

Often times you may need to remove a configured component from a work order without having to delete the entire ticket. From the drop-down menu for each data component there is a drop option. This option allows you to drop any configured component from the ticket.

Order Actions

There are several Trouble Ticket actions available within this ribbon group:

- **Send To** – allows you to send a Trouble Ticket onto a specific person within the next work center.
- **Send Back** – allows you to send the Trouble Ticket back to a specific person within a previous work center.
- **Assign To** – allows you to assign the Trouble Ticket to a specific person within the current work center.
- **Cancel Order** – allows you to cancel the Trouble Ticket at any point.
- **Put on Hold** – allows you to place a Trouble Ticket on hold. Placing a Trouble Ticket on hold allows you to reserve items within the database without having to commit the information. Once you place a hold on a Trouble Ticket, the button name changes to 'Remove from Hold' allowing you to remove the hold and continue processing the order.
- **Optional Work Centers** – if the administrator has selected some work centers as optional for the Trouble Ticket, you can click the field to access a drop-down list of the optional work centers.
- **Switch Ticket Type** - allows you to switch the Trouble Ticket to a work order with an open status. This does not change the work flow; it simply moves the ticket to the Orders list.

Reporting

Custom reports allow you to print out ticket information on a form designed by your CAIRS administrator. Your administrator creates cells in a form and associates them to certain fields within the ticket. When you choose the report, the fields from the ticket populate the cells to create a complete printable form.

Attach

Attach a file to any Trouble Ticket within this ribbon group. Your CAIRS administrator pre-defines eligible file types.

Trouble Ticket Panes

There are several panes below the ribbon; each pane contains specific information for the Trouble Ticket. Within these panes, you work through the entire Trouble Ticket work flow. The seven panes of information are (for a detailed description of the pane see the appropriate section below):

- **Basic Information**
- **Adjustable Fields**
- **Other Fields**
- **Portal Work Order Info**
- **Description**
- **Work Flow, Work Notes and Equipment and Services**
- **Components**

After you create a Trouble Ticket, CAIRS adds a solid yellow line directly below the ribbon, containing the ticket status, the active work center name, the name of the person that the previous user sent the work order to, and any additional notes.

Basic Information and Adjustable Fields Pane

When you first enter the Trouble Ticket – [New Trouble Ticket] window, the Basic Information pane contains the only available fields. Once you select the work flow the remainder of the pane becomes available plus the Adjustable and Other Fields panes. Within the Basic Information pane, you can create a Trouble Ticket number (or have one auto-generated), an alternate number and due date.

The Adjustable Fields pane allows you to enter in the ticket location and contact information. This pane includes site name, building name, contact name, contact number, etc.

The Adjustable Fields pane can be customized. You can hide, repositions, and rename fields. If you right click on the pane a menu box will open allowing you to perform the following options:

- **Rename field everywhere**

- **Rename field in view**
- **Mask on field everywhere**
- **Mask on field in view**
- **Change field required everywhere**
- **Change field required in view**
- **Update Dropdown**
- **Copy**
- **Customize**
- **Remove this Column**
- **Reset Column Visibility**

To reposition a field, simple click on the left-hand side of the field, continue to hold the button down and drag and drop the field to the proper location. To learn more about customizing, see Getting Started → Customizing your CAIRS.

The Other Fields pane displays information regarding the ticket's status. Each time the status of the ticket changes the information within this pane updates.

After completing the required fields within these three panes, the Create New Trouble button becomes available. Once clicked, the work flow displays within the Work Flow pane. Throughout your Trouble Ticket's process, the button label changes to reflect the specific action you are completing. For example, when the information is complete in a work center or you are ready to close the ticket, the button label reads 'Complete Work Center.'

The Portal Work Order Info pane displays the information entered by the subscriber when they created the ticket on the Subscriber Portal website. The information that is populated here will also be visible in the Adjustable Fields pane in the Portal Request field.

The Description pane allows the user to enter in a complete ticket description and remains available as the ticket moves through the workflow. The information that is populated here will also be visible in the Adjustable Fields pane in the Description field.

The Portal Request and the Description field can be restricted to read only access based on profile. When you right click on the Adjustable Fields pane, the customization menu pops up, scroll down and click on Customize. In the Customize Display popup, select the profile that you are customizing, within the Column Properties pane click the Read Only column to insert a checkmark. You can select multiple profiles within the 'Profiles to Update' pane. Once saved the selected profiles will only be able to read the fields. To learn more about Customizing, please see "Getting Started".

Work Flow Pane

At the bottom of the pane are two tabs: Work Flow and Equipment and Services. The Work Flow tab allows you to view the complete work flow. The Equipment and Services tab allows you to view, add, and delete equipment and/or services related to the trouble ticket.

Once you create a Trouble Ticket, the complete work flow display within the Work Flow/Equipment and Services pane (if the work flow is not visible click the Work Flow tab located in the lower portion of the pane). The work flow starts at the top of the pane and flows to the bottom. Each time frame is indicated with a solid blue line that displays the time frame number. Each work center within the time frame is contained within a box with the work center name in the pink line at the top of the box. A green arrow displays to the left of the active work center. Within each work center are the available data components, in the example below the Subscriber component is the only one available with the Directory Work Center.
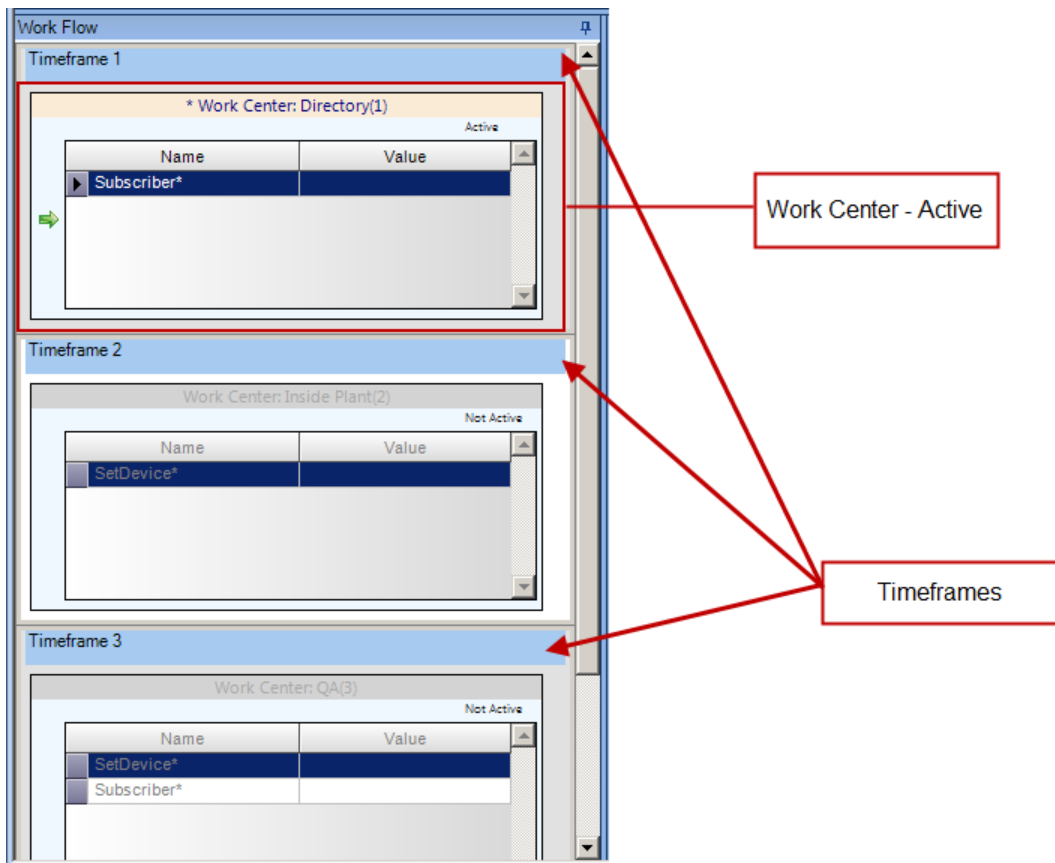
Note that there are two additional work centers within the above work flow: Inside Plant and QA. Once you complete the required fields within the Directory work center, the Trouble Ticket can be sent to the next time frame and work center. Once sent, the Directory work center turns to Not Active and the Inside Plant work center becomes active. You continue the same process until the Trouble Ticket reaches the final timeframe where you can complete and close the ticket.

The Equipment and Services tab allows you to view all equipment and/or services related to the trouble ticket. In addition, you can add or delete equipment or services related to the Trouble Ticket. If there are any charges related to the equipment or service, the account number located in the Adjustable Fields pane incurs all charges.

Configured Components Pane

Once all the required fields within a data component are complete and saved, a tab for the component displays in the lower right-hand pane. Each component type displays as a new tab. In the example below, there are two components for the Trouble Ticket, Set Devices and Subscribers. Within the Set Device tab, notice that there are two column; this indicates that the ticket is fixing two different set devices. Each new component of the same type displays as a new column within the tab.
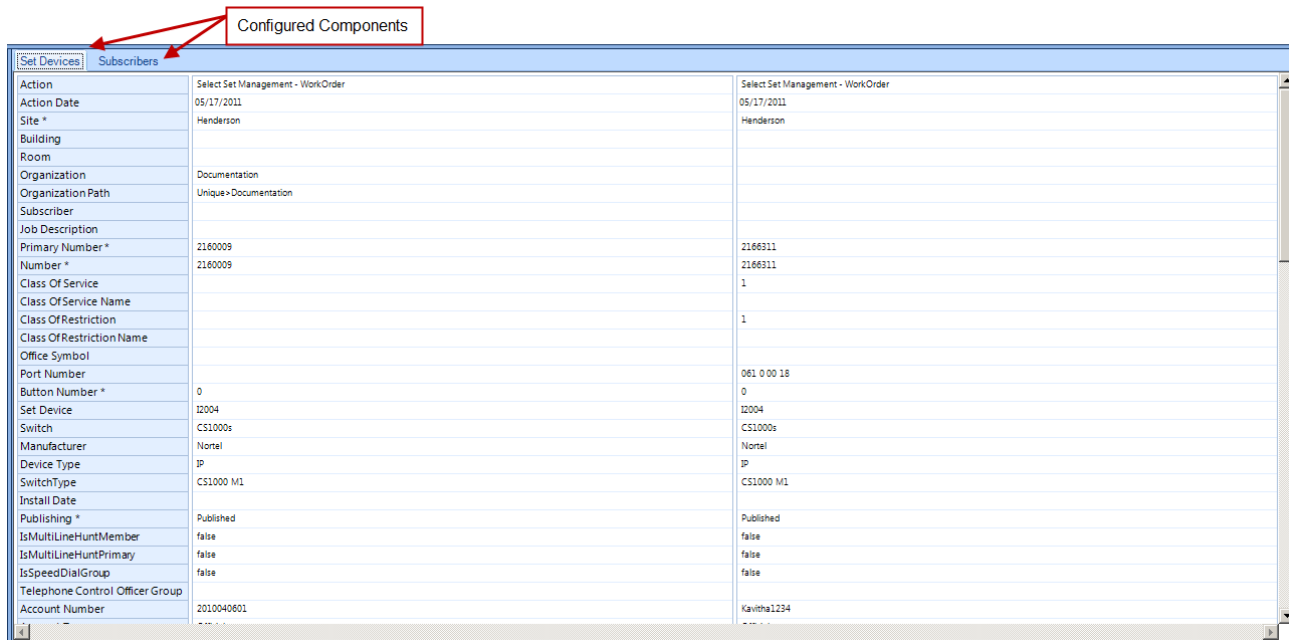
To view the information for a component, click the tab and use the scroll bar to view the details. If your permissions allow, you can modify the information. To do so, double-click any field within the pane and/or column. The component screen opens allowing you to change the appropriate information. However, if the Trouble Ticket is in a work center that does not have access to the data component the information is read-only.

A Trouble Ticket – Start to Finish

Creating and Completing a Trouble Ticket

The first step is to create a new work order. The work flow changes depending on the type of ticket you are creating, however, the fields within the Adjustable Fields pane are consistent with every Trouble Ticket.

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** and then **All Active Troubles**.

3. There are two ways to create a new Trouble Ticket:

   - Within the tool bar directly above the **Navigation** pane, click the drop-down arrow next to **New**. From the list, select **Trouble Ticket**.

4. Within the **Actions** pane, click the **Create New Trouble** link.

The Trouble Ticket – [New Trouble Ticket] window opens allowing you to generate a new ticket.

5. In the **Basic Information** pane, click the **Work Flow** drop-down arrow to access a list of the workflows created within your database. From the list, select the workflow.

6. After selecting the workflow, the Order Number and the Due Date field become available. Depending on how your administrator has designed your work flow, the fields may auto-populate. However, if the fields are blank, complete the following fields:

    - **Trouble Number** – type an alphanumeric order number.

7. **Alt Order Number** – type an alphanumeric alternate order number.

    - **Due Date** – type the date the order is to be complete by, during the order process you can make changes to the due date.

    Notice that once you select the work flow, the data components associated to the work centers become available. This allows you to select the component(s) associated to the Trouble Ticket before you create the ticket.

8. To attach an existing component, within the **Data Components** ribbon group, click the lower portion of the component button to access a menu, from the menu, select the **Search** option.

! The Set Device button has two search options: **Search for Existing Primary Devices** - displays a list of the primary button information for all set devices and **Search Existing Devices** - displays a list of all telephone numbers associated to a set device and their button number.

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9. The Component Search pop-up opens. There are two ways to populate the information within the list:

    - Within the search box, type the name, number, or portion of the name or number and then click the magnifying glass.

10. Click the **Show All** button.

11. When you have located the component, double-click the row. A message box displays verifying that you have added the component to the ticket and asks if you want to add another. To add another component, click **Yes** within the box and repeat the process. To add only one component and return to the Trouble Ticket, click **No**.

After you click No, and after adding one or more components, the search window closes and you are back at the Trouble Ticket.

Within the lower right-hand corner, the associated components populate within the tabs. Each different component displays as a new tab. If you add more than one component of the same type, each component displays as a separate column within the tab.

When you select a component the site, building, switch name, and organization name populate with the information from the first component selected.

In addition, the Adjustable Fields, Other Fields, Portal Request, and Description panes become available.

12. Within the **Adjustable Fields** pane, complete the following information, if you have associated a component some fields may already be populated, you can change the information (required fields are marked with an asterisk (*):

- **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. Each site level is separated by a >.

13. **Building**– click the drop-down arrow to access a list and from the list, select the building name. This is the physical location of where to install, move, or modify the component.

- **Switch Name** – click the drop-down arrow to access a list and from the list select the switch name the new component(s) will be assigned to.

14. **Organization Name** – click the drop-down arrow to access a list from the list, select the name of the organization. The organization drop-down list displays the bottom-most organization first. After the ~~the complete path to the selected organization displays. Each level of the organizational tree is separated by a >. Once you select an organization, the complete path populates within the field.

- **Subscriber Name** – click the drop-down arrow to access a list and from the list, select the name of the subscriber associated with the new component(s).

15. **Account Number** – click the drop-down arrow to access a list and from the list select the account number for the trouble ticket. Any charges related equipment and services for the ticket are charged to this account number.

- **Contact Name** – type the name of the contact for this ticket.

16. **Contact Phone** – type the telephone number for the contact for this ticket.

- **TCO** – click the drop-down arrow to access a list of the TCO Groups within your database, from the list select the group to associate to the work order. This field must be populated if you want your subscribers to see the TCO when viewing the work order through the Subscriber Portal.

17. **Description** - if your profile permissions allow you can type in a description for the trouble ticket here or in the Description pane. This field may remain active and editable throughout the ticket process.

- **Portal Request** - if the trouble ticket was requested via the portal, this is the description the user entered. This field appears here as well as in its own pane because you can restrict editing based on profile.

The Portal Request pane displays the information entered by the subscriber when they created the work order on the Subscriber Portal website.

The Description pane allows the user to enter in a complete work order description and remains available as the Work Order moves through the workflow.

The Portal Request and the Description field can be restricted to read only access based on profile. When you right click on the Adjustable Fields pane, the customization menu pops up, scroll down and click on Customize. In the Customize Display popup, select the profile that you are customizing, within the Column Properties pane click the Read Only column to insert a checkmark. You can select multiple profiles within the 'Profiles to Update' pane. Once saved the selected profiles will only be able to read the fields. To learn more about Customizing, please see "Getting Started".

- **Work order Category** – click the drop-down arrow to access a list, from the list select the ticket category. After the creation of the trouble ticket, you can modify the category, if necessary.

18. The Other Fields pane is read-only. This pane displays information regarding the status of the ticket; the following information is displayed:

- **User Name/Created By** – this field remains blank until you generate the ticket at which time the field populates with your user name. Once you generate the ticket, this field name changes to **Created By**. When anybody views the ticket within your system, their user name displays in this field.

19. **Open Date** – auto-populates with the current date. When viewing the ticket, this field displays the open date.

- **Close Date** – remains blank until a user closes the ticket at which time this field populates with the ticket's close or cancel date.

20. **Current Status***– auto-populates to Open. When viewing the ticket, this field displays the ticket status. You may see one of the following statuses:

- Open

21. Closed

- On Hold

22. Reviewed

- Cancelled

23. Complete

- Not Active

24. Pending Sent Back

- **Current Time Frame*** – displays the time frame number the ticket is currently in.

25. **User Name** – this field remains blank until you generate the ticket at which time the field populates with your user name. Once you generate the ticket, this field name changes to Last Opened By. When anybody views the ticket within your system, their user name displays in this field.

- **Last Activity Date** – this field remains blank until you generate the ticket, at which time the field populates with the current date and time. Once you generate the ticket, this field name changes to Last Opened. When the ticket is viewed or any changes are made, this field displays the date and time those actions were saved.

26. **Hold Date** – this field remains blank until you place the ticket on hold, if applicable. Once you place the ticket on hold, the date the hold is placed on the order displays in this box.

The Portal Request pane populates with information submitted via the Subscriber Portal.

27. Click the **Description** field to type a description. Within this field be as descriptive as possible as all users with access to the ticket can view this field. You can access the field any time during the ticket process.

28. Once the required information is complete within the upper pane, click the **Create New Ticket** button.

The Trouble Ticket is created and the workflow, order number and due date are grayed out. The open date, last opened by and last opened fields are completed with the appropriate information.

! At this point, the rest of the process greatly depends on your access rights. You may or may not be able to complete a work center or data component. If you have access rights, the work center and associated data component become available.

The Work Flow pane displays the work centers, time frames and data components associated with the work flow.

29. If you have not already associated a data component you have two options to associate a Data Component:

- To add a new component, click the button to access a drop-down list and from the list select **Add**.

30. To modify an existing component, click the button to access a drop-down list and from the list, select **Search**. The Component Search pop-up opens. There are two ways to populate the information within the list:

- Within the search box, type the name, number, or portion of the name or number and then click the magnifying glass.

31. Click the **Show All** button.

When you have located the component, click the row to highlight. Within the upper right-hand corner of the **Component Search** pop-up, click the red **X** to close.

! The Set Device has two search options. The Search for Existing Primary Devices displays a list of the primary button information for all set devices. The Search Existing

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Device displays a list of all telephone numbers associated to a set device and their button number. These options are helpful when you are working a Trouble Ticket because you can access the information relating to a specific button on a set.

32. With either search or add the General component window opens. Complete the required fields (fields marked with an asterisk **(*)** for the data component. Within the **Actions** ribbon group, click **Save & Close** to return to the ticket.

Back at the ticket screen, the complete data component displays in the lower right-hand pane. Every time you complete a new component, a new tab displays behind the first with the name of the component, if you add two of the same data component types, a new column displays within the tab. For example, if you are adding two set devices, there will be two columns within the Set Device tab.

33. Once you have completed your work within the work center and you are ready to send the order on, click the **Complete Work Center** button within the **Trouble Ticket Info** pane.

The work order moves to the next center. Notice that a complete checkbox now displays directly above completed work centers.
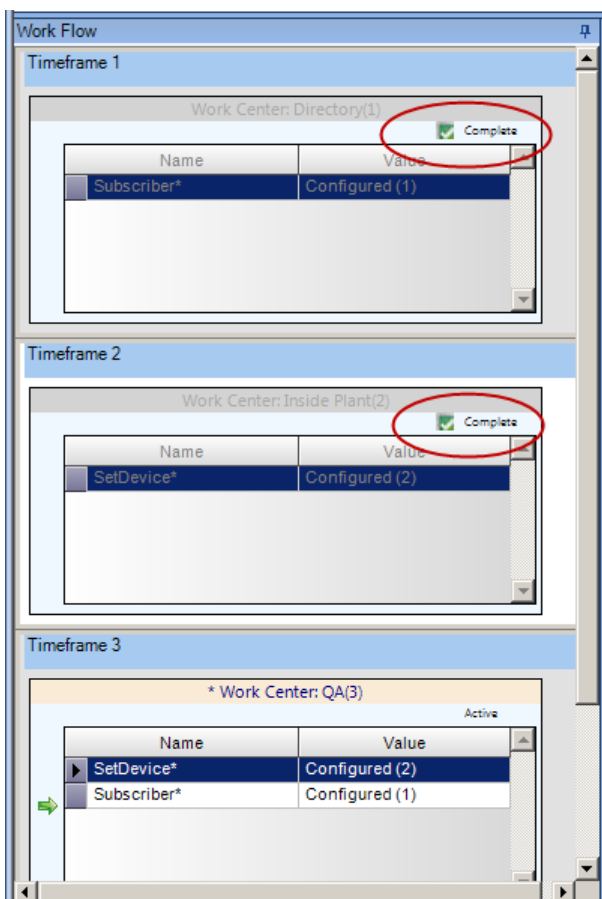
Once the ticket has moved through all the centers, the last work center can close the order.

34. To close the order click the **Complete Work Center** button, a message box opens that asks, 'That was the last work center, do you want to close this Trouble Ticket too?' Click **Yes** to continue or **No** to cancel.

The Trouble Ticket window closes and you are returned to the Troubles list.

Adding an Existing Component

If you haven't already associated a component or need to associate additional components, follow these steps.

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** and then **All Active Troubles**.

3. There are two ways to create a new Trouble Ticket:

   • Within the tool bar directly above the **Navigation** pane, click the drop-down arrow next to **New**. From the list, select **Trouble Ticket**.

4. Within the **Actions** pane, click the **Create New Trouble** link.

5. The Trouble Ticket – [New Trouble Ticket] window opens allowing you to generate a new ticket.

6. In the **Basic Information** pane, click the **Work Flow** drop-down arrow to access a list of the workflows created within your database. From the list, select the workflow.

! Once the information within the Basic Information pane is completed and you create the ticket, the pane name change to Trouble Ticket Info.

7. After selecting the workflow, the Order Number and the Due Date field become available. Depending on how your administrator has designed your work flow, the fields may auto-populate. However, if the fields are blank, complete the following fields:

   • **Trouble Number** – type an alphanumeric order number.

8. **Alt Order Number** – type an alphanumeric alternate order number.

   • **Due Date** – type the date the order is to be complete by, during the order process you can make changes to the due date.

9. Notice that once you select the work flow, the data components associated to the work centers become available. This allows you to select the component(s) associated to the Trouble Ticket before you create the ticket.

10. To attach an existing component, within the **Data Components** ribbon group, click the drop-down arrow associate to the appropriate component to access a menu. From the menu, select the **Search** option.

! The Set Device button has two search options: <u>Search for Existing Primary Devices</u> - displays a list of the primary button information for all set devices and <u>Search Existing</u>

Devices - displays a list of all telephone numbers associated to a set device and their button number.

11. The Component Search pop-up opens. There are two ways to populate the information within the list:

    - Within the search box, type the name, number, or portion of the name or number and then click the magnifying glass.

    12. Click the **Show All** button.

13. When you have located the component, double-click the row. A message box displays verifying that you have added the component to the ticket and asks if you want to add another. To add another component, click **Yes** within the box. To add only one component and return to the Trouble Ticket, click **No**.

14. After you click No and after adding one or more components, the search window closes and you are back at the Trouble Ticket.

15. Within the lower right-hand corner, the associated components populate within the tabs. Each different component displays as a new tab. If you add more than one component of the same type, each component displays as a separate column within the tab.

16. After the component is associated, the site, building, switch name and account number fields automatically populate within the Adjustable Fields pane.

17. You can modify those fields if necessary by clicking the field and typing or selecting the new information.

18. Once all required fields are populated, click the Create New Ticket button within the Basic Information pane.

19. The ticket is created and the workflow, ticket number and due date are grayed out. The open date, last opened by and last opened fields are completed with the appropriate information.

20. You can continue to work on the trouble ticket if your permissions allow.

Associating Equipment and/or Services to a Trouble Ticket

At times, there is a need to associate equipment or a service directly to a ticket. When you create the Trouble Ticket, you must complete the **Account Number** field within the **Adjustable Fields** pane. This is the account number CAIRS uses to bill the charges accumulated with the ticket. At any time during the Trouble Ticket process, you can add an account number to the ticket by clicking on the drop-down arrow in the account number field within the Adjustable Fields pane.

Since adding, modifying, deleting and viewing equipment and services is the same throughout CAIRS, we have consolidated the process into one section on the manual. Please see Common Elements – Equipment & Services to learn how to more.

Trouble Ticket Notes

Before you started adding notes it is a good idea to add some note categories. These categories help to group the notes based on a common element. For example, Update Ticket, Remove Component, etc. To learn more about adding note categories, please see Common Elements → Managing Note Categories.

Since the process to adding, modifying, deleting and viewing notes is the same throughout CAIRS, we have consolidated the process into one section on the manual. Please see Common Elements → Notes to learn more.

Show Ribbon Group

Within the Show ribbon group, the Trouble and Trouble Log buttons allow you to manipulate how you view the Trouble Ticket information. As well as viewing the history of actions performed on the ticket.

Trouble Log

The log provides you with a location to view the activity that occurred on the ticket. It provides such information as the action, user name, status, etc.

Viewing a Trouble Ticket's Activity

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click the **All Active Troubles** sub-menu.

3. The list of open Trouble Tickets populates. If you have a large number of active tickets, the list may not populate. To populate the list, do one of the following:

   - Within the search box, type any portion of the record and then click the magnifying glass.

   4. Click the **Show All** button.

5. Within the list, double-click the order to access.

6. Within the **Show** ribbon group, click the **Order Log** button. The log shows every action completed on the ticket.

7. Within the Order Log, the following information is displayed:

   - **Activity Note**
   - **Activity Date***
   - **Component Name**

   - **User Name**
   - **Order Status***
   - **Work Center Status**

8. To return to the ticket, within the **Show** ribbon group, click the **Order** button.

Packages

Trouble Tickets submitted through Subscriber Portal work a little differently than the standard ticket. Each type of trouble ticket your administrator(s) allows subscribers to request, combine to form a configuration package. Each configuration package includes the following information:

- **Work Order Type** – indicates whether the package is for a set device, circuit, cell phone, authorization code or general task

- **Work Order Action** – indicates what type of action the subscriber is requesting either add, modify, or delete

- **Work Flow Name** – indicates the associated work flow within CAIRS

- **Approval Requirements** – indicates if the request requires approval from a TCO and/or Resource Manager

- **Sites and/or Organizations** – indicates what site and/or organization can submit the request.

- **Related Equipment and/or Services** – indicates the necessary equipment and/or services related to the request and the associated cost.

Once a subscriber has submitted the request and the request is approved the information is sent to the work order system and into the first work center. You will notice that the Portal Request pane and the Portal ribbon group become available. The Portal Request pane displays the work request description that the subscriber entered into the website. The Packages button, within the Portal ribbon group, allows you to view the complete package details submitted by the subscriber. The fields are read-only.

Viewing Package Details

1. Click the **Orders/Troubles** menu.

2. Within the **Navigation** pane, click **Orders** and then **All Active Troubles**.

3. A list of the open tickets populates. If you have a large number of active trouble tickets, the list may not populate. To populate the list, do one of the following:

    - Within the search box, type any portion of the record and then click the magnifying glass.

    4. Click the **Show All** button.

5. Once the list opens, double-click the trouble number. A Trouble Ticket window opens.

6. Within the **Show** ribbon group, click the **Package** button.

7. The screen changes to display the Selected Configuration Packages. The two panes provide the complete package details as submitted by the subscriber.

8. The top pane displays the some basic package information. By clicking the plus (+) sign next, you can view the package details including the equipment and/or services, related to the package.

9. The Package Fields pane displays any additional notes the subscriber entered regarding the request.

10. To return to the work order screen, click the **Order** button within the **Show** ribbon group.

Trouble History

History provides the user with timeline of the actions that have occurred on the ticket. The main window provides a basic list of the actions, by double-clicking on the action; a pop-up opens with a detailed description of the action. Viewing history is the same throughout CAIRS, we have consolidated history into one section of the manual. Please see Common Elements → History to learn more.

Data Components Ribbon Group

When you enter a work center, there will be one or more data components (as assigned by your CAIRS administrator) ready for completion. Each of the data components allows you to manipulate a particular item within your database. The available components differ depending on the type of Trouble Ticket, work center needs, and user privileges. The following data components are available:

- **Subscriber** – allows you to add, delete, and modify a database subscriber.

- **Authorization Code** – allows you to add, delete, and modify authorization codes.

- **Circuit** – allows you to add, delete, and modify a main circuit and circuit segments.

- **Account** – allows you to associate accounting/billing information to a set device, circuit, or subscriber.

- **General Task** – allows you to manage work order and/or Trouble Tickets tasks.

- **Cell Phone** – allows you to add, delete, and modify cell phones.

- **Set Device** – allows you to add, delete, and modify an analog, digital, and IP set into the database.

- **Set Device (EWSD)** – allows those with an EWSD Switch to add, delete, and modify sets.

Each Data Component button is segmented (depending on your screen size the button may not be segmented but may only contain a drop-down arrow). When you click the lower portion of the button, a drop-down list displays. For each component there is a search option, this allows you to search for an existing component to associate to the work order. The Set Device button has two search options:

- **Search for Existing Primary Devices** – displays a list of the primary button information for all set devices

- **Search Existing Devices** – displays a list of all telephone numbers associated to a set device and their button number

When you click the components button, CAIRS opens the general screen for that component. Once the component is open, complete the necessary fields, required fields must be completed before the Trouble Ticket can move to the next work center. All configured components display within the Configured Components pane in the lower right-hand corner of the work order screen.

Adding a New Data Component

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** and then **All Active Troubles**.

3. A list of the open troubles populates. If you have a large number of active tickets, the list may not populate. To populate the list, do one of the following:

   - Within the search box, type any portion of the record and then click the magnifying glass.

   4. Click the **Show All** button.

5. Once the list opens, double-click the order number. A Trouble Ticket window opens.

6. Within the **Data Components** ribbon group, click an available button of the component to add to the ticket.

7. The General – Component window opens.

8. Complete the required fields, then within the **Actions** ribbon group, click **Save & Close** to return to the order.

9. Within the lower right-hand corner, the configured components populate with tabs. Each different component displays as a new tab. If you add more than one component of the same type, each component displays as a separate column within the tab.

10. If you are completing the work center (if all the required fields for the component are complete) and you are ready to send the ticket to the next center, click the **Complete Work Center** button, within the **Trouble Ticket Info** pane.

11. If you are still working within the work center, within the **Actions** ribbon group, click **Save** (to save and stay) or **Save & Close** (to save and exit).

Searching for Existing Data Components

Each Data Component button is segmented (depending on your screen size the button may not be segmented but may only contain a drop-down arrow). When you click the lower portion of the button, a drop-down list displays. For each component there is a search option, this allows you to search for an existing component to associate to the Trouble Ticket. The Set Device button has two search options:

- **Search for Existing Primary Devices** – displays a list of the primary button information for all set devices

- **Search Existing Devices** – displays a list of all telephone numbers associated to a set device and their button number

Complete the following to search for an existing component

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** and then **All Active Troubles**.

3. A list of the open troubles populates. If you have a large number of active tickets, the list may not populate. To populate the list, do one of the following:

   - Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. Once the list opens, double-click the order number. A Trouble Ticket window opens.

! Depending on the size of your window, each of the data component buttons may contain a drop-down arrow or segments. By clicking the arrow, a list displays. From the list, select Search.

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6. Within the **Data Components** ribbon group, click the arrow to access a drop-down menu. From the menu select the **Search** option.

7. The Component Search pop-up opens. There are two ways to populate the information within the list:

   - Within the search box, type the name, number, or portion of the name or number and then click the magnifying glass.

8. Click the **Show All** button.

9. When you have located the component, double-click the row. A message box displays verifying that you have added the component to the order and asks if you want to add another. To add another component, click **Yes** within the box. To add only one component and return to the ticket, click **No**.

10. After you click No, and after adding one or more components, the search window closes and you are back at the Trouble Ticket.

11. Within the lower right-hand corner, the configured components populate with tabs. Each different component displays as a new tab. If you add more than one component of the same type, each component displays as a separate column within the tab.

12. If you are completing the work center (if all the required fields for the component are complete) and you are ready to send the ticket to the next center, click the **Complete Work Center** button, within the **Trouble Ticket Info** pane.

13. If you are still working within the work center, within the **Actions** ribbon group, click **Save** (to save and stay) or **Save & Close** (to save and exit).

Dropping a Component

Often times you may need to remove a configured component from a Trouble Ticket without having to delete the entire trouble. From the drop-down menu for each data

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component there is a drop option. This option allows you to drop any configured component from the ticket. Keep in mind this only drops the information from the work order, so if you have saved the component, it remains within the database.

! It is important to remember that when you drop a component from a Trouble Ticket you are simply removing the association to the ticket. Since you have previously saved the information for the component, it remains within the database. If you truly want to remove the component from your database, you will need to delete the component.

1. Click **Orders/Troubles**.
2. Within the **Navigation** pane, click **Troubles** and then **All Active Troubles**.
3. A list of the open troubles populates. If you have a large number of active tickets, the list may not populate. To populate the list, do one of the following:
   - Within the search box, type any portion of the record and then click the magnifying glass.
   4. Click the **Show All** button.
5. Once the list opens, double-click the order number. A Trouble Ticket window opens.

! Depending on the size of your window, each of the data component buttons may contain a drop-down arrow or segments. By clicking the arrow, a list displays. From the list, select Search.

6. Within the **Data Components** ribbon group, click the arrow to access a drop-down menu. From the menu, select the **Drop** option.
7. A window with the configured components for the ticket opens. Within the list, highlight the component to remove from the ticket.
8. Within the upper right-hand corner of the window, click the **Drop Selected Component**. Be aware, there is no undo button; once you click the button, you completely remove the component from the ticket.

The component is removed and no longer displays in the lower right-hand pane of the ticket.

9. If you are completing the work center (if all the required fields for the component are complete) and you are ready to send the ticket to the next center, click the **Complete Work Center** button, within the **Trouble Ticket Info** pane.
10. If you are still working within the work center, within the **Actions** ribbon group, click **Save** (to save and stay) or **Save & Close** (to save and exit).

Order Actions Ribbon Group

Within the Order Actions ribbon group, you can perform several different actions to the ticket. For example, you can send a ticket to a particular person within the next work center.

Send To

The Send To action allows you to send a Trouble Ticket to a person who has access to the next work center. In the example below, the Trouble Ticket is currently in the Work Center: Directory, you can send the Trouble Ticket to a specific person in either the Work Center: Inside Plant, Work Center: Outside Plant or Work Center: QA. When a Trouble Ticket is sent to you, you can view those order through Orders → My Work Center Troubles.

Sending a Trouble Ticket to a User

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** and then **All Active Troubles**.

3. A list of the open troubles populates. If you have a large number of active tickets, the list may not populate. To populate the list, do one of the following:

   • Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. Once the list opens, double-click the order number. A Trouble Ticket window opens.

6. Within the **Order Actions** ribbon group, click the **Send To** button. A drop-down lists the next work center(s) within the workflow.

7. Mouse over the top of a work center name. A list of users with access to the next work center displays. From the list, select the name of the person to send the trouble ticket to, you will see the first name, last name and user name display.

8. A message box displays allowing you to type any key ticket issues. Once the message is complete, click the **OK** button.

9. In order for the action to be processed, you need to complete the work center. Make sure all required fields for the associated data components are complete and click the **Complete Work Center** button within the **Trouble Ticket Info** pane.

10. If you have access to the next work center, the order remains open. Within the **Actions** ribbon group, click **Save & Close** (save and exit) to return to the Troubles list.

Viewing a Trouble Ticket Sent to You

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** and then **My Work Center Troubles**.

3. A list of the open troubles populates. If you have a large number of active tickets, the list may not populate. To populate the list, do one of the following:

   • Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. The My Troubles list populates with a list of Trouble Tickets that another user sent to you.

6. To access the ticket, double-click the order number. The Trouble Ticket window opens. Directly below the ribbon is a yellow line. Within the line, notice that your user name displays in the attn field and the reason for sending the ticket to you displays in the note field.

Send Back (Rejecting)

When a person in a previous work center is missing or enters in incorrect information, you can send the Trouble Ticket back or reject it to a particular work center. By sending a Trouble Ticket back, you are making that ticket go through all the previous work centers. For example, if you send a Trouble Ticket back to the first work center, it will have to go through all work centers again before the ticket is closed.

Sending a Trouble Ticket Back to a Work Center

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** and then **All Active Troubles**.

3. A list of the open troubles populates. If you have a large number of active tickets, the list may not populate. To populate the list, do one of the following:

   - Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. Once the list opens, double-click the order number. A Trouble Ticket window opens.

6. Within the **Order Actions** ribbon group, click the **Send Back** button. A drop-down lists the previous work center(s) within the workflow.

7. Mouse over the top of a work center name. A list of users with access to the work center displays. From the list select the name of the person to send the trouble ticket back to, you will see the first name, last name and user name display.

8. A message box displays allowing you to type any key issues regarding the ticket. Once the message is complete, click the **OK** button.

9. In order for the action to be processed, you need to complete the work center. Make sure all required fields for the associated data components are complete and click the **Complete Work Center** button within the **Trouble Ticket Info** pane.

10. If you have access to the work center, the order remains open. Within the **Actions** ribbon group, click **Save & Close** (save and exit) to return to the Troubles list.

Assign To

The Assign To option allows you to assign this trouble ticker to a person who has access to the current work center. Once you assign it to the person, they can view the Trouble Tickets assigned to them through Orders →Troubles Assigned to Me.

Assigning a Trouble Ticket

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** and then **All Active Troubles**.

3. A list of the open troubles populates. If you have a large number of active tickets, the list may not populate. To populate the list, do one of the following:

   - Within the search box, type any portion of the record and then click the magnifying glass.

   4. Click the **Show All** button.

5. Once the list opens, double-click the order number. A Trouble Ticket window opens.

6. Within the **Order Actions** ribbon group, click the **Assign To** button. A drop-down field lists the current work center within the workflow.

7. Move the pointer over a work center name. A list of users with access to the work center displays. From the list, select the name of the person to assign the trouble ticket to, you will see the first name, last name and user name display.

8. A message box displays allowing you to type any key issues regarding the ticket. Once the message is complete, click the **OK** button.

9. The ticket window remains open. To complete the process, click the **Save & Close** button with the **Actions** ribbon group.

Viewing a Trouble Ticket Assigned to You

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** and then **Troubles Assigned to Me**.

3. A list of the open troubles populates. If you have a large number of active tickets, the list may not populate. To populate the list, do one of the following:

   - Within the search box, type any portion of the record and then click the magnifying glass.

   4. Click the **Show All** button.

   The My Troubles list populates with a list of Trouble Tickets that another user sent to you.

5. To access the ticket, double-click the order number. The Trouble Ticket window opens. Directly below the ribbon is a yellow line. Within the line, notice that your user name displays in the attn field and the reason for sending the ticket to you displays in the note field.

Put On Hold and Remove From Hold

You may need to place a Trouble Ticket on hold for various reasons. When you hold a Trouble Ticket, the ticket will not affect any due dates that you have in place. Once you put a work order on hold, the order is moved from the Active Troubles list and placed in the Held Troubles list.

Holding a Trouble Ticket

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** and then **All Active Troubles**.

3. A list of the open troubles populates. If you have a large number of active tickets, the list may not populate. To populate the list, do one of the following:

   • Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. Once the list opens, double-click the order number. A Trouble Ticket window opens.

6. Within the **Order Actions** ribbon group, click the **Put On Hold** button.
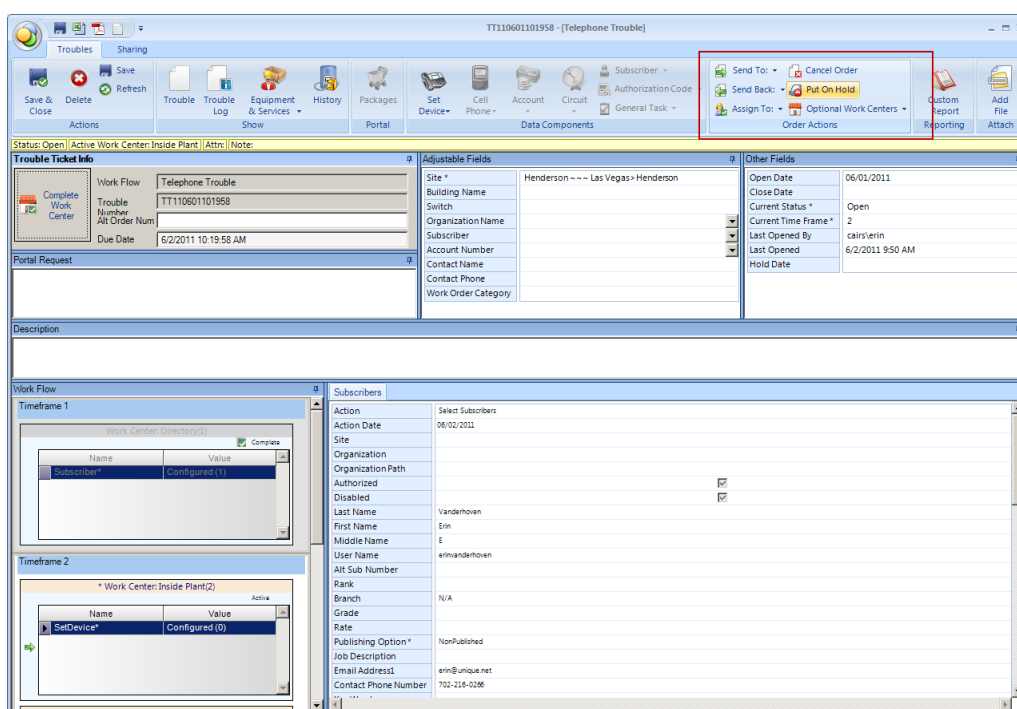
7. A message box displays allowing you to enter a reason why the ticket is going on hold. Type the reason and click the **OK** button. The ticket window closes.

8. To view a list of Trouble Tickets currently on hold, click **Troubles** then **Held Troubles.**

Viewing a Held Trouble Ticket

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** then **Held Troubles**.

3. A list of the open troubles populates. If you have a large number of tickets, the list may not populate. To populate the list, do one of the following:

   • Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

The Held Troubles list populates with a list of Trouble Tickets on hold.

5. To access the ticket, double-click on the order number. The Trouble Ticket window opens. Directly below the ribbon is a yellow line. Within the line, notice the status has changed to OnHold with the reason the Trouble Ticket is on hold. Once you remove the ticket from hold, the status changes to Open.

Releasing a Held Trouble Ticket

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** and then **Held Troubles**.

3. A list of the open troubles populates. If you have a large number of active tickets, the list may not populate. To populate the list, do one of the following:

   - Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. Once the list opens, double-click the order number. A Trouble Ticket window opens.

6. Within the **Order Actions** ribbon group, click the **Remove From Hold** button.

7. A message box displays to allow you to enter a reason for removing the hold, entering a reason is optional. Type the reason and click the **OK** button.

8. The ticket opens to the work center that was open when the order was held.

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

Cancel Order

You can cancel a Trouble Ticket at any time during the work flow. However, if you have components associated to the Trouble Ticket, they remain in your database. In order to change or remove the configured components you must access them through menu item.

Cancelling a Work Order

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** and then **All Active Troubles**.

3. A list of the open troubles populates. If you have a large number of active tickets, the list may not populate. To populate the list, do one of the following:

   - Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. Once the list opens, double-click on the order number.

6. A Trouble Tickets window opens. Within the **Order Actions** ribbon group, click the **Cancel Order** button.
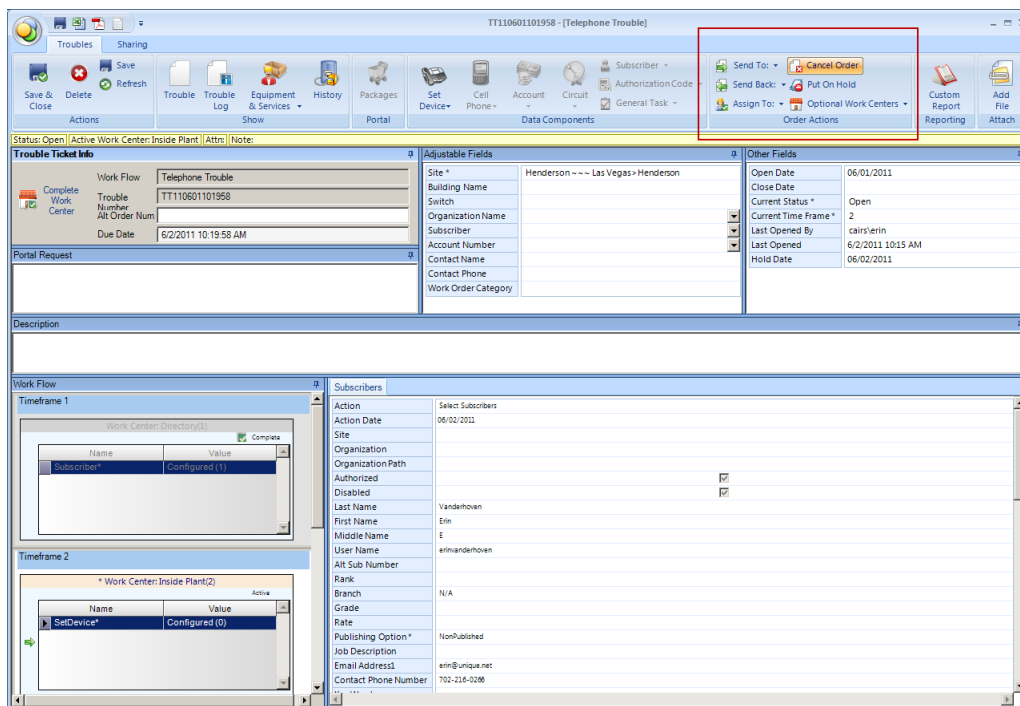
7. If you have configured components for the ticket, a message box displays informing you that cancelling the ticket will not change the status of the configured components. Even if you cancel the ticket the configured components remain in your database.

8. Within the box, click **Yes** to continue cancelling the ticket or **No** to return to the ticket, remove the configured component and then cancel the ticket.

9. Once you click **Yes**, a text box displays allowing you to enter in a reason for cancelling. Type the reason and click the **OK** button.

10. To view the cancelled Trouble Tickets, click **Troubles** then **Order History**.

Optional Work Centers

When your administrator creates your different workflows, they can designate certain work centers as optional for that workflow. With the Optional Work Centers button within the Order Actions ribbon group, you can add the work center back into the workflow.

Viewing the Optional Work Centers

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** and then **All Active Troubles**.

3. A list of the open troubles populates. If you have a large number of active tickets, the list may not populate. To populate the list, do one of the following:

   - Within the search box, type any portion of the record and then click the magnifying glass.

   4. Click the **Show All** button.

5. Once the list opens, double-click the order number. A Trouble Ticket window opens.

6. Within the **Order Actions** ribbon group, click the **Optional Work Centers** button.

7. A list of the optional work centers displays below the button.

Adding the Optional Work Centers into an Open Order

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** and then **All Active Troubles**.

3. A list of the open troubles populates. If you have a large number of active tickets, the list may not populate. To populate the list, do one of the following:

   - Within the search box, type any portion of the record and then click the magnifying glass.

   4. Click the **Show All** button.

5. Once the list opens, double-click the order number. A Trouble Ticket window opens.

6. Within the **Order Actions** ribbon group, click the **Optional Work Centers** button.

7. A box opens with a list of all the optional work centers. Within the box, click on the checkbox next to each work center that you want to add into the trouble ticket.
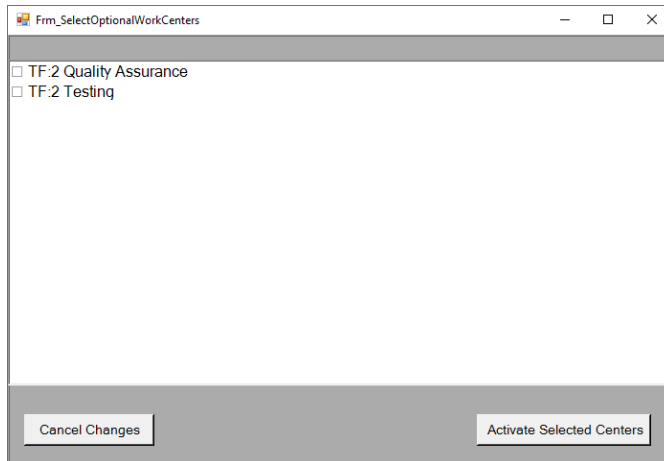
8. Once they are selected, click on the Actiate Selected Centers button in the lower right-hand corder of the box. Alternatively, click on the Cancel Changes button to not add any optional work centers into the work flow.

9. The work centers are added, you can view them wihtin the Work Flow pane.

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

Removing a Work Center

You can remove any work center from a Trouble Ticket. This allows your site to create one work flow for all Trouble Tickets within your database. For example, you can create one work flow that can be used for set device, cell phone and circuits troubles. With the ability to remove a work center from a work flow, you can manipulate the work flow as it progresses from start to finish.

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** and then **All Active Troubles**.

3. A list of the open troubles populates. If you have a large number of active tickets, the list may not populate. To populate the list, do one of the following:

   - Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. Once the list opens, double-click the order number.

6. Within the Work Flow pane, right-click on the work center to remove from the work flow, click Remove Work Center selection.

! In order for a work center to be removed from the work flow, your CAIRS administrator must designate the work center as optional within the work flow. To learn more about the creating work flows, see System Admin →Work Flows.

7. A message box opens verifying that you really want to remove the work center from the work flow. Click **Yes** to continue or **No** to cancel the operation.

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

Switching a TT to a WO

You can switch a trouble ticket to a work order ticket by clicking the **Switch to Work Order** button, this does not change the work flow it simply moves the ticket from the trouble section to the work order section. There is a button in work orders that allow you to move the ticket back into trouble tickets.

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** and then **All Active Troubles**.

3. A list of the open troubles populates. If you have a large number of active tickets, the list may not populate. To populate the list, do one of the following:

    - Within the search box, type any portion of the record and then click the magnifying glass.

    4. Click the **Show All** button.

5. Once the list opens, double-click the order number.

6. A trouble ticket window opens.

7. Within the **Order Actions** ribbon group, click the Switch to Work Order button.

8. Once clicked the trouble ticket window closes and you are returned to the Troubles list.

! Remember that this does not change the trouble ticket or work centers for the ticket, it simply moves the ticket to the Orders list. You still have to complete the requirements for the initial work flow selected.

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9. To view the order just switched, click Orders → All Active Orders.

Custom Reporting

The Custom Reporting ribbon group allows you to print the trouble ticket information on a form designed by you. The form is created by your CAIRS administrators within System Admin → Custom Report Templates. When you click the Custom Report button, a selection box opens allowing you to select the report template to print with the ticket information.

Generating a Custom Report

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** and then **All Active Troubles**.

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3. A list of the open troubles populates. If you have a large number of active tickets, the list may not populate. To populate the list, do one of the following:

- Within the search box, type any portion of the record and then click the magnifying glass.

    4. Click the **Show All** button.

5. Once the list opens, double-click the order number.

6. A trouble ticket window opens.

7. Within the Reporting ribbon group, click the Custom Report button. The Select Report Template window opens, within the list find the template to use, click on the name to highlight.

8. Within the lower portion of the window, click the Generate Report button.

9. The report opens in the appropriate program allowing you to save, print or send.

Attach Ribbon Group

Before you can attach files to a record, your CAIRS administrator must determine the allowable file types and size. Please contact your CAIRS administrator if you are unable to attach files.

There are two different types of files that you can attach to a record; the first button allows you to attach a regular file. These files follow the record and other users are able to see them. Although, this is convenient, if changes need to be made to the file, the file will have to be saved and then re-attached.

The second file attachment type allows you to attach a link to a file that is in a shared location. The benefit of this file attachment is that when changes are made to the file there is no need to reattach the file. The disadvantage is that all CAIRS users have to have access to the shared file location.

Since the process to add, modify, delete and view Attachments is the same throughout CAIRS, we have consolidated the process into one section on the manual. Please see Common Elements → File Attachments to learn how to more.

Viewing a Trouble Ticket

Within the Navigation pane, there are five different ways to view Trouble Tickets. You can view open, closed and/or cancelled Trouble Tickets within your database. The six available options are:

- **My Work Center Troubles** – provides a list of Trouble Tickets currently assigned into a work center that you have permission to view.

- **Troubles Assigned to Me** – provides a list of Trouble Tickets assigned or sent to you by another user.

- **Troubles Created By Me** - provides a list of the Trouble Tickets that you created.

- **Held Troubles** – provides a list of Trouble Tickets currently on hold.

- **All Active Troubles** – provides a list of all the open Trouble Tickets

- **Trouble History** – provides a list of Trouble Tickets that have been cancelled or completed.

Each selection displays information regarding the Trouble Ticket. When you right-click on a column, you can change the amount of information within the line display. You can also change the order of the columns by clicking and holding on the column header, then drag and drop it to the new location within the line display (when you click and hold two red arrows displays so you know where you are in the line display).

My Work Center Troubles

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** and then **My Work Center Troubles**.

3. A list of the Trouble Ticket currently in a work center that you can access populates. If you have a large number of Trouble Tickets, the list may not populate, there are two ways to populate the list:

   - Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. Find the Trouble Ticket within the list and double-click it to open the Trouble Ticket details window.

Troubles Assigned to You

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** and then **Troubles Assigned to Me**.

3. A list of Trouble Tickets assigned to you or sent to you by another user populates. If you have a large number of tickets, the list may not populate. To populate the list, do one of the following:

   - Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. Find the Trouble Ticket within the list and double-click it to open the Trouble Ticket details window.

Troubles you created

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** and then **Troubles Created by Me**.

3. A list of Trouble Tickets assigned to you or sent to you by another user populates. If you have a large number of tickets, the list may not populate. To populate the list, do one of the following:

   - Within the search box, type any portion of the record and then click the magnifying glass.

   4. Click the **Show All** button.

5. Find the Trouble Ticket within the list and double-click it to open the Trouble Ticket details window.

Held Troubles

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** and then **Held Troubles**.

3. A list of Trouble Tickets on hold populates. If you have a large number of Trouble Tickets, the list may not populate, there are two ways to populate the list:

   - Within the search box, type any portion of the record and then click the magnifying glass.

   4. Click the **Show All** button.

5. Find the Trouble Ticket within the list and double-click it to open the Trouble Ticket details window.

Viewing All Trouble Tickets

1. Click Orders/Troubles.

2. Within the Navigation pane, click Troubles and then All Troubles.

3. A list of all the open Trouble Tickets populates. If you have a large number of tickets, the list may not populate. To populate the list, do one of the following:

   - Within the search box, type any portion of the record and then click the magnifying glass.

   - Click the Show All button.

4. Find the Trouble Ticket within the list and double-click it to open the Trouble Ticket details window.

Viewing Closed or Cancelled Trouble Tickets

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** and then **Order History**.

3. A list of closed or cancelled Trouble Tickets populates. If you have a large number of tickets, the list may not populate. To populate the list, do one of the following:

   - Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the **Show All** button.

5. The Current Status column displays whether the ticket was completed or cancelled.

6. Find the Trouble Ticket within the list and double-click it to open the Trouble Ticket details window.

Reopening

Often times, a Trouble Ticket may be closed before the work is completed. In this case, you can re-open the ticket, instead of creating a new one. When you access the Trouble Ticket within History, the button used to create and complete the work center is now used to re-open the Trouble Ticket.

Reopening a Trouble Ticket

1. Click **Orders/Troubles**.

2. Within the **Navigation** pane, click **Troubles** and then **Order History**.

3. A list of closed or cancelled Trouble Tickets populates. If you have a large number of tickets, the list may not populate. To populate the list, do one of the following:

    - Within the search box, type any portion of the record and then click the magnifying glass.
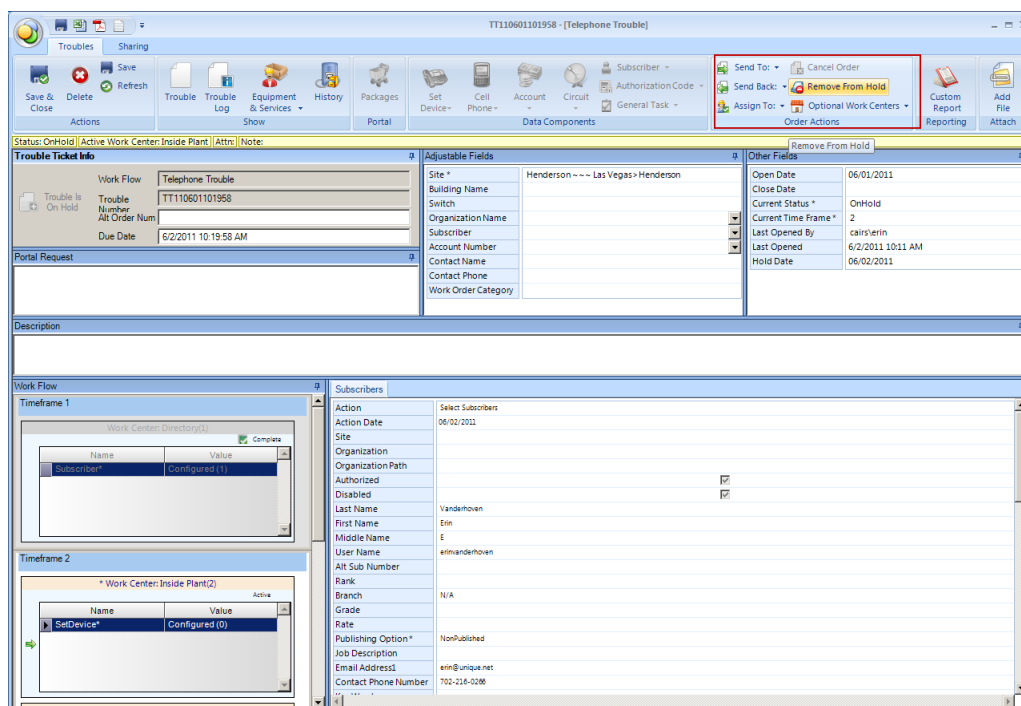
4. Click the **Show All** button.

5. Find the order within the list and double-click it to open the Trouble Ticket details window.

6. Within the Trouble Ticket **Info** pane, click the **Reopen Trouble Ticket** button to change the order status to **Active**.
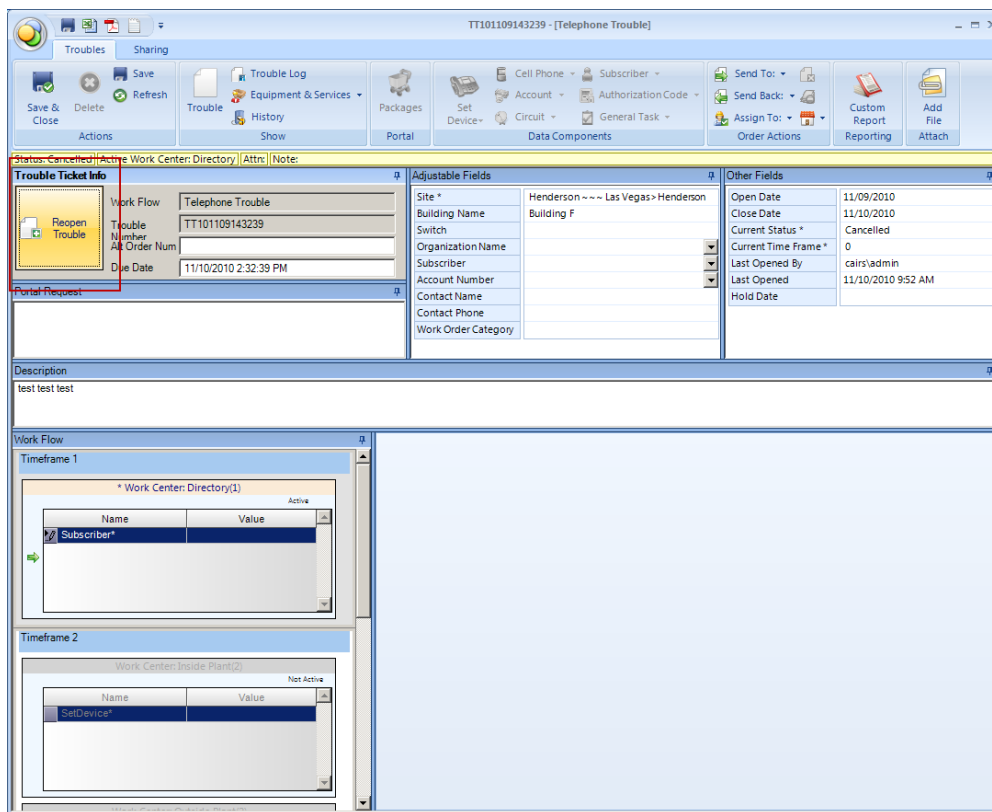
The order opens to the last Work Center and Time Frame.

7. You can send the ticket to a previous work center and time frame by using the **Send Back** button within the **Order Actions** ribbon group.

8. Click the **Save** button, to save and stay or the **Save & Close** button to return to the Troubles list.

    The ticket now displays within the All Active Troubles list.

General Orders

General Orders allows you to create a main work order and assign sub work orders. This is similar to the process used in Subscriber Portal, in that you select a package type and action and then you determine the number of orders to create.

Before general orders can be used, your CAIRS administrator needs to create your Configuration Packages. These packages determine what component and type of action you want to perform, for example, install new analog set, delete circuit, etc.

Your administrator also determines whether you can close a general order if you have sub work orders still open. If your administrator has set the Don't Close General Orders until Sub-Order are Closed setting to true, the system prevents you from closing the general until all subs are closed. If the setting is set to false, you will be able to close the general with subs still open.

Understanding the General Order Screen

There are six panes of information when you view the general order screen. The first pane, General Order Information, displays basic order information, this includes such items as site, building name, switch name, TCO, project open and close date, etc. Some of the information from this pane will carry over into each of the sub-orders associated to the general order.

The second pane, Sub-Orders/Packages displays a list of the sub-order associated to the general order. There are several selections at the top of the pane that allow you to view different pieces of information associated to the sub-orders. The Show dropdown box allows you to view the sub-orders and their status, the following selections are available:

- All Orders
9. All Active Open Orders
- Orders on Hold
10. Closed Orders
- Cancelled Orders

For any of the above selections, you can view the orders based on sub-order number or component. The Selected Sub-Order Package Fields pane, displays the additional request fields completed by the Subscriber when they submitted the request via Subscriber Portal. This is read only information.

The General Description and General Notes pane allows you to enter in specific details for the general work order. These field will carry over into any sub work orders. When they carry over, they will combine into the Work Order Description field.

The Additional Notes pane allows you to associate notes to the general order. These notes are specific to the general order and will _not_ carry over to any sub work orders.

Creating a General Order

There are two ways to generate a general work order. The first is to create the general order and then create the sub-orders. The second way is to use the General Order Wizard.

Creating a General Order

1. Click the **Orders/Troubles** menu.
2. Within the **Navigation** pane, click **Orders** and then **All Active General Orders**
3. Within the Actions pane, click the Add General Order link
4. The General Order window opens
5. Within the General Order Information pane, complete the following information (required fields are marked with an asterisk (*)):
   - General Order Number * – type an alphanumeric order number.
   6. Site * - click the drop-down arrow to access a list and from the list, select the site. The site drop-down list displays two columns the Site column show the bottom-most site. The Path column displays the complete path to the site. Each site level is separated by a >.
   - Description – type in the description of the work order, please keep in mind that this description is attached to each sub work order, once you click off the field the information will also populate in the General Description pane and vice versa. If there are more than one line of information, hoover over the field to view the complete description.

7. Created By – click the drop-down arrow to access a list of CAIRS users, from the list select your user name.

- Building Name - click the drop-down arrow to access a list and from the list, select the building name. This is the physical location of where to install, move, or modify the component.

8. Switch Name – click the drop-down arrow to access a list and from the list, select the switch name associated with the new component(s).

- Organization Name – click the drop-down arrow to access a list and from the list, select the name of the organization. The organization drop-down list displays the bottom-most organization first. After the ~~ the complete path to the selected organization displays. Each level of the organizational tree is separated by a >. Once you select an organization, the complete path populates within the field.

9. Subscriber Name – click the drop-down arrow to access a list and from the list, select the name of the subscriber associated with the new component(s).

- TCO – click on the drop-down to access a list and from the list, select the TCO related to the orders. There are two columns of information within the list, the TCO Name and the Job Description.

10. Account Number – click the drop-down arrow to access a list and from the list select the account number for the new component(s). The list of accounts displays not only the account number but also the account type, one-time, recurring or call charges and organization.

- Alternate Project Name – type the alternate name for the project, if applicable.

11. Contact Name – type the name of the contact for this work order.

- Contact Phone – type the telephone number for the contact for this work order.

12. Notes - use this field for any additional information you would like to attach to the work orders. Once you click off the field the information will also populate in the General Notes pane and vice versa. If there are more than one line of information, hoover over the field to view the complete description.

When the sub work orders are created the Description populates in the sub-order description pane, the Notes populate in the portal work order info pane.

- Project Open Date – this field auto-populates with today's date. To change the date, click the field to access a drop-down arrow, once clicked a calendar appears, from the calendar select the date to initiate the work orders. 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.

13. Project Close Date – this field allows you to enter a date to close the general order.

- Package Name – type the package name

14. Package Action – type the package action

- Package Type – type the package type

15. Component Name – type the name of the component associated to the order

- General Order Miscellaneous 1 – 10 – use these fields for any other information you want associated with the work order and sub orders.

16. General Order Date 1 – 5 – use these date fields related information that you want to track for the work order and sub orders.

17. Before you can continue, you need to save your progress, within the Actions ribbon group click the Save button.

Adding Sub-Orders

There are 3 options when adding sub-orders to the general. The first is Create Orders, this allows you to create multiple subs whether an order or trouble. The other options are to create a single sub-order or trouble ticket.

Create Orders button

18. Within the Sub-Order Actions, click on the Create Orders button. The wizard opens to allow you to add the appropriate sub orders, the first step in the process is to pick the package action and type. Within the Package Type field, click on the dropdown arrow to access a list of packages, select one of the following:

   - Set Device

   19. Circuit

   - Authorization Code

   20. Cell Phone

   - General Task

21. Once you selected your package type, there are three actions you can perform for each of the package types:

   - New Service

   22. Change Existing Service

   - Disconnect Service

23. When you choose New Service the only option you have is to click on the Next button and continue with the Wizard.

24. However, if you choose change or disconnect, you will have to select an existing devise before you can continue. The lower pane will automatically populate with the devices that are associated to the package type (set device, circuit, cell phone, auth code, etc.) when you select either the change or disconnect actions.   The list that populates is site specific, so only the devices assigned to your chosen site appear within the list.

25. You can either scroll through the list or perform a search for the device by typing a portion of the record or the entire record into the textbox and click on the magnifying glass. Once the list populates, highlight the device and click the next button.

26. Next, you determine which package is needed for this work order. Again, these packages are created by your CAIRS administrator in System Admin -> Subscriber Portal Settings -> Configuration Packages. By clicking on the plus sign (+) next to the package name, you can view the equipment or services associated to the package.

27. Within the list, find the correct package, in the Quantity to Create column type the number of the sub-orders you want to create. You can add multiple type of packages to one general order, just put a number in the quantity to create field.

28. Click the Next button to continue.

29. The next screen allows you to add any additional request notes to the work order. Once you have completed your note, click on the Next button to continue.

30. The final screen completes the wizard. Within the lower right-hand corner, click on the Finish button. The subs are created and now populate in the Sub-Orders/Packages pane.

Creating a Single Order/Trouble

31. When you click on either the Create Single Order or Create Single Ticket button, the appropriate window opens allowing you to work through the order process.

32. When you click Save the order or trouble will populate in the Sub-Orders/Package pane.

33. Within the Actions ribbon group, click the Save button to continue working with the general order or the Save & Close button to return to the All Active General Orders list.

What Now?

You have created your General Work Order and the Sub-Orders underneath it, now what do you do? All sub-orders or troubles can be viewed in the Sub-Orders/Packages pane. You can also view the subs within the All Active Orders or All Active Troubles list. To view the order or trouble details, double click on the row to open the appropriate window. You will work through each sub-order/trouble separately.

Your administrator has determined if you are able to close the general order if sub-orders are still open. If your administrator has set the Don't Close General Orders until Sub-Order are Closed setting to true, the system prevents you from closing the general until all subs are closed. If the setting is set to false, you will be able to close the general with subs still open.

Just like every other work order, there are several actions you can perform for each sub-order. These actions include holding, releasing from hold, cancelling, or completing the orders.

With either setting, once all sub-orders are closed or cancelled beneath the General Work Order, the general order closes as well.

At any time during the processing of the general work order, you can add more sub-orders. To do so, click on the Create Orders buttons within the Sub-Orders Actions ribbon group to open the wizard to add more subs.

General Order Wizard

The wizard provides a step-by-step guide to creating a general work order with subs-orders.

1. Click the **Orders/Troubles** menu.

2. Within the **Navigation** pane, click **Orders** and then **All Active General Orders**

3. There are two ways to access the wizard:

   - Within the toolbar directly above the **Navigation** pane, click on the New General Order Wizard link.

4. Within the **Actions** pane, click the **New General Order Wizard** link.

5. With either option the New Order Wizard opens. The first window allows you to enter in General Order Information, the fields in this window are the same as the fields within the General Order Information pane as defined above.

6. Once you have completed the fields, click the Next button in the lower right-hand corner of the wizard.

7. The next step in the process is to pick the package action and type. Within the Package Type field, click on the dropdown arrow to access a list of packages, select one of the following:

   - Set Device

8. Circuit

   - Authorization Code

9. Cell Phone

   - General Task

10. Once you selected your package type, there are three actions you can perform for each of the package types:

    - New Service

    11. Change Existing Service

    - Disconnect Service

12. When you choose New Service the only option you have is to click on the Next button and continue with the Wizard.

13. However, if you choose change or disconnect, you will have to select an existing devise before you can continue. The lower pane will automatically populate with the devices that are associated to the package type when you select either the change or disconnect actions.   The list that populates is site specific, so only the devices assigned to your chosen site appear within the list.

14. You can either scroll through the list or perform a search for the device by typing a portion of the record or the entire record into the textbox and click on the magnifying glass. Once the list populates, highlight the device and click the next button.

15. Next, you determine which package is needed for this work order. Again, these packages are created by your CAIRS administrator in System Admin -> Subscriber Portal Settings -> Configuration Packages. By clicking on the plus sign (+) next to the package name, you can view the equipment or services associated to the package.

16. Within the list, find the correct package, in the Quantity to Create column type the number of the sub-orders you want to create. You can add multiple type of packages to one general order, just put a number in the quantity to create field.

17. Click the Next button to continue.

18. The next screen allows you to add any additional request notes to the work order. Once you have completed your note, click on the Next button to continue.

19. The final screen completes the wizard. Within the lower right-hand corner, click on the Finish button.

General Order Notes

Before you started adding notes it is a good idea to add some note categories. These categories help to group the notes based on a common element. For example, Update Ticket, Remove Component, etc. To learn more about adding note categories, please see Common Elements → Managing Note Categories.

Since the process to adding, modifying, deleting and viewing notes is the same throughout CAIRS, we have consolidated the process into one section on the manual. Please see Common Elements → Notes to learn more.

Sub-Order Actions

The Sub-Order actions allow you to perform certain actions on the entire set of orders or on an individual order. Within the Sub-Orders/Packages pane, you can place a checkmark in the rows that you want to perform the action on.

Holding & Releasing

There are two ways you can put sub-orders on hold, you can access the sub-order itself and hold it from the button within the Order Actions ribbon group. Here we will talk about how you can hold an order from within the General Work Order.

1. Click the **Orders/Troubles** menu.

2. Within the **Navigation** pane, click **Orders** and then **All General Active Orders**.

3. A list of the open orders populates. If you have a large number of active work orders, the list may not populate. To populate the list, do one of the following:

    - Within the search box, type any portion of the record and then click the magnifying glass.

    4. Click the **Show All** button.

5. Once the list opens, double-click the order number. The general work order window opens.

Holding

6. Within the Sub-Orders/Packages pane, find the order that you want to Hold, within the Selected column click the box to insert a checkmark. You can place a checkmark in multiple rows if desired.

7. Within the Sub-Order Actions ribbon group, click on the Put Orders on Hold button.

8. A message box displays allowing you to enter a reason why you are holding the sub-order(s). Type the reason and click the **OK** button. The Order Status column changes to display OnHold.

9. To view a list of work orders currently on hold, click **Orders** and then **Held Orders.**

Releasing

10. Within the Sub-Orders/Packages pane, find the order that you want to Release from Hold, within the Selected column click the box to insert a checkmark. You can place a checkmark in multiple rows if desired.

11. Within the Sub-Order Actions ribbon group, click on the Release Orders from Hold button

12. A message box displays allowing you to enter a reason why you releasing the hold on the sub-order(s). Type the reason and click the OK button. The Order Status column changes to display Open.

Cancel Orders

1. Click the **Orders/Troubles** menu.

2. Within the **Navigation** pane, click **Orders** and then **All General Active Orders**.

3. A list of the open orders populates. If you have a large number of active work orders, the list may not populate. To populate the list, do one of the following:

    - Within the search box, type any portion of the record and then click the magnifying glass.

    4. Click the **Show All** button.

5. Once the list opens, double-click the order number. The general work order window opens.

6. Within the Sub-Orders/Packages pane, find the order that you want to cancel, within the Selected column click the box to insert a checkmark. You can place a checkmark in multiple rows if desired.

7. Within the **Sub-Order Actions** ribbon group, click the **Cancel Order** button.

8. You are asked to enter a reason for canceling the order, once entered click the OK button to continue or the Cancel button to stop the operation.

9. Are you returned to the General Order window, within the Sub-Orders/Packages pane, you will notice that the Order Status column now reads canceled.

10. You can double click on the row to view the complete order details or you can return to the Orders menu and click on Order History.

Resource Manager Actions

Your CAIRS administrators can determine whether a package requires the approval of a Resource Manager before being submitted into CAIRS. Often times a Resource Manager is required to approve requests submitted by their subscribers. Ideally, the Resource Manager logs into the Subscriber Portal and approves the requests; however, they can approve requests within CAIRS.

Approve Selected Orders

1. Click the **Orders/Troubles** menu.
2. Within the **Navigation** pane, click **Orders** and then **All General Active Orders**.
3. A list of the open orders populates. If you have a large number of active work orders, the list may not populate. To populate the list, do one of the following:
   - Within the search box, type any portion of the record and then click the magnifying glass.
   4. Click the **Show All** button.
5. Once the list opens, double-click the order number. The general work order window opens.
6. Within the Sub-Orders/Packages pane, find the order that you want to approve, within the Selected column click the box to insert a checkmark. You can place a checkmark in multiple rows if desired. If there are several sub orders, you can click on the Toggle Selection button to enter or remove a checkmark from every row.
7. Within the TCO Actions ribbon group, click the Approve Selected button.
8. The project Approval Notes popup opens; you can enter in any notes related to the approval process. When completed, click the OK button to complete the approval process or click Cancel to return to the General Order.
9. When you press OK the sub-orders are created and you can access them through Orders -> All Active Orders.

Reject Selected Orders

1. Click the **Orders/Troubles** menu.
2. Within the **Navigation** pane, click **Orders** and then **All General Active Orders**.
3. A list of the open orders populates. If you have a large number of active work orders, the list may not populate. To populate the list, do one of the following:
   - Within the search box, type any portion of the record and then click the magnifying glass.
   4. Click the **Show All** button.
5. Once the list opens, double-click the order number. The general work order window opens.
6. Within the Sub-Orders/Packages pane, find the order that you want to cancel, within the Selected column click the box to insert a checkmark. You can place a checkmark in multiple rows if desired. If there are several sub orders, you can click on the Toggle Selection button to enter or remove a checkmark from every row.
7. Within the TCO Actions ribbon group, click the Reject Selected button.
8. The Reason for Rejection popup opens, you can enter in any notes regarding the rejection. When complete, click the OK button to complete the rejection process or click Cancel to return to the General Order.

Attach Ribbon Group

Before you can attach files to a record, your CAIRS administrator must determine the allowable file types and size. Please contact your CAIRS administrator if you are unable to attach files.

There are two different types of files that you can attach to a record, the first button allows you to attach a regular file. These files follow the record and other users are able to see them. Although, this is convenient, if changes need to be made to the file, the file will have to be saved and then re-attached.

The second file attachment type allows you to attach a link to a file that is in a shared location. The benefit of this file attachment is that when changes are made to the file there is no need to reattach the file. The disadvantage is that all CAIRS users have to have access to the shared file location.

Since the process to add, modify, delete and view file attachments is the same throughout CAIRS, we have consolidated the process into one section on the manual. Please see Common Elements → File Attachments to learn more.

General Order Views

Within the Views pane, you can sort your general orders list based on certain characteristics. For example, you can view all general orders that need Resource Manager Approval. The default or simple list displays all general orders starting with the most recently created order first. The following views are available:

- Basic Lookup
- Simple List
- Notes
- Needs Resource Manager Approval

- Components
- TCO
- Custom Summary
-

When you click the option circle next to a selection, the list changes to group your orders based on the common characteristic. For each group, you can click the plus sign next to the group name to view the work orders within the grouping.

General Order History

Within General Order History, you can view all general orders that have been completed or cancelled within your database. The list provides some basic order information to view the complete information double click on the order number to open the General Order screen. To view the information for a sub-order, you will have to access the order through Order History.

General Tasks

Within General Tasks, you can create a task to track any sort of information you want. For those CAIRS 32 users, this is similar to the General Work Order. These tasks can relate to configured component, database items, dig permits, etc. Similar to a work order, each task can have related equipment and or services, as well as an account number.

Before you can start a general task, it is a good idea to add in both the task type and task status. These allow for better tracking of your active tasks.

Manage General Task Types

Managing your task types allows you to place each task into a category. For example: Funding Requests, Dig Permits, etc.

Managing Task Types

1. Click Orders/Troubles.
1. Within the Navigation pane, click General Tasks.
2. There are two ways to manage your task types:

   - Within the toolbar directly above the Navigation pane, click the Manage General Task Types button.

   1. Within the Action pane, click the Manage General Task Types link.

3. With either option, the Manage General Task Types window opens.

Adding

4. In the Manage Task Types list pane, click the top row, marked with an asterisk (*) to add a new record.
2. You can add multiple types by clicking on the row marked within an asterisk (*).

Deleting

5. There are two ways to select the type to delete:

   - Right-click the record selector box and click Delete.

- Highlight the name in the list and within the Actions ribbon group click the Delete button.

6. Once you click Delete, a message box displays verifying that you really want to delete the type. Click Yes within the box to continue or No to cancel the operation.

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

7. If you do not want to delete the type, right-click the record to access a pop-up menu, click Undelete.

4. 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.

8. Within the Actions ribbon group, click Save (to save and stay) to continue working with the task, or Save & Close (to save and exit) to return to the General Tasks list.

Manage General Task Status

The Task Status allows you to place an action to the task, for example, you can create an in-process status, on hold, rejected, etc.

Managing Task Status

1. Click Orders/Troubles.

2. Within the Navigation pane, click General Tasks.

3. There are two ways to manage your task types:

   - Within the toolbar directly above the Navigation pane, click the Manage General Task Status button.

   2. Within the Action pane, click the Manage General Task Status link.

4. With either option, the Manage General Task Status window opens.

Adding

5. In the Task Status list pane, click the top row, marked with an asterisk (*) to add a new record.

6. You can add multiple items by clicking on the row marked within an asterisk (*).

Deleting

7. There are two ways to select the status to delete:

   - Right-click the record selector box to access a menu, from the menu click Delete.

   3. Highlight the name in the list and within the Actions ribbon group click the Delete button.

8. Once you click Delete, a message box displays verifying that you really want to delete the status. Click Yes within the box to continue or No to cancel the operation.

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

10. If you do not want to delete the status, 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 item. 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 task, or Save & Close (to save and exit) to return to the General Tasks list.

Understanding the General Task Screen

The General Task screen has three panes of information: General Task Information, Accounts for Equipment and Services, and Equipment and Services pane. The General Task Information pane allows you to enter some basic task information, such as, task type, organization name, subscriber name, etc.

The Equipment and Services pane allows you to associate equipment and/or services to the task. This pane works in conjunction with the Accounts for Equipment and Services pane, if there is not an account associated within this pane, you will not be able to associate equipment or services to the task.

A General Task - Start to Finish

1. Click Orders/Troubles.

2. Within the Navigation pane, click General Tasks.

3. There are two ways to create a new task:

    - Within the toolbar directly above the Navigation pane, click the drop-down arrow next to New. Select General Task.

    4. Within the Actions pane, click the Add New General Task link.

4. The General – General Task window opens allowing you to generate a task.

5. Within the General Task Information pane, complete the following fields (required fields are marked with an asterisk (*)):

    - Task Name * - type the name of the task to complete. (Example: cable pull to bldg. 211, funding for new sets, etc.).

    5. Site * - click the drop-down arrow to access a list, select the site. The site drop-down list displays the bottom-most site first. After the ~~ is the complete path to the site. Each site level is separated by a >.

    - Task Subject – type the subject of the task, if applicable

    6. Priority Number – type the priority number for the task.

- Open Date – this field auto populates with the current date. To change the date, click the field to access a drop-down arrow. From the calendar, select the open 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.

7. Due Date – click the field to access a drop-down calendar to enter the due date for the task. . From the calendar, select the due 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.

- General Task Type – click the drop-down arrow to access a list, select the task type.

8. General Task Status – click the drop-down arrow to access a list, select the task status.

- Estimated Hours to Complete – type the number of hours needed to complete the task.

9. Estimated Days to Complete – type the number of days needed to complete the task.

- Organization Name - click the drop-down arrow to access a list, and then select the name of the organization. The organization drop-down list displays the bottom-most organization first. After the ~~ the complete path to the selected organization displays. Each level of the organizational tree is separated by a >. Once you select an organization, the complete path populates within the field.

10. Subscriber Name - click the drop-down arrow to access a list, and then select the name of the subscriber associated with the task.

- General Task Misc 1 – 5 – choose these fields for any miscellaneous information regarding the task.

11. Task Description – type a description of the task; be as specific as possible so that other users can quickly identify the purpose of the task.

- Vendor Award Date – this field allows you to enter in a date of the vendor award, if applicable. To add a date, click the field to access a drop-down arrow. Once clicked a calendar displays, from the calendar, select the date of the award. 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.

12. Delivery Date – this field allows you enter in the delivery date for the task. To add a date, click the field to access a drop-down arrow. Once clicked a calendar displays, from the calendar, select the delivery 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.

6. Within the Actions ribbon group, click Save (to save and stay) to continue working with the task, or click Save & Close (to save and exit) to return to the General Tasks list.

Equipment or Services Associated to a Task

At times, there is a need to associate equipment or a service directly to a task. Before any equipment or services can be added, you need to associate an account number.

Since adding, modifying, deleting and viewing equipment and services is the same throughout CAIRS, we have consolidated the process into one section on the manual. Please see Common Elements → Equipment & Services to learn how to more.

Adding an Account for Equipment and Services

You can associate a few different account numbers to this set for the different charge types associated with your equipment and services. For example, you can a separate account numbers for recurring and one-time charges. Alternatively, you can have one account number for all charges associated with the equipment, services, and calls.

1. Click Orders/Troubles.

2. Within the Navigation pane, click General Tasks.

3. A list of the open tasks populates. If you have a large number of active tasks, the list may not populate. To populate the list, do one of the following:

   - Within the search box, type any portion of the record and then click the magnifying glass.

   13. Click the Show All button.

4. Once the list opens, double-click the task name. The General Task window opens.

5. Within the Accounts for Equipment and Services pane, click the row marked with the asterisk to enter in a new account number for the equipment and services. Complete the following fields, required fields are marked with an asterisk (*):

   - Charge Type* – click the drop-down arrow to access a list, then select one of the following choices:

   14. Both One Time and Recurring Charges – bills the account for all one time and recurring charges

      - Recurring Charges - bills the account for only recurring charges

   15. One-time Charges – bills the account for only one- time charges

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! If you choose to assign an account number as a default for call charges, you can still assign separate account numbers for certain buttons. The selections within the Accounts for Calls tab overrides the selection made within this pane.

- Site* – once you click any of the drop-down lists, the site name auto-populates with the site selected on the General-Set Device window.

16. Subscriber Name – click on the drop-down arrow to access a list, and from the list select the appropriate subscriber

- Organization – if you have selected an account, number associated to an organization, that organization name populates within the field. This is a read only field.

17. Account Number* – click the drop-down arrow to access a list of the account numbers and their associated organizations. If an account number is associated to multiple organizations, the account number appears in the list multiple times, for example if account number 2424 is associated to three different organizations, there are three appearances of the account number within the drop-down. Each account number references the different organization name.

    From the list, select the account number and organization responsible for the charges.

! When you create an account number, you can assign it to an organization or to a subscriber; this designates the account as official or unofficial. If you select an account with an organization, it is most likely an Official Account. If you select an account where the organization is blank, it is most likely an Unofficial account and associated to a subscriber.

- Billing Start Date* – click the drop-down arrow to access a calendar, from the calendar select the date to start the billing. 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.

18. Billing End Date – click the drop-down arrow to access a calendar, from the calendar select the date to stop the billing for the equipment or service. 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. Within the Actions ribbon group, click Save (to save and stay) to continue working with the set, or click Save & Close (to save and exit) to return to the Set Management list.

General Tasks – Notes

Before you started adding notes it is a good idea to add some note categories. These categories help to group the notes based on a common element. For example, Update Ticket, Remove Component, etc. To learn more about adding note categories, please see Common Elements → Managing Note Categories.

Since the process to adding, modifying, deleting and viewing notes is the same throughout CAIRS, we have consolidated the process into one section on the manual. Please see Common Elements → Notes to learn more.

General Tasks File Attachments

Before you can attach files to a record, your CAIRS.net administrator must determine the allowable file types and size. Please contact your CAIRS.net administrator if you are unable to attach files.

There are two different types of files that you can attach to a record; the first button allows you to attach a regular file. These files follow the record and other users are able to see them. Although, this is convenient, if changes need to be made to the file, the file will have to be saved and then re-attached.

The second file attachment type allows you to attach a link to a file that is in a shared location. The benefit of this file attachment is that when changes are made to the file there is no need to reattach the file. The disadvantage is that all CAIRS users have to have access to the shared file location.

Since the process to add, modify, delete and view file attachments is the same throughout CAIRS, we have consolidated the process into one section on the manual. Please see Common Elements → File Attachments to learn more.

Preventive Maintenance Jobs

Preventive Maintenance Jobs allows you to automatically create notifications, work order, trouble tickets or send emails on a one-time or recurring schedule. A preventive maintenance job can include anything that occurs on a one-time or recurring basis such as switch maintenance, database maintenance, facilities maintenance, etc.

Understanding the General – Preventive Maintenance Jobs Screen

There are four panes of information within the General – Preventive Maintenance Jobs screen. They are General, Email, Order Template, and Schedule.

General Pane

The General Pane displays basic job information such as job type, description and the action that CAIRS will perform. There are three actions that CAIRS can perform: start an order or trouble ticket, send an email or do both.

Email Pane

The email pane displays the contacts that will receive the email from CAIRS.

Order Template Pane

This pane displays all the information that will be transferred to the order or trouble ticket when created.

Schedule Pane

There are four tabs within this pane. The Schedule tab display the times and days the job will occur. The Process Log tab displays the job name as well as the status of the job. The Created Records tab displays the order, troubles or emails that have been created for the job. The Components tab displays any devices that have been associated to the job. You can double click on any record to view the complete information.

Preventive Maintenance Job Types

Before you can start to create your jobs, you will need to create the types. The types can be what sort of maintenance you are performing such as switch maintenance, facilities maintenance, etc.

Managing a Job Type

1. Click the Orders/Troubles menu.

1. In the **Navigation** pane, click **Preventive Maintenance Jobs**.

2. You have two alternatives for Manage Preventive Maintenance Job Types:

    - On the toolbar directly above the **Navigation** pane, click the Manage Preventive Maintenance Job Types button.

    19. Within the **Action** pane, click the Manage Preventive Maintenance Job Types link.

3. With either option, the Manage Preventive Maintenance Job Types window opens.

    <u>**Adding**</u>

4. In the Manage Preventive Maintenance Job Types * list pane, click the top row, marked with an asterisk (*) to add a new record.

5. Type the new job type name this can be such things as update, maintenance, etc.

6. To add another job, click the **Save** button and repeat steps 4 and 5, as necessary.

Modifying

7. Click the field to modify and type the new information.

Deleting

8. There are two ways to select the job type to delete:

    - Right-click the record selector box (located just left of the name) and click **Delete**.

    20. Highlight the name in the list and within the **Actions** ribbon group click the **Delete** button.

9. Once you click Delete, a message box opens verifying that you really want to delete the type. Click **Yes** within the box to continue or **No** to cancel the operation.

10. Once selected, CAIRS.net draws a line through the type allowing you to delete multiple types at the same time.

11. If you do not want to delete the type, right-click the record and click **Undelete**.

12. Once you select Undelete, a message box opens verifying that you really want to keep the type. 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) or click **Save & Close** (to save and exit).

Adding a Job

Each preventive maintenance job is associated to an action. The action determines what CAIRS will do automatically. You can create and order or trouble, send email or do both. We will first create the basic job information and then we will discuss the specifics for each action.

After you have created the basic job information, you can create the schedule of when the order is to be created or the email sent.

Creating the Basic Job Information

1. Click the Orders/Troubles menu.

2. In the **Navigation** pane, click **Preventive Maintenance Jobs**.

3. There are two ways to create a new job:

    - Within the toolbar directly above the Navigation pane, click the drop-down arrow next to New. Select Preventive Maintenance Job.

    21. Within the Actions pane, click the Add New General Task link.

4. With either option the General – Preventive Maintenance Job window opens. We will start with the General pane, complete the following fields, required fields are marked with an asterisk (*):

- **Preventive Maintenance Job Name –** type in the name of the job

- **Preventive Maintenance Job Type * -** click on the dropdown arrow to access a list of the job types you created, from the list click on the type to associate to the job. The type appears in the field.

- **Preventive Maintenance Job Description –** type in the description of the job. The information within this field will transfer over to the order or trouble once created.

- **Start Order or Trouble** – click the box to insert a checkmark to have this job start and order or trouble ticket. If selected the fields within the Order Template need to be completed.

- **Send Email for the Job –** click the box to insert a checkmark to have the job automatically send an email to the people listed in the Email pane

- **Show Notification for Job -** click the box to insert a checkmark to notify users of a job, when users open CAIRS they will be notified that the job is occurring.

5. You can use one or more of the checkboxes for each job, simply click the box and complete the appropriate pane.

6. Once you have completed these fields it is a good idea to save your information before you continue. Within the Actions ribbon group, click on the Save button. In the next few sections we will break out each action and the information you need to complete for the job.

Start Order or Trouble

If you have selected the Start Order or Trouble action, your next step is to complete the fields within the Order Information pane. The fields that you complete within this pane transfer over to the work order or trouble ticket upon completion.

1. Within the Order Template pane, complete the following information, required fields are marked with an asterisk (*):

- Site * – click on the dropdown arrow to access a list of the sites, there are two columns of information. The first column displays the site that you are assigning to the order. The second column displays the path of the site, this includes all parents. Find the site within the list and click to add the site name to the field.

- Work Flow Name * – click on the dropdown arrow to access a list of work flows, from the list find the work flow to associate to the job. Click on the work flow name to associate it to the order/trouble.

- Work Order Category - click the drop-down arrow to access a list of the work order categories created, from the list click on the work order category.

- Building Name – click on the dropdown arrow to access a list of the buildings created in your database, from the list click on the building name to associate to the order/trouble

- Switch Name – click on the dropdown arrow to access a list of the switches created in your database, from the list click on the switch to associate to the order/trouble

- Organization Name - click the drop-down arrow to access a list and from the list, click on the name of the organization to associate to the order/trouble. The organization drop-down list displays the bottom-most organization first. After the ~~ the complete path to the selected organization displays. Each level of the organizational tree is separated by a >. Once you select an organization, the complete path populates within the field.

- Subscriber Name - click the drop-down arrow to access a list and from the list, click on the name of the subscriber to associate with the order/trouble

- Account Number - click the drop-down arrow to access a list and from the list click the account number to associate to the order/trouble. The list of accounts displays not only the account number but also the account type, one-time, recurring or call charges and organization

- TCO - click the drop-down arrow to access a list of the TCO Groups within your database, from the list click on the group to associate to the order/trouble.

- Days to Due Date – type in the number of days until the job is due for completion

- Contact Name – type in the contact name

- Contact Phone – type in the contact phone number

- Order Trouble Misc 1 – 30 – use these fields to enter in any additional information regarding the order/trouble.

2. Once you have completed these fields it is a good idea to save your information before you continue. Within the Actions ribbon group, click on the Save button.

Send Email

If you have selected the email option, you will complete the information within the Email pane. When the email is sent the description from the General pane is the email body and the preventive maintenance job name is the subject.

1. Within the Email pane complete the following fields for each person that you want to receive the emails, required fields are marked with an asterisk (*):

- Contact Name * - type in the name of the person receiving the email

- Email Address * - type in the email address of the person receiving the email

- Contact Primary Number – type in the telephone number

- Contact Alternate Number – type in the alternate telephone number, such as a cell phone

- Preventive Maintenance Job Email Misc 1 – 5 – use these fields for any additional information about the recipient that you want to track

2. Once you have completed these fields it is a good idea to save your information before you continue. Within the Actions ribbon group, click on the Save button.

History

1. Click the Orders/Troubles menu.

2. In the **Navigation** pane, click **Preventive Maintenance Jobs**.

3. Depending on the amount of records 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 then click the magnifying glass.

   22. Click the **Show All** button.

4. The **Preventive Maintenance Jobs** list open, displaying all existing jobs. Double-click the job to view.

5. The **Preventive Maintenance Job** window opens.

6. Within the **Show** ribbon group, click the **History** button. The following read only information displays for each action performed on the job:

   - **Action Name*** – describes the completed action. For example, Add, Update, etc.

   23. **Custom Field Name –** displays the field name of the modified information

   - **Old Value –** displays the old information

   24. **New Value –** displays the new information

   - **User Name -** displays the username of the person who completed the changes

   25. **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.

   26. **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 job, 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 job.

Deleting a Job

1. Click the Orders/Troubles menu.

2. In the **Navigation** pane, click **Preventive Maintenance Jobs**.

3. Depending on the amount of records 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 then click the magnifying glass.

   27. Click the **Show All** button.

4. The **Preventive Maintenance Jobs** list open, displaying all existing jobs. Within the list find the job to delete, there are two ways to delete a job:

   - Highlight the job within the list and click on the Delete Preventive Maintenance Job link within the Actions pane.

   - Double click on the job to open the record, within the Actions ribbon group, click on the Delete button

5. With either option, once you click delete a message box opens verifying that you really want to delete the job. Click **Yes** within the box to continue or **No** to cancel the operation.

The Schedule

There are two options when creating the schedule for your jobs. Within the Schedule ribbon group are two buttons the Manage Schedule and Create Schedule button. The Create Schedule button allows you to create the dates and times of when the job is to occur. Once the schedule is created you can use the Manage Schedule button to make any necessary changes.

The schedule pane lists all the dates and times of when the job is to occur. You can create schedule entries here, however it is much easier to use the Create Schedule button.

Creating the Schedule

There are several options available when you create the schedule. When you click on the Create Schedule button, the Recurring Schedule popup opens. There are three sections of information that you need to determine for each occurrence.

Start Time

Within this section you will determine when the order or trouble ticket is to be created or the email sent. Click on the dropdown arrow to access a list of times, scroll to the appropriate time and click on the time to insert it into the field. Alternatively, you can click on the field and type in the time, you must keep the formatting the same.

Recurrence Pattern

There are four options within the recurrence pattern section. Within each pattern the right side of the section changes to allows you to determine the different settings.

Daily

With this option you can determine how often the job occurs on a daily basis. The default is for the job to occur daily, however you can change that to occur every 2, 3, 4 etc. days. Within the right side of the section, click on the option button next to the first Every, then type in the number of days between each occurrence in the text box.

Weekly

With this option you can determine how many weeks between each occurrence of the job. The default is for the job to occur every week on Friday. To change this type in the number of weeks between each occurrence in the text box and select the day of the week the job occurs on.

Monthly

With this option you can determine how many months between each occurrence of the job. The default is that the job occurs on the first day of every month. To change this type in the day that the job occurs each month and how many months in between.

Alternately you can determine what day of each month the job occurs on, for example, the second Saturday of every month. The default is to occur on the first Sunday of every month. To change click on the first dropdown arrow and select either first, second, third, fourth or last. Then click on the next dropdown box and select what day of the week, Sunday – Saturday. Last you can have it occur every month or type in the appropriate number into the field.

Yearly

With this option, the job will occur on a yearly basis. You determine how many years between each occurrence and what month and date of the job. The default is for the job to occur every year on the first Sunday of May. To change this, first determine the number of years between each occurrence. Then select what month and date the job is to occur on.

If you don't want to choose a specific date, you can select the last option to have the job occur on a day in any month, the default option is to have the job occur on the first Sunday of every May. Click on each dropdown arrow to make the appropriate selections.

Recurrence Range

The final step is to determine for how long the jobs will occur. You will determine the start and end date. The start text box default to the current date, to change that you either click on the small up and down just to the right of the date, this will advance you one more forward or backward. To change the date completely click on the dropdown arrow to access a calendar, click on the date to add to the field. 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.

Once you have completed the schedule click on the Ok button to continue. Each occurrence of the job now appears in the Schedule pane.

Deleting a Scheduled Occurrence

Once an occurrence appears within the Schedule pane, you can delete it. Right click on the record selector box just to the left of the Scheduled Start Time to access a menu. From

the menu select Delete, a message box appears verifying that you really want to delete the occurrence. Click Ok to continue or no to cancel the operation.

Process Log

The Process Log displays when each occurrence of the job was started and what the status of that occurrence.

Created Records

The Created Records pane provides information on what types of records have been created from the Preventive Maintenance Job (orders or troubles) the name of the record, and the date and time it was created. From this pane, double-click a created record to open that record. For example, if 5 work orders have been created by this Preventive Maintenance Job, any of those orders can be opened from this pane.

Reports

There are four reports that you can generate for your work order and/or trouble tickets. The following report types are available:

- All Orders and Troubles – displays a list of all the work order/troubles within your system, this includes open, completed and cancelled.

28. All Orders and Troubles By Directory Number – displays a list of the work orders/troubles within your system based on telephone number, this report includes open, completed and cancelled work orders.

- All Orders and Troubles By Circuit - displays a list of the work orders/troubles within your system based on circuit name, this report includes open, completed and cancelled work orders.

29. All Portal Requests – displays a list of work orders/troubles with your system that were submitted via the Subscriber Portal, this includes open, completed and cancelled work orders.

- Equipment and Service By Category – displays a list of the equipment and services associated to the work orders based on equipment category. This report includes a One-time Cost Total.

! In order for the Equipment and Service By Category report to work properly, you need to define a report category for each equipment type and/or each piece of equipment. To learn more about this please see, Equipment and Services □ Manage Report Category.

When you click on any of the menu options the report generates to you screen. Once the report displays, you can export the information into a PDF, Excel, or text file.

For each of the reports you can create a search parameter to display only the information that you want to see. When you click the double drop-down arrow in the upper right-hand corner, the Advanced Search Options become available. These search options allow you to limit the amount of information generated within the report.

Generating a Report

1. Click Orders/Troubles.

2. Within the Navigation pane, click Reports.

3. From the four report types, click the report that you want to generate.

4. The report displays in the right-hand pane.

Creating a Search Parameter

1. Click Orders/Troubles.

2. Within the Navigation pane, click Reports.

3. From the four report types, click the report that you want to generate.

4. Click the double drop-down arrow next to the magnifying glass.
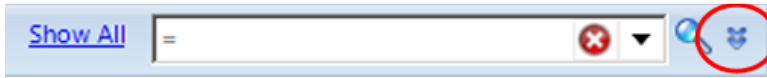
5. The Advanced Search field opens displaying search fields corresponding to the selected Band.
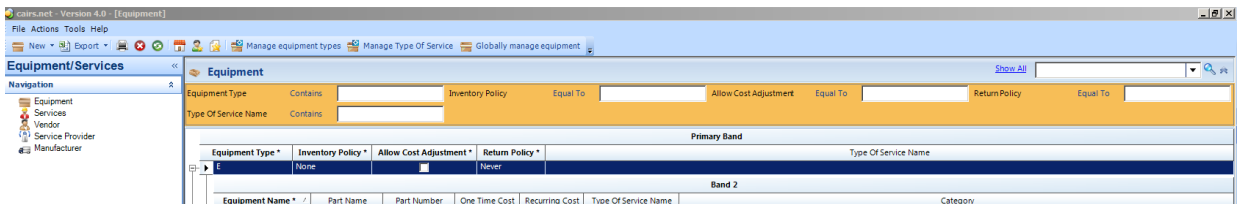
6. Next to each search field is a search criteria descriptor such as Contains, Equal to, etc. This descriptor tells the system how to look for the information within the fields. A different descriptor can be selected by clicking the field's descriptor button.

7. Choose the new descriptor and type the search criteria into the field. Press ENTER. Results matching your search criteria display.

Exporting your report

1. Click Orders/Troubles.

2. Within the Navigation pane, click Reports.

3. From the four report types, click the report that you want to generate.

4. Once your report displays within the right-hand pane you can export the report.

5. Within the toolbar at the top of the screen, click the drop-down arrow next to Export. There are seven options to choose from:

   • Excel (All Levels) – exports the report to an Excel spreadsheet.

   30. Excel (Top Level Only) – not applicable

   • Excel (Expanded Levels Only) – not applicable

   31. Excel (Multiple Files) – exports each order into a separate file. When you select this option, the Browse For Folder pop-up opens allowing you select where to save the files. Within the pop-up select the folder, and click the OK button, the files appear within Windows Explorer in the designated location.

   • PDF (All Levels) – exports the report to a PDF file.

   32. PDF (Top Level Only) – not applicable

   • PDF (Expanded Levels Only) – not applicable

6. Once exported, the file opens allowing you to save or modify the file in the appropriate program.

Subscribers

Subscribers are individuals, businesses, service groups, or other entities that provide useful resources or specific services for the site. Subscribers are not directly a part of the Sites hierarchical structure but often require Site services (including telephone services) necessary for them to be located on the site. Subscribers are generally required to pay for

the services provided to them by the Site. CAIRS maintains general information regarding their name, location, and telephone listing in the Subscribers Section.

Telephone Control Officer Group

A Telephone Control Officer (TCO) is the person responsible for managing your site's Subscriber services. Each TCO is placed into a group to manage several different subscribers.

Resource Manager Group

A resource manager is the individual responsible for monitoring the resources available for a group of people. They are required to evaluate and approve funding for work orders submitted by their Subscribers.

When a subscriber submits a work order through the Subscriber Portal, the work order stops in CAIRS and waits for the Resource Manager to approve funding. Your CAIRS administrator decides which work orders require approval. Once approved the work order can resume within the workflow.

Commanding Officers

Each Subscriber and Subscriber Manager can be assigned a Commanding Officer who ultimately has the final approval over Subscribers and Subscriber Managers.

Supervising Managers

You can assign each subscriber a Supervising Manager. These managers have permission to view data within Subscriber Portal and you can limit their permission based on site and/or organization.

Subscribers

The Subscribers section provides you with the capability to create and maintain an active list of all subscribers (within your infrastructure) in the CAIRS system. Anyone who receives any type of service should be included in the list of subscribers allowing you to bill him or her for the services your organization provides. During installation a Unique Communications installer assists the administrator (or someone designated by the administrator) in setting up the subscriber information.

Subscriber Information

When you open the General – Subscriber window, there are four panes of information. The Subscriber Information pane displays basic information, such as, name, rank, organization, site, etc. The Notes pane displays all created notes for the subscriber. The Related Set Devices displays the sets the subscriber is associated to as well as the port name, set type and set template. The Portal Menu Access pane displays the sections of the portal that this subscriber has access to view.

Adding a New Subscriber

1. Click Subscribers.

2. Within the Navigation pane, click Subscribers.

3. There are two ways to add a subscriber:

- Within the toolbar directly above the Navigation pane, click the drop-down arrow next to New. From the list, select Subscribers.

4. Within the Actions pane, click Add New Subscribers.

5. With either option, the General - Subscriber window opens. Complete the following Subscriber information (required fields are marked with an asterisk (*)):

- **Site*** – click on the dropdown arrow to access a list of the sites, there are two columns of information. The first column displays the site that you are assigning to the subscriber. The second column displays the path of the site, this includes all parents. Find the site within the list and click to add the site name to the field.

6. **Organization Name** – click the drop-down arrow to access a list and from the list, click on the name of the organization to associate to the subscriber. The organization drop-down list displays the bottom-most organization first. After the ~~ the complete path to the selected organization displays. Each level of the organizational tree is separated by a >. Once you select an organization, the complete path populates within the field.
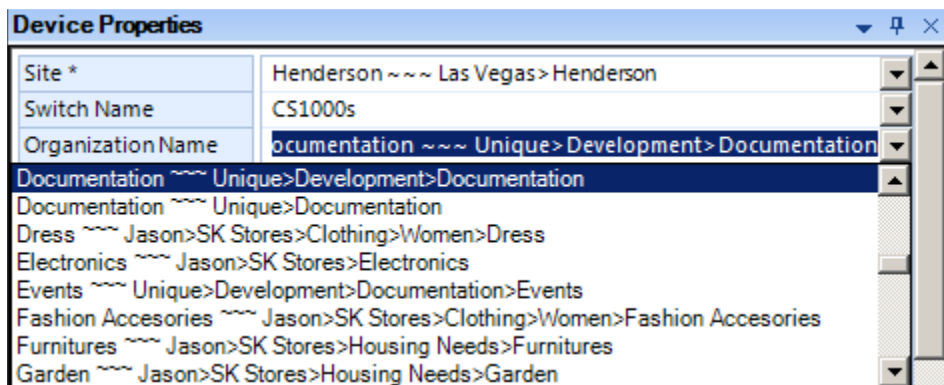
Once you select an organization, the complete path displays within the field.

- **Organization Path** – After you save and close the record, this field populates with complete path of the organization starting with the parent and moving to the child. Each level of the path is separated by a >.

7. **Authorized** – The field defaults to include a solid square, this means that the value is neither true nor false. You will need to click on the field twice to insert a checkmark to indicate this subscriber as authorized. Leave the field blank to make this subscriber un-authorized meaning they will not be able to use the Subscriber Portal.

- **Disabled** – The field defaults to include a solid square, this means that the value is neither true nor false. You will need to click on the field once to remove the solid square to indicate this subscriber as active. Click the field again to insert a checkmark which indicates their account has been disabled. The user will receive a message letting them know their account has been disabled.

8. **Last Name** – type the subscriber's last name.

•   **First Name** – type the subscriber's first name.

9. **Middle Name** – type the subscriber's middle name.

•   **User Name** – type the user name chosen by the subscriber to access their subscriber information.

10. **Alt Sub Number** – type the alternate subscriber number.

•   **Rank** – click the field to access a drop-down list and from the list, select the rank. If a rank is not in the dropdown list, you can type the rank in the field.

11. **Branch** – click the field to access a drop-down list and from the list, select the branch. If a branch is not in the dropdown list, you can type the branch in the field.

•   **Grade** – click the field to access a drop-down list and from the list, select the grade. If a grade is not in the dropdown list, you can type the grade in the field.

12. **Rate** – click on the field to access a drop-down list and from the list, select the rate. If a rate is not in the dropdown list, you can type the rate in the field.

•   **Commanding Officer** – click the field to access a drop-down list and from the list, select the Commanding Officer.

13. **Publishing Option*** – from the drop-down list, select one of the following publishing options:

    •   **Published** – click on the field to access a drop-down list and from the list, select one of the following publishing options:

    14. **Non-published** – if selected, this listing will not appear in any printed or online directory.

    •   **Classified** – if selected, this listing displays in the classified directory only.

    15. **Temporary** – if selected, this displays as a temporary listing.

    •   **Both Published and Classified** – if selected, the listing displays in both the published and classified directory.

    16. **Alternate** – if selected, the Alternate Number that displays in the Alt Number field displays in place of the original number in both the printed and online directories.

•   **Job Description** – type the job description information for the subscriber, if applicable.

17. **E-Mail Address** – type the subscribers e-mail address.

•   **Contact Phone Number** – type the contact phone number of the subscriber.

18. **Key Word** – type a name allowing operators to perform a more precise subscriber search. For example, if the Subscribers last name is Smith, a key word can be the first name.

- **Date Added*** – this field auto-populates with the current date. To change the date, click the field to access a drop-down calendar and from the calendar select the date to add the subscriber. 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.

19. **Account Type*** – click the field to access a drop-down list and from the list select whether the subscriber account is official or unofficial.

- **Comments** – comments can be added when registering.

20. **Subscriber Misc. 1 – 5** – use these fields to enter in any further subscriber information

- **Is Portal Administrator** – if this subscriber is your Subscriber Portal administrator, click the field to insert a checkmark in the field. This allows the subscriber to see Configuration menu option when they access the portal.

21. **Certificate User Name** – if you are using certificate authentication, this field will populate with the certificate user name

- **Certificate Serial Number** – this field populates with the certificate serial number

22. **Certificate EDIPI** – this field populates with the EDIPI for the certificate

- **Customer Code** – this field populates with the Customer Code that is associated TCO and/or Organization that the subscriber belongs to.

23. To add another subscriber, click the Save & New button within the Actions ribbon group and repeat step #3.

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

Adding a Subscriber from Active Directory

1. Click Subscribers.

2. Within the Navigation pane, click Subscribers.

3. There are two ways to add a subscriber from Active Directory:

- Within the toolbar directly above the Subscribers list, click the Add Subscriber from Active Directory link.

4. Within the Actions pane, click the Add Subscriber from Active Directory link.

5. The Provide Active Directory Credentials window opens. Log in with your Administrator Name, Administrator Password, and Domain.

6. Click the OK button.

7. The Active Directory list displays. Within the Active Directory list:

- Search for a Subscriber by typing the subscriber name or portion of the name in the text box. The list displays all subscribers containing the portion of the search

characters. For example, if the search parameter typed in is 'Len', anywhere "len" displays in the active directory listings displays (highlighted fields display the search characters) 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.

8. Within the list, double-click the subscriber name to add. The Subscriber window opens with the Last Name, First Name and User Name populated with the Active Directory information.

9. Type the remaining subscriber information.

10. To add another subscriber, click the Save & New button within the Actions ribbon group and repeat
steps #6 - 8.

11. When you have completed entering the information, click Save & Close, within the Actions ribbon group.

12. The Active Directory list remains open until closed allowing the administrator to add multiple subscribers without having to log in each time. To close the Active Directory list, click the red X in the upper-right-hand corner of the window.

Viewing Subscriber Records

1. Click Subscribers.

2. Within the Navigation pane, click Subscribers.

3. Depending on the amount of records you have within your database, the Subscriber 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 then click the magnifying glass.

4. Click the **Show All** button.

5. There are several additional viewing options for subscribers, within the Views pane, click the option button next to one of the following options to have CAIRS sort the subscriber list based on the common characteristic:

   - Basic Lookup
   - Simple List
   - Requesting SP Access
   - Rank
   - Publishing Option
   - Site
   - Organization

   - Official Accounts
   - Unofficial Accounts
   - Unofficial Detail
   - Account Current
   - TCO Groups
   - Subscriber Notes
   - Disabled Subscribers

- Authorization Codes

6. Each of the 15 viewing options sorts the list and puts the records into groups. Click the plus sign (+) next to each group to drill down to individual records. Double-click the record to view it in detail.

Disabling an Existing Subscriber

1. Click Subscribers.

2. Within the Navigation pane, click Subscribers.

3. Depending on the amount of records you have within your database, the Subscriber 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 then click the magnifying glass.

4. Click the Show All button.

5. Once the list populates, double-click the subscriber needing modification. The General – Subscriber window opens.

6. Click the box within Disabled field to insert a checkmark.

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

Deleting a Subscriber Record

To delete a subscriber record, that subscriber must be free of all assignments.

1. Click Subscribers.

2. Within the Navigation pane, click Subscribers.

3. Depending on the amount of records you have within your database, the Subscriber 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 then click the magnifying glass.

4. Click the Show All button.

5. Once the list populates, there are three ways to delete a subscriber:

   - Highlight the Subscriber name within the list, and on the toolbar directly above the Navigation pane, click the red X.

6. Highlight the Subscriber name within the list, and within the Actions pane click the Delete Subscribers link.

   - Within the subscriber list, double-click the Subscriber name. The Subscriber window opens. 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 Subscriber. Click Yes within the box to continue or No to cancel the operation.

Subscriber Notes

Please see Common Elements → Notes to learn more.

Portal Menu Access

Subscribers must exist in your CAIRS database in order to have access to the portal. When they first register with the portal, they will be notified that they will only have access to the phone book until a CAIRS administrator authorizes their user. In addition to authorizing a user, you can grant them access to menu options. The following menu options are available:

- Billing
8. Call Record Search
- Control Numbers
9. Inventory
- Phonebook
10. Service Requests
- Troubles

Your CAIRS administrators can define the defaults that will be given to any registered subscriber, you can adjust that by adding or removing the checkmarks. To add access, click on the box to add a checkmark. To remove access, click on the box to remove the checkmark. After you make any changes, click on the Save & Close button in the Actions ribbon group.

Subscriber Passwords

Reset a Password

1. Click Subscribers.
2. Within the Navigation pane, click Subscribers.
3. Depending on the amount of records you have within your database, the Subscriber 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 then click the magnifying glass.
   4. Click the Show All button.
5. Once the list populates, double-click the desired subscriber. The Subscriber window opens.

6. Within the Show ribbon group, click the Rest Password button.

7. A box opens with the new temporary password. Select Reset Password to save the new password, or Cancel to stop the process. If you selected to continue the process, a box opens saying the user's password user successfully updated. Click Ok to return to the Subscriber window.

Subscriber History

Please see Common Elements → History to learn more.

Subscriber Orders and Troubles

Please see Common Elements → Orders and Troubles to learn more.

Subscriber Accounts

An account number can be directly associated to a Subscriber, if they are an Unofficial subscriber. All charges incurred by the subscriber will be billed to the associated account.

**If the subscriber is listed as an official subscriber, they can only be associated to a TCO Group. The TCO Group is associated to an organization which is in turn associated to the account number.

Adding an Existing Account Number to a Subscriber

1. Click Subscribers.

2. Within the Navigation pane, click Subscribers.

3. Depending on the amount of records you have within your database, the Subscriber 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 then click the magnifying glass.

    4. Click the Show All button.

5. Once the list populates, double-click the desired subscriber. The Subscriber's window opens.

6. Within the Component Group ribbon group, click the lower portion of the Account button to access a drop-down list. From the list, select List.

7. The Search Accounts popup opens, this popup allows you to search for an existing account. There are two ways to populate the list of available account numbers:

    - Within the search box, type any portion of the account number and then click the magnifying glass.

    8. Click the Show All button.

9. Once the list populates, double-click the number to add the account to the subscriber. The accounts window closes and returns you to the Subscriber window.

10. Within the Actions ribbon group, click Save to continue working with the subscriber.

11. To view the account associated with the subscriber, click on the top portion of the Account button within the Components ribbon group. This will open the account details window. To return to the subscriber exit out of the account by clicking the X in the upper right-hand corner.

Creating a New Account for a Subscriber

1. Click Subscribers.

2. Within the Navigation pane, click Subscribers.

3. Depending on the amount of records you have within your database, the Subscriber 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 then click the magnifying glass.

   - Click the Show All button.

4. Once the list populates, double-click the desired subscriber. The Subscriber's window opens.

5. Within the Component Group ribbon group, click the Account button to access a drop-down list. From the list, select New.

6. The General – Account window opens. There are four information panes. Within the Account pane, complete the following fields (required fields are marked within an asterisk (*)):

   - **Account Number*** – type the account number; this field can contain numbers, letters and/or symbols.

7. **Fiscal Year** – click the field to access a drop-down list, from the list select the fiscal year to apply the charges to, this is commonly the current fiscal year.

   - **Mailing Address** – click the field to access a drop-down list and from the list select the mailing address of where to send the bills.

8. **Category** – another way to group accounts together. Within Accounts is a Manage Account Category that populates the drop-down list.

   - **Allow Call Charges** – click the box to insert a checkmark to indicate the account is responsible for all charges incurred from calls.

9. **Allow One Time Charges** – click the box to insert a checkmark to indicate the account is responsible for all one-time equipment and service charges.

   - **Allow Recurring Charges** – click the box to insert a checkmark to indicate the account is responsible for all recurring equipment and service charges.

10. **Account Type*** – this field auto-populates with Unofficial indicating you are creating an unofficial account. If the account is unofficial, click on the field to access a dropdown list, from the list select Unofficial.

- **Mission Funded** – click the box to insert a checkmark to indicate the charges associated with the account are mission funded.

11. **Exchange Rate Type** – if you are using foreign currency, click on the field to access a dropdown list, from the list select the appropriate exchange rate.

- **Mail Delivery Preference*** – click the field to access a drop-down list and from the list select whether the contact receives the entire bill, notification only or nothing by mail.

12. **Email Delivery Preference*** – click the field to access a drop-down list and from the list select whether the contact receives the entire bill, notification only or nothing by email.

- **Account Misc. 1-10** – use these field to add any additional comments regarding the account

13. **Exclude From Financial Summary** – click the box to insert a checkmark indicating that you want to exclude this account number from the Financial Summary. Leave the field blank to include the account number in the summary.

- **Created Date** – This field auto-populated with the date you created the account number. The field populates after you save the information. To change the created date, click the field to access a drop-down arrow. Click the arrow to access a calendar. To change the month and year click the right or left arrow. Click the date to select. The new date populates in the box.

14. Once you have completed the information, within the Actions ribbon group, click Save & Close (to save and exit) to return to the Subscriber window.

! Within the Account window, you do not need to complete the Subscriber information. After you save the account number CAIRS associates the subscriber and account. When you access the account again, the subscriber pane populates with the subscriber's information.

Reviewing Associated Accounts

1. Click Subscribers.

2. Within the Navigation pane, click Subscribers.

3. Depending on the amount of records you have within your database, the Subscriber 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 then click the magnifying glass.

4. Click the Show All button.

5. Once the list populates, double-click the desired subscriber. The Subscriber's window opens.

6. Within the Component group, click the Account button to access a drop-down list. From the list, select Review.

7. The General – Account window opens allowing you to review and/or modify the account information.

8. Within the Actions ribbon group, click the Save & Close button to return to the Subscriber window.

Subscriber's Set Device

Adding a Set Device to a Subscriber

1. Click Subscribers.

2. Within the Navigation pane, click Subscribers.

3. Depending on the amount of records you have within your database, the Subscriber 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 then click the magnifying glass.

   4. Click the Show All button.

5. Once the list populates, double-click the desired subscriber. The Subscriber's window opens.

6. Within the Component Group ribbon group, click the Set Device drop-down to access a list. Click Add.

7. The Search Set Devices window opens. Click Show All at the top of the window to display a list of available devices.

8. To search for a set device, type the main listed number or portion of the number in the search box in the upper-right-hand corner of the screen. A new list displays with the highlighted numbers. To return to the full list of set devices after a search is complete, click the red X within the search parameters box.

9. To add the set device to the subscriber, double-click the number. The set window closes and returns you to the Subscriber window.

10. Notice that the Set Device pane now populates with the Set Device information.

Review a Subscriber's Set Device

1. Click Subscribers.

2. Within the Navigation pane, click Subscribers.

3. Depending on the amount of records you have within your database, the Subscriber 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 then click the magnifying glass.

4. Click the Show All button.

5. Once the list populates, double-click the desired subscriber. The Subscriber's window opens.

6. Within the Component Group ribbon group, click the Set Device drop-down to access a list. From the list, select Review.

7. The Set Device window opens.

8. If you made any modifications to the set click the Save button within the Actions ribbon group to save your changes and return to the Subscriber window.

9. If you are viewing the set device without modification, click the X in the upper-right-hand corner of the window to return to the Subscriber window.

Removing a Subscriber's Set Device

When you are viewing the subscriber there is no way to remove the set devices from the subscriber record. To remove the subscriber, you must access the set device, remove the subscriber name and save. This will remove the association.

File Attachments

Please see Common Elements → File Attachments to learn more.

Telephone Control Officer Group

A Telephone Control Officer (TCO) monitors the telephone activity for a certain Subscriber group. In this software section, you are creating a TCO Group. Each group contains the Subscribers that are your TCOs.

There are two Subscriber types when accessing a TCO group. First, there are the Selected Subscribers (Subscribers who are TCOs). You will need to add the person as a subscriber and then select them to be a TCO. The second type of subscriber is the Managed Subscriber managed by the TCO. Again, you will need to add each subscriber and select the appropriate person in the TCO field.

TCO Group Information

Adding a Telephone Control Officer Group

1. From the main menu, click Subscribers.

2. Within the Navigation pane, click Telephone Control Officer Group.

3. There are two ways to add a Telephone Control Officer Group:

    - Within the toolbar directly above the Navigation pane, click the drop-down arrow next to New. From the list, select Telephone Control Officer Group.

    4. Within the Actions pane, click Add Telephone Control Officer Group.

5. The Telephone Control Officer window opens. There are 3 information panes:

    - Group Information

    6. Selected Subscribers

    - All Subscribers

7. Within the top pane, Group Information, complete the following information (required fields are indicated with an asterisk (*)):

    - **Telephone Control Officer Group*** – type the Telephone Control Officer Group name.

    8. Job Title – type the job title.

    - **Commanding Officer** – click the field to access a drop-down list and from the list select the name of the Commanding Officer associated with the group.

    9. **Control Number Qty Requested** – type the total number of control numbers required for Toll Tickets, if applicable

    - **Limit By Organization** – click the field to insert a checkmark limiting visibility to only those Organizations selected within the Organizations Ribbon group.

    10. **Limit Billing Detail By Organization** – click the field to insert a checkmark limiting the billing detail to the only the organization associated to the TCO

- **Limit By Account** - click the field to insert a checkmark limiting visibility to only those Accounts selected within the Direct Accounts ribbon group.

11. **Limit By Customer Code** – click the field to insert a checkmark limiting the visibility to only the accounts associated to the Customer Code

12. Within the Actions ribbon group, click Save (save and stay) to continue working within this group or Save & Close (save and exit) to return to the Telephone Control Officer Group.

Deleting a Telephone Control Officer Group

1. Click Subscribers.

2. Within the Navigation pane, click Telephone Control Officer Group.

3. Depending on the amount of records you have within your database, the TCO Group 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 then click the magnifying glass.

4. Click the Show All button.

5. There are three ways to delete a Telephone Control Officer Control Group:

   - Highlight the Telephone Control Officer Group name within the list and within the toolbar directly above the Navigation pane, click the red X.

6. Highlight the Telephone Control Officer Group name within the list and in the Actions pane, click the Delete Telephone Control Officer Group link.

   - Within the Telephone Control Officer Group list, double-click the Telephone Control Officer Group name. The Telephone Control Officer window opens. 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 group. Click Yes within the box to continue or No to cancel the operation.

Selected Subscribers

Managing Subscribers to the group

1. Click Subscribers.

2. Within the Navigation pane, click Telephone Control Officer Group.

3. Depending on the amount of records you have within your database, the TCO Group 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 then click the magnifying glass.

4. Click the Show All button.

5. Once the list populates, double-click the desired TCO Group. The Telephone Control Officer window opens.

Adding a Subscriber to the Group

6. The Subscribers in the Selected Subscribers pane displays a list of Subscribers assigned as Telephone Control Officers to the group.

7. The Available Subscribers pane displays a list of Subscribers currently within your database.

8. To assign a subscriber to the group, highlight the subscriber within the Available Subscribers pane. Within the Subscriber Association ribbon group at the top of the screen, click the Add TCO button.

9. The subscriber name moves from the Available Subscribers pane into the Selected Subscribers pane.

Remove a Subscriber from the Group

10. To remove a subscriber from the group, highlight the subscriber name within the Selected Subscribers pane.

11. Within the Subscriber Association ribbon group at the top of the screen, click the Remove TCO button.

12. Within the Actions ribbon group, click Save (save and stay) to continue working within this group or Save & Close (save and exit) to return to the Telephone Control Officer Group List.

Managed Subscribers

Assigning a Subscriber to a TCO

1. Click Subscribers.

2. Within the Navigation pane, click Subscribers.

3. Depending on the amount of records you have within your database, the Subscriber 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 then click the magnifying glass.

    4. Click the Show All button.

5. Once the list populates, double-click the desired subscriber. The Subscriber's window opens.

6. Within the top pane, click the TCO field to access a drop-down list and from the list select the appropriate TCO group.

7. Within the Actions ribbon group, click the Save & Close button to return to the main menu.

Viewing Managed Subscribers

1. Click Subscribers.

2. Within the Navigation pane, click Telephone Control Officer Group.

3. Depending on the amount of records you have within your database, the TCO Group 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 then click the magnifying glass.

   4. Click the Show All button.

5. Once the list populates, double-click the desired TCO Group. The Telephone Control Officer window opens.

6. Within the Show ribbon group, click the Managed Subscribers button.

7. The screen changes to displays a list of the Subscribers within the Telephone Control Officer Group.

Removing a Subscriber from a TCO

1. Click Subscribers.

2. Within the Navigation pane, click Subscribers.

3. Depending on the amount of records you have within your database, the Subscriber 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 then click the magnifying glass.

   4. Click the Show All button.

5. Once the list populates, double-click the desired subscriber. The Subscriber's window opens.

6. Within the top pane, click the TCO field to access a drop-down list. From the list, select the blank line at the top of the list.

7. Within the Actions ribbon group, click the Save & Close button to return to the main menu.

TCO Groups Organization

Managing Organizations

1. Click Subscribers.

2. Within the Navigation pane, click Telephone Control Officer Group.

3. Depending on the amount of records you have within your database, the TCO Group 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 then click the magnifying glass.

4. Click the Show All button.

5. Once the list populates, double-click the desired TCO Group. The Telephone Control Officer window opens.

6. Within the Show ribbon group, click the Organizations button. The screen changes to displays two panes of information, the top pane displays the organization associated to the TCO Group. The lower pane displays the complete list of organizations currently established within your database.

7. Within the Search Organizations (lower pane), there are 7 columns of information:

- **Organization Name** – displays the lowest level of the organization tree.

8. **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.

9. **TCO** – displays the TCO Group associated to the organization

- **Organization Code** – displays the organization code

10. **Organization Abbreviation** – displays the organization abbreviation

- **Inactive** – if a checkmark appears in the column, the organization has been deactivated and should not be assigned to the TCO Group

Adding an Organization

11. To add an organization to a TCO Group, 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 appears within the pane.

Deleting an Organization

12. Within the Selected Organizations pane, right-click the Organization to delete. A small pop-up box opens; click Delete within the box.

13. 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.

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

15. If you do not want to delete the Organization, right-click the record to access a pop-up menu. Click Undelete.

16. 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.

17. Within the Actions ribbon group, click Save (to save and stay) to continue adding information for the TCO, or Save & Close (to save and exit) to return to the TCO Group list.

TCO Groups Direct Accounts

Managing Direct Account

1. Click Subscribers.

2. Within the Navigation pane, click Telephone Control Officer Group.

3. Depending on the amount of records you have within your database, the TCO Group 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 then click the magnifying glass.

    4. Click the Show All button.

5. Once the list populates, double-click the desired TCO Group. The Telephone Control Officer window opens.

6. Within the Show ribbon group, click the Direct Accounts button.

7. The screen changes to displays two panes of information, the top pane displays the account number associated to the TCO Group. The lower pane displays the complete list of account numbers currently established within your database.

8. Within the Search Organization (lower pane), there are 3 columns of information:

    - Account Number

    9. Organization Name

    - Organization Path

Adding a Direct Account

10. To add an account to a TCO Group, find the number within the list and double-click the row. The account number displays in the Selected Organizations pane.

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

Deleting a Direct Account

11. Within the Selected Accounts pane, right-click the account number to delete. A small pop-up box opens; click Delete within the box.

12. Once you click Delete, a message box displays verifying that you really want to delete the account. Click Yes within the box to continue or No to cancel the operation.

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

14. If you do not want to delete the account number, right-click the record to access a pop-up menu. Click Undelete.

15. 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.

16. Within the Actions ribbon group, click Save (to save and stay) to continue adding information for the TCO, or Save & Close (to save and exit) to return to the TCO Group list.

TCO Groups Customer Codes

Managing Customer Codes

1. Click Subscribers.

2. Within the Navigation pane, click Telephone Control Officer Group.

3. Depending on the amount of records you have within your database, the TCO Group 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 then click the magnifying glass.

4. Click the Show All button.

5. Once the list populates, double-click the desired TCO Group. The Telephone Control Officer window opens.

Adding a Customer Code

6. Within the Show ribbon group, click the Customer Codes button.

7. Within in the pane, click on the row marked with an asterisk and type in the new customer code.

8. Alternately, you can click on the field to access a dropdown list, from the list select the customer code to associate to the TCO Group.

Deleting a Customer Code

9. Within the Show ribbon group, click the Customer Codes button.

10. Within the pane, right-click the customer code to delete. A small pop-up box opens; click Delete within the box.

11. Once you click Delete, a message box displays verifying that you really want to delete the code. Click Yes within the box to continue or No to cancel the operation.

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

13. If you do not want to delete the code, right-click the record again to access a pop-up menu. Click Undelete.

14. 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.

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

Resource Managers

A Resource Manager is responsible for monitoring resources available for a group of people. They are required to evaluate and approve funding for work orders submitted by their subscribers.

When a subscriber submits a work order through the Subscriber Portal, the work order stops within CAIRS and waits for the Resource Manager to approve funding. Once approved, the work order resumes within the workflow. Not all work orders require approval and your CAIRS administrator decides which work orders require approval.

In this section of the software, you are creating a Resource Manager Group. Each group contains the Subscribers that are also Resource Managers. You create each resource manager in your database as a subscriber, and then assign him or her to a resource manager group.

Once you create your resource manager groups, you assign them to a site. When a subscriber submits a work order for the site, Subscriber Portal notifies the Resource Manager that a work order requires their approval.

Resource Manager Information

Adding a Resource Manager Group

1. Click Subscribers.

2. Within the Navigation pane, click Resource Manager Group.

3. There are two ways to add a Resource Manager Group:

- Within the toolbar directly above the Navigation pane, click the drop-down arrow next to New. From the list, select Resources Manager Group.

    4. Within the Actions pane, click the Add Resource Manager Group.

5. The General - Resource Manager window opens. There are 3 information panes:

- Group Information

    6. Selected Subscribers

- All Subscribers

7. Within the top pane, Group Information, complete the following information (required fields are indicated with an asterisk (*)):

- Resource Manager – type the manager's name.

    8. Job Title – type the manager's job title.

9. In the bottom group, All Subscribers, select the subscriber(s) to be assigned to this group. To search for a specific subscriber, type their name or part of their name in the search box and press ENTER, or select the magnifying glass. A list of possible matches populates within the pane.

10. Click the desired subscriber(s) and click the Add Selected Manager in the Subscriber Association ribbon group.

11. The Selected Subscribers pane populates with the selected subscriber(s).

12. Within the Actions ribbon group, click Save (save and stay) to continue working within this group or Save & Close (save and exit) to return to the Resource Manager list.

Deleting a Resource Manager Group

You cannot delete a group until you remove the managed Subscribers from the group.

1. Click Subscribers.

2. Within the Navigation pane, click Resource Manager Group.

3. Depending on the amount of records you have within your database, the Resource Manager Group 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 then click the magnifying glass.

    4. Click the Show All button.

5. Once the list populates, double-click the desired Resource Manager Group. The Resource Manager window opens.

6. There are three ways to delete a Resource Manager Group:

- Highlight the Resource Manager Group name within the list and within the toolbar directly above the Navigation pane, click the red X.

7. Highlight the Resource Manager Group name within the list and within the Actions pane click the Delete Resource Manager Group link.

- Within the list, double-click the Resource Manager Group name. The Resource Manager Group window opens. Within the Actions ribbon group, click the Delete button.

8. Once you click Delete, a message box displays verifying that you really want to delete the group, click Yes within the box to continue or No to cancel the operation.

Selected Subscribers

Managing Subscribers to a Group

1. Click Subscribers.

2. Within the Navigation pane, click Resource Manager Group.

3. Depending on the amount of records you have within your database, the Resource Manager Group 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 then click the magnifying glass.

   4. Click the Show All button.

5. Once the list populates, double-click the desired Resource Manager Group. The Resource Manager window opens.

6. The Subscribers in the Selected Subscribers pane are currently assigned to this Resource Manager Group.

7. The All Subscribers pane displays a list of Subscribers currently within your database but assigned to this group.

Adding a Subscriber to a Group

8. To assign a subscriber to the group, highlight the subscriber within the Available Subscriber list in the All Subscribers pane and click the Add Selected Manager in the Subscribers Association ribbon group. Alternatively, double-click the selected subscriber in the Available Subscriber list.

9. The subscriber name moves from the Available Subscriber pane into the Selected Subscribers pane.

Deleting a Subscriber from the Group

10. To remove a subscriber from the group, highlight the subscriber's name within the Selected Subscribers pane and click Remove Selected Manager from the Subscriber Association ribbon group.

11. Within the Actions ribbon group, click Save (save and stay) to continue working within this group or Save & Close (save and exit) to return to the Resource Manager list.

Resource Manager Sites

Managing Sites

1. Click Subscribers.

2. Within the Navigation pane, click Resource Manager Group.

3. Depending on the amount of records you have within your database, the Resource Manager Group 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 then click the magnifying glass.

4. Click the Show All button.

5. Once the list populates, double-click the desired Resource Manager Group. The Resource Manager window opens.

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 Resource Manager. 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.

7. Site Path – displays the complete path to the site. Each level is separated by a >.

    • Site Level – displays the site level name or number.

8. 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, once entered click the magnifying glass. Any record with the search characteristics appears within the pane.

Adding a Site

9. To add a site to a Resource Manager, 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 resource. For example, if you associate a parent and want all the children associated you must associate all children site as well.

Deleting a Site

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10. Within the top pane, right-click the site name to access a pop-up menu, from the menu select Delete.

11. 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.

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

13. If you do not want to delete the site, right-click the record to access a pop-up menu and click Undelete.

14. Within the Actions ribbon group, click Save (save and stay) to continue working with this group or Save & Close (save and exit) to return to the Resource Manager list.

Resource Manager Organizations

Managing Organizations

1. Click Subscribers.

2. Within the Navigation pane, click Resource Manager Group.

3. Depending on the amount of records you have within your database, the Resource Manager Group 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 then click the magnifying glass.

4. Click the Show All button.

5. Once the list populates, double-click the desired Resource Manager Group. The Resource Manager window opens.

6. Within the Show ribbon group, click the Organizations button. The screen changes to displays two panes of information, the top pane displays the organization associated to the Resource Manager Group. The lower pane displays the complete list of organizations currently established within your database.

7. Within the Search Organizations (lower pane), there are 7 columns of information:

    - **Organization Name** – displays the lowest level of the organization tree.

8. **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.

9. **TCO** – displays the TCO Group associated to the organization

    - **Organization Code** – displays the organization code

10. **Organization Abbreviation** – displays the organization abbreviation

- **Inactive** – if a checkmark appears in the column, the organization has been deactivated and should not be assigned to the TCO Group

<u>**Adding an Organization**</u>

11. To add an organization to a Resource Manager Group, 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 appears within the pane.

<u>**Deleting an Organization**</u>

12. Within the Selected Organizations pane, right-click the Organization to delete. A small pop-up box opens; click Delete within the box.

13. 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.

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

15. If you do not want to delete the Organization, right-click the record to access a pop-up menu. Click Undelete.

16. 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.

17. Within the Actions ribbon group, click Save (to save and stay) to continue adding information for the Resource Manager, or Save & Close (to save and exit) to return to the Resource Manager Group list.

Commanding Officers

Each Subscriber and Subscriber Manager can be assigned a Commanding Officer who ultimately has final approval over Subscribers and Subscriber Managers.

Commanding Officer Information

Adding a Commanding Officer

1. Click Subscribers.

2. Within the Navigation pane, click Commanding Officers.

3. There are two ways to add a Commanding Officer:

- Within the toolbar, directly above the Navigation pane, click the drop-down arrow next to New. From the list, select Commanding Officer.

4. Within the Actions pane, click Add New Commanding Officer.

5. The Commanding Officer window opens. Complete the following information, (required fields are indicated with an asterisk (*)):

- **Commanding Officer*** – type the Commanding Officer name.

6. **Email Address*** – type the Commanding Officer email address.

7. Within the Actions ribbon group, click Save & New (save and stay) to continue adding Commanding Officers or Save & Close (save and exit) to return to the Commanding Officer List.

Deleting a Commanding Officer

1. Click Subscribers.

2. Within the Navigation pane, click Commanding Officers.

3. Depending on the amount of records you have within your database, the Commanding Officers 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 then click the magnifying glass.

4. Click the Show All button.

5. There are three ways to delete a Commanding Officer:

- Highlight the Commanding Officer name within the list, and within the toolbar directly above the navigation pane, click the red X.

6. Highlight the Commanding Officer name within the list and within the Actions pane click the Delete Commanding Officer link.

- Within the list, double-click the Commanding Officer name. The Commanding Officer window opens. 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 group. Click Yes within the box to continue or No cancel the operation.

Managed Subscribers

1. Click Subscribers.

2. Within the Navigation pane, click Subscribers.

3. Depending on the amount of records you have within your database, the Subscriber 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 then click the magnifying glass.

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4. Click the Show All button.

5. Once the list populates, double-click the desired subscriber. The Subscriber window opens.

Adding a Subscriber

6. Within the top pane, click the Commanding Officer field to access a drop-down list and select the appropriate Officer.

Removing a Subscriber

7. Within the top pane, click the Commanding Officer field to access a drop-down list and select the blank line at the top of the list.

8. Within the Actions ribbon group, click the Save & Close button to return to the main menu.

Viewing Managed Subscribers

1. Click Subscribers.

2. Within the Navigation pane, click Commanding Officers.

3. Depending on the amount of records you have within your database, the Commanding Officers 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 then click the magnifying glass.

   4. Click the Show All button.

5. Once the list populates, double-click the desired Commanding Officer. The Commanding Officer window opens.

6. Within the Show ribbon group, click the Managed Subscribers button.

7. The screen changes to display a list of the Subscribers associated to the Commanding Officer.

Commanding Officer Sites

Managing Sites

1. Click Subscribers.

2. Within the Navigation pane, click Commanding Officers.

3. Depending on the amount of records you have within your database, the Commanding Officers 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 then click the magnifying glass.

   4. Click the Show All button.

5. Once the list populates, double-click the desired Commanding Officer. The Commanding Officer window opens.

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 Commanding Officer. 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.

7. **Site Path** – displays the complete path to the site. Each level is separated by a >.

   - **Site Level** – displays the site level name or number.

8. **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, once entered click the magnifying glass. Any record with the search characteristics appears within the pane.

Adding a Site

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

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

Deleting a Site

10. Within the top pane, right-click the site name to access a pop-up menu, from the menu select Delete.

11. 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.

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

13. If you do not want to delete the site, right-click the record to access a pop-up menu and click Undelete.

14. 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.

15. Within the Actions ribbon group, click Save (save and stay) to continue working with the commanding officer, or Save & Close (save and exit) to return to the Commanding Officer list.

Commanding Officer Organizations

Managing Organizations

1. Click Subscribers.

2. Within the Navigation pane, click Commanding Officers.

3. Depending on the amount of records you have within your database, the Commanding Officers 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 then click the magnifying glass.

    4. Click the Show All button.

5. Once the list populates, double-click the desired Commanding Officer. The Commanding Officer window opens.

6. Within the Show ribbon group, click the Organizations button. The screen changes to displays two panes of information, the top pane displays the organization associated to the Commanding Officer. The lower pane displays the complete list of organizations currently established within your database.

7. Within the Search Organization (lower pane), there are 7 columns of information:

    • **Organization Name** – displays the lowest level of the organization tree.

    8. **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.

    9. **TCO** – displays the TCO Group associated to the organization

    • **Organization Code** – displays the organization code

    10. **Organization Abbreviation** – displays the organization abbreviation

    • **Inactive** – if a checkmark appears in the column, the organization has been deactivated and should not be assigned to the Commanding Officer

Adding an Organization

11. To add an organization to a Commanding Officer, 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. All records with the search criteria appear within the pane.

Deleting an Organization

12. Within the Selected Organizations pane, right-click the Organization to delete. A small pop-up box opens; click Delete within the box.

13. 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.

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

15. If you do not want to delete the Organization, right-click the record to access a pop-up menu and click Undelete.

16. 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.

17. Within the Actions ribbon group, click Save (to save and stay) to continue adding information for the Commanding Officer, or Save & Close (to save and exit) to return to the Commanding Officer list.

Supervising Managers

Supervising Managers allow subscribers to view portal billing at multiple levels within an organization's structure. One subscriber at a very high level can see all of the sub organizations and another subscriber at a lower level will see only their organizations. Each supervising manager can have their own set of Organizations and these organizations can overlap between mangers.

Adding a Supervising Manager

1. Click Subscribers.

2. Within the Navigation pane, click Supervising Managers.

3. There are two ways to add a Supervising Manager

   - Within the toolbar directly above the Navigation pane, click the drop-down arrow next to New. From the list, select Supervising Manager

4. Within the Actions pane, click Add New Supervising Manager

5. The General - Supervising Manager window opens. Complete the following information, (required fields are indicated with an asterisk (*)):

   - **Supervising Manager Name*** - type the name of the Supervising Manager

6. **Subscriber*** - click the field to access a dropdown list, from the list select the Subscriber, this is an existing subscriber within the CAIRS database.

   - **Limit By Site** – click the field to insert a checkmark to limit the Supervising Manager to only those sites selected within the Site button

7. **Limit By Organization** - click the field to insert a checkmark limiting visibility to only those Organizations selected within the Organizations Ribbon group.

- **Limit By Account** - click the field to insert a checkmark limiting visibility to only those Accounts selected within the Direct Accounts ribbon group.

8. **Limit Billing Detail by Organization** - click the field to insert a checkmark limiting the billing detail to the only the organization associated to the Supervising Manager

9. Within the Actions ribbon group click Save (to save and stay) within the Actions ribbon group to save the information and continue working within the window or Save & Close, to save the information and close the window.

Deleting a Supervising Manager

1. Click Subscribers.

2. Within the Navigation pane, click Supervising Manager.

3. Depending on the amount of records you have within your database, the Supervising Manager 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 then click the magnifying glass.

4. Click the Show All button.

5. There are three ways to delete a Supervising Manager:

   - Highlight the Supervising Manager name within the list, and within the toolbar directly above the navigation pane, click the red X.

6. Highlight the Supervising Manager name within the list and within the Actions pane click the Delete Supervising Manager link.

   - Within the list, double-click the Supervising Manager name. The Supervising Manager window opens. 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 manager. Click Yes within the box to continue or No cancel the operation.

Supervising Manager Sites

Managing Sites

1. Click Subscribers.

2. Within the Navigation pane, click Supervising Manager.

3. Depending on the amount of records you have within your database, the Supervising Manager 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 then click the magnifying glass.

4. Click the Show All button.

5. Once the list populates, double-click the desired Supervising Manager. The Supervising Manager window opens.

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 Supervising Manager. 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.

7. **Site Path** – displays the complete path to the site. Each level is separated by a >.

  - **Site Level** – displays the site level name or number.

8. **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, once entered click the magnifying glass. Any record with the search characteristics appears within the pane.

Adding a Site

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

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

Deleting a Site

10. Within the top pane, right-click the site name to access a pop-up menu, from the menu select Delete.

11. 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.

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

13. If you do not want to delete the site, right-click the record to access a pop-up menu and click Undelete.

14. 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.

15. Within the Actions ribbon group, click Save (save and stay) to continue working with this manager or Save & Close (save and exit) to return to the Supervising Manager list.

Supervising Manager Organizations

Managing Organizations

1. Click Subscribers.

2. Within the Navigation pane, click Supervising Manager.

3. Depending on the amount of records you have within your database, the Supervising Manager 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 then click the magnifying glass.

4. Click the Show All button.

5. Once the list populates, double-click the desired Supervising Manager. The Supervising Manager window opens.

6. Within the Show ribbon group, click the Organizations button. The screen changes to displays two panes of information, the top pane displays the organization associated to the Supervising Manager. The lower pane displays the complete list of organizations currently established within your database.

7. Within the Search Organization (lower pane), there are 7 columns of information:

   - **Organization Name** – displays the lowest level of the organization tree.

8. **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.

9. **TCO** – displays the TCO Group associated to the organization

   - **Organization Code** – displays the organization code

10. **Organization Abbreviation** – displays the organization abbreviation

    - **Inactive** – if a checkmark appears in the column, the organization has been deactivated and should not be assigned to the Supervising Manager

Adding an Organization

11. To add an organization to a Supervising Manager, 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 appears within the pane.

Deleting an Organization

12. Within the Selected Organizations pane, right-click the Organization to delete. A small pop-up box opens; click Delete within the box.

13. 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.

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

15. If you do not want to delete the Organization, right-click the record to access a pop-up menu, click Undelete.

16. 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.

17. Within the Actions ribbon group, click Save (to save and stay) to continue adding information for the Supervising Manager, or Save & Close (to save and exit) to return to the Supervising Manager list.

Supervising Manager Direct Account

Managing Direct Account

1. Click Subscribers.

2. Within the Navigation pane, click Supervising Manager.

3. Depending on the amount of records you have within your database, the Supervising Manager 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 then click the magnifying glass.

   4. Click the Show All button.

5. Once the list populates, double-click the desired Supervising Manager. The Supervising Manager window opens.

6. Within the Show ribbon group, click the Direct Accounts button.

7. The screen changes to displays two panes of information, the top pane displays the account number associated to the Supervising Manager. The lower pane displays the complete list of account numbers currently established within your database.

8. Within the Search Organization (lower pane), there are 3 columns of information:

   - Account Number

   9. Organization Name

   - Organization Path

Adding a Direct Account

10. To add an account to a Supervising Manager, find the number within the list and double-click the row. The account number displays in the Selected Organizations pane.

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

Deleting a Direct Account

11. Within the Selected Accounts pane, right-click the account number to delete. A small pop-up box opens; click Delete within the box.

12. Once you click Delete, a message box displays verifying that you really want to delete the account. Click Yes within the box to continue or No to cancel the operation.

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

14. If you do not want to delete the account number, right-click the record to access a pop-up menu, click Undelete.

15. 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.

16. Within the Actions ribbon group, click Save (to save and stay) to continue adding information for the manager, or Save & Close (to save and exit) to return to the Supervising Manager list.

Supervising Manager Customer Codes

Managing Customer Codes

1. Click Subscribers.

2. Within the Navigation pane, click Supervising Managers.

3. There are two ways to add a Supervising Manager

    - Within the toolbar directly above the Navigation pane, click the drop-down arrow next to New. From the list, select Supervising Manager

    4. Within the Actions pane, click Add New Supervising Manager

5. The General - Supervising Manager window opens. Within the Show ribbon group, click the Customer Codes button.

Adding a Customer Code

6. Within in the pane, click on the row marked with an asterisk and type in the new customer code.

7. Alternately, you can click on the field to access a dropdown list, from the list select the customer code to associate to the Supervising Manager.

Deleting a Customer Code

8. Within the Show ribbon group, click the Customer Codes button.

9. Within the pane, right-click the customer code to delete. A small pop-up box opens; click Delete within the box.

10. Once you click Delete, a message box displays verifying that you really want to delete the code. 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 code, right-click the record again to access a pop-up menu. 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 working with the Supervising Manager, or Save & Close (to save and exit) to return to the Supervising Manager list.

Portal Views

These read only views are the exact view that your Subscriber Portal users will see when accessing the portal. There are 3 different views:

- Cell Phone
- DSN Phone
- Circuit

Equipment/Services

Track item inventory records, establish stock limits, track related costs, and create and manage vendor, service provider, and manufacturer information related to equipment and services from the Equipment/Services section. The vendor, service provider, and

manufacturer information are especially valuable in providing contact information, maintaining shipping information and providing a record of your main contacts.

In CAIRS, the cost of Equipment and/or Services can be associated to different network assets including set devices, circuits, organizations, account codes, and subscribers. Use CAIRS to track costs associated with the equipment and/or services assigned to the specific asset. This provides you with the information necessary to bill the appropriate party for the equipment and/or services provided to them.

When creating a record for any provided equipment or service, you are required to associate the record to a specific site.

! CAIRS functionality does not permit equipment items or services to be un-associated with a site.

Within the Navigation pane, you can select from five choices used to manage Equipment and Services:

- **Equipment** – manage all equipment types including their related information and cost. Equipment is defined as a physical device, for example, a 2500 set, an M5316, router, etc.

33. **Services** – manage all service types including their related information and cost. A service is defined as performing an action for a piece of equipment, for example, man-hours, labor cost, etc.

- **Vendor** – manage the equipment vendors.

34. **Service Provider** – manage the service providers.

- **Manufacturer** – manages the equipment and/or service manufacturers.

Equipment

Equipment is broken into three parts. First, you add all the equipment types available within your system. Equipment types are categories you place equipment into, for example, Analog Set Devices, Digital Set Devices, Circuits, etc.

Next, you add in equipment items. These are the specific groups of items you provide, for example, M5316, 2500, M5112, etc. Now, you can add the specific pieces of equipment. This is your on-shelf inventory. You can add in a general piece of equipment with a specific amount and when that amount is at a certain level CAIRS notifies the administrator. Alternatively, you can add in specific (each with a serial number) pieces of equipment. Once it is associated to an assignment, you cannot use that equipment elsewhere.

Managing Type of Service

A type of service is a way to categorize your equipment, services, and call charges for billing and payment distribution purposes.

1. Click **Equipment/Services** from the menu.

2. Within the Navigation pane, click **Equipment**.

3. You will have two alternatives for Managing Type of Service:

- Within the toolbar directly above the **Navigation** pane, click the **Manage Type Of Service** button.

7. Within the Action pane, click the **Manage Type Of Service** link.

! If you are unable to view the Actions pane, you may need to use the scroll bar to the right of the Navigation pane to reveal the menu choices. Or using your mouse, point at the Separation bar, and when the up/down arrow appears, right-click the line and hold it to pull the line down.

4. Using either of the choices, The Manage Type Of Service window opens.

Adding a Type of Service

5. Click the top row, marked with an asterisk (*), to add a new record.

6. The line highlights. Type the following information (required fields are marked with an asterisk (*)):

- **Type of Service Name*** type the name of the type of service for example Mission Funded, Reimbursable, etc.

8. **Type of Service ID*** – type the 2-character type of service id.

- **Description** – use this field to type a description of the type of service.

9. **Mission Funded*** – this field remains empty, indicating the type of service is not mission funded. Click the box to insert a checkmark to indicate the type of service is mission funded.

- **Import Charge Type Override** – when using Vendor Media Import for equipment charges you can choose to override how the charges will be imported. Click on the dropdown arrow to select one of the following:

  10. **None** – this will import the charges based on the vendor

  - **Import as One Time –** this will import all charges as one-time charges only

  11. **Import as Recurring** – this will import all charges as recurring, they will continue to be charged to the account monthly

7. To add another type, click the **Save** button and repeat steps 4 and 5, as necessary.

Deleting a Type of Service

8. Within the Manage Type Of Service window, there are two ways to delete a type of service:

- Right-click the record selector box next to the type of service name to access a menu from the menu click on **Delete.**

  12. Highlight the name in the list and within the Actions ribbon group click the **Delete** button.

9. Once you click Delete, a message box appears verifying that you really want to delete the type of service. Click **Yes** within the box to continue or **No** to cancel the operation.

    Once selected, CAIRS draws a line through the entire row allowing you to delete multiple types at once.

10. If you do <u>not</u> want to delete the type, right-click the record to access a pop-up menu and click **Undelete.**

11. Once you select Undelete, a message box appears verifying that you really want to keep the type. 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 service types or **Save & Close** (to save and exit) to return to the Equipment list.

Manage Report Category

The Report Category allows you to generate a report within Orders and Troubles to view the equipment and services related to each work order based on this category.

1. Click **Equipment/Services** from the menu.

2. Within the Navigation pane, click **Equipment**.

3. You will have two alternatives for Managing Report Category:

    - Within the toolbar directly above the **Navigation** pane, click the **Manage Report Category** button.

    13. Within the Action pane, click the **Manage Report Category** link.

! If you are unable to view the Actions pane, you may need to use the scroll bar to the right of the Navigation pane to reveal the menu choices. Or using your mouse, point at the Separation bar, and when the up/down arrow appears, right-click the line and hold it to pull the line down.

4. Using either of the choices, The Manage Report Category window opens.

<u>Adding a Report Category</u>

5. Click the top row, marked with an asterisk (*), to add a new record. The line highlights. Type the following information (required fields are marked with an asterisk (*)):

    - **Report Category –** type the category name, for example, material, overtime hours, regular hours, etc.

    14. **Included Data * -** click the dropdown arrow to access a list from the list select one of following:

        - All Charges
        5. One Time Cost Only
        - Quantity Only

6. To add another category, click the **Save** button and repeat steps 4 and 5, as necessary.

Deleting a Report Category

7. Within the Manage Report Category window, there are two ways to delete a type of service:

    -   Right-click the record selector box next to the report category to access a menu from the menu click on **Delete.**

    15. Highlight the name in the list and 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 category. Click **Yes** within the box to continue or **No** to cancel the operation.

    Once selected, CAIRS draws a line through the entire row allowing you to delete multiple categories at once.

9. If you do not want to delete the category, right-click the record to access a pop-up menu, and click **Undelete.**

10. Once you select Undelete, a message box appears verifying that you really want to keep the category. 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 categories or **Save & Close** (to save and exit) to return to the Equipment list.

Manage Warehouses

This option allows you to manage your inventory more efficiently by adding in the complete details for each item. You can enter in contact information, address information, miscellaneous information, etc.

1. Click **Equipment/Services** from the menu.

2. Within the Navigation pane, click **Equipment**.

3. You will have two alternatives for Managing Warehouses:

    -   Within the toolbar directly above the **Navigation** pane, click the **Manage Warehouses** button.

    16. Within the Action pane, click the **Manage Warehouses** link.

! If you are unable to view the Actions pane, you may need to use the scroll bar to the right of the Navigation pane to reveal the menu choices. Or using your mouse, point at the Separation bar, and when the up/down arrow appears, right-click the line and hold it to pull the line down.

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4. Using either of the choices, The Manage Warehouses window opens.

Adding a Warehouse

5. Click the top row, marked with an asterisk (*), to add a new record. The line highlights. Type the following information (required fields are marked with an asterisk (*)):

   - Warehouse Name * - type the name of the warehouse, this is the location of where the item is located.

   17. Contact Name and Number – type the name and number of the contact at the warehouse

   - Email Address – type the email address of contact

   18. Website Address – type the website address

   - Address Line 1 – 4 – use the four fields to enter in the address

   19. City – type the city name

   - State – type the two-digit state abbreviation

   20. Zip Code – type the zip code

   - Country – type the country name

   21. Warehouse Misc 1 – 5 – use these fields to type any miscellaneous information regarding the warehouse

   - Notes – use this field for any additional notes regarding the warehouse

6. To add another warehouse, click the **Save** button and repeat steps 4 and 5, as necessary.

Deleting a Warehouse

7. Within the Manage Warehouse window, there are two ways to delete a warehouse:

   - Right-click the record selector box next to the warehouse name to access a menu from the menu click on **Delete.**

   22. Highlight the name in the list and 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 warehouse. Click **Yes** within the box to continue or **No** to cancel the operation.

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

9. If you do not want to delete the warehouse, right-click the record to access a pop-up menu, and click **Undelete.**

10. Once you select Undelete, a message box appears verifying that you really want to keep the warehouse. 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 warehouses or **Save & Close** (to save and exit) to return to the Equipment list.

Managing Technicians

You can add a list of technicians to associate to the equipment or service upon installation. This allows you to track who installed each piece of equipment or service and when they installed it.

1. Click **Equipment/Services** from the menu.

2. Within the Navigation pane, click **Equipment**.

3. You will have two alternatives for Managing Technicians:

    - Within the toolbar directly above the **Navigation** pane, click the **Manage Technicians** button.

    35. Within the Action pane, click the **Manage Technicians** link.

4. Using either of the choices, The Manage Technicians window opens.

Adding a Technician

5. Click the top row, marked with an asterisk (*), to add a new record. The line highlights. Complete the following information (required fields are marked with an asterisk (*)):

    - **Technician *** - type the name of the technician into the field

    36. **Email Address** – type the email for the technician

    - **Primary/Secondary Contact Number –** type the primary then the secondary telephone number for the technician

    37. **Technician Misc 1-4** – use these fields for any other information regarding the technician

6. To continue adding technicians, click the **Save** button and repeat steps 4 and 5, as necessary.

Deleting a Technician

7. Within the Managing Technicians window, there are two ways to delete a technician:

    - Right-click the record selector box next to the Technician Name to access a menu from the menu click on **Delete.**

    38. Highlight the name in the list and 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 technician. Click **Yes** within the box to continue or **No** to cancel the operation.

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

9. If you do not want to delete the technician, right-click the record to access a pop-up menu, and click **Undelete.**

10. Once you select Undelete, a message box appears verifying that you really want to keep the technician. 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 technicians or **Save & Close** (to save and exit) to return to the Equipment list.

Managing Equipment Types

Equipment Types are categories you place equipment into. For example: Analog Set Devices, Digital Set Devices, Circuits, etc.

Adding Equipment Types

1. Click **Equipment/Services** from the menu.

2. Within the Navigation pane, click **Equipment**.

3. You will have two alternatives for Managing Equipment Types:

    • Within the toolbar directly above the **Navigation** pane, click the **Manage equipment types** button.

    23. Within the Action pane, click the **Manage equipment types** link.

! If you are unable to view the Actions pane, you may need to use the scroll bar to the right of the Navigation pane to reveal the menu choices. Or, using your mouse, point at the Separation bar, and when the up/down arrow appears, right-click the line and hold it to pull the line down.

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4. Using either of the choices, The Manage equipment types window opens. Click the top row, marked with an asterisk (*), to add a new record. The line highlights.

5. Type the following information required fields are marked with an asterisk (*)):

    • **Equipment Type*** – type the name of the equipment. This is the broad type for example, Analog Sets, Digital Sets, Circuits, etc.

    24. **Inventory Policy*** – click the dropdown arrow to access a list and select the appropriate policy. There are three policies to choose from:

    • **Do Not Track Quantity -** select this if you do not want to track no many items of each equipment item you have on you shelves.

    25. **Manage Total Quantity** – select to track the total quantity of equipment items. This policy notifies the user when there are no items available to assign and when the total quantity is below the low safety stock level. For example, if you have 30, 2500 sets, when you are reach your safety stock level CAIRS notifies the user, if you reach zero you will still be able to assign.

- **Restrict by Total Quantity** – select this policy to track the total quantity of equipment, when the items reach the low safety stock level CAIRS notifies the user, however, when you reach an available quantity of zero, the user will not be able to assign the equipment until the stock level is replenished. If you want to keep track of each item with a specific serial number, this is the policy to use.

26. **Allow Cost Adjustment*** – Click the box to insert a checkmark to allow any user to modify the cost of the equipment type.

- **Return Policy*** – click the dropdown arrow to access a list and select the return policy for the equipment. The following two choices are available:

27. **Never** – when selected, the equipment is deleted from the database and does not return to the available quantity.

- **Always** – when selected, the equipment returns to your available quantity, allowing you to keep an accurate count of your inventory.

! The return policy is directly related to the inventory policy. The options within the list vary depending on the policy selected. For example, if you select Manage Individual Items, the return policy list only includes Always.

- **Default Zero Cost Billing Policy** – to select the default zero cost policy, click the field to access a dropdown list and from the list select: Do Not Bill, Bill as One Time Charge or Bill as Recurring Charge. This selection allows you to include equipment in a bill that is not charged. The equipment can appear in either the one-time or recurring charge section of the bill. If you choose to not include these equipment items within the bill, select Do Not Bill.

28. **Default Vendor Import Charge Billing Policy –** if you are importing charges via the vendor media import you can select a charge policy, click on the field to access a dropdown list and from the list select one of the following policies:

- Bill Normally – this is the default, all imported charges will be billed according to the equipment or service

29. Bill as Zero Cost – all imported charges will be billed as a zero cost to the account

- Do Not Bill – although charges are imported into cairs they are not billed on and will not display on a bill associated to the account

30. **Default System Charge Policy –** the default is to bill all charges normally meaning they will be billed based on the details for each equipment or service item, however you can make a system policy to handle charges related to this equipment type differently, other than bill normally you have the following options available, click on the field to access a dropdown list and from the list select one of the following policies:

- Bill as Zero Cost – all charges related to this equipment type will be visible on the bill as a zero cost charge to the account

31. Do Not Bill – although charges are in cairs they are not billed on and will not display on a bill associated to the account

- **Type of Service Name** – click the dropdown arrow to access a list and select the type of service.

32. **Report Category** – click the dropdown arrow to access a list, from the list select the report category.

! The report category for the equipment type is the default category if you do not associate a category to each equipment item CAIRS uses this category.

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6. To add another equipment type, click the **Save** button within the **Actions** ribbon group and repeat step #6.

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

Deleting Equipment Types

You cannot delete an Equipment type if any equipment items of this type are in use, or assigned for use. You can delete equipment items if they are not in use, and/or are not assigned for use.

1. Click **Equipment/Services** from the menu.

2. Within the Navigation pane, click **Equipment**.

3. You will have two alternatives for Managing Equipment Types:

- Within the toolbar directly above the **Navigation** pane, click the **Manage equipment types** button.

33. Within the Action pane, click the **Manage equipment types** link.

! If you are unable to view the Actions pane, you may need to use the scroll bar to the right of the Navigation pane to reveal the menu choices. Or, using your mouse, point at the Separation bar, and when the up/down arrow appears, right-click the line and hold it to pull the line down.

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4. Using either of the choices, The Manage equipment types window opens.

5. There are several two ways to delete an equipment type:

- Right-click the record selector box next to the Equipment Type to access a menu from the menu click on **Delete.**

39. Highlight the name in the list and 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 equipment type. Click **Yes** within the box to continue or **No** to cancel the operation.

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

If you have not reassigned all the equipment associated with the equipment type, a different message box appears notifying you that you still have equipment assigned to the type. You have to delete, or move these items to other Equipment types, before you can complete the deletion.

Equipment

Equipment Items are the specific groups of items you provide, for example, within the Digital Sets equipment type, the equipment items might be M5316, 2500, M5112, etc.

Adding Equipment

! You are required to add Equipment Types before adding Equipment Records. If you need to add an Equipment Type, please refer to the "Adding an Equipment Type" Section.

If you are adding an Equipment Record that fits within an existing Equipment Type, use the following procedure:

1. Click **Equipment/Services** from the menu.
2. Within the Navigation pane, click **Equipment**.
3. There are two ways to add an equipment item:

    - Within the toolbar directly above the **Navigation** pane, click the dropdown arrow next to **New**. Select **Equipment**.

    34. Within the **Actions** pane, click the **Add New Equipment** link.

4. Within either option, the General-Equipment window opens. Complete the following information for the equipment items (required fields are marked with an asterisk (*)):

    - **Equipment Name*** – type the equipment name. This is the more specific name for example M5316, IBN, Data Circuit, etc.

    35. **Equipment Type*** – click the field to access a dropdown list and from the list select the equipment type.

    - **One Time Cost** – type the one-time cost for the equipment, if applicable. When entering in the amount, type the total cost with a decimal point. If you fail to enter a decimal point CAIRS will add one for you in the appropriate location, for example, if you type 10, CAIRS will make the cost $10.00.

    36. **Recurring Cost** * – type the recurring cost for the equipment, if applicable. When entering in the amount, type the total cost with a decimal point. If you fail to enter a decimal point caris.net will add one for you in the appropriate location, for example, if you type 10, CAIRS will make the cost $10.00.

- **Zero Cost Billing Policy –** click the field to access a dropdown list and from the list select: Do Not Bill, Bill as One Time Charge or Bill as Recurring Charge. This selection allows you to include equipment in a bill that is not charged. The equipment can appear in either the one-time or recurring charge section of the bill. If you choose to not include these equipment items within the bill, select Do Not Bill.

37. **Vendor Import Charge Billing Policy** – the default is set to bill all charges normally meaning they will be charged based on the cost indicated above, however you can change the policy for this item. Click on the dropdown arrow to access a list and from the list select one of the following options:

    - **Bill Normally** – this is the default, all imported charges will be billed according to the equipment

    38. **Bill as Zero Cost** – all imported charges will be billed as a zero cost to the account

    - **Do Not Bill** – although charges are imported into CAIRS they are not billed on and will not display on a bill associated to the account

39. **System Charge Policy –** the default is to bill all charges normally meaning they will be billed based on the cost indicated above, however you can make a system policy to handle charges related to this item differently, other than bill normally you have the following options available, click on the field to access a dropdown list and from the list select one of the following policies:

    - **Bill as Zero Cost** – all charges related to this item will be visible on the bill as a zero-cost charge to the account

    40. **Do Not Bill** – although charges are in CAIRS they are not billed on and will not display on a bill associated to the account

- **Part Number** – type the part number.

41. **Part Name** – type the part name.

- **Description** – type the description of the equipment item

42. **Vendor Name** – click the field to access a dropdown list and select the Vendor name.

- **Vendor Equipment Name** – type the name the vendor uses to refer to the equipment.

43. **Service Provider Name** – click the field to access a dropdown list and select the Service Provider name.

- **Manufacturer Name** – click the field to access a dropdown list and select the Manufacturer name.

44. **Abbreviation** – type the equipment name abbreviation.

- **Medium Safety Stock Level** – type a number for the medium stock level, when reached the user receives a message box stating that the equipment quantity is now below the medium stock level.

45. **Low Safety Stock Level -** type a number for the low stock level, when reached the user receives a message box stating that the equipment quantity is now below the low stock level.

- **Type of Service Name** – click the field to access a dropdown list and select the type of service for the equipment.

46. **Report Category** - click the dropdown arrow to access a list, from the list select the report category.

! If you do not associate a report category to the equipment item, CAIRS uses the category associated to the equipment type.

- **Category** – type the equipment category.

47. **Notes** – type any additional miscellaneous equipment item notes.

- **ES Misc 1** – 5 – use these fields for any additional information relating to the equipment item.

Adding/Delete an Image

5. Within the lower portion of the window is the Images pane, here you can add pictures of the equipment. To add an image, click on the New Image button.

6. You will be able to browse to the location of the picture, it must be in a .BMP, .JPG, .JEPG or .PNG file format. Once at the file location, click on the file name and click on the Open button. The image will appear in the Image pane. To add multiple images, follow the same procedure.

7. To remove an image, click on the red x on the image. You will be asked to verify that you really want to delete the image, click yes to continue or no to cancel the operation.

Adding Equipment Items

**If the Inventory Policy is either Manage Total Quantity or Restrict by Total Quantity are associated to the equipment type you will be required to add at least 1 item before saving. If the inventory policy is Do Not Tract Quantity you will be allows to save the equipment item with no actual inventory.

8. Once you click on the Save button, you will receive a message that requires you to add at least 1 item to the inventory before you can continue. Within the message box, click Yes to continue. The Items list opens.

9. Click the top line marked with an asterisk (*), to add new items. Complete the following equipment information (required fields are marked with an asterisk (*)):

- **Warehouse Name –** click the dropdown arrow to access a list and from the list select the warehouse name of where the equipment item is stored.

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48. **Vendor Name –** click the dropdown arrow to access a list and from the list select the vendor name

- **Serial Number** – type the serial number, if applicable.

49. **Purchase Order Number –** type the purchase order for the equipment item

- **Site** – click the dropdown arrow to access a list and select the site. The site dropdown 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 >.

- **Item Status*** – click the field to access a dropdown list and select whether the item is **Existing** (in stock) or **Unavailable** (out-or-stock).

50. **Total Quantity Available –** type the total quantity available for this ser, the field defaults to one (1). If a minus sign appears before the number that means that you have assigned more items then were available in your total quantity available.

- **Total Quantity Used –** this field automatically populates when an equipment item is in use

51. **Assigned –** this field defaults to no until the equipment item is assigned to a component, once assigned the field automatically populates with yes.

- **Rack, Shelf, and Bin –** type the rack, shelf and bin name or number to provide the location of the equipment item within the warehouse.

52. **Item Information 1** – 4 – use these fields to type any additional information regarding the equipment item.

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

Deleting Equipment

1. Click Equipment/Services from the menu.

2. Within the Navigation pane, click Equipment.

3. Depending on the amount of records 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 then click the magnifying glass.

53. Click the Show All button.

4. The Equipment list displays in the pane. Double-click the equipment type name within the list.

5. The Equipment 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 equipment type. Click Yes within the box to continue or No to cancel the operation.

On-Shelf Inventory

A few things about your on-shelf inventory, you have already started to create your inventory when you added the first equipment item. You can continue to add items in either bulk meaning that you have 1 item listed with a large quantity. Or you can add individual items each with a serial number. Here are a few handy hints:

- The most commonly used inventory policy is Manage Total Quantity, this allows you to enter in one equipment item with a large quantity.

- If you want to track individual items with serial numbers, Use the Restrict by Total Quantity inventory policy.

- You can use a bar scanner to quickly scan your items into the database. You simply access the items and start scanning, CAIRS will do the rest!

- No bar scanner, use our import tool! If you have a spreadsheet with your equipment, we can help you to import in into your database.

- Stock Levels – If you want to be notified that your inventory is running low make sure your put a value in the Medium and Low Safety Stock Levels. When your inventory reaches both levels, you will be notified.

Adding more Equipment Items

Based on your inventory policy, you may have already added an equipment item. Below are the steps to add more items.

1. Click **Equipment/Services** from the menu.

2. Within the Navigation pane, click **Equipment**.

3. Depending on the amount of records 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 then click the magnifying glass.

54. Click the **Show All** button.

4. A list of equipment items displays. Within the list, double-click the equipment item that you **want to assi**gn pieces to. The Equipment window opens.

5. Within the **Show** ribbon group, click the **Items** button.

6. The window changes to the Items view. Click the top line marked with an asterisk (*), to add new items. Complete the following equipment information (required fields are marked with an asterisk (*)):

- **Warehouse Name –** click the dropdown arrow to access a list and from the list select the warehouse name of where the equipment item is stored.

55. **Vendor Name –** click the dropdown arrow to access a list and from the list select the vendor name

- **Serial Number** – type the serial number, if applicable. If no serial numbers are present, CAIRS automatically enters "none."

56. **Purchase Order Number –** type the purchase order for the equipment item

- **Site** – click the dropdown arrow to access a list and select the site. The site dropdown 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 >.

- **Item Status*** – click the field to access a dropdown list and select whether the item is **Existing** (in stock) or **Unavailable** (out-or-stock).

57. **Total Quantity Available –** type the total quantity available for this serial number, the field defaults to one (1). If a minus sign appears before the number that means that you have assigned more items then were available in your total quantity available.

- **Total Quantity Used –** this field automatically populates when an equipment item is in use

58. **Assigned –** this field defaults to no until the equipment item is assigned to a component, once assigned the field automatically populates with yes.

- **Rack, Shelf, and Bin –** type the rack, shelf and bin name or number to provide the location of the equipment item within the warehouse.

59. **Item Information 1** – 4 – use these fields to type any additional information regarding the equipment item.

7. To add another piece of equipment, click the **Save & New** button within the **Actions** ribbon group and repeat step #7.

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

Deleting an Equipment Item

1. Click **Equipment/Services** from the menu.

2. Within the Navigation pane, click **Equipment**.

3. Depending on the amount of records 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 then click the magnifying glass.

    60. Click the Show All button.

4. Within the list, double-click the **Equipment item.**

5. The Equipment window opens. Within the **Show** ribbon group, click the **Items** button.

6. The screen changes to display all the associated pieces of equipment. Within the list, right-click the piece of equipment to delete and select **Delete**.

7. Once you click Delete, a message box appears verifying that you really want to delete the piece of equipment. Click **Yes** within the box to continue or **No** to cancel the operation.

    Once selected, CAIRS draws a line through the item allowing you to delete multiple pieces of equipment at once.

8. If you do not want to delete the piece of equipment, right-click the record to access a pop-up menu. Click **Undelete.**

9. Once you select Undelete, a message box appears verifying that you really want to undelete the type. Click **Yes** within the box to continue or **No** to cancel the operation.

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

Viewing Equipment Item History

Please see Common Elements → History to learn more.

Globally Manage Equipment

Within this option, you can view all your equipment and make modifications to the equipment without having to go into each individual equipment item.

Modifying an Equipment Item

1. Click **Equipment/Services** from the menu.

2. Within the Navigation pane, click **Equipment**.

3. There are two ways to globally manage your equipment:

   • Within the toolbar directly above the Navigation pane, click the **Globally manage equipment** button.

   61. Within the Actions pane, click the **Globally manage equipment** link.

   With either option, the Equipment Global Change window opens. The window displays a list of the equipment items currently within your database.

4. There are two ways to find the record you want to modify:

   • You can sort the list by clicking any column header. Click the header once to sort the list alphabetically or numerically. Click the header again to reverse the order.

   62. Within the Search text box, type any portion of the record and click the magnifying glass

5. Once the record is located, the following information is available, the fields marked with an asterisk (*) cannot be edited:

   • **Equipment Name * -** displays the name of the equipment (field cannot be edited).

   63. **Equipment Type Name * -** displays the equipment type name (field cannot be edited).

   • **Inventory Policy *** - displays the inventory policy, whether None, Manage Individual Items, or Manage Total Quantity.

   64. **Warehouse** – click the dropdown arrow to access a list; select the warehouse for the equipment.

   • **Vendor Name -** click the dropdown arrow to access a list, select the vendor name for the equipment.

   65. **Item Vendor -** click the dropdown arrow to access a list, select the item vendor name for the equipment.

   • **Serial Number** – click the field to type the new serial number

   66. **Purchase Order Number –** type the purchase order for the equipment item

   • **Site** – click the dropdown arrow to access a list and select the site. The site dropdown 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 >.

- **Item Status * –** displays whether the equipment is Existing or Unavailable, you cannot edit this field

67. **Total Quantity Available** – click the field to type the total available quantity.

- **Rack, Shelf, and Bin –** type the rack, shelf and bin name or number to provide the location of the equipment item within the warehouse.

68. **Item Information 1** – 4 – use these fields to type any additional information regarding the equipment item.

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

Services

Services can be broken into three parts. First, you will add all the Service types available within your system. Service types are categories you place Services into, for example, Labor, Features, Lines, etc.

Next, you will add in Services. These are the specific groups of items you provide, for example, Cell Phone Service, Voice Mail, Internet Service, Man-hours etc.

Now, you can add in the specific Service items. You can breakdown each service into individual items each with a specific serial number. When used for an assignment, the service item is no longer available. Alternatively, you can be general and add just one item to each service. For example, with Man-hours, you can add 1 hour as the item and increase the quantity for the service provided.

Managing Type of Service

The process is the same for both Equipment and Services. To learn more, see Equipment → Managing Type of Service.

Manage Report Category

The process is the same for both Equipment and Services. To learn more, see Equipment → Managing Report Category.

Manage Warehouses

The process is the same for both Equipment and Services. To learn more, see Equipment → Managing Warehouses.

Manage Technicians

The process is the same for both Equipment and Services. To learn more, see Equipment → Managing Technicians.

Service Types

Service types are categories you place services into, for example, Labor, Features, Lines, etc. Since the process is the same please see Equipment → Managing Equipment Types

Services

A Service is a specific group of items you provide, for example, Cell Phone Service, Voice Mail, Internet Service, Man-hours etc.

Adding a Service

! It is required to add Service Types before you can add Service Records. If you need to add a Service Type, please refer to the "Adding a Service Type" Section.

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1. Click **Equipment/Services** from the menu.

2. Within the Navigation pane, click **Services**.

3. There are two ways to add a service item:

    - Within the toolbar directly above the **Navigation** pane, click the dropdown arrow next to **New**. Select **Service**.

    69. Within the **Actions** pane, click the **Add new service** link.

4. Within either option, the Service window opens. Complete the following information for the service items (required fields are marked with an asterisk (*)):

    - **Service Name*** – type the service name, for example, hourly rate, voice mail, etc.

    70. **Service Type*** – click the field to access a dropdown list and from the list select the service type.

    - **One Time Cost** – type the one-time service cost (if applicable). When entering in the amount, type the total cost with a decimal point. If you fail to enter a decimal point, caris.net will add one for you in the appropriate location. For example, if you type 10, CAIRS will make the cost $10.00.

    71. **Recurring Cost** – type the recurring cost for the service (if applicable). When entering in the amount, type the total cost with a decimal point. If you fail to enter

a decimal point caris.net will add one for you in the appropriate location. For example, if you type 10, CAIRS will make the cost $10.00.

- **Zero Cost Billing Policy –** click the field to access a dropdown list and from the list select: Do Not Bill, Bill as One Time Charge or Bill as Recurring Charge. This selection allows you to include a service in a bill that is not charged. The service can appear in either the one-time or recurring charge section of the bill. If you choose to not include these service items within the bill, select Do Not Bill.

72. **Vendor Import Charge Billing Policy** – the default is set to bill all charges normally meaning they will be charged based on the cost indicated above, however you can change the policy for this item. Click on the dropdown arrow to access a list and from the list select one of the following options:

    - **Bill Normally** – this is the default, all imported charges will be billed according to the service item

    73. **Bill as Zero Cost** – all imported charges will be billed as a zero cost to the account

    - **Do Not Bill** – although charges are imported into cairs they are not billed on and will not display on a bill associated to the account

74. **System Charge Policy –** the default is to bill all charges normally meaning they will be billed based on the cost indicated above, however you can make a system policy to handle charges related to this item differently, other than bill normally you have the following options available, click on the field to access a dropdown list and from the list select one of the following policies:

    - **Bill as Zero Cost** – all charges related to this item will be visible on the bill as a zero cost charge to the account

    75. **Do Not Bill** – although charges are in cairs they are not billed on and will not display on a bill associated to the account

- **Part Number** – type the part number.

76. **Part Name** – type the part name.

- **Description** – type the description of the service item

77. **Vendor Name** – click the dropdown arrow to access a list and select the Vendor name.

- **Vendor Equipment Name** – type the name the vendor uses to refer to the service.

78. **Service Provider Name** - click the dropdown arrow to access a list and select the Service Provider name.

- **Manufacturer Name** – click the dropdown arrow to access a list and select the Manufacturer name.

79. **Abbreviation** – type the service name abbreviation.

- **Medium Safety Stock Level** – type a number for the medium stock level, when reached the user receives a message box stating that the service quantity is now below the medium stock level.

80. **Low Safety Stock Level -** type a number for the low stock level, when reached the user receives a message box stating that the service quantity is now below the low stock level.

- **Type of Service Name** – click the dropdown arrow to access a list and select the type of service for the service.

81. **Report Category** – click the dropdown arrow to access a list, from the list select the report category.

- **Category** – type the service category.

82. **Notes** – type any additional miscellaneous service item notes.

- **ES Misc 1** – 5 – use these fields for any additional information relating to the service item.

Adding/Delete an Image

5. Within the lower portion of the window is the Images pane, here you can add pictures of the equipment. To add an image, click on the New Image button.

6. You will be able to browse to the location of the picture, it must be in a .BMP, .JPG, .JEPG or .PNG file format. Once at the file location, click on the file name and click on the Open button. The image will appear in the Image pane. To add multiple images, follow the same procedure.

   To remove an image, click on the red x on the image. You will be asked to verify that you really want to delete the image, click yes to continue or no to cancel the operation.

Adding Equipment Items

**If the Inventory Policy is either Manage Total Quantity or Restrict by Total Quantity are associated to the equipment type you will be required to add at least 1 item before saving. If the inventory policy is Do Not Tract Quantity you will be allows to save the equipment item with no actual inventory.

7. Once you click on the Save button, you will receive a message that requires you to add at least 1 item to the inventory before you can continue. Within the message box, click Yes to continue. The Items list opens.

8. Click the top line marked with an asterisk (*), to add new items. Complete the following equipment information (required fields are marked with an asterisk (*)):

- **Warehouse Name –** click the dropdown arrow to access a list and from the list select the warehouse name of where the equipment item is stored.

83. **Vendor Name –** click the dropdown arrow to access a list and from the list select the vendor name

- **Serial Number** – type the serial number, if applicable.

84. **Purchase Order Number –** type the purchase order for the equipment item

- **Site** – click the dropdown arrow to access a list and select the site. The site dropdown 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 >.

- **Item Status*** – click the field to access a dropdown list and select whether the item is **Existing** (in stock) or **Unavailable** (out-or-stock).

85. **Total Quantity Available –** type the total quantity available for this ser, the field defaults to one (1). If a minus sign appears before the number that means that you have assigned more items then were available in your total quantity available.

- **Total Quantity Used –** this field automatically populates when an equipment item is in use

86. **Assigned –** this field defaults to no until the equipment item is assigned to a component, once assigned the field automatically populates with yes.

- **Rack, Shelf, and Bin –** type the rack, shelf and bin name or number to provide the location of the equipment item within the warehouse.

87. **Item Information 1** – 4 – use these fields to type any additional information regarding the equipment item.

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

Deleting a Service

1. Click **Equipment/Services** from the menu.

2. Within the Navigation pane, click **Service**.

3. Depending on the amount of records 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 then click the magnifying glass.

88. Click the **Show All** button.

4. The Service list displays in the pane. Double-click the service type name within the list.

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5. The Service 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 service. Click **Yes** within the box to continue or **No** to cancel the operation.

7. If any record within your database currently references the service, a message box appears telling you that all references need to be removed or changed in order to delete the service. Click the **OK** button to close the message box.

Service Items

Once you have added in the Service, you can add specific services providing several options when using this service. For example, 1 man-hour, 5 man-hours, etc.

Adding Service Items

1. Click **Equipment/Services** from the menu.

2. Within the Navigation pane, click **Services**.

3. Depending on the amount of records 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 then click the magnifying glass.

   89. Click the **Show All** button.

4. Within the list, double-click the service item you want to assign. The Services window opens.

5. Within the **Show** ribbon group, click the **Items** button.

6. The window changes to the Items view. Click the top line marked with an asterisk (*), to add new items. Complete the following information for the piece of service (required fields are marked with an asterisk (*)):

   • **Warehouse Name –** click the dropdown arrow to access a list and select the warehouse name.

   90. **Vendor Name –** click the dropdown arrow to access a list and select the vendor name

   • **Serial Number** – type the serial number, if applicable. If no serial numbers are present, CAIRS automatically fills in "None."

   91. **Purchase Order Number –** type the purchase order for the service item

   • **Site** – click the dropdown arrow to access a list and select the site. The site dropdown 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 >.

- **Item Status*** – click the field to access a dropdown list and select whether the item is Existing (in stock) or Unavailable (out-of-stock).

92. **Total Quantity Available –** type the total quantity available for this serial number, the field defaults to 1

- **Total Quantity Used –** once an equipment item is used, this field displays the total number or items used or assigned within your database.

93. **Assigned** – this field auto displays with the assignment for the piece of service. If the service is unassigned the field displays a "No"

- **Rack, Shelf, and Bin –** type the rack, shelf and bin name or number to provide the location of the service item within the warehouse.

94. **Item Information 1** – 4 – use these fields to type any additional information regarding the service item.

7. To add another piece of service, click the **Save & New** button within the **Actions** ribbon group and repeat step #5.

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

Deleting a Service Item

1. Click **Equipment/Services** from the menu.

2. Within the Navigation pane, click **Services**.

3. Depending on the amount of records 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 then click the magnifying glass.

95. Click the **Show All** button.

4. A list of Services populates. Within the list, double-click the Service.

5. The Services window opens. Within the **Show** ribbon group, click the **Items** button.

6. The screen changes and displays all the associated pieces of Service. Within the list, right-click the service item to delete and click **Delete**.

7. Once you click Delete, a message box appears verifying that you really want to delete the item. Click **Yes** within the box to continue or **No** to cancel the operation.

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

8. If you do not want to delete the service item, right-click the record to access a pop-up menu. Click **Undelete**.

9. Once you select Undelete, a message box appears verifying that you really want to undelete the item. Click **Yes** within the box to continue or **No** to cancel the operation.

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

Viewing Service Item History

Please see Common Elements → History to learn more.

Globally Manage Service

Within this option, you can view all your service and make modifications without having to go into each individual service item.

Modifying a Service Item

1. Click **Equipment/Services** from the menu.

2. Within the Navigation pane, click **Services**.

3. There are two ways to globally manage your service:

   • Within the toolbar directly above the Navigation pane, click the **Globally manage service** button.

   96. Within the Actions pane, click the **Globally manage service** link.

4. With either option, the Services Global Change window opens. The lower portion of the window displays a list of the service items currently within your database.

5. There are two ways to find the record that you want to modify:

   • You can sort the list by clicking any column header. Click the header once to sort the list alphabetically, or numerically. Click the header again to reverse the order.

   97. Within the Search text box, type any portion of the record and click the magnifying glass

6. Once the record is located, the following information is available, the fields marked with an asterisk (*) cannot be edited:

   • **Service Name * -** displays the name of service, you cannot edit this field.

   98. **Service Type Name * -** displays the service type name, you cannot edit this field.

   • **Inventory Policy*** - displays the inventory policy, whether None, Manage Individual Items, or Manage Total Quantity.

   99. **Warehouse Name** – click the dropdown arrow to access a list; select the warehouse for the service

- **Vendor Name -** click the dropdown arrow to access a list, select the vendor name for the service.

100. **Item Vendor -** click the dropdown arrow to access a list, select the item vendor name for the service.

- **Serial Number** – click the field to type the new serial number

101. **Purchase Order Number –** type the purchase order for the service item

- **Site** – click the dropdown arrow to access a list and select the site. The site dropdown 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 >.

Device Properties	▾ ⏻
Site *	Henderson ~~~ Las Vegas>Henderson ▾
Switch Name	
Organization Name	89012 ~~~ Las Vegas>Henderson>89012
Subscriber Name	GMC ~~~ North Central Main>GMC
Template Name	Henderson ~~~ Las Vegas>Henderson
Set Type Name	Las Vegas ~~~ Las Vegas
Set Name In Switch	North Central Main ~~~ North Central Main
	Provo ~~~ Provo
	Vendor Parts ~~~ Vendor Parts

- **Item Status** – displays whether the service is Existing or Unavailable, you cannot edit this field

102. **Total Quantity Available** – click the field to type the total available quantity

- **Rack, Shelf, and Bin –** type the rack, shelf and bin name or number to provide the location of the service item within the warehouse.

103. **Item Information 1** – 4 – use these fields to type any additional information regarding the service item.

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

Vendors, Service Providers, & Manufacturers

The Vendors submenu manages information regarding your frequently used vendors. Inputting vendor information here allows you to access the information when placing orders or to contact them regarding their product or performance.

The Procedures for adding, updating, and deleting Vendors, Service Providers, and Manufacturers are the same. Therefore, we will cover only the steps for Vendor, to apply the procedures to Service Providers or Manufacturers, just replace the term Vendor with the appropriate term.

Adding a Vendor (Service Provider or Manufacturer)

1. Click **Equipment/Services** from the menu.

2. Within the Navigation pane, click **Vendor**.

3. There are two ways to add a new Vendor:

   - Within the toolbar directly above the Navigation pane, click the dropdown arrow next to New. , select Vendor.

   104. Within the Actions pane, click the Add New Vendor link.

4. Within either option, the Vendor Window opens. Complete the following information for the vendor (required field are marked with an asterisk (*)):

   - **Vendor Name*** – type the vendor name.

   105. **Shipping Address** – use the rows to type the complete vendor shipping address.

   - **Billing Address** – use the rows to type the complete billing address for the vendor.

   106. **Contact** – type the name of your vendor contact.

   - **Telephone Number** – type your contacts telephone number.

   107. **Fax Number** – type the contact's fax number.

   - **Email Address** – type your contact's email address.

   108. **Url** – type the vendor's website address.

   - **Notes** – type any additional miscellaneous vendor notes relating.

5. To add another Vendor, click the **Save & New** button within the **Actions** ribbon group and repeat step #4.

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

Deleting a Vendor (Service Provider or Manufacturer)

1. Click **Equipment/Services** from the menu.

2. Within the Navigation pane, click **Vendor**.

3. The Vendor list displays. Within the list, double-click the vendor to modify. The Vendor window opens.

4. There are two ways to delete the Vendor:

   - Within the toolbar directly above the Navigation pane, click the red **X.**

   109. Within the list, highlight the vendor name.

   - Within the Actions pane, click the **Delete Vendor** link.

   110. Double-click the Vendor name; the Vendor 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 vendor. Click **Yes** within the box to continue or **No** to cancel the operation.

Accounting

The Accounting section manages several aspects relating to billing for the equipment and services provided to your customers. The first billing step is to create your accounts. There are two different account types within CAIRS:

- **Official Accounts** – these account types are associated to an organization and allow you to bill each organization for the equipment and services used.

6. **Unofficial Accounts** – these account types are associated to a subscriber and allow you to bill an individual for the provided equipment and services.

Each account, regardless of type, can be associated to either a circuit or a set device. Once associated, the organization or the subscriber is responsible for payment on all charges incurred.

CAIRS works together with UCE to collect, format and price your calls and places them into an *.acx file. Once created, you can import the *.acx file into your active call database. If your call records arrive from a third party, you must import those call into your active call database. Before importing, you must create a template to match up the third party information to fields within CAIRS.

Official Accounts

Official accounts are associated to Organizations only and do not have to be associated to an organization but you cannot associate them to anything else. Many sites refer to official accounts and billing as Class A billing.

Before you can start to manage your accounts, it is a good idea to have a few things setup within your database. First, you can create your billing cycles; this determines what time period to create the bill for, when CES generates the bill, due date, late payment date, etc. Second, you can create account categories; this is an additional field to allow you to place each account into an additional category besides organization or site.

Managing Billing Cycle

Within Manage Billing Cycle, CAIRS defaults a few items for you. We default the Fiscal year start date to October 1st. We also determine the start day and end day for each month, you can edit these fields if necessary.

There are some important considerations to keep in mind when determining your billing cycle. First, the Run Month and Run Day, these fields determine the earliest date you can generate a bill. It is advisable that you allow a few days at the beginning of the Run Month to allow manipulation of accounts, if necessary.

Second, a system setting determines whether CAIRS generates the bill automatically, if set to true, CAIRS automatically generates the bill on the Run Day.

Managing the Billing Cycle

1. Click the **Accounting** menu.
2. Within the **Navigation** pane, click **Accounts** and then **Official Accounts**.
3. There are two ways to manage the billing cycle:

    -   Within the tool bar directly the **Navigation** pane, click the **Manage Billing Cycle Plan** button.

4. Within the **Actions** pane, click the **Manage Billing Cycle Plan** link.
5. With either option, the Billing Cycle Plan window opens.
6. The first step is to determine when your fiscal year starts, within the actions ribbon group click one of the following buttons:

    -   Set to October 1st Fiscal Year – click this button to set the fiscal year as October 1st, once clicked the Billing Cycle Plan Dates pane changes to start your billing cycle with October.

7. Set to January 1st Fiscal Year – click this button to set the fiscal year to January 1st, once clicked the Billing Cycle Plan Dates pane changes to start your billing cycle with January.

    -   Set Fiscal Year with First Start Month and Day – click this button to set the fiscal year to the first unofficial billing date as determined by the First Official Billing Date system setting

8. Next, you determine the days to wait before running the bill and the bill due date Within the top pane complete the following fields:

    -   Days to Wait Before Running Bill – type-in the number of days to wait from the end day to the day you want to run the bill, most times this is set to one or two. This gives your users the time fix any account issues.

9. Days to Wait Until Bill is Due – type-in the number of days to wait from the end day to the billing due date. Most times, this is set to 15 or 16.
10. Now that you have determined your fiscal year start date and billing dates, it is time to complete the setup of your billing cycle. Within the Billing Cycle Plan Dates pane,

complete the following fields (although some fields are auto-populated you can modify them to fit your needs):

- Sequence – this field auto-populates with a number between 1 and 12 to reflect the corresponding location in the billing cycle.

11. Start Month – this is the first month of your billing cycle, this is determined by your Fiscal year start date. To change the month, click the field to access a dropdown arrow, once you click the arrow a list of month appears, click on the month. The selected month populates within the field.

- Start Day – this is the first day of the month that you start your billing, most times this is the first of the month. To change the day, click on the field and type in the new day to start the billing.

12. End Month – for each start month, you must select an end month, most times this is the same month as the start month. However, you can bill for multiple months at a time by altering the end month. To change the month, click the field to access a dropdown arrow, once you click the arrow a list of month appears, click on the month. The selected month populates within the field.

- End Day – this is the last day of the month that you will end the billing. To change the day, click on the field and type in the new day to end the billing.

! Do not forget about Leap Year, it occurs every four years! The end day for February is the 29th in a leap year. Here is a list of the next couple of leap years: 2012, 2016, 2020, 2024, 2028, 2032, and so on.

- Run Month – this is the month in which you run the bill for the previous billing period. If you bill on a monthly basis, this is next month. To change the month, click the field to access a dropdown arrow, once you click the arrow a list of month appears, click on the month. The selected month populates within the field.

13. Run Day – this is the day of the run month that the bill generates. This field populates with the selection you determined in the upper pane. To change the day, click on the field and type in the run day.

- Due Month – this is the month in which the bill you generate is due, this is most likely the same as the run month. To change the month, click the field to access a dropdown arrow, once you click the arrow a list of month appears, click on the month. The selected month populates within the field.

14. Due Day – this is the day the bill is due. This field populates with the selection you determined in the upper pane. To change the day, click on the field and type in the due date of the bill.

15. Within the **Actions** ribbon group, click the **Save** (to save and stay) button to continue working with billing cycles, or click the **Save & Close** (to save and exit) button to return to the Official Accounts list.

Account Category

Often times, you may want to categorize your account number based on a field other than organization or subscriber. This is where the Account Category comes into play.

Managing Categories

1. Click the **Accounting** menu.
2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**
3. There are two ways to manage account categories:

   - Within the toolbar directly the Navigation pane, click the **Account Category** button

   4. Within the Actions pane, click the **Account Category** link.

   With either option, the Account Category window opens.

Adding

5. Click the row with an asterisk (*) to add new items to the list and type the new account category.
6. Once you start typing in the category, a new row with an asterisk (*) displays at the top of the list allowing you to add multiple categories at once.

Modifying

7. Click a row to modify and type the new information.

Deleting

8. Right-click the selector box next to the category name and click **Delete**.
9. 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.
10. Once selected, CAIRS draws a line through the category allowing you to delete multiple items at once.
11. If you do not want to delete the category, right-click the record and click **Undelete**.
12. Once you select Undelete, a message box displays verifying that you really want to keep the category. 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 working with account categories, or click **Save & Close** (to save and exit) to return to the Official Accounts list.

Official Account Report Preferences

The Official Account Report Preferences allow you to determine what files you want to generate when creating a bill. In addition, you can determine where those files go, whether to a file or printer.

You can set the report preferences for each account number. When you set the preferences within the account, they overwrite any selections you have made here. For example, if you check the Call Detail XLS here but not in the account number, the call data XLS file will not generate.

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. There are two ways to change your report preferences:

    • Within the toolbar directly above the **Navigation pane,** click the **Official Report Preferences** button.

4. Within the Actions pane, click the **Official Report Preferences** link.

5. Within either option, the Billing Report Preferences window opens. The lower portion of the window displays the different formats and delivery options for your billings, as a default all fields are checked. This indicates the account summary or call data generates to the particular file type or location.

    The following options are available:

    • **Account Summary XLS** – the account summary for each account number generates to an Excel Spreadsheet

6. **Call Detail XLS** – the call data for each account generates to an Excel Spreadsheet

    • **Call Charges Tab Delimited** – the call charges for each account generate to a tad delimited file

7. **One Time Charges Tab Delimited** – the one-time charges for each account generate to a tab delimited file

    • **Recurring Charges Tab Delimited** - the recurring charges for each account generate to a tab delimited file

8. **Account Type** – this default to Official

    • **Mailed Report PDF to File** – the mailed report is generated to a PDF file

9. **Mailed Report PDF to Printer** – the mailed report is sent directly to the printer

    • **Report to XML** - the call, recurring, and one-time charges are generated into an XML file.

10. **Combined Detail XLS** – this report provides a combined detail of all mission funded and non-mission funded charges relating to an account.

11. If you want to remove the file type from generating, click on the box to remove the checkmark.

12. Within the Actions ribbon group, click on **Save** (to save and stay) to continue working with your preferences, or click **Save & Close** (to save and exit) to return to the Official Accounts list.

Address Types

Managing Address Types

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Official Accounts**.

3. Within the **Actions** pane, click the **Address Types** link.

4. The Address Types window opens.

<u>Adding</u>

5. Click the row with an asterisk (*) and type the new type.

6. Once you start typing in the type, a new row with an asterisk (*) automatically displays at the top of the list allowing you to add multiple types at once.

<u>Deleting</u>

7. Right-click the selector box next to the Address Type. From the pop-up, click **Delete**.

8. Once you click Delete, a message box displays verifying that you really want to delete the type. 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) to continue adding types, or click **Save & Close** (to save and exit) to return to the Official Accounts list.

Understanding the General Account Window

There are essentially four parts to the General - Accounts screen: Ribbon Groups, Account pane, Bill Summary pane and Account Balance Summary pane.

Ribbon Groups

Each of the ribbon groups allows you to perform certain account functions. For instance, you can associate site and organizations to an account, generate a bill for the account number, and make a payment to the account, etc.

Actions

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

- **Save & Close** – click this button to save the completed information and return to Accounts list.

10. **Save** – click this button to save the information you have completed and remain within the Account.

- **Refresh** – click this button to add newly saved information to the account.

Show

Within the Show ribbon group, you define the entities belonging to the account. You define the Organizations, Site, Set Device, Authorization Codes, etc.

Management

Within the Management ribbon group, you are able to view and change the account status. You can define whether the account is active, closed, suspended, etc.

Billing Tools

Within Billing Tools, you create bills to send to your customers for their one-time, recurring, and call charges. Each bill also includes the charges for equipment and/or services applied to the account.

Once you generate a bill, you can then perform refunds or adjustments as well as make payment to the account balance.

Panes

Each account has several panes of information that appear within the Billing Account window.

Account Information Pane

The Account Information pane displays general account information. For example, the account number, what charges the account is responsible for and account type, to name a few.

Notes/Equipment & Services Pane

This pane defaults to the Notes tab to allow you to add, view, modify and delete notes relating to the account. At the bottom of the screen, the Equipment and Services tab allows you to view all equipment and/or services related to the account. In addition, you can add or delete equipment or services related to the account.

Bill Summary Pane

The Bill Summary pane displays the charges and balance for the selected billing period. Each billing period with a generated bill displays in the drop-down list on the right side of the pane. Once you select a billing period, the pane displays the balance, current charges and payments or adjustments.

Account Balance Summary Pane

The Account Balance Summary pane displays a more detailed bill description. There are several information tabs to view:

- Balance Summary – displays the bill's basic information. For example, date you generated the bill, payments, charges, adjustments, and statement balance.

11. Number/Circuit Summary – displays the telephone number or circuit and the charges associated with each.

- One-Time Charges – displays a list of the one-time charges associated with the billing cycle.

12. Recurring Charges – displays a list of the recurring charges associated with the billing cycle.

- Calls – displays a list of calls associated with the billing cycle.

13. Payments/Funding – displays a list of payments applied to the account balance when you generated the bill.

- Adjustments – displays a list of the adjustments applied to the account when you generated a bill.

Within any of the tabs, if the complete information does not display, you can search for any part by typing the parameter into the text box and clicking the magnifying glass or by clicking the **Show All** button.

Official Accounts Configuration

Within this section, we discuss how to add an account and its basic information. We then discuss how to associate an account to organizations, sites, set devices, etc.

Adding an Official Account

1. Click the **Accounting** menu.
2. Within the **Navigation** pane, click **Accounts,** then **Official Accounts.**
3. There are two ways to add an Account:

    - Within the toolbar directly above the **Navigation** pane, click the drop-down arrow next to **New**. From the list, select **Official Accounts**.

    4. Within the **Actions** pane, click the **Add New Billing Account**.

5. With either option the General – Account window opens. There are 3 information panes. Within the **Account** pane, complete the following fields (required fields are marked within an asterisk (*)):

    - **Account Number*** – type the account number. This field can contain numbers, letters, and/or symbols. If the field reads 'Automatic By Setting', the account number is auto-created by the system.

    6. **Mailing Address** – click the drop-down arrow to access a list and from the list, select the mailing address of where to send the bills.

    - **Category –** click the drop-down arrow to access a list and from the list, select the account category.

    7. **Call Charges*** – click the box to insert a checkmark indicating the account is responsible for all charges incurred from calls.

    - **One Time Charges*** – click the box to insert a checkmark indicating the account is responsible for all one-time equipment and service charges.

    8. **Recurring Charges*** – click the box to insert a checkmark indicating the account is responsible for all recurring equipment and service charges.

- **Account Type*** – this field auto-populates with Official indicating you are creating an official account.

9. **Mission Funded** – click the field to insert a checkmark indicating the charges associated with the account are mission funded. This will zero out any balance for call and equipment charges after you run the bill.

- **Mail Delivery Preference*** – click the drop-down arrow to access a list. From the list, select Receives the Entire Bill, Notification Only or Nothing by Mail.

10. **Email Delivery Preference*** – click the drop-down arrow to access a list. From the list, select Receives the Entire Bill, Notification Only or Nothing by Email.

- **Account Miscellaneous 1 – 10** – use these fields to add any additional account comments.

11. **Exclude From Financial Summary –** click the box to insert a checkmark indicating that you want to exclude this account number from the Financial Summary. Leave the field blank to include the account number in the summary.

- **Created Date –** This field auto-populated with the date you created the account number. The field populates after you save the information. To change the created date, click the field to access a drop-down arrow. Click the arrow to access a calendar. To change the month and year click the right or left arrow. Click the date to select. The new date populates in the box.

12. The Bill Summary and Account Balance Summary pane shows information once changes are associated to the account.

13. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue adding information for the account, or click **Save & Close** (to save and exit) to return to the Official Accounts list.

Modifying an Official Account

1. Click the **Accounting** menu.
2. Within the **Navigation** pane, click **Accounts,** then **Official Accounts.**
3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

4. Click the **Show All** button.
5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account to modify.
6. The Accounts window opens. Modify the fields as necessary.
7. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with accounts, or click **Save & Close** (to save and exit) and return to the Official Accounts list.

Deleting an Official Account

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

   4. Click the **Show All** button.

5. The Accounts list opens, displaying the account that matched your search criteria. Highlight the account to delete. There are two ways to delete an account:

   - Within the toolbar directly above the **Navigation** pane, click the red **X**.

   - Click the **Delete Billing Account** link within the **Actions** pane.

6. Once you click Delete, a message box displays verifying that you really want to delete the account. Click **Yes** within the box to continue or **No** to cancel the operation.

7. If there are any associations to the account, CAIRS does not allow you to delete the account number. If associations exist, a warning message displays notifying you that there is existing information associated to the account. Click **Continue** to remove the assignments.

Account Entries - Components

Within Account Entries, you can view the configured items associated to the account and the related charge types. This is also, where you will add component to the account. When you access the window there are two panes, the top pane displays a list of the components that are currently associated to the account and the following information:

- **Item Number or Name** – displays the telephone number, circuit name, etc.

8. **Item Type** – displays the item type for example, Organization, Cell Phone Number, Telephone, Circuit Segment, etc.

- **Item Delete Date** – displays the date the item was deleted from the account. The item still appears in the list, however, no charges are incurred.

9. **Account Number** – displays the account number

- **Site** – displays the site name

10. **Organization Name and Path** – displays the organization name and the entire organization path

- **Billing Start and End Date** – displays the date the account started to incur charges and the date the charges ended

11. **Charge Type** – displays the charge type the account is responsible for, there are four types: Call Charges, One Time, Recurring, and Both One Time and Recurring Charges.

A component may appear in the list more than once, depending on the charge types associated.

The lower pane allows you to search for components to add to the account. There are two tabs at the bottom of the pane, the Add Item Pick List is a general tab that will allow you to search for any component whether telephone, cell phone, circuit, etc. The Add Sets Pick List is more specific to configured sets, this tab allows you to search on fields within a set, for example, port, building name, room, etc.

Once you have associated the component to the account you can also associate equipment and services.

Viewing Related Components

1. Click the **Accounting** menu.
2. Within the **Navigation** pane, click **Accounts,** then **Official Accounts.**
3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

    4. Click the **Show All** button.
5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account to view.
6. Within the Show ribbon group, click on the Accounting Entries button. The screen changes to displays two panes of information. The top pane displays a list of the items related to the account. The lower allows you to associate more items to the account.
7. The top pane displays the following item information:

    • Item Number or Name

    8. Item Type

    • Item Delete Date

    9. Account Number

    • Site

    10. Organization Name and Path

    • Billing Start and End Date

    11. Charge Type

12. An item may appear in the list more than once depending on the different charge types. For example, if the account is responsible for one-time and call charges, each item may appear twice within the list.

13. To view more detail, double click on the record to open the Assigned Accounts and Equipment window. This window allows you to associate additional equipment and services to the component.

Adding a Component (other than a set) to an Account

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

   4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account to view.

6. Within the Show ribbon group, click on the Accounting Entries button. The screen changes to displays two panes of information. The top pane displays a list of the items related to the account. The lower allows you to associate more items to the account.

7. Within the lower pane, there are two sections; the left hand side allows you to search for components to add to the account. The right hand side displays a list of instructions on how to add the component to the account.

8. At the bottom of the pane are two tabs:

   - Add Items Pick List - this is a generic list of all items within your database, this could be anything from a circuit to subscriber to a set.

   9. Add Sets to Pick List – this is a more specific list that pertains to only your configured sets.

10. Click on the Add Items Pick List tab to perform a search, there are a couple of ways to find the component:

    - Within the Search textbox, you can type-in the entire component name or number or a portion of the name or number, then click on the magnifying glass

    11. Click on the Show All button to view every component within your database

    - You can also use the Last Search button to display the list of items from your previous search

12. Once the list displays, find your component to add to the account, double click on the record to open Assigned Accounts and Equipment window.

13. Within the window there are three panes of information, the Configured Item pane displays the item name or number, item type (Telephone, circuit, etc) and the Delete Date

14. The Accounts for Equipment and Services pane displays the account numbers that are associated to the item. There can be more than one entry in this pane depending on how the charges are distributed. Within the pane, you can add an account number to the configured item.

15. The Equipment and Services pane displays a list of the equipment and services associated to the configured item. Within this pane, you can also add equipment and services to the item.

Adding an Account Number to the Configured Item

1. Within the Accounts for Equipment and Services pane, click the row marked with the asterisk to enter in a new account number for the equipment and services. Complete the following fields, required fields are marked with an asterisk (*):

   - **Charge Type*** – click the drop-down arrow to access a list, then select one of the following choices:

     2. **Both One Time and Recurring Charges** – bills the account for all one time and recurring charges

     - **Recurring Charges** - bills the account for only recurring charges

     3. **One-time Charges** – bills the account for only one- time charges

   - **Site*** – once you click any of the drop-down lists, the site name auto-populates with the site selected on the General-Set Device window.

   4. **Subscriber Name –** this field does not relate to official accounts.

   - **Organization –** if you have selected an account number associated to an organization, that organization name populates within the field. This is a read only field.

   5. **Account Number*** – click the drop-down arrow to access a list of the account numbers and their associated organizations. If an account number is associated to multiple organizations, the account number appears in the list multiple times, for example if account number 2424 is associated to three different organizations, there are three appearances of the account number within the drop-down. Each account number references the different organization name.

     From the list, select the account number and organization responsible for the charges.

! When you create an account number, you can assign it to an organization or to a subscriber; this designates the account as official or unofficial. If you select an account with an organization, it is most likely an Official Account. If you select an account where the organization is blank, it is most likely an Unofficial account and associated to a subscriber.

- **Billing Start Date*** – click the drop-down arrow to access a calendar, from the calendar select the date to start the billing. 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. **Billing End Date** – click the drop-down arrow to access a calendar, from the calendar select the date to stop the billing for the equipment or service. 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. At this point, you should save your progress. Within the **Actions** ribbon group, click the **Save** button.

Adding an Equipment or Services to the Configured Item

8. Within the Equipment and Services pane click on the row marked with an asterisk to add new equipment or services to the item. Use the drop-down lists or type the appropriate information in each of the following columns for the equipment or service, required fields are marked with an asterisk (*):

- **Equipment or Service Type*** – click the drop-down arrow to access a list, there are three columns of information within the list:

  9. **Equipment or Service Types** – displays the name of the equipment or service

  - **Is Service Type** – a checkmark indicates that the type is a service

  10. **Allow Cost Adjustment** – a checkmark indicates that the you can adjust the cost of the equipment or service

  Within the list, select the equipment or service type.

- **Equipment or Service Name*** – click the drop-down arrow to access a list, and then select the equipment or service name. This list displays only the names associated to the type that you previously selected.

11. **Part Name*** – click on the drop-down arrow to access a list, select the part name.

- **Site** – once you click any of the drop-down lists, the field auto-populates with the site name you selected in the Device Properties pane.

12. **Serial Number*** – this field may auto-populate after you select a part name, it may either contain None or Generate Automatically, if these are contained within the field do not change the selection. However, if the field is blank click the drop-down arrow to access a list, and select the appropriate serial number

- **Quantity – this** f**ield aut**o-populates with a pre-determined quantity amount. To change, click the field and type-in the new information.

13. **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.

14. **Total One Time Cost** – displays the total one-time cost for the equipment item.

- **Total Recurring Cost –** displays the total recurring cost for the equipment item.

! At the bottom of the list of equipment is a totals line displaying the one-time and recurring charges totals for all the equipment items within the list.

- **Install Date*** – this field auto-populates with today's date. To change the date, click the field to access a drop-down arrow, once clicked a calendar displays. From the calendar, select the date to install the new equipment. This is the date the charges start for billing purposes. 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. **Delete Date** – click the field to access a drop-down arrow. Once clicked, a calendar displays, from the calendar select the date to delete the item from the set. To change the date, click the field to access a drop-down 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.

- **Notes** – click on the grey square in the field to open the Note popup that allows you to enter in any notes regarding the equipment or service. Once you have finished typing the note, click on the OK button to save the note and close the popup. Alternatively, you can click on the Cancel button to cancel the operation.

16. **Location** – type the equipment or service location.

- **Last Recurring Bill Date** – this field indicates the last date the piece of equipment generated a bill.

17. You can continue to add equipment and services to the item, when finished, click on the Save & Close button within the Actions ribbon group to return to the Account.

You will notice that the item now appears in the Related to Account pane.

Adding a Configured Set to an Account

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account to view.

6. Within the Show ribbon group, click on the Accounting Entries button. The screen changes to displays two panes of information. The top pane displays a list of the items related to the account. The lower allows you to associate more items to the account.

7. Within the lower pane, there are two sections; the left-hand side allows you to search for components to add to the account. The right-hand side displays a list of instructions on how to add the component to the account.

8. To add a set to the account, click on the Add Sets to Pick List tab at the bottom of the pane

9. You need to search for the set to add to the account, there are a couple of ways to find the set:

- Within the Search textbox, you can type-in the entire component name or number or a portion of the name or number, then click on the magnifying glass

10. Click on the Show All button to view every component within your database

- You can also use the Last Search button to display the list of items from your previous search

11. Once the list displays, find the set to add to the account, double click on the record to open the Set Management window.

12. Within the lower portion of the Facilities pane, click on the Accounts for Equipment and Services tab. The pane changes to display the accounts related to the different charge types for the equipment and services.

13. Click the row marked with the asterisk to enter in a new account number for the equipment and services. Complete the following fields, required fields are marked with an asterisk (*):

When you start typing in any field CAIRS will try to auto-populate information from within the account that is not already populated relating to the account. For example, when you are adding an account for calls and the account is associated to a organization and site, both those fields will populate within the Accounts for Calls pane.

- **Charge Type*** – click the drop-down arrow to access a list, then select one of the following choices:

14. **Both One Time and Recurring Charges** – bills the account for all one time and recurring charges

- **Recurring Charges** - bills the account for only recurring charges

15. **One-time Charges** – bills the account for only one- time charges

- **Site*** – once you click any of the drop-down lists, the site name auto-populates with the site selected on the General-Set Device window.

16. **Organization –** if you have selected an account number associated to an organization, that organization name populates within the field. This is a read only field.

- **Account Number*** – click the drop-down arrow to access a list of the account numbers and their associated organizations. If an account number is associated to multiple organizations, the account number appears in the list multiple times, for example if account number 2424 is associated to three different organizations, there are three appearances of the account number within the drop-down. Each account number references the different organization name.

  From the list, select the account number and organization responsible for the charges.

! When you create an account number, you can assign it to an organization or to a subscriber; this designates the account as official or unofficial. If you select an account with an organization, it is most likely an Official Account. If you select an account where the organization is blank, it is most likely an Unofficial account and associated to a subscriber.

- **Billing Start Date*** – click the drop-down arrow to access a calendar, from the calendar select the date to start the billing. 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.

17. **Billing End Date** – click the drop-down arrow to access a calendar, from the calendar select the date to stop the billing for the equipment or service. 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.

18. When you have added the account number to the set click the Save & Close button within the Actions ribbon group to return to the Account, you will notice that the item now appears in the Related to Account pane.

Removing a Component from an Account

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account to view.

6. Within the Show ribbon group, click on the Accounting Entries button. The screen changes to displays two panes of information. Within the top pane, double-click the item to remove from the account.

   The Assigned Accounts and Equipment window opens.

7. Within the Account for Equipment and Services pane, right click on the selector box next to the charge type, a popup menu opens, within the box click **Delete**.

8. Once you click Delete, a message box appears verifying that you really want to delete the account. Click Yes within the box to continue or No to cancel the operation.

9. To save your changes, click on the Save & Close button within the Actions ribbon group to return to the Account.

Viewing the Component

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

   4. Click the **Show All** button.

5. The Account**s list** opens, displaying the account matching your search criteria. Double-click the account to view.

6. Within the Show ribbon group, click on the Accounting Entries button. The screen changes to displays two panes of information. Within the top pane, double-click the item to view.

   The Assigned Accounts and Equipment window opens.

7. Within the Related Item Actions ribbon group, click on the Open Item button. This opens the components window allowing you to make changes.

8. If you do make any changes make sure to save them by clicking either the Save or Save & Close button within the Actions ribbon group.

Current Balance

You can determine the balance due on an account for any billing period.

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

   4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Within the **Show** ribbon group, click the **Current Balance** button. There are two panes of information; the top pane allows you to select the billing period and the lower pane displays the bill for the period selected.

7. Within the top pane, complete the following fields to select a billing period and determine the balance (required fields are marked with an asterisk (*)):

    - **Bill From Date*** – this field auto-populates with the current billing cycle. To change the date, click the field to access a drop-down 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.

8. **Bill To Date*** – this field auto-populates with the current date. To change the date, click the field to access a drop-down 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.

    - **Fiscal Year*** – this field auto-populates with the current fiscal year. To change to a previous year click the field to type the appropriate year.

9. **Due Date*** – this field auto-populates with the current billing cycle's due date based on the Billing Cycle created within Manage Billing Cycle.

    - **Date Mailed** – this field indicates the date the bill was sent to the printer.

10. **Date Emailed** – this field displays the first date an email regarding the bill was sent to the organization.

    - **Date Copied –** this field indicates the date the bill was copied

11. **Last Delivery Attempt Date** – this field indicates the date that CES last attempted to deliver to the appropriate destination.

    - **Previous Balance –** displays the balance of the previous statement for the account number

      12. Total One Time Charge

    - **Total Recurring Charge**

      13. Total Call Charge

14. Once the fields are complete, click the **Determine Balance** button.

15. The lower pane populates with the bill information. The current account balance is the last field within the pane.

Official Account Organizations

Once you associate the account number to an organization, they are tied together in CAIRS. An account number can be associated to multiple organizations. Within this button, you are associating the different organizations to the account number.

There are a couple of things that you need to be aware of when dealing with the account/organization association:

1. When associating the organizations, remember that the child organizations do not inherit the association of their parents. You need to associate all levels to the account.

2. If you assign an account number(s) directly to the organization within Directory/Organizations, that overrides all selections made within this window. To ensure that there is no account number associated to an organization, access: Directory/Organization →Organizations → access the organization to view the associated account number, if applicable.
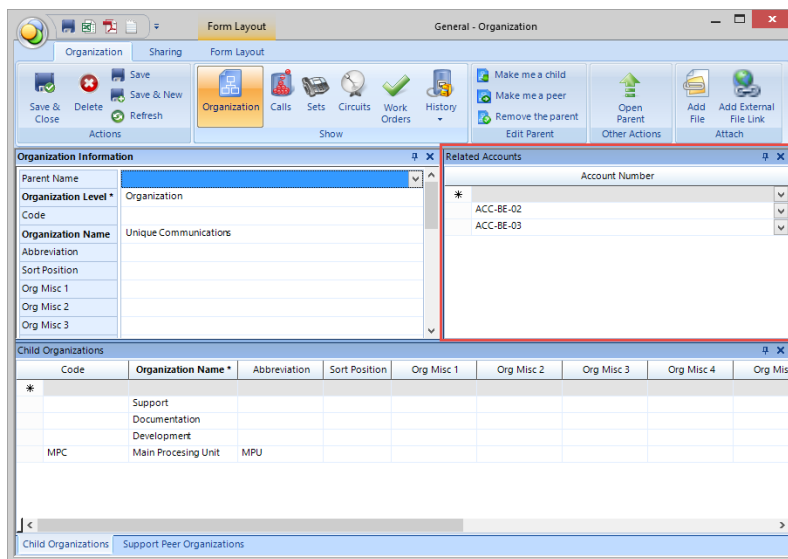
3. If you are going to associate multiple organizations to an account, you need to set the Filter Organization By Account System Setting to False.

Adding an Organization

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Within the **Show** ribbon group, click the **Organizations** button. The screen displays two panes of information; the top pane displays the organization associated to the account. 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.

8. **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.

9. **TCO** – displays the TCO Group associated to the organization

- **Organization Code** – displays the organization code

10. **Organization Abbreviation** – displays the organization abbreviation

11. To add an organization to an account, 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.

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

Deleting an Organization

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

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**.

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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) to continue working with accounts, or click **Save & Close** (to save and exit) to return to the Accounts list.

Official Account Sites

An account number can be limited to a site allowing you to monitor the account numbers for each site independently.

Child sites do not inherit the association of their parents; you need to associate all levels to the account number.

Adding Site Association

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

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 account. 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.

7. **Site Path** – displays the complete path to the site. Each level is separated by a >.

   - **Site Level** – displays the site level name or number.

8. **Site Code** – displays the three-digit alphanumeric site code.

! 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, and then click the magnifying glass. Any record with the search characteristics displays within the pane.

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9. To add a site to the account, 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.

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

Selecting All Sites

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

   4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Within the **Show** ribbon group, click the lower portion of the **Site** button to access a drop-down menu. From the menu, highlight **Select All Sites**.

   All site names displays within the top pane.

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

Deleting a Site

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

   4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Within the **Show** ribbon group, click the **Sites** button.

7. Within the top pane, right site 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.

   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 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 working with accounts, or click **Save & Close** (to save and exit) to return to the Accounts list.

Unselecting All Sites

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

   4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Within the **Show** ribbon group, click the lower portion of the **Site** button to access a drop-down menu. From the menu, highlight **Unselect All Sites**.

   The site names are removed from the top pane indicating that there are no site associations.

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

Official Account TCO Subscribers

Within the TCO Subscriber button, you can view the TCO subscribers associated to the account. The list provides the TCO name, first and last of the subscriber as well as email address and contact phone number. The final column determines whether the subscriber is an administrator for Subscriber Portal. By double clicking on any record, you can open the subscriber record, at which point you can modify the record.

Official Account Orders/Troubles/Tasks

You can view all orders, trouble tickets, and/or tasks related to the account; this includes those that are active, closed, on hold or past due.

Viewing Orders

Within an account, click on the Order/Troubles and Tasks button within the Show ribbon group. The window changes to displays two panes of information, the top pane displays the orders, the lower pane displays the troubles. The list of the active orders populates in the upper pane.

To view a list of the closed orders, click on the option button next to the Closed. The window changes to display a list of closed order related to the account.

To view a list of the orders On Hold, click on the option button next to the On Hold. The window changes to display a list of held order related to the account.

To view a list of all orders; active, closed, held, and past due, click on the option button next to All. The window changes to display a list of every order related to the account.

To view a list of the order that are past due, click on the option button next to the Past Due. The window changes to display a list of orders that are past the due date based on the Days to Complete field within the Work Flow Setup.

You can search for an order by typing a search parameter within the textbox in the upper right hand corner of the pane and click on the magnifying glass.

Viewing Tasks

Within the account, click on the Order/Troubles and Tasks button within the Show ribbon group, within the lower portion of the Orders pane, click on the Tasks tab. The list of the open tasks populates in the upper pane.

To view a list of the closed tasks, click on the option button next to the Closed. The window changes to display a list of closed tasks related to the account.

To view a list of all task; active, closed, held, and past due, click on the option button next to All. The window changes to display a list of every task related to the account.

To view a list of the tasks that are past due, click on the option button next to the Past Due. The window changes to display a list of tasks that are past the due date based on the Days to Complete field within the Work Flow Setup.

You can search for a task by typing a search parameter within the textbox in the upper right hand corner of the pane and click on the magnifying glass.

Viewing Troubles

Within an account, click on the Order/Troubles and Tasks button within the Show ribbon group. The window changes to displays two panes of information, the top pane displays the orders, the lower pane displays the troubles. The list of the active troubles populates in the lower pane.

To view a list of the closed troubles, click on the option button next to the Closed. The window changes to display a list of closed trouble tickets related to the account.

To view a list of the troubles On Hold, click on the option button next to the On Hold. The window changes to display a list of held trouble tickets related to the account.

To view a list of all troubles; active, closed, held, and past due, click on the option button next to All. The window changes to display a list of every trouble ticket related to the account.

To view a list of the troubles that are past due, click on the option button next to the Past Due. The window changes to display a list of trouble tickets that are past the due date based on the Days to Complete field within the Work Flow Setup.

You can search for a task by typing a search parameter within the textbox in the upper right hand corner of the pane and click on the magnifying glass.

Official Account Addresses

Viewing Associated Addresses

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

    4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Within the **Show** ribbon group, click the upper portion of the **Addresses** button.

7. The window displays two panes of information. The top pane displays a list of addresses currently associated to the account and the lower pane displays a list of all address currently within your database.

8. If the information in the top pane does not readily populate, you can search for an address by typing in the name or portion of the name within the search text box or click the **Show All** link.

Adding a New Address

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

    4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Within the **Show** ribbon group, click the lower portion of the Addresses button to access a drop-down menu. From the menu, click **Add New Address**.

7. The Address window opens. Complete the following fields for the address (required fields are marked with an asterisk (*)):

   - **Address Label** – type the address label. For example, work, home, etc.

   8. **Street*** – type the mailing address.

   - **City** – type the city name.

   9. **State/Province** – type the state abbreviation, province name or other designation.

   - **Zip Postal** – type the 5-digit zip code.

   10. **Zip Plus 4** – type the 4-digit code displaying after the standard zip code, if applicable.

   - **Country/Region** – type the country abbreviation.

   11. **Address Type** – click the drop-down arrow to access a list, from list select the address type.

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

Once you have added the address into the system, you must associate it to the account.

Associating an Address to an Account

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

   4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Within the **Show** ribbon group, click the upper portion of the **Addresses** button. The window displays two panes of information. The top pane displays a list of addresses currently associated to the account and the lower pane displays a list of all address currently within your database.

7. To populate the information in either pane:

   - Within the search box, type a portion of the address and then click the magnifying glass.

8. Click the **Show All** button.

9. To associate an address to an account, find the address within the **Available Addresses** pane and double-click the address. The address displays in the Addresses for Account pane.

10. To associate additional addresses, repeat steps 6 and 7.

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

Adding a Mailing Address

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Within the **Show** ribbon group, click the upper portion of the **Addresses** button. There are two ways to populate the list of Address for the Account:

- Within the search box, type the account number or portion of the number and then click the magnifying glass.

7. Click the **Show All** button.

8. Once the list populates, highlight the address within the **Addresses for Account** pane.

9. Within the **Show** ribbon group, click the lower portion of the **Address** button to access a drop-down menu. From the menu, click **Make Mailing Address**.

10. Alternatively, right-click the address within the list to access a pop-up menu and from the menu select **Select this address for mailing bills**.

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

12. To ensure the address is now the mailing address, within the **Show** ribbon group click the **Billing Account** button. Within the **Account** pane, the mailing address now populates with your selection.

Removing an Address from an Account

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Within the **Show** ribbon group, click the upper portion of the **Addresses** button. There are two ways to populate the list of Address for the Account:

- Within the search box, type the account number or portion of the number and then click the magnifying glass.

7. Click the **Show All** button.

8. Right-click the address to access a pop-up menu and select **Remove from this account**.

9. The address redisplays in the Available Address pane.

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

Official Account Calls

If the account you are currently viewing is responsible for call charges, you can view a summary of account-applied charges.

To view the calls associated to the account, within the Show ribbon group, click the **Calls** button. Depending on the amount of calls associated to the account, the list may not populate right away. To populate the list, complete one of the following:

- Within the search box, type any portion of the record, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

11. Click the **Show All** button.

The window displays the following call information:

- **Call Type** – call type name.

- **Total Calls** – the total number of calls made.

- **Total Cost** – the total cost of calls.

12. **Total Call Duration** – the total duration of calls in minutes.

At the bottom of the list, are call charge totals. To view the details for each call type, click the **plus sign (+)** next to the call type name, to return to the default view, click the minus sign **(-)** next to the call type name.

You can export or print the call data by clicking on the Sharing tab at the top of the screen. There are 4 export formats:

- **PDF** – you can export the total report (expanded bands only or primary band) to a PDF file. Once selected the PDF file generates to your screen, you can save the file to any location.

13. **Excel** – you can export the total report (expanded bands only or primary band) to an Excel spreadsheet. Once selected, Excel opens with your report, you can save the file to any location.

- **Print** – you can send the entire report (expanded bands only or primary band) to a printer. Once selected the Print box displays allowing you to choose your printing options.

14. **Text** – you can export the total report (expanded bands only or primary bands) to a tab delimited text file. Once selected, the Select the location to save the Tab-delimited Text File box opens. Browse to the location, type the file name within the text box and click the Save button.

Official Account Authorization Codes

You can associate authorization codes to each account number. Generally, subscribers use authorization codes to make calls that incur a charge. If the account number in not responsible for call charges, you cannot bill for those charges. Be sure the checkbox for Call Charges is marked on the Billing Account button.

Since an Official Account is not associated with a subscriber, the authorization code has to belong to the organization.

CAIRS can generate authorization codes automatically or you can manually enter in the codes. If you choose to have CAIRS generate the codes, you have to designate how many digits and the increment. To learn more about this see System Admin→ System Settings→ Auto Number Setup.

Viewing an Accounts Authorization Codes

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Within the **Show** ribbon group, click the upper portion of the **Authorization Codes** button. There are two ways to populate the list:

    - Within the search box, type the authorization code or portion of the code and then click the magnifying glass.

7. Click the **Show All** button.

8. The window displays a list of the authorization codes associated to the account.

Adding an Authorization Code from within an Account Number

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Click the lower portion of the **Authorization Code** button to access a drop-down menu. From the menu, select **New Auto Auth Code**.

7. A new authorization code displays at the top of the list within the lower pane.

! Once you create a new authorization code, you can go into Accounting -> Authorization Codes to populate the remaining information. Once saved, you can refresh the screen within the account to see the complete information.

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

Deleting an Authorization Code from within an Account Number

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Within the **Show** ribbon group, click the upper portion of the **Authorization Codes** button. If the list does not populate, there are two ways to populate the list:

   - Within the search box, type the authorization code or portion of the code and then click the magnifying glass.

7. Click the **Show All** button.

8. The window displays a list of the authorization codes associated to the account. Within the list, right-click the selector box next to the authorization code and click **Delete**.

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

9. If you do not want to delete an item, 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 item. 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 accounts, or click **Save & Close** (to save and exit) to return to the Accounts list.

Charge Type Override

When you click the Charge Type Override button, the screen changes to display two panes of information: Call Types and Equipment and Service Types. Within each account, you can indicate a specific call type(s), equipment type, or service type as reimbursable. The charge type override works in connection with the type of service, for each override you determine whether the charges related to the call type or equipment and service type are mission funded. You can create your Types of Service within Equipment and Services →Type of Service.

Adding a Charge Type Override

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

    4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Within the **Show** ribbon group, click the **Charge Type Override** button.

7. The screen changes to display two panes of information: Call Types and Equipment and Service Types.

Call Type Override

8. Within the Call Type pane, click the row marked with an asterisk (*) to add a new record. Within the Call Type column, click the drop-down arrow to access a list of the call types within your database, from the list select the appropriate call type.

9. In the **Type of Service Name** column, click the drop-down arrow to access a list. From the list, select the associated type of service.

10. Before adding more information, it is a good idea to save your changes, within the A**ctions** ribbon group, click the **Save** button.

Equipment and Service Type Override

11. Within the Equipment and Services pane, click the row marked with an asterisk (*) to add a new record. Within the Equipment Type column, click the drop-down arrow to access a list of the equipment and service types within your database, from the list select the appropriate type.

12. In the **Type of Service Name** column, click the drop-down arrow to access a list, from the list select the associated type of service.

13. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with reimbursable types, or click **Save & Close** (to save and exit) to return to the Official Accounts.

Removing a Charge Type Override

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

   4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Within the **Show** ribbon group, click the **Charge Type Override** button.

7. The screen changes to display two panes of information: Call Types and Equipment and Service Types.

8. Within the appropriate pane, right-click the selector box next to the type name. A small pop-up menu opens, within the box click **Delete**.

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

10. If you do not want to delete an item, 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 item. 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 account, or click **Save & Close** (to save and exit) to return to the Official Accounts.

Settings

Within the Settings button, you determine two things: what billing report files you want generated for the account and what call types you want to exclude from the printed bill. Excluding calls from the bill is helpful if you do not want to include zero cost calls.

Account Billing Report Preferences

There are two ways to set the preferences; you can set them either for each account number or for all of the official accounts. Within this option, you are setting the preferences for this account number. The selections here over-ride the setting you may have chosen for all of official accounts.

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Within the **Show** ribbon group, click the **Settings** button. There are two panes of information, within the top pane you determine the preferences, the lower is used for excluding call types from bills.

7. The Billing Report Preferences pane displays the different formats and delivery options for your billings, as a default all fields are checked. This indicates the account summary or call data generates to the particular file type or location.

    The following options are available:

- **Account Summary XLS** – the account summary for each account number generates to an Excel Spreadsheet

8. **Call Detail XLS** – the call data for each account generates to an Excel Spreadsheet

- **Call Charges Tab Delimited** – the call charges for each account generate to a tad delimited file

9. **One Time Charges Tab Delimited** – the one-time charges for each account generate to a tab delimited file

- **Recurring Charges Tab Delimited** - the recurring charges for each account generate to a tab delimited file

10. **Account Type** – this default to Official

- **Mailed Report PDF to File** – the mailed report is generated to a PDF file

11. **Mailed Report PDF to Printer** – the mailed report is sent directly to the printer

- **Report to XML** - the call, recurring, and one-time charges are generated into an XML file.

12. **Combined Detail XLS** – this report provides a combined detail of all mission funded and non-mission funded charges relating to an account.

13. If you want to remove the file type from being generated, click on the box to remove the checkmark.

14. Within the Actions ribbon group, click on **Save** (to save and stay) to continue working with your preferences, or click **Save & Close** (to save and exit) to return to the Official Accounts list.

Adding a Call Type to Exclude from Bill

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Within the **Show** ribbon group, click the **Settings** button.

7. Within the **Call Types to Exclude from Printed PDF Bills** pane, click the row marked with an asterisk (*). Within the **Call Type** column, click the drop-down arrow to access a list of the call types within your database, from the list select the appropriate call type.

8. Within the **Exclude From Bill** column, click the box to insert a checkmark indicating that you want to exclude the call type from the printed bill.

9. You can continue adding call types by clicking on the row marked with an asterisk (*).

10. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with settings, or click **Save & Close** (to save and exit) to return to the Official Accounts.

Deleting a Call Type from being Excluded

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Within the **Show** ribbon group, click the **Settings** button.

7. Wiithin the **Call Types to Exclude from Printed PDF Bills** pane, right-click the selector box next to the type name. A small pop-up menu opens. Click **Delete**.

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

8. If you do not want to delete an item, right-click the record and click **Undelete**.

9. 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.

10. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with settings, or click **Save & Close** (to save and exit) to return to the Official Accounts.

Viewing Official Accounts

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Official Accounts**.

3. Before the Account list populates, you must either:

   - Within the search box, type the account number or portion of the number and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Use the Views pane to sort the Accounts list based on a common category or characteristic. The following views are available:

   - **Simple List** (default view)

6. **Detailed List**

   - **Accounts by Directory Number**

7. **Authorization Codes**

   - **Account Status**

8. **Accounts by Bill Delivery Dates**

   - **Accounts by Building**

9. **Account Notes**

- **Custom View -** this selection allows you to create a custom view by dragging and dropping column headers to create a line display.

10. To select a different view, click the option button next to the selection. There are two ways to populate the list:

- Within the search box, type any portion of a record and then click the magnifying glass.

11. Click the **Show All** button.

12. If available, click the plus sign (+) next to the group to view the individual records.

13. Double-click the record to view the Account window.

Account Management

Within the Management ribbon group, you can view an account's status over its entire history. This is the area to see if the account is active, closed, suspended, etc. You can change the account status but be aware this ribbon group overrides all other account statuses. For example, if you close the account here, the billing on this account stops.

Manage Status Change Types

This option allows you to populate the Status Change Types drop-down list. These change types explain why the account status is changing. Possible change types are non-payment, customer request, etc.

Adding a Status Type

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Within the **Management** ribbon group, click the lower portion of the **Account Status** button to access a drop-down menu. From the menu, select **Manage Status Types**.

The Account Status Change Types window opens.

7. Click the field marked with an asterisk (*) to add new records. Once you start typing, a new row displays above allowing you to add multiple items.

8. Type the **Change Type** that explains why the account status is changing, for example, non-payment, customer request, rotation date, etc.

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

Deleting a Status Type

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

   4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Within the **Management** ribbon group, click the lower portion of the **Account Status** button to access a drop-down menu. From the menu, select **Manage Status Types**.

7. The Account Status Change Types window opens. There are two ways to delete a type:

   • Right-click the type to access a pop-up menu and select **Delete**.

   8. Highlight the row by clicking the name and within the **Actions** ribbon group click the **Delete** button.

9. Once you click Delete, a message box displays verifying that you really want to delete the type. Click **Yes** within the box to continue or **No** to cancel the operation.

Account Status

Within this option, you can change the account status. This allows you to suspend or close an account for different reasons. You can also reopen or make the account active again. Keep in mind, that when you change the account status to suspended or closed all billing stops for that account.

There are a few important notes about Account Status. For Account Status to work properly you must have turned on the 'Update Account Status' CES process and have it running at regular and frequent intervals. If CES does not run then the account status will not change. There are two dates relating to each status, the Requested and the Date Applied. The Requested Date is the date the user requested the CES process to run. The Date Applied is when the account status change took effect.

Account Status cannot be set to a date that already passed. Since the status update is directly related to a CES process if you put the effective date in the past it will update the

status to the date and time the CES process was run. It can be set to a date in the future, once CES runs the process the account status changed and the action is initiated.

Viewing Account Status

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

   There are two ways to view the account status. First, the solid line directly beneath the ribbon displays the current status.

6. Alternatively, click the upper portion of the **Account Status** button within the **Management** ribbon group.

   The screen displays a complete account status history. Pay close attention to the Status and Date Requested columns, the most recent status appears at the top of the list.

   There are four account statuses:

   - **Active**

7. **Suspended**

   - **Closed**

8. **Reopened**

   There are six additional columns of information: User Name, First Name, Last Name, Time Requested, Account Status Change Type, and Date Applied.

Changing Account Status

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Within the **Management** ribbon group, click the lower portion of the **Account Status** button to access a drop-down menu. From the menu, select **Change Account Status**.

7. The New Account Status Change window opens. Complete the following fields (required fields are marked with an asterisk (*)):

   • **Status** – click the field to access a drop-down list and from the list select one of the following:

      8. **Active**

      • **Suspended**

      9. **Closed**

      • **Reopened**

   10. **Date Requested** – the field defaults to today's date. To change the date click the field to access a drop-down arrow, once clicked a calendar displays, from the calendar select the effective 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.

Keep in mind, this is a CES process so the date and time requested is when you have initiated the process to run. Once the process runs, the Date Applied will populate with actual date and time the account status was changed.

   • **Status Change Type** – click the field to access a drop-down list and from the list select the change type.

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

   When you change the status of an account the yellow line directly below the ribbon displays the new account status.

Billing Tools

Within the Billing Tools ribbon group, you generate bills for the account you are currently viewing. You can adjust the bill without generating a new bill by either crediting or debiting the account. Once you generate the bill and send it out to the customer, you can apply payments made. Payment made to an account will not show on the account until you generate a bill for the next bill cycle.

Finally, you can rollback a bill cycle. When you perform a rollback, you are deleting the previous bill for the cycle and generating a new bill in its place. Make sure you really want to do this because there is no undo function.

Adjustments

You handle refunds and adjustments the same way within CAIRS. You can enter a credit (refund) to the account allowing the positive balance to apply to the next generated bill. Alternatively, you debit (adjust) the account to apply a balance to the next generated bill.

Applying a Credit or Debit

Remember that when applying a refund to an account, the credit amount does not apply until you generate the next bill cycle.

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Account window opens, and defaults to show the Billing Account information.

6. Within the **Billing Tools** ribbon group, click the **Refunds and Adjustments** button. Within the solid blue line below the ribbon, click the circle next to either:

   - **Credit (Refund)** – apply funds to an account.

7. **Debit (Adjustment)** – add charges to the balance statement.

8. Within the top pane, complete the following information (required fields are marked with an asterisk (*)):

   - **Adjustment Amount*** – type the adjustment amount. When you enter in the amount, type the total amount with a decimal point. If you fail to enter in the decimal point CAIRS adds one in the appropriate location, for example if you type $100, CAIRS converts that to $1.00 instead of $100.00.

9. **Adjustment Date*** – this field auto-populates with the current date. To change the date, click the field to access a drop-down 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.

   - **Type of Service Name** – click the drop-down arrow to access a list and from the list select the Type of Service

10. **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. Each site level is separated by a >.

    - **Organization Name** – click the drop-down arrow to access a list from the list, select the name of the organization. The organization drop-down list displays the

bottom-most organization first. After the ~~the complete path to the selected organization displays. Each level of the organizational tree is separated by a >. Once you select an organization, the complete path populates within the field.

11. **Note** – type any necessary information for why you are applying an adjustment.

12. Directly below the top pane, on the right-hand side of the screen, click the **Apply Adjustment** button.

13. The information moves from the top pane to the Pending Adjustments pane.

14. When you generate the next bill, the refund or adjustment applies to the account.

Viewing Adjustment History

In order for a credit or debit to apply to an account, you must generate the bill for the next bill cycle. After generating the bill, there are two ways to view the applied adjustments.

First, within the **Billing Tools** ribbon group, click the **Refunds and Adjustments** button. Any adjustments made to the account displays in the Adjustment History pane. CAIRS designates a credit with the amount encased in parenthesis while a debit does not have parenthesis.

Second, on the **Billing Account** screen (Show ribbon group →Billing Account button), select a bill period from the drop-down box in the middle of the screen. The bill summary displays on the lower portion of the screen. Click the **Adjustments** tab to view the credits and debits applied to the account.

Creating a Bill

After you apply any adjustments to an account the customer may want a revised bill. The Create Bill button allows you to generate a new bill for only the account you are viewing. You may have to perform a rollback on the account number before you can generate a new bill, CAIRS does not allow you to generate multiple bills for a single billing cycle. To learn how to perform a rollback see: Billing Tools →Rollback a Bill → Performing a Rollback.

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account, The Accounts window opens.

6. Within the **Billing Tools** ribbon group, click the **Create Bill** button.

! If a bill has already been generated for this account number in the current billing cycle, you need to perform a rollback. A rollback allows you to remove the previous bill for just this account.

7. The Create Bill pop-up opens. Complete the following bill fields (required fields are marked with an asterisk (*)):

! Some of the following fields auto-populate with information you have previously designated. When you enabled and created a billing cycle, you determined the information that displays in these fields.

- **Bill From Date*** – this field populates with the last date of the previous bill period. To change the date, click the field to access a drop-down 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.

8. **Bill To Date*** – this field populates with the current date. To change the date, click the field to access a drop-down 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.

- **Fiscal Year*** – this field populates with the current fiscal year. To change the information, click the field and type the correct fiscal year.

9. **Due Date*** – this field auto-populates with the bill due date. To change the date, click the field to access a drop-down 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.

- **Date Mailed** –you can type the date you mailed the bill or you can click the drop-down arrow to access a calendar. From the calendar select the date that you mailed the bill.

10. **Date Emailed** –you can type the date you emailed the bill or you can click the drop-down arrow to access a calendar. From the calendar select the date you emailed the bill.

- **Last Delivery Attempt Date** – this field displays the date that CES last attempted to deliver a bill by either method.

11. **Date Copied –** this field indicates the date the bill was copied

- **Previous Statement Balance -** displays the balance of the previous statement for the account number

12. Once you have completed the information within the pop-up, click the **Run Bill** button to produce the bill for this account.

Viewing the Bill You Created for an Account Number

When you create a bill, the bill information automatically displays in the Account Balance Summary pane within the Billing Account screen. To view the detailed bill, complete the following steps:

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

    4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Account window opens, and defaults to show the Billing Account information.

6. Within the **Bill Summary** pane, click the **Select billing period** drop-down box (in the upper right-hand corner of the pane). From the list, select the billing period to view.

7. The Bill Summary pane displays the following information:

    - **Charge Category**

    8. **One Time Charges**

    - **Recurring Charges**

    9. **Call Charges**

    - **Current Charges**

    10. **Funding and Adjustments**

    - **Previous Balance**

    11. **Current Balance**

12. Within the lower portion of the screen, several information tabs display various portions of the bill. You can view the following information by clicking the appropriate tab:

    - **Balance Summary** – displays the bills generated on the account and the total charges, payments and adjustments made on the account. Any amounts seen within parentheses are credits to the account.

    13. **Number/Circuit Summary** – if multiple set devices and/or circuits are associated to the account, this tab displays the device name, total one-time charges, total recurring charges, and total call charges. To view the full details, click the **plus sign (+)** next to the number or circuit name.

- **One-Time Charges** – displays only the one-time charges associated to the account. Within the column on the left-hand side of the screen are the view selections. To change the view, click the option button next to the name. Each of the views changes how the information is organized or grouped together.

14. **Recurring Charges** – displays only the recurring charges associated to the account. Within the column on the left-hand side of the screen are the view selections. To change the view, click the option button next to the name. Each of the views changes how the information is organized or grouped together.

- **Calls** – displays a list of the call data associated to the account. Within the column on the left-hand side of the screen are the view selections. To change the view, click the option button next to the name. Each of the views changes how the information is organized or grouped together.

15. **Funding/Payments** – displays a list of funding/payments credited to the account.

- **Adjustments** – displays a list of adjustments made on the account.

Rollback a Bill

The purpose of rolling back a bill is to delete the previous bill and create a new one. Be aware that there is not a backup of the previous bill. When you roll back a bill, you are removing the charges from the bill and placing them back into the system. This allows you to modify the bill before sending a final bill to your customers or the Subscriber Portal.

You can perform a rollback on a single account or on the entire bill. See the section on Generating an Entire Bill which covers how to perform a rollback on the entire bill.

Performing a Rollback

1. Click the **Accounting** menu.
2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**
3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

    4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Account window opens, and defaults showing the Billing Account information.

6. To verify you are on the most recent bill cycle, click the drop-down arrow in the **Select billing period** box. CAIRS performs a rollback from the top of the list to the bottom.

7. Within the **Billing Tools** ribbon group, click the **Rollback Last Bill** button.

8. A message box displays verifying that you really want to perform the rollback. Remember a rollback deletes the last bill.

9. Click **Yes** to continue with the rollback or **No** to cancel the operation.

10. The bill cycle no longer displays in the list, allowing you to generate a new bill for this account number.

Funding

Organizations can make payments that apply to their statement balance. Before you can accept payments, you must determine the types, methods and locations you allow within your CAIRS.

A Type is considered what type of payment you are accepting, for example, a standard payment, late payment, etc.

A Method is considered what form of payment you are accepting, for example, cash, check, credit card, etc.

A Location is considered where your customer is making the payment, for example, in office, cash box, mail, etc.

Manage Payment and Funding Types

1. Click on the **Accounting** menu.

2. In the **Navigation** pane, click **Accounts** and then **Official Accounts**.

3. There are three ways to Manage Payment and Funding Types

   - Within the tool bar directly above the **Navigation** pane, click the **Payment and Funding Types** button

   - Within the **Actions** pane, click the **Payment and Funding Types** link.

   - Within the **Account** list, double click on the account number, The Account window opens. Within the **Billing Tools** ribbon group, click the lower portion of the **Funding** button to access a dropdown menu. From the menu, select **Manage Funding Types**.

4. With either option, the Payment and Funding Types popup opens. Click the line marked within an asterisk. Once you start typing, a new row appears allowing you to add multiple items.

5. Within the field, type-in the type explaining the payment types you are applying to the account. For example, a type can be a standard payment, discrepancy, bad check, etc.

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

Manage Payment and Funding Methods

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Accounts** and then **Official Accounts**.

3. There are three ways to Manage Payment and Funding Methods:

- Within the tool bar directly the **Navigation** pane, click on the **Payment and Funding Methods** button.

- Within the **Actions** pane, click the **Payment and Funding Methods** link.

- Within the Account list, double click on the account number, The Account window opens, within the **Billing Tools** ribbon group, and click the lower portion of the **Funding** button to access a dropdown menu. From the menu, select **Payment and Funding Methods**.

4. With either option, the Payment and Funding Methods popup opens. Click the line marked within an asterisk. Once you start typing, a new row appears allowing you to add multiple items.

5. Within the field, type-in the method that explains what form of payment you accept. For example, cash, check, credit, debit, etc.

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

Manage Payment and Funding Locations

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Accounts** and then **Official Accounts**.

3. There are three ways to Manage Payment and Funding Locations:

- Within the tool bar directly the **Navigation** pane, click on the **Payment and Funding Locations** button.

- Within the **Actions** pane, click the **Payment and Funding Locations** link.

- Within the Account list, double click on the account number, The Account window opens, within the **Billing Tools** ribbon group, and click the lower portion of the **Funding** button to access a dropdown menu. From the menu, select **Payment and Funding Locations**.

4. With either option, the Payment and Funding Locations popup opens. Click the line marked within an asterisk. Once you start typing, a new row appears allowing you to add multiple items.

5. Within the field, type-in the locations. For example, drop box, mail, OTC, etc.

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

Deleting a Type, Method or Location

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Accounts** and then **Official Accounts**.

3. There are three ways to delete a type, method or location:

- Within the tool bar directly the **Navigation** pane, click the appropriate button.

- Within the **Actions** pane, click the appropriate link .

- Within the Account list, double click on the account number, The Account window opens, within the **Billing Tools** ribbon group, and click the lower portion of the **Funding** button to access a dropdown menu. From the menu, make the appropriate selection.

4. With either option, the window opens.

5. Right click the selector box next to the name, a small popup box opens and within the box click **Delete**.

6. Once you click Delete, a message box appears verifying that you really want to delete the item. Click **Yes** within the box to continue or **No** to cancel the operation.

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

8. If you do not want to delete the item, right-click the record to access a popup menu and from the popup, click **Undelete**.

9. Once you select Undelete, a message box appears verifying that you really want to keep the item. Click **Yes** within the box to continue or **No** to cancel the operation.

10. Within the **Actions** ribbon group, click **Save & Close**.

Making a Payment

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Accounts** and then **Official Accounts**.

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

    4. Click the **Show All** button.

5. The Accounts list opens to the right displaying the account matching your search criteria. Double-click the account. The Account window opens.

6. Within the **Billing Tools** ribbon group, click the upper portion of the **Funding** button.

7. The screen changes allowing you to enter in a payment to apply to the account. Within the top pane, complete the following information (required fields are marked with an asterisk(*****):

- **Payment or Funding Type** – click the dropdown arrow to access a list and from the list, select the payment type.

- **Payment or Funding Method** – click the dropdown arrow to access a list and from the list, select the payment method.

- **Payment or Funding Location** – click on the dropdown arrow to access a list and from the list, select the location where the payment was made.

- **Receipt Number*** – this field auto-populates with an invoice number. To change the number, click the field and type-in the new invoice number.

- **Received Date*** –this field auto-populates with the current date. 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.

- **Amount Due** – this field auto-populates with the current account balance.

! The next four fields work together allowing you to keep an accurate account of the funds submitted into your system. If the amount submitted is greater than the amount due, CAIRS makes the appropriate calculations and displays the amounts in the appropriate fields. For example:

Amount Due – 35.65

Amount Submitted - $40.00

Change Given - $4.35

Net Payment - $35.65

Account Balance - $0.00 (Shown at the bottom of the pane in the solid blue line)

CAIRS does not allow you to give change if the total submitted is more than the net payment. CAIRS does not provide the change given amount in the field, if the customer is submitting more than the amount due, a credit appears in the Account Balance. If the customer does not want a credit, type the amount in the Change Given field, once entered the Account Balance will be $0.00.

- **Amount Submitted** – type-in the total amount submitted. When entering in the amount received, type-in the total amount with a decimal point. If you fail to enter in the decimal point, CAIRS adds one in the appropriate location. For example, if you type-in $100, CAIRS converts it to $1.00 instead of $100.00.

! The Amount Submitted field can go to four digits after the decimal point. This allows sites properly bill when using foreign currency. However, when you type in the amount you must enter the decimal point and then the four digits, if you do not CAIRS will automatically change it to the standard format of $00.00.

- **Change Given** – this field auto-populates with the correct change to give to the person when they have submitted more that the balance statement. For example, if the statement balance is $35.50 and the submitted amount is $36.00, this field displays -$0.50 allowing you to keep an accurate accounting of the funds entering your system.

- **Net Payment** – if the amount submitted is the same as the amount due, this field populates with the same amount.

! CAIRS has a built-in calculator. In the lower left-hand corner of the top pane, click the **Calculator** button. The standard Windows calculator displays.

- **Check Number** – if the customer submitted a check for payment, type-in the check number.

- **Check Status** – click on the dropdown arrow to access a list, from the list select the check status. You have three options: Good, Bad, or Resolved.

- **Fiscal Year** – type-in the current fiscal year, or the fiscal year the payment should apply to.

- **Note** – type-in any additional payment notes.

8. Once you have completed the fields, click the **Apply Payment** button in the lower right-hand corner of the pane.

! Payments made on the last day within the billing cycle are included within that billing cycle.

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9. Once applied, the payment information displays in the **Payment History** pane in the lower portion of the screen.

10. The status of the payment is Pending. A payment is not applied to a balance until you generate the next bill cycle.

Viewing Funding History

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Accounts** and then **Official Accounts**.

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

    4. Click the **Show All** button.

5. The Accounts list opens to the right displaying the account matching your search criteria. Double-click the account. The Account window opens.

6. Within the **Billing Tools** ribbon group, click the upper portion of the **Funding** button.

7. Within the **Funding History** pane in the lower portion of the screen, you can view the payment applied and pending on the account.

8. If the list does fully populate with all payments processed, search for a specific payment by typing in any portion of any field or by clicking the **Show All** button.

Editing a Payment

You can edit a payment that is pending to an account. However, once the status of the payment changes from pending the payment is no longer editable

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Accounts** and then **Official Accounts**.

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

   4. Click the **Show All** button.

5. The Accounts list opens to the right displaying the account matching your search criteria. Double-click the account. The Account window opens.

6. Within the **Billing Tools** ribbon group, click the upper portion of the **Funding** button.

7. Within the **Funding History** pane in the lower portion of the screen, a list of the payments made to the account appears.

8. Next to the status, click the record selector box to access a popup menu, from the menu select Edit. The complete payment details appear in the upper pane.

9. Make the necessary changes and click the **Update Funding** button in the lower right hand corner of the pane.

10. The status of the payment is Pending. A payment is not applied to a balance until you generate the next bill cycle.

Deleting a Payment

You can delete a payment that is pending to an account. However, once the status of the payment changes from pending the payment is no longer editable.

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Accounts** and then **Official Accounts**.

3. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

   4. Click the **Show All** button.

5. The Accounts list opens to the right displaying the account matching your search criteria. Double-click the account. The Account window opens.

6. Within the **Billing Tools** ribbon group, click the upper portion of the **Funding** button.

7. Within the **Funding History** pane in the lower portion of the screen a list of the payments made to the account appears.

8. Next to the status, click on the record selector box to access a popup menu, from the menu select **Delete**.

9. Once you click Delete, a message box appears verifying that you really want to delete the payment. Click **Yes** within the box to continue or **No** to cancel the operation.

10. The payment is removed from the Payment History pane, the total amount due return to the amount before the payment was applied.

Running a Bill - Official

Within Billing Cycle History, you can view the bills have are completed or are in the process of completion for all cycles. You can also generate or schedule a bill for a cycle.

! You cannot generate a bill on a cycle if there is already one in place. If this is the case, you must Rollback the current bill to generate another. See Billing History – Official → Rolling Back a Billing Cycle.

Viewing Bill Cycle History

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Click the **plus sign (+)** next to Official Accounts to access the submenus. Click **Run Bill Requests – Official.**

    A list of the bills you have asked CES to run populates within the pane on the right-hand side of the screen.

4. To view the complete information, double-click any row.

    The General – Billing Cycle History window opens. The top pane displays the same information as listed above while the lower pane breaks the bill down based on account.

5. To view the complete account information, double-click the row. The General Account's window opens. To return to the General – Billing Cycle History window, click the **X** in the upper right-hand corner of the account.

Run Bill - Official

Before you can run a bill, you must set-up your Billing Cycle; this determines the dates of the billing period, run month, run date and due day of the bill. Each bill run is determined by the billing cycle.

! Within the Billing Cycle Plan, there is a Run Month and Run Day. These determine when CAIRS is allowed to generate the bill. For example, if you have the following scenario:

Bill Start Date – January 1   **Bill End Date – January 31**

Run Month – February   **Run Day – 6**

All charges between the 1st and 31st of January are included in the bill.

The bill cannot be generated before February and not before the 6th. This allows you to review and correct any issues with accounts, if necessary.

If you put a request to generate the bill before February 6th, the bill will not generate until the 6th. You will see the request as Not Yet Started, on the 6th you will see a In process status.

If you put click on the Run Bill link on the 7th, the bill runs right away, there is no wait time.

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Click the **plus sign (+)** next to **Official Accounts** to access the submenus. Click **Run Bill Requests – Official**.

4. Before the list of bills generated or are in the process of being generated are populated in the pane to the right you must click the Show All button. The most recent bills appear at the top of the list.

! Before you run a bill, it is a good idea to make sure that no other bills relate to the billing period. Pay close attention to the Status column, this column displays whether the bill is completed, in process, or not yet started.

5. Within the Actions pane, click the Run Bill – Official link

6. Once you click the link, the following message box appears:

As stated in the message, the bill runs based on the billing cycle's run month and run day. You have the option of viewing the cycle plan by clicking the View Cycle Plan button.

7. Click on Yes to continue the run bill process, this process may take several hours to complete.

8. A status box appears with the following information:

- Bill Status

9. Processing # of #

- Accounts Billed

10. Account Failed

- Account Current

11. Accounts Unassigned

- Accounts Closed and Suspended

12. The status box stays open until the bill is completed. To view the complete details of the bill, click the View Details button. This General – Billing Cycle window opens. This window displays three panes of information:

    - General Information – this pane displays the status of the bill, including start time, total accounts processed, total bills succeeded, total bills failed, to name a few fields.

13. Bills Generated – once CAIRS generates a bill for an account, the account number lists within this pane. The pane displays such information as total payments, total charges, etc.

    - Failed Bills – if CAIRS is unable to generate a bill for an account, the account number displays within this pane. Any additional information that CAIRS can provide also displays.

14. To make sure you are viewing the most current information, click the Refresh button within the Actions ribbon group.

Schedule Bill - Official

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Click the **plus sign (+)** next to **Official Accounts** to access the submenus. Click **Run Bill Requests – Official**.

4. Before the list of bills generated or are in the process of being generated are populated in the pane to the right you must click the Show All button. The most recent bills appear at the top of the list.

! Before you schedule a bill, it is a good idea to make sure that no other bills relate to the billing period. Pay close attention to the Status column, this column displays whether the bill is completed, in process, or not yet started.

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5. Within the Actions pane, click the Schedule Bill – Official link

    Once clicked the following popup becomes available:

6. To schedule the bill for a future date, click on the dropdown arrow to access a calendar. There are two ways to change the date:

    - Click the right or left arrow, and once at the appropriate month and year, click the number to select the date.

7. Click the month name, a list of the months opens, from the list select the appropriate month. To change the year: click the year to access a set of up and down arrow, use the arrows to select the appropriate year. Once at the appropriate month and year, click the date.

    Within either selection, the date appears in the box.

8. Once you have the appropriate date, click the Schedule button.

9. Alternately, click the Cancel button to not schedule the bill and return to the Accounting menu.

Exporting your Bill

In the toolbar at the very top of the Accounts window is a little button that allows you to export your report into a pdf. When you click on the button a popup opens that allows you to choose your Export Options. The following three options are available:

- Export report for selected bill – when you select this option, the Select Report Template popup opens, this allows you to select which report template you want to use when exporting the bill. To select a report template, highlight the template name within the list and click on the Generate Report button.

10. Export mailed report for selected bill – this selection exports the bill onto the mailed billed, this is a standard template that is built into the software. You have the option to add items to the template within System Admin → Billing Setups → Billing Report Setup → Mailed Bill Elements.

- Export account information – this selection exports the account information, including number/circuit information, call summary, payments, etc. for the billing cycle selected.

In addition to the pdf, you can export the account information into an excel spreadsheet or text document.

Deleting your Billing Cycle History

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Click the **plus sign (+)** next to **Official Accounts** to access the submenus. Click **Run Bill Requests – Official**.

   A list of the bills you have asked CES to run populates within the pane on the right-hand side of the screen.

4. Within the list, highlight the cycle that you want to delete.

5. Within the **Actions** pane, click the **Delete Billing Cycle History** link

6. A message box opens asking if you really want to delete the history, within the box click **Yes** to continue or **No** to cancel the operation.

   Once you click Yes, the cycle history is removed from your database.

Bill Delivery Manager

The Bill Delivery Manager allows you to see all the bills you have generated and their associated status. There are two panes of information: Billing Periods and Billing Period Details. The window defaults to the most current Billing Period and will show the bills that are ready to print. The Billing Periods pane displays a list of the billing periods as determined by your billing cycle and the bills that have been generated for that period. This will include both official and unofficial bills so there may be more than one entry for a specific billing period.

The Billing Period Details displays a list of the account numbers billed for the Billing Period you have highlighted. The pane also includes the folder name and location of where you can find the completed bill on the server.

Within the Show ribbon group, there are two additional views for your bills. The Show Printed Bills displays a list of the bills that have already been printed. When you highlight a billing period the right-hand pane changes to display a list of the account numbers that have printed a bill.

The last view, is Show Bills Not Delivered, this view displays the accounts that the bill was not able to be delivered. When you highlight a billing period the right-hand pane changes to display a list of the account numbers that were unable to have a bill delivered. If all your bills are not being delivered, make sure that you have all the folders and path names correct in your billing settings.

Selected Bill Actions

There are several actions you can perform on the bills generated for a particular billing period. When you highlight a Billing Period the accounts that have bills generated appear in the right hand pane. You can perform the following actions on the bills that have been generated for the selected Billing Period:

- Print Bills with Default Printer – select to print the bills for the billing period to the default printer

7. Set Bills as Printed – when you click this button, it changes all the bills generated for the billing period to printed. They are now viewable in the Show Printed Bills button.

- Set Bills as Delivered and Printed – when click this button, it changes all the bills generated for the billing period as print and delivered. Delivered means that the bills were delivered to the portal for viewing or delivered to the email associated to the account. Delivery preference is based on each account.

8. Set Bills as Not Printed – when clicked this button, it changes all the bills generated for the billing period as not printed. This allows you to be able to re-print the bills if necessary.

- Set Bills as Not Delivered or Printed – when clicked this changed all the bills generate for the billing period as not printed or delivered. This allows you to be able to re-print or re-deliver the bills if necessary.

Settings

There are a few settings that will allows you to further deal with your bills that have been generated.

- Change Account Category – it is possible for CAIRS to delivery only the bills that have a specific category associated. To use this feature, you must first create your different account categories and then assign a category to every account in your database. When you select the category here, only the accounts with this category will get a bill. If left blank, all accounts will get a bill delivered.

9. Set Path to Bill Files – this setting works in connection with CES, this path should be the root path of where the bill files are delivered. It should be the same location as that CES generates the bill files.

- Set Path to PDF Reader – the process requires Adobe Reader to be able to print the mailed bill files. This is the path of where CAIRS can find the reader (i.e.: C:\Program Files (x86)\Adobe\AcroRd32), so it can run a command to open and print the bill files. In order for the Print Bills Process to run, an Adobe Reader must be installed.

Billing History – Official

Viewing your Billing History

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Click the **plus sign (+)** next to **Official Accounts** to access the submenus. Click **Billing History – Official**.

   A list of the bills produced displays within the right-hand pane.

4. Each row gives a summary of the Billing information. The following read-only information is displayed:

   - **Bill From and Bill To dates**

   5. **Total Bills Sent**

- **Total Bills Certified**

6. **Total Charges**

- **Total Payments**

7. **Total One-time, Recurring and Call Charges**

- **Total Adjustments**

8. **Account Type**

9. To view the account number breakdown of the above information, click the **plus sign (+)** next to the **Bill From Date**.

10. Within the **Views** pane, there are several alternate view selections. Each selection organizes or groups the bills differently, to change the view click the option button next to the selection.

11. The list displays additional information pertaining to each account number. To view the complete account information, double-click the row. The General Accounts window opens.

12. If you make changes to the account number, click the **Save & Close** button within the **Actions** ribbon group to return to the Billing History – Official list.

! At this point, if you make any changes to the charges on the account, the Billing History will not reflect the new charges. You need to either rollback the current bill or produce a new bill for the individual account number.

Rolling Back a Billing Cycle

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Click the **plus sign (+)** next to **Official Accounts** to access the submenus. Click **Billing History – Official**.

   A list of the bills you have asked CES to run populates within the pane on the right-hand side of the screen.

4. Within the **Tools** ribbon group, click **Rollback Billing Cycle**.

! Be aware that there is not a backup of the previous bill. When you roll back a bill, you are removing the charges from the bill and placing them back into the system.

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5. When asked if you really want to roll back the billing cycle, click **Yes** to continue or **No** to cancel the operation.

6. The status changes to **Rolled Back After Completed**.

   At this point, there is no bill for the cycle; you must run another bill for the cycle.
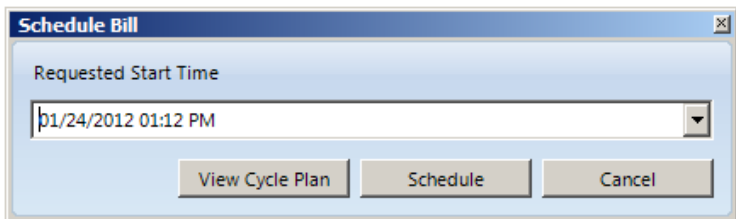
Exporting Your Billing History

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Click the **plus sign (+)** next to **Official Accounts** to access the submenus. Click **Billing History – Official**. A list of the bills produced populates within the right-hand pane.

4. Within the toolbar at the top of the screen, click the drop-down arrow next to **Export**. There are seven options to choose from:

   - **Excel (All Levels)** – exports all call records to an Excel spreadsheet. If you have several account numbers in your database, this procedure can take some time.

   - **Excel (Top Level Only)** – exports only the top level of information.

   - **Excel (Expanded Levels Only**) – exports the full detail for the expanded records to an Excel spreadsheet. The un-expanded records are in the file as a top level and you only see the summary line.

   - **Excel (Multiple Files)** – exports each bill into a separate file.

   - **PDF (All Levels)** – exports all call records to a PDF file. If you have several account numbers in your database, this procedure can take some time.

   - **PDF (Top Level Only)** – exports only the top level of information.

   - **PDF (Expanded Levels Only)** – exports the expanded records full detail to a PDF file. The un-expanded records are in the file as a top level, and you only see the summary line.

   - **Tab-Delimited Text (Top Level Only)** – exports the top level of information into a tab-delimited text file.

   The file opens onto you screen allowing you to save or modify the file in the appropriate program.

Accounting Entries

Within Accounting Entries, you can view a list of the components associated to each account and the related charge types. When you access the menu option, you can click on the Show All button in the upper right hand portion of the window or you can perform a search for a specific component or account. When the list opens the following information displays:

- Item Number or Name

5. Item Type

- Item Delete Date

6. Account Number

- Site

7. Organization Name and Path

- Billing Start and End Date

8. Charge Type

The component may appear in the list more than once depending on how many accounts are related to the different charge types.

By double-clicking on any record you open the Assigned Accounts and Equipment window, to learn more about associating information please see the Official Account Configuration → Account Entries section.

Customer Codes

Customer Codes allow you to change the accounting information related to numerous devices at one time. When devices are associated to the customer code any changes made to the customer code will reflect on the devices. To get started using customer codes you will need to create the code and then associate the various devices.

Adding a customer Code

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**

3. Click the **plus sign (+)** next to **Official Accounts** to access the submenus if they are not already visible. Click on Customer Codes

4. There are two ways to add a Customer Code

- Within the toolbar directly above the **Navigation** pane, click the drop-down arrow next to **New**. From the list, select **Customer Code**.

5. Within the **Actions** pane, click the **Add New Billing Customer Code** link.

6. With either option the General – Customer Code window opens.

7. Within the Customer Code Details pane, complete the following fields (required fields are marked with an asterisk *):

- Customer Code * - type in the alpha-numeric customer code (this can up to 99 characters)

8. Customer Name – type in the customer name

* Primary Contact Number – type in the contact number

9. Email Address – type in the email address of your customer

* Site – click on the dropdown arrow to access a list of the site, from the list select the site to associate to the code

10. Before continuing it is a good idea to save your progress, within the **Actions** ribbon group, click on the **Save** (to save and stay) button or click on the **Save & Close** (to save and exit) button.

Related Accounts

11. Before you start to assign items, you should associated the proper account information. Within the Related Accounts pane complete the following fields (require fields are marked with an asterisk (*)):

* **Charge Type*** – click the drop-down arrow to access a list, then select one of the following choices:

  12. **All Charges** – bills the account for all charges

  * **Recurring Charges** - bills the account for only recurring charges

  13. **One-time Charges** – bills the account for only one- time charges

  * **Call Charges** – bills the account for charges related to call

14. **Site*** – click on the drop-down arrow to access a list, and from the list selected the appropriate site name.

* **Subscriber Name** – click on the drop-down arrow to access a list, and from the list select the appropriate subscriber

15. **Account Number*** – click the drop-down arrow to access a list of the account numbers and their associated organizations. If an account number is associated to multiple organizations, the account number appears in the list multiple times, for example if account number 2424 is associated to three different organizations, there are three appearances of the account number within the drop-down. Each account number references the different organization name.

  From the list, select the account number and organization responsible for the charges.

* **Organization –** if you have selected an account number associated to an organization, that organization name populates within the field. You can associate an organization to the customer code although it will not appear anywhere else in cairs but here.

! When you create an account number, you can assign it to an organization or to a subscriber; this designates the account as official or unofficial. If you select an account with an organization, it is most likely an Official Account. If you select an account where the organization is blank, it is most likely an Unofficial account and associated to a subscriber.

- **Billing Start Date*** – click the drop-down arrow to access a calendar, from the calendar select the date to start the billing. 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.

16. **Billing End Date** – click the drop-down arrow to access a calendar, from the calendar select the date to stop the billing for the equipment or service. 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.

17. You can add up to 3 accounts number for each customer code. Each time a change is made to the account information the changes are reflected on the Associated Items.

Related Items

18. In the lower portion of the window are two panes, the Related Numbers and Unassigned Numbers. The Related Numbers pane display a list of the items that are already associated to this code. The Unassigned Numbers displays a list of the numbers that are not associated to any code.

An item can only be associated to one code at a time. When an item is associated to the code it will no longer appear in the Unassigned Numbers pane.

19. To associate an item, find the item name or number within the Unassigned Numbers pane and double click on the row. This moves your selection from the unassigned pane to the Related Numbers pane.

20. There is a search option available, within the Search textbox type in any portion of the item you are looking for and click on the magnifying glass. You can click on the double down arrows for additional search fields.

21. You can continue to double click on items to associate them to the code. Once you are done, don't forget to save! Within the Actions ribbon group, click on the Save and Close button.

22. After you save you will notice that cairs runs a process to Sync the accounting information. You will see a status box in the lower right hand corner of your primary monitor. Once the sync is complete all the associated items will reflect the proper account information.

Unassigned Numbers Search

There are a few options available to limit the amount of items within the Unassigned Numbers pane.   These options add items into the pane making it a little more difficult to find your selection. The pane defaults to include only telephone numbers that are active within your database. These two available options add items into the pane:

- **Show All Item Types** – when checked this includes all active items within your database, this means that circuits, segments, general tasks and numbers appear within the pane

23. **Include Delete Items** – when checked this includes not only your active items but also your deleted items within the pane.

Sync Accounting Entries

Once you associate all your items and save cairs will automatically sync all the associated items with the correct account information. However, you can perform a manual sync by clicking the 'Sync Accounting Entries' button within the Account Management ribbon group. The following box opens in the lower right hand corner of your screen:
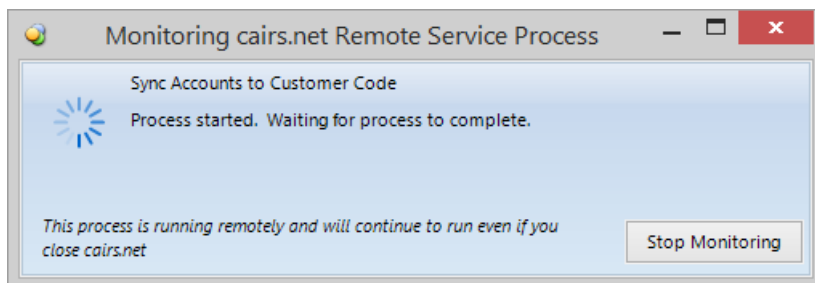
Once the sync is completed the box will close. This process runs in the background so you can continue to work in any menu options in cairs.

Removing Related Items

You can remove any of the related numbers from the Related Number pane by right clicking on the number within the pane and selecting 'Delete' from the menu popup. A solid white line is place over the item name to allow you to delete multiple items at once. Click on the Save button within the Actions ribbon group to remove the item and return it to the Unassigned Numbers pane.

Deleting a Customer Code

1. Click the **Accounting** menu.
2. Within the Navigation pane, click **Accounts,** then **Official Accounts.**
3. Click the **plus sign (+)** next to **Official Accounts** to access the submenus.
4. Depending on the amount of records 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, this could be the account number, organization name, site name, etc. and then click the magnifying glass.

    5. Click the **Show All** button.

6. The Customer Code list opens, within the list find the code that you want to delete.

7. There are three ways to delete the code:

    - Highlight the code within the list, in the toolbar directly above the **Navigation** pane, click the red **X**.

8. Highlight the code within the list, click on the 'Delete Billing Customer Code' link within the **Actions** pane.

- Double click on the code to open the record, within the Actions ribbon group click on the Delete button

9. With any of the above options, you will receive a message that asks if you are sure you want to delete the selected record? Click Yes to continue with the operation or No to cancel

10. After you click yes, the customer code is removed and you are returned to the Customer Code list.

Unofficial Accounts

Unofficial accounts associated to a Subscriber allow them to be billed for equipment, service, one-time, recurring and call charges.

Managing Billing Cycle

Within Manage Billing Cycle, cairs.net defaults a few items for you. We default the Fiscal year start date to October 1st. We also determine the start day and end day for each month, you can edit these fields if necessary.

There are some important considerations to keep in mind when determining your billing cycle. First, the Run Month and Run Day, these fields determine the earliest date you can generate a bill. It is advisable that you allow a few days at the beginning of the Run Month to allow manipulation of accounts, if necessary.

Second, a system setting determines whether cairs.net generates the bill automatically, if set to true, cairs.net automatically generates the bill on the Run Day.

Managing the Billing Cycle

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. There are two ways to manage the billing cycle:

    - Within the tool bar directly the **Navigation** pane, click the **Manage Billing Cycle Plan** button.

    - Within the **Actions** pane, click the **Manage Billing Cycle Plan** link.

4. With either option, the Billing Cycle Plan window opens.

5. The first step is to determine when your fiscal year starts, within the actions ribbon group click one of the following buttons:

    - Set to October 1st Fiscal Year – click this button to set the fiscal year as October 1st, once clicked the Billing Cycle Plan Dates pane changes to start your billing cycle with October.

6. Set to January 1st Fiscal Year – click this button to set the fiscal year to January 1st, once clicked the Billing Cycle Plan Dates pane changes to start your billing cycle with January.

- Set Fiscal Year with First Start Month and Day – click this button to set the fiscal year to the first unofficial billing date as determined by a the First Official Billing Date system setting

7. Next, you determine the days to wait before running the bill and the bill due date Within the top pane complete the following fields:

- Days to Wait Before Running Bill – type-in the number of days to wait from the end day to the day you want to run the bill, most times this is set to one or two. This gives your users the time fix any account issues.

8. Days to Wait Until Bill is Due – type-in the number of days to wait from the end day to the billing due date. Most times, this is set to 15 or 16.

9. Now that you have determined your fiscal year start date and billing dates, it is time to complete the setup of your billing cycle. Within the Billing Cycle Plan Dates pane, complete the following fields (although some fields are auto-populated you can modified them to fit your needs):

- Sequence – this field auto-populates with a number between 1 and 12 to reflect the corresponding location in the billing cycle.

10. Start Month – this is the first month of your billing cycle, this is determined by your Fiscal year start date. To change the month, click the field to access a dropdown arrow, once you click the arrow a list of month appears, click on the month. The selected month populates within the field.

- Start Day – this is the first day of the month that you start your billing, most times this is the first of the month. To change the day, click on the field and type in the new day to start the billing.

11. End Month – for each start month, you must select an end month, most times this is the same month as the start month. However, you can bill for multiple months at a time by altering the end month. To change the month, click the field to access a dropdown arrow, once you click the arrow a list of month appears, click on the month. The selected month populates within the field.

- End Day – this is the last day of the month that you will end the billing. To change the day, click on the field and type in the new day to end the billing.

! Don't forget about Leap Year, it occurs every four years! The end day for February is the 29th in a leap year. Here is a list of the next couple of leap years: 2012, 2016, 2020, 2024, 2028, 2032, and so on.

- Run Month – this is the month in which you run the bill for the previous billing period. If you bill on a monthly basis, this is next month. To change the month, click the field to access a dropdown arrow, once you click the arrow a list of

month appears, click on the month. The selected month populates within the field.

12. Run Day – this is the day of the run month that the bill generates. This field populates with the selection you determined in the upper pane. To change the day, click on the field and type in the run day.

- Due Month – this is the month in which the bill you generate is due, this is most likely the same as the run month. To change the month, click the field to access a dropdown arrow, once you click the arrow a list of month appears, click on the month. The selected month populates within the field.

13. Due Day – this is the day the bill is due. This field populates with the selection you determined in the upper pane. To change the day, click on the field and type in the due date of the bill.

14. Within the **Actions** ribbon group, click the **Save** (to save and stay) button to continue working with billing cycles, or click the **Save & Close** (to save and exit) button to return to the Unofficial Accounts list.

Account Categories

Often times, you may want to categorize your account number based on a field other than organization or subscriber. This is where Account Category comes into play.

Adding a Category

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. There are two ways to manage account categories:

   - Within the tool bar directly the **Navigation** pane, click the **Account Category** button.

   4. Within the **Actions** pane, click the **Account Category** link.

5. The Manage Account Category window opens.

<u>Adding</u>

6. Click the row with an asterisk (*) to add new items to the list and type the new account category.

7. Once you start typing in the category, a new row with an asterisk (*) displays at the top of the list allowing you to add multiple categories at once.

<u>Modifying</u>

8. Click a row to modify and type the new information.

<u>Deleting</u>

9. Right-click the selector box next to the category name and click **Delete**.

10. 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.

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

12. If you do not want to delete the category, right-click the record and click **Undelete**.

13. Once you select Undelete, a message box displays verifying that you really want to keep the category. 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 account categories, or click **Save & Close** (to save and exit) to return to the Official Accounts list.

Late Payment Management

With Late Payment Management, you determine what happens on an account when a payment is not received by the due date. This is a two-step process, first you what action is taken on the account when it is past due by a certain number of days. The following actions are available:

- Send Reminder Notice

15. Set as Overdue

- Send Overdue Notice

16. Generate Work Order

- Set In Paycheckage

17. Set As Current

- Set as No Subscriber

The second step in the process is to create templates, which is essentially an email sent to the subscriber or other personnel regarding the status of the account. For each action, you can associate a template that is automatically generated by cairs.net when the account becomes overdue.

Creating a Notice Template

Before creating the notification timing, create the notice template. This allows you to build the notice that is sent to the subscriber at your determined intervals.

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. There are three ways to manage late payments**:**

- Within the tool bar directly the **Navigation** pane, click the **Late Payment Management** button.

- Within the **Actions** pane, click the **Late Payment Management** link.

- Within the account, click the lower half of the **Payments** button to access a list. From the list, select **Late Payment Management**.

4. With either option, the Late Payment Management window opens.

5. Within the **Show** ribbon group, click the lower half of the **Notice Templates** button. From the list, select **New Notice Template**.

6. The General-Document Template Editor window opens, allowing you to create the notice sent to subscribers.

7. Within the **General** pane, complete the following information:

- **Notice Name** – type the notice name to send out. For example: 30 Days Past Due Notice.

- **E-mail Subject** – type the e-mail subject.

8. Within the **Document Text** pane, type the body of the e-mail. Adjust the font by clicking the appropriate button within the **Font** ribbon group.

9. When complete, click **Save** (to save and stay) to continue working with this template, click **Save & New** to save the template and refresh the screen to allow you to add another template, or click **Save & Close** (to save and exit) to return to the Late Payment Management window.

Creating a Notification

You can create several notifications that are e-mailed to the subscriber and/or commanding officer at date intervals for past due payments.

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. There a**re two way**s to manage la**te payments**:

- Within the tool bar directly the Navigation pane, click the **Late Payment Management** button

18. Within the **Actions** pane, click the **Late Payment Management** link.

4. With either option, the Late Payment Management window opens.

5. Click the line marked with an asterisk (*) to add a new notification. Complete the following fields (required fields are marked with an asterisk (*)):

- **Days Past Due*** – type the number of days the bill is past due before this notification is sent

19. **Action*** – click the dropdown arrow to access a list and from the list, select the action to perform. The following options are available:

- Send Reminder Notice

20. Set As Overdue

- Send Overdue Notice

21. Generate Work Order

- Set In Paycheckage

22. Set As Current

- Set as no Subscriber

23. **Notice Name** – click the dropdown arrow to access a list, from the list select the notice name (notice template). If nothing displays within this list, you will need to create a new template. Please refer to Creating a Notice Template.

- **Notice to Commanding Officer** – click the dropdown arrow to access a list, from the list select the notice name you want to send to the subscriber's Commanding Officer.

24. **Work Flow Name** – if you set the action to 'Generate Work Order' you will need to select what work order you want to initiate, click the dropdown arrow to access a list of all workflows. From the list, select the work flow that cairs.net creates when the payment is past due.

- **Site** – if you manage multiple sites, you can make the late payment action site specific. Click on the field to access a list of sites from the list select the site to associate to the action

25. **Account Status and Excluded Selected Status *** – these fields work together include or exclude an account status from the notification. For example, if you have selected an account status of closed and put a checkmark in the exclude column, all accounts with a status of closed will be excluded from this action. Click the dropdown arrow to access a list of the different account statuses, from the list select one of the following statuses to apply to the account for this action:

- **Any**

26. **Open**

- **Closed**

27. **Suspended**

- **Exclude Selected Status *** - the default is to remain unchecked, to excluded the status click on the box to insert a checkmark

28. **Description** – type a brief description of the notice.

6. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue adding notifications or click **Save & Close** to return to the Accounts list.

Account Status Change Configuration

The Account Status Configuration allows you to change the account status seamlessly within your database. For example, if changing an account to a Suspended status, you want to be able to also suspend any associated configured items. Each status is associated

to a work order that performs a certain action within your database as well as your switch database.

There are two places within cairs.net that you can configure your status changes. From the main accounts menu, within the Actions pane there is the Account Status Change Configuration link. Also, within an account you can click on the lower portion of the Account Status button to access a dropdown menu on which you can select the Status Change Configuration option. With either selection, the same window opens allowing you to configure how you want to deal with your different account statuses.

Adding a Status Change

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. To populate the Account list, you must either:

    - Within the search box, type the account number or portion of the number and then click the magnifying glass.

    - Click the **Show All** button.

4. The Accounts list opens, displaying the account matching your search criteria.

5. There are two ways to access the Status Change Configuration window:

    - Within the Actions pane, click the Account Status Change Configuration link

6. Within the list, double-click on the account number to open the Accounts window. Within the Management ribbon group, click the lower half of the **Account Status** button to access a dropdown menu. From the menu, select **Status Change Configuration**

7. With either option, the Status Change Configuration window opens. Within the lower pane click the field marked with an asterisk, this row is used to add new information. Once you click the first field, a new line displays allowing you to add multiple items at one time. Complete the following information for each status change (required fields are marked with an asterisk (*)):

    - **Account Status *** – click the dropdown arrow to access a list and from the list, select the account status that you want to configure

    - **Work Flow Name** – click the dropdown arrow to access a list and from the list, select the work flow that is associated with the change type.

    - **Work Order Description** – type any information regarding the work order

    - **Override Default Actions * -** this field defaults to include a checkmark to indicate that your users can override the actions that the system performs when you change the status. For example, when you change the status to closed the system automatically sets the delete date for associated equipment and services. This setting allows your users to override this and set the delete date themselves. By clicking the field you remove the checkmark to indicate that the users cannot override the system actions.

8. Within the **Actions** ribbon group, click **Save** (to save and stay) or click **Save & Close** (to save and exit) to return to the Accounts list.

Deleting a Status Change

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. To populate the Account list, you must either:

   - Within the search box, type the account number or portion of the number and then click the magnifying glass.

   - Click the **Show All** button.

4. The Accounts list opens, displaying the account matching your search criteria.

5. There are two ways to access the Status Change Configuration window:

   - Within the Actions pane, click the Account Status Change Configuration link

6. Within the list, double-click on the account number to open the Accounts window. Within the Management ribbon group, click the lower half of the **Account Status** button to access a dropdown menu. From the menu, select **Status Change Configuration**

7. With either option, the Status Change Configuration window opens. Within the lower pane, right clcik on the selector box next to the Account Status, a small pop-up menu opens, within the box click **Delete**.

8. Once you click **Delete**, a message box displays verifying that you really want to delete the item. Click **Yes** within the box to continue or **No** to cancel the operation.

   Once selected, cairs.net draws a line through the item allowing you to delete multiple items at once.

9. If you do not want to delete the item right-click the record to access a pop-up menu, click **Undelete**

10. Within the **Actions** ribbon group, click **Save** (to save and stay) or click **Save & Close** (to save and exit) to return to the Accounts list or the account.

Unofficial Account Report Preferences

The Unofficial Account Report Preferences allow you to determine what files you want to generate when creating a bill. In addition, you can determine where those files go, whether to a file or printer.

You can set the report preferences for each account number. When you set the preferences within the account, they overwrite any selections you have made here. For example, if the Call Detail XLS is checked here but not in the account number, the call data XLS file will not generate.

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Unofficial Accounts.**

3. There are two ways to change your report preferences:

   - Within the toolbar directly above the **Navigation pane,** click the **Official Report Preferences** button.

4. Within the Actions pane, click the **Official Report Preferences** link.

5. Within either option, the Billing Report Preferences window opens. The lower portion of the window displays the different formats and delivery options for your billings, as a default all fields are checked. This indicates the account summary or call data generates to the particular file type or location.

   The following options are available:

   - **Account Summary XLS** – the account summary for each account number generates to an Excel Spreadsheet

6. **Call Detail XLS** – the call data for each account generates to an Excel Spreadsheet

   - **Call Detail Tab Delimited** – the call data for each account generates to a tab delimited file

7. **One Time Charges Tab Delimited** – the one-time charges for each account generate to a tab delimited file

   - **Recurring Charges Tab Delimited** - the recurring charges for each account generate to a tab delimited file

8. **Account Type** – this default to Unofficial

   - **Mailed Report PDF to File** – the mailed report is generated to a PDF file

9. **Mailed Report PDF to Printer** – the mailed report is sent directly to the printer

   - **Report to XML** - the call, recurring, and one-time charges are generated into an XML file.

10. If you want to remove the file type from generating, click on the box to remove the checkmark.

   Within the Actions ribbon group, click on **Save** (to save and stay) to continue working with your preferences, or click **Save & Close** (to save and exit) to return to the Unofficial Accounts list.

Address Types

Adding an Address Type

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. Within the **Actions** pane, click the **Address Types** link.

4. The Address Types window opens.

<u>Adding</u>

5. Click the row with an asterisk (*) and type the new type.

6. Once you start typing in the type, a new row with an asterisk (*) automatically displays at the top of the list allowing you to add multiple types at once.

<u>Deleting</u>

7. Right-click the selector box next to the Address Type. From the pop-up, click **Delete**.

8. Once you click Delete, a message box displays verifying that you really want to delete the type. 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) to continue deleting types, or click Save & Close (to save and exit) to return to the Unofficial Accounts list.

Understanding the General Account Window

There are four parts to the General - Accounts screen: Ribbon groups, Account pane, Bill Summary pane and Account Balance Summary pane.

Ribbon Groups

Each of the ribbon groups allows you to perform certain account functions. For instance, you can associate site and organizations to an account, generate a bill for the account number, and make a payment to the account, etc.

Actions

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

- **Save & Close** – click this button to save the completed information and return to Accounts list.

10. **Save** – click this button to save the information you have completed and remain within the Account.

- **Refresh** – click this button to add newly saved information to the account.

Show
Within the Show ribbon group, you define what entities belong to the account. You define the Organizations, Site, Set Device, Authorization Codes, etc.

Management
Within the Management ribbon group, you are able to view and change the account status, active, closed, suspended, etc.

Billing Tools

Within Billing Tools, you create bills to send to your customers for their one-time, recurring, and call charges. Each bill also includes the charges for equipment and/or services applied to the account.

Once you generate a bill, you can then perform refunds or adjustments as well as make payment to the account balance.

Panes

Each account has several panes of information that appear within the Billing Account window.

Account Information Pane

The Account Information pane displays general account information. For example, the account number, what charges the account is responsible for and account type, to name a few.

Equipment and Services

The Equipment and Services pane allows you to associate an equipment or service item directly to the account for billing purposes. In addition, you can view the related subscriber information by clicking the tab at the bottom of the pane.

Bill Information

The Billing Information pane is separated into two panes. The top pane displays the Bill Summary. The bottom pane displays the Account Balance Summary.

Summary Pane

The Bill Summary pane displays the balance and charges for the selected billing period. Each billing period with a generated bill displays in the dropdown list on the right side of the pane. Once you select a billing period, the pane displays the balance, current charges and payments or adjustments.

Account Balance Summary Pane

The Account Balance Summary pane displays a more detailed bill description. There are several information tabs:

- **Balance Summary** – displays basic information for the bill. For example, the date you generated the bill, payments, charges, adjustments, and statement balance.

11. **Number/Circuit Summary** – displays the telephone number or circuit, and the charges associated with each.

- **One-Time Charges** – displays a list of one-time charges associated with the billing cycle.

12. **Recurring Charges** – displays a list of recurring charges associated with the billing cycle.

- **Calls** – displays a list of calls associated with the billing cycle.

13. **Payments** – displays a list of payments applied to the account balance when you generated the bill.

- **Adjustments** – displays a list of the adjustments applied to the account when you generated a bill.

Within any of the tabs, if the complete information does not appear, you can search by typing the parameter into the text box and clicking the magnifying glass or by clicking the **Show All** button.

Unofficial Accounts Configuration

Within this section, we discuss how to add an account and its basic information. We will then discuss how to associate an account to a subscriber, sites, set devices, etc.

Adding an Unofficial Account

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. There are two ways to add an Account:

   - Within the tool bar directly above the **Navigation** pane, click the dropdown arrow next to **New**. From the list, select **Unofficial Accounts**.

4. Within the **Actions** pane, click **Add New Billing Account**.

5. With either option the General – Account window opens (If you have automatic numbering turned on then the window name is Automatic By Setting – Accounts). There are four information panes within the **Account** pane. Complete the following fields (required fields are marked with an asterisk (*)):

   - **Account Number*** – type the account number. This field can contain numbers, letters and/or symbols. If the field reads 'Automatic By Setting', the account number is auto-created by the system.

6. **Mailing Address** – click the dropdown arrow to access a list and from the list, select the mailing address of where to send the bills.

   - **Category –** click the dropdown arrow to access a list, and from the list select the account category.

7. **Call Charges*** – click the box to insert a checkmark indicating the account is responsible for all charges incurred from calls.

   - **One Time Charges*** – click the box to insert a checkmark indicating the account is responsible for all one-time equipment and service charges.

8. **Recurring Charges*** – click the box to insert a checkmark indicating the account is responsible for all recurring equipment and service charges.

   - **Account Type*** – this field auto-populates with Unofficial indicating you are creating an unofficial account.

9. **Mission Funded** – click the box to insert a checkmark the field indicating the charges associated with the account are mission funded.

- **Mail Delivery Preference*** – click the dropdown arrow to access a list, and from the list select whether the contact receives the entire bill, notification only or nothing by mail.

10. **E-mail Delivery Preference*** – click the dropdown arrow to access a list, and from the list select whether the contact receives the entire bill, notification only or nothing by e-mail.

- **Account Miscellaneous 1 – 10** – use these fields to add any additional account comments.

11. **Exclude From Financial Summary –** click the box to insert a checkmark in the box, this indicates that you want to exclude this account number from the Financial Summary. Leave the field blank to include the account number in the summary.

- **Created Date –** This field auto-populated with the date you created the account number. The field populates after you save the information. To change the created date, click the field to access a dropdown arrow, click the arrow to access a 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.

12. Within the Equipment and Services pane, click on the Subscriber Information tab to associate subscriber to the account you are currently creating. Complete the following information within the pane (required fields are indicated by an asterisk (*)):

- **Site*** – click the dropdown arrow to access a list and from the list, select the site. The site dropdown list displays the bottom-most site first. After the ~~ is the complete path to the site. Each site level is separated by a >.

13. **Organization** – click the dropdown arrow to access a list; from the list, select the name of the organization. The organization dropdown list displays the bottom-most organization first. After the ~~ the complete path to the selected organization appears. Each level of the organizational tree is separated by a >. Once you select an organization, the complete path populates within the field.

- **Organization Path -** displays the complete path to the organization name. Each level is separated by >.

14. **Authorized –** this field defaults to include a checkmark to indicate that the subscriber is authorized to access the Subscriber Portal. Click the box to remove the checkmark to indicate that the subscriber cannot access Subscriber Portal.

- **Disabled –** this field defaults to include a checkmark to indicate that the subscriber is disabled, click the field to remove the checkmark to indicate the subscriber is active.

15. **Last Name** – type the subscriber's last name.

- **First Name** – type the subscriber's first name**.**

16. **Middle Name** – type the subscriber's middle name.

- **User Name** – type the subscriber's user name (used to access their subscriber information within Subscriber Portal, if applicable).

17. **Alt Sub Number** – type the alternate subscriber telephone number.

- **Rank** – click the dropdown arrow to access a list, and from the list select the subscriber's rank.

18. **Branch** – click the dropdown arrow to access a list, and from the list select the subscriber's branch.

- **Grade** – click the dropdown arrow to access a list, and from the list select the subscriber's grade.

19. **Rate** – click the dropdown arrow to access a list, and from the list select the subscriber's credit limit.

- **TCO** – click the dropdown arrow to access a list, and from the list select the subscriber's TCO.

20. **Commanding Officer** – click the dropdown arrow to access a list, and from the list select the subscriber's Commanding Officer.

- **Publishing Option*** – click the dropdown arrow to access a list, and from the list select the publishing option for the subscriber's information. The following options are available:

  - **Published**

  - **Non-Published**

  - **Classified**

  - **Temporary**

  - **Both Published and Classified**

  - **Alternate**

- **Job Description** – type the subscriber's job description, if applicable.

21. **E-Mail Address** – type the subscriber's e-mail address.

- **Contact Phone Number** – type the subscriber's contact phone number.

22. **Key Word** – type a name allowing operators to perform a precise subscriber search. For example, if the Subscribers last name is Smith, the key word can be the first name.

- **Date Added*** – this field auto-populates with the current date. 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.

23. **Account Type** – this field auto-populates to Unofficial.

- **Comments –** type any additional comments regarding the subscriber.

24. **Subscriber Misc 1 –** 5 - use these fields to add any additional subscriber comments.

25. Once charges are associated to the account, the **Bill Summary and Account Balance Summary** pane displays information.

26. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue adding information for the account, or click **Save & Close** (to save and exit) to return to the Unofficial Account list.

Modifying an Unofficial Account

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. Before the Account list populates, you must either:

    • Within the search box, type the account number or portion of the number and then click the magnifying glass.

    4. Click the **Show All** button.

5. The Accounts list opens, displaying the account that matched your search criteria. Double-click the account to modify. The Accounts window opens

6. Modify the fields as necessary.

7. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue modifying accounts, or click **Save & Close** (to save and exit) to return to the Unofficial Accounts list.

Deleting an Unofficial Account

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. Before the Account list populates, you must either:

    • Within the search box, type the account number or portion of the number and then click the magnifying glass.

    4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Highlight the account to delete. There are two ways to delete an account

    • Within the tool bar directly above the **Navigation** pane, click the red **X**.

    • Once highlighted, click the **Delete Billing Account** link within the **Actions** pane.

6. Once you click **Delete**, a message box displays verifying that you really want to delete the account. Click **Yes** within the box to continue or **No** to cancel the operation.

7. If there are account associations (a warning message displays notifying you that there is existing information associated to the account), cairs.net does not allow the account number to be deleted. Click **Continue** to remove the assignments.

Account Entries - Components

Within Account Entries, you can view the configured items associated to the account and the related charge types. This is also where you will add component to the account. When you access the window there are two panes, the top pane displays a list of the components that are currently associated to the account and the following information:

- **Item Number or Name** – displays the telephone number, circuit name, etc.

8. **Item Type** – displays the item type for example, Subscriber, Cell Phone Number, Telephone, Circuit Segment, etc.

- **Item Delete Date** – displays the date the item was deleted from the account. The item still appears in the list, however, no charges are incurred.

9. **Account Number** – displays the account number

- **Site** – displays the site name

10. **Organization Name and Path** – displays the organization name and the entire organization path

- **Billing Start and End Date** – displays the date the account started to incur charges and the date the charges ended

11. **Charge Type** – displays the charge type the account is responsible for, there are four types: Call Charges, One Time, Recurring, and Both One Time and Recurring Charges.

A component may appear in the list more than once, depending on the charge types associated.

The lower pane allows you to search for components to add to the account. There are two tabs at the bottom of the pane, the Add Item Pick List is a general tab that will allow you to search for any component whether telephone, cell phone, circuit, etc. The Add Sets Pick List is more specific to configured sets, this tab allows you to search on fields within a set, for example, port, building name, room, etc.

Once you have associated the component to the account you can also associate equipment and services.

Viewing Related Components

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts,** then **Unofficial Accounts.**

3. Before the Account list populates, you must either:

    - Within the search box, type the account number or portion of the number and then click the magnifying glass.

    4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account to view.

6. Within the Show ribbon group, click on the Accounting Entries button. The screen changes to displays two panes of information. The top pane displays a list of the items related to the account. The lower allows you to associate more items to the account.

7. The top pane displays the following item information:

    - Item Number or Name

    8. Item Type

    - Item Delete Date

    9. Account Number

    - Site

    10. Organization Name and Path

    - Billing Start and End Date

    11. Charge Type

12. An item may appear in the list more than once depending on the different charge types. For example, if the account is responsible for one-time and call charges, each item may appear twice within the list.

13. To view more detail, double click on the record to open the Assigned Accounts and Equipment window. This window allows you to associate additional equipment and services to the component.

Adding a Component (other than a set) to an Account

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts,** then **Unofficial Accounts.**

3. Before the Account list populates, you must either:

    - Within the search box, type the account number or portion of the number and then click the magnifying glass.

    4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account to view.

6. Within the Show ribbon group, click on the Accounting Entries button. The screen changes to displays two panes of information. The top pane displays a list of the items related to the account. The lower allows you to associate more items to the account.

7. Within the lower pane, there are two sections; the left hand side allows you to search for components to add to the account. The right hand side displays a list of instructions on how to add the component to the account.

8. At the bottom of the pane are two tabs:

- **Add Items Pick List** - this is a generic list of all items within your database, this could be anything from a circuit to subscriber to a set.

9. **Add Sets to Pick List** – this is a more specific list that pertains to only your configured sets.

10. Click on the Add Items Pick List tab to perform a search, there are a couple of ways to find the component:

- Within the Search textbox, you can type-in the entire component name or number or a portion of the name or number, then click on the magnifying glass

11. Click on the Show All button to view every component within your database

- You can also use the Last Search button to display the list of items from your previous search

12. Once the list displays, find your component to add to the account, double click on the record to open Assigned Accounts and Equipment window.

13. Within the window there are three panes of information, the Configured Item pane displays the item name or number, item type (Telephone, circuit, etc) and the Delete Date

14. The Accounts for Equipment and Services pane displays the account numbers that are associated to the item. There can be more than one entry in this pane depending on how the charges are distributed. Within the pane, you can add an account number to the configured item.

15. The Equipment and Services pane displays a list of the equipment and services associated to the configured item. Within this pane, you can also add equipment and services to the item.

Adding an Account Number to the Configured Item

16. Within the Accounts for Equipment and Services pane, click the row marked with the asterisk to enter in a new account number for the equipment and services. Complete the following fields, required fields are marked with an asterisk (*):

- **Charge Type*** – click the dropdown arrow to access a list, then select one of the following choices:

  17. **Both One Time and Recurring Charges** – bills the account for all one time and recurring charges

  - **Recurring Charges** - bills the account for only recurring charges

  18. **One-time Charges** – bills the account for only one- time charges

- **Site*** – once you click any of the dropdown lists, the site name auto-populates with the site selected on the General-Set Device window.

19. **Subscriber Name –** click on the dropdown arrow to access a list of subscriber and from the list select the subscriber responsible for the equipment or service charges

- **Organization –** this field does not apply to unofficial accounts.

20. **Account Number*** – click the dropdown arrow to access a list of the account numbers associated to the subscriber, select the appropriate account

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! When you create an account number, you can assign it to an organization or to a subscriber; this designates the account as official or unofficial. If you select an account with an organization, it is most likely an Official Account. If you select an account where the organization is blank, it is most likely an Unofficial account and associated to a subscriber.

- **Billing Start Date*** – click the dropdown arrow to access a calendar, from the calendar select the date to start the billing. 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. **Billing End Date** – click the dropdown arrow to access a calendar, from the calendar select the date to stop the billing for the equipment or service. 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.

22. At this point, you should save your progress. Within the **Actions** ribbon group, click the **Save** button.

Adding an Equipment or Services to the Configured Item

23. Within the Equipment and Services pane click on the row marked with an asterisk to add new equipment or services to the item. Use the dropdown lists or type the appropriate information in each of the following columns for the equipment or service , required fields are marked with an asterisk (*):

- **Equipment or Service Type*** – click the dropdown arrow to access a list, there are three columns of information within the list:

  24. **Equipment or Service Types** – displays the name of the equipment or service

  - **Is Service Type** – a checkmark indicates that the type is a service

  25. **Allow Cost Adjustment** – a checkmark indicates that the you can adjust the cost of the equipment or service

  Within the list, select the equipment or service type.

- **Equipment or Service Name*** – click the dropdown arrow to access a list, and then select the equipment or service name. This list displays only the names associated to the type that you previously selected.

26. **Part Name*** – click on the dropdown arrow to access a list, select the part name.

- **Site** – once you click any of the dropdown lists, the field auto-populates with the site name you selected in the Device Properties pane.

27. **Serial Number*** – this field may auto-populate after you select a part name, it may either contain None or Generate Automatically, if these are contained within the field do not change the selection. However, if the field is blank click the dropdown arrow to access a list, and select the appropriate serial number

- **Quantity –** this field auto-populates with a pre-determined quantity amount. To change, click the field and type-in the new information.

28. **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.

29. **Total One Time Cost** – displays the total one-time cost for the equipment item.

- **Total Recurring Cost –** displays the total recurring cost for the equipment item.

! At the bottom of the list of equipment is a totals line displaying the one-time and recurring charges totals for all the equipment items within the list.

- **Install Date*** – this field auto-populates with today's date. To change the date, click the field to access a dropdown arrow, once clicked a calendar displays. From the calendar, select the date to install the new equipment. This is the date the charges start for billing purposes. 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. **Delete Date** – click the field to access a dropdown arrow. Once clicked, a calendar displays, from the calendar select the date to delete the item from the set. 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.

- **Technician –** click the dropdown arrow to access a list, from the list select the technician name.

31. **Notes** – click on the grey square in the field to open the Note popup that allows you to enter in any notes regarding the equipment or service. Once you have finished typing the note, click on the OK button to save the note and close the popup. Alternatively, you can click on the Cancel button to cancel the operation.

- **Location** – type the equipment or service location.

32. **Last Recurring Bill Date** – this field indicates the last date the piece of equipment generated a bill.

33. You can continue to add equipment and services to the item, when finished, click on the Save & Close button within the Actions ribbon group to return to the Account.

You will notice that the item now appears in the Related to Account pane.

Adding a Configured Set to an Account

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts,** then **Unofficial Accounts.**

3. Before the Account list populates, you must either:

   - Within the search box, type the account number or portion of the number and then click the magnifying glass.

   4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account to view.

6. Within the Show ribbon group, click on the Accounting Entries button. The screen changes to displays two panes of information. The top pane displays a list of the items related to the account. The lower allows you to associate more items to the account.

7. Within the lower pane, there are two sections; the left-hand side allows you to search for components to add to the account. The right-hand side displays a list of instructions on how to add the component to the account.

8. To add a set to the account, click on the Add Sets to Pick List tab at the bottom of the pane

9. You need to search for the set to add to the account, there are a couple of ways to find the set:

   - Within the Search textbox, you can type-in the entire component name or number or a portion of the name or number, then click on the magnifying glass

   10. Click on the Show All button to view every component within your database

   - You can also use the Last Search button to display the list of items from your previous search

11. Once the list displays, find the set to add to the account, double click on the record to open the Set Management window.

12. Within the lower portion of the Facilities pane, click on the Accounts for Equipment and Services tab. The pane changes to display the accounts related to the different charge types for the equipment and services.

13. Click the row marked with the asterisk to enter in a new account number for the equipment and services. Complete the following fields, required fields are marked with an asterisk (*):

! Most of the information auto-populates in the pane from the account record after you select a charge type. To make any modification, click the field to access the correct information.

- **Charge Type*** – click the dropdown arrow to access a list, then select one of the following choices:

    14. **Both One Time and Recurring Charges** – bills the account for all one time and recurring charges

    - **Recurring Charges** - bills the account for only recurring charges

    15. **One-time Charges** – bills the account for only one- time charges

- **Site*** – once you click any of the dropdown lists, the site name auto-populates with the site selected on the General-Set Device window.

16. **Subscriber Name –** click on the dropdown arrow to access a list of subscriber and from the list select the subscriber responsible for the equipment or service charges

- **Organization –** this field does not apply to unofficial accounts.

17. **Account Number*** – click the dropdown arrow to access a list of the account numbers associated to the subscriber, select the appropriate account

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! When you create an account number, you can assign it to an organization or to a subscriber; this designates the account as official or unofficial. If you select an account with an organization, it is most likely an Official Account. If you select an account where the organization is blank, it is most likely an Unofficial account and associated to a subscriber.

- **Billing Start Date*** – click the dropdown arrow to access a calendar, from the calendar select the date to start the billing. 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.

18. **Billing End Date** – click the dropdown arrow to access a calendar, from the calendar select the date to stop the billing for the equipment or service. 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.

19. When you have added the account number to the set click the Save & Close button within the Actions ribbon group to return to the Account, you will notice that the item now appears in the Related to Account pane.

Removing a Component from an Account

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts,** then **Unofficial Accounts.**

3. Before the Account list populates, you must either:

    - Within the search box, type the account number or portion of the number and then click the magnifying glass.

    4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account to view.

6. Within the Show ribbon group, click on the Accounting Entries button. The screen changes to displays two panes of information. Within the top pane, double-click the item to remove from the account.

   The Assigned Accounts and Equipment window opens.

7. Within the Account for Equipment and Services pane, right click on the selector box next to the charge type, a popup menu opens, within the box click **Delete**.

8. Once you click Delete, a message box appears verifying that you really want to delete the account. Click Yes within the box to continue or No to cancel the operation.

9. To save your changes, click on the Save & Close button within the Actions ribbon group to return to the Account.

Viewing the Component

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts,** then **Unofficial Accounts.**

3. Before the Account list populates, you must either:

   • Within the search box, type the account number or portion of the number and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account to view.

6. Within the Show ribbon group, click on the Accounting Entries button. The screen changes to displays two panes of information. Within the top pane, double-click the item to view.

   The Assigned Accounts and Equipment window opens.

7. Within the Related Item Actions ribbon group, click on the Open Item button. This opens the components window allowing you to make changes.

8. If you do make any changes make sure to save them by clicking either the Save or Save & Close button within the Actions ribbon group.

Current Balance

You can determine the balance due on an account for any billing period.

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. Before the Account list populates, you must either:

- Within the search box, type the account number or portion of the number and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Account window opens.

6. Within the **Show** ribbon group, click the **Current Balance** button. There are two panes of information; the top pane allows you to select the billing period and the lower pane displays the bill for the period selected.

7. Within the top pane, complete the following fields to select a billing period and determine the balance (required fields are marked with an asterisk (*) (*)):

- **Bill From Date*** – this field auto-populates with the current billing cycle. 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.

8. **Bill To Date** – this field auto-populates with the current date. 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.

- **Fiscal Year*** – this field auto-populates with the current fiscal year. To change to a previous year, click the field and type the appropriate year.

9. **Due Date*** – this field auto-populates with the current billing cycle's due date based on the Billing Cycle created within Manage Billing Cycle.

- **Date Mailed** – the field displays the date the bill was sent the printer.

10. **Date E-mailed** – this field displays the first date the billed was e-mailed to the subscriber.

- **Last Delivery Attempt Date** – this field displays the date that CES last attempted to deliver a bill by either method.

11. **Date Copied –** this field indicates the date the bill was copied

- **Previous Statement Balance –** displays the balance of the previous statement for the account number

12. **Previous Reimbursable Statement Balance** – displays the balance of the reimbursable charges for the previous statement

13. Once the fields are completed, click the **Determine Balance** button.

14. The lower pane populates with the bill information with current balance for the account shown in last field within the pane.

Unofficial Account Addresses

Viewing Associated Addresses

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. Before the Account list populates, you must either:

   - Within the search box, type the account number or portion of the number and then click the magnifying glass.

   4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Account window opens.

6. Within the **Show** ribbon group, click the top half of the **Addresses** button.

7. The window displays two panes of information. The top pane displays a list of addresses currently associated to the account and the lower pane displays a list of all address currently within your database.

8. If the information in the top pane does not readily populate, you can search for an address by typing in the name or portion of the name within the search text box or click the Show All link.

Adding a New Address

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. Before the Account list populates, you must either:

   - Within the search box, type the account number or portion of the number and then click the magnifying glass.

   4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Account window opens.

6. Within the **Show** ribbon group, click the lower half of the **Addresses** button to access a dropdown menu. From the menu, click **Add New Address**.

7. The Address window opens, complete the following fields (required fields are marked with an asterisk (*) (*)):

   - **Address Label** – type the address label. For example, work, home, etc.

   8. **Street*** – type the mailing address.

   - **City** – type the city name.

   9. **State/Province** – type the state abbreviation, province name or other designation.

- **Zip Postal** – type the 5-digit zip code.

10. **Zip Plus 4** – type the 4-digit code appearing after the standard zip code, if applicable.

- **Country/Region** – type the country abbreviation.

11. **Address Type** – click the dropdown arrow to access a list, from list select the address type.

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

13. Once you have added the address into the system, associate the address to the account.

Associating an Address to an Account

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. Before the Account list populates, you must either:

- Within the search box, type the account number or portion of the number and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Account window opens.

6. Within the **Show** ribbon group, click the top half of the **Addresses** button. The window displays two panes of information. The top pane displays a list of addresses currently associated to the account and the lower pane displays a list of all address currently within your database.

7. To populate the information within either pane:

- Within the search box, type a portion of the address and then click the magnifying glass

8. Click the **Show All** button

9. To associate an address to an account, find the address within the **Available Addresses** pane and double-click the address. The address displays in the **Addresses for Account** pane.

10. To associate additional addresses, repeat the process.

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

Adding a Mailing Address

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. Before the Account list populates, you must either:

    - Within the search box, type the account number or portion of the number and then click the magnifying glass.

    4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Account window opens.

6. Within the **Show** ribbon group, click the top half of the **Addresses** button. There are two ways to populate the list of Account addresses:

    - Within the search box, type the account number or portion of the number and then click the magnifying glass.

    7. Click the **Show All** button.

8. Once the list populates, highlight the address within the **Addresses for Account** pane.

9. Within the **Show** ribbon group, click the lower half of the **Address** button to access a dropdown menu. From the menu, click **Make Mailing Address**.

10. Alternatively, right-click the address within the list to access a pop-up menu. From the menu select **Use this address for mailing bills**.

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

12. To ensure the address is now the mailing address, within the **Show** ribbon group click the **Billing Account** button. Within the **Account** pane, the mailing address now populates with your selection.

Removing an Address from an Account

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. Before the Account list populates, you must either:

    - Within the search box, type the account number or portion of the number and then click the magnifying glass.

    4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Account window opens.

6. Within the **Show** ribbon group, click the top half of the **Addresses** button. There are two ways to populate the list of Addresses for the Account:

    - Within the search box, type the account number or portion of the number and then click the magnifying glass.

7. Click the **Show All** button.

8. Right-click the address to access a pop-up menu and from the menu, select **Remove from this account**.

9. The address re-appears in the **Available Addresses** pane.

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

Unofficial Account Calls

If the account you are currently viewing is responsible for call charges, you can view a summary of the charges applied to the account. To view the calls associated to the account, click the **Calls** button within the **Show** ribbon group. Depending on the amount of calls associated to the account, the list may not populate right away. To populate the list, complete one of the following:

- Within the search box, type any portion of a call record (site name, extension, etc.) and then click the magnifying glass.

11. Click the **Show All** button.

The window displays the following information for each call type:

- **Call Type** – call type name.

12. **Total Calls** – the total number of calls made.

- **Total Cost** – the total cost of calls.

13. **Total Duration** – the total duration of call in minutes.

At the bottom of the list is a total for all call charges. To view the details for each call type, click the plus sign (+) next to the call type name. To return to the default view, click the minus sign (-) next to the call type name.

You can export or print the call data by clicking the **Sharing** tab at the top of the screen. There are 3 export formats:

- **PDF** – you can export the total report, expanded bands only or primary band to a PDF file. Once selected the PDF file generates to your screen, you can save the file to any location.

- **Excel** – you can export the total report, expanded bands only or primary band to an Excel spreadsheet. Once selected, Excel opens with your report, you can save the file to any location.

- **Print** – you can send the entire report, expanded bands only or primary band report a printer. Once selected the Print box displays, allowing you to choose your printing options.

- **Text** – you can export the total report, expanded bands only or primary bands to a tab delimited text file. Once selected, the Select the location to save the Tab-

delimited Text File box opens. Browse to the location, type the file name within the text box and click the **Save** button.

Reimbursable Types

When you click the Reimbursable Types button, the screen changes to display two panes of information: Call Types and Equipment and Service Types. Within each account, you can indicate a specific call type(s), equipment type, or service type as reimbursable. This button works in connection with the Type of Service, for each reimbursable type, you must indicate a type of service. The Type of Service is used to indicate whether the reimbursable type is mission funded.

Adding a Call, Equipment or Service Type as Reimbursable

1. Click the **Accounting** menu.
2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.
3. To populate the Account list, you must either:

   - Within the search box, type the account number or portion of the number and then click the magnifying glass.

   4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Account window opens.
6. Within the **Show** ribbon group, click the **Reimbursable Types** button.
7. The screen changes to displays two panes of information: Call Types and Equipment and Service Types.
8. To add a Call Type, click the row marked with an asterisk (*). Within the Call Type column, click the dropdown arrow to access a list of the call types within your database, from the list select the appropriate call type.
9. In the Type of Service Name column, click the dropdown arrow to access a list, from the list select the associated type of service.
10. Before adding more information, it is a good idea to save your changes, within the Actions ribbon group, click the **Save** button.
11. To add Equipment and Service Types, click the row marked with an asterisk (*). Within the Billable Cost Type Name column, click the dropdown arrow to access a list of the equipment and service types within your database, from the list select the appropriate type.
12. In the Type of Service Name column, click the dropdown arrow to access a list, from the list select the associated type of service.
13. Within the **Actions** Ribbon group, click **Save** (to save and stay) to continue working with reimburseable types, or click **Save & Close** (to save and exit) to return to the Unofficial Accounts list.

Removing a Reimbursable Type

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. To populate the Account list, you must either:

   • Within the search box, type the account number or portion of the number and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Account window opens.

6. Within the **Show** ribbon group, click the **Reimbursable Types** button.

   The screen changes to displays two panes of information: Call Types and Equipment and Service Types.

7. Within the appropriate pane, right-click the selector box next to the type name. A small pop-up menu opens; click **Delete**.

   Once selected, cairs.net draws a line through the item allowing you to delete multiple items at once.

8. If you do not want to delete an item, right-click the record to access a pop-up menu and click **Undelete**.

9. 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.

10. Within the **Actions Ribbon** group, click **Save** (to save and stay) to continue working with reimburseable types, or click **Save & Close** (to save and exit) to return to the Unofficial Accounts list.

Viewing Unofficial Accounts

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. Before the Account list populates, you must either:

   • Within the search box, type the account number or portion of the number and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Use the Views pane to sort the Accounts list based on a common category or characteristic. The following views are available:

   • **Simple List** (default view)

6. **Detailed List**

   • **Accounts by Charge Type**

7. **Account Status**

- **Account Standing**

8. **Pending Status Changes**

- **Accounts with Bad Checks**

9. **Unofficial Accounts Billing Summary**

- **Unofficial Report Preferences**

10. **Accounts by Bill Delivery Dates**

- **Accounts by Building**

11. **Account Notes**

- **Custom View -** this selection allows you to create a custom view by dragging and dropping column headers to create a line display.

12. To select a different view, click the option button next to the selection. There are two ways to populate the list:

- Within the search box, type any portion of a record and then click the magnifying glass.

13. Click the **Show All** button.

14. If available, click the plus sign (+) next to the group to view the individual records.

15. Double-click the record to view the Account window.

Settings

Within the Settings button, you determine two things: what billing report files you want generated for the account and what call types you want to exclude from the printed bill. Excluding calls from the bill is helpful if you do not want to include zero cost calls.

Account Billing Report Preferences

There are two ways to set the preferences; you can set them either for each account number or for all of the official accounts. Within this option, you are setting the preferences for this account number. The selections here over-ride the setting you may have chosen for all of official accounts.

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Unofficial Accounts.**

3. To populate the Account list, you must either:

- Within the search box, type the account number or portion of the number and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Within the **Show** ribbon group, click the **Settings** button. There are two panes of information, within the top pane you determine the preferences, the lower is used for excluding call types from bills.

7. The Billing Report Preferences pane displays the different formats and delivery options for your billings, as a default all fields are checked. This indicates the account summary or call data generates to the particular file type or location.

   The following options are available:

   - **Account Summary XLS** – the account summary for each account number generates to an Excel Spreadsheet

8. **Call Detail XLS** – the call data for each account generates to an Excel Spreadsheet

   - **Call Detail Tab Delimited** – the call data for each account generates to a tab delimited file

9. **One Time Charges Tab Delimited** – the one-time charges for each account generate to a tab delimited file

   - **Recurring Charges Tab Delimited** - the recurring charges for each account generate to a tab delimited file

10. **Account Type** – this default to Unofficial

    - **Mailed Report PDF to File** – the mailed report is generated to a PDF file

11. **Mailed Report PDF to Printer** – the mailed report is sent directly to the printer

    - **Report to XML** - the call, recurring, and one-time charges are generated into an XML file.

12. If you want to remove the file type from being generated, click on the box to remove the checkmark.

13. Within the Actions ribbon group, click on **Save** (to save and stay) to continue working with your preferences, or click **Save & Close** (to save and exit) to return to the Unofficial Accounts list.

Adding a Call Type to Exclude from Bill

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. To populate the Account list, you must either:

   - Within the search box, type the account number or portion of the number and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Account window opens.

6. Within the **Show** ribbon group, click the **Settings** button.

7. Within the **Call Types to Exclude from Printed PDF Bills** pane, click the row marked with an asterisk (*). Within the Call Type column, click the dropdown arrow to access a list of the call types within your database, from the list select the appropriate call type.

8. Within the Exclude From Bill column, click the box to insert a checkmark to indicate that you want to exclude the call type from the printed bill.

9. You can continue adding call types by clicking on the row marked with an asterisk (*).

10. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with settings, or click **Save & Close** (to save and exit) to return to the Unofficial Accounts.

Deleting a Call Type from being Excluded

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. To populate the Account list, you must either:

    -   Within the search box, type the account number or portion of the number and then click the magnifying glass.

    4. Click the Show All button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Account window opens.

6. Within the **Show** ribbon group, click the **Settings** button.

7. Wiithin the **Call Types to Exclude from Printed PDF Bills** pane, right-click the selector box next to the type name. A small pop-up menu opens, within the box click **Delete**.

8. Once selected, cairs.net draws a line through the item allowing you to delete multiple items at once.

9. If you do not want to delete an item, 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 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 **Save** (to save and stay) to continue working with settings, or click **Save & Close** (to save and exit) to return to the Unofficial Accounts.

Unofficial Account - File Attachments

Before you can attach files to a record, your cairs.net administrator must determine the allowable file types and size. Please contact your cairs.net administrator if you are unable to attach files.

There are two different types of files that you can attach to a record; the first button allows you to attach a regular file. These files follow the record and other users are able to see them. Although, this is convenient, if changes need to be made to the file, the file will have to be saved and then re-attached.

The second file attachment type allows you to attach a link to a file that is in a shared location. The benefit of this file attachment is that when changes are made to the file there is no need to reattach the file. The disadvantage is that all cairs users have to have access to the shared file location.

The process to add either file type is the same.

Attaching a File or External File to an Account

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Unofficial Accounts.**

3. Depending on the amount of records 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 then click the magnifying glass.

   4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Within the **Attach** ribbon group, click on either **Add File** or the **Add External Link** button.

7. The **Select the File to Attach** window opens. Browse to select the file to attach and click the **Open** button.

! If the file type that you want to add in not showing up within your location, click on the file type dropdown arrow to select the correct file format. If the file type is not available within the dropdown, please contact your cairs.net administrator to add the file type to the allowable file types list.

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8. Once attached, a button displays directly below the ribbon. To view the attached file, click the button.

Viewing and Saving an Attached File

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Unofficial Accounts.**

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Directly below the ribbon, a button displays with the file name. Click the button to view the attachment.

7. Alternatively, right-click the file name to access a pop-up menu, then select **Open**.

8. To save, right-click the file name to access a pop-up menu, and then select **Save Target As.**

9. Within the Save Target As window, browse to the location of where you want the file saved and click the Save button.

Deleting a File Attachment

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Unofficial Accounts.**

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Accounts window opens.

6. Right-click the file name to access a pop-up menu, and then select **Delete**.

7. Once you click Delete, a message box displays verifying that you really want to delete the file. Click **Yes** within the box to continue or **No** to cancel the operation.

Account Management

Within the Management ribbon group, you can view the account's status over its entire history. This is the area to see if the account is active, closed, suspended, etc. You can change the account status but be aware this ribbon group overrides all other account statuses. For example, if you close the account here, the billing on this account stops.

Manage Status Change Types

This option allows you to populate the Status Change Types dropdown list. These change types (possible change types are non-payment, customer request, etc.) explain why the account status is changing.

Adding a Status Type

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts**, and then **Unofficial Accounts**.

3. Before the Account list populates, you must either:

   - Within the search box, type the account number or portion of the number and then click the magnifying glass.

   4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Account window opens.

6. Within the **Management** ribbon group, click the lower half of the **Account Status** button to access a dropdown menu. From the menu, select **Manage Status Types**.

7. The Account Status Change Types window opens. Click the field marked with an asterisk (*) (*), this row is used to add new records. Once you start typing, a new row displays above allowing you to add multiple items.

8. Type the **Change Type** that explains why the account status is changing, for example, non-payment, customer request, rotation date, etc.

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

Deleting a Status Type

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. Before the Account list populates, you must either:

   - Within the search box, type the account number or portion of the number and then click the magnifying glass.

   4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Account window opens.

6. Within the **Management** ribbon group, click the lower half of the **Account Status** button to access a dropdown menu. From the menu, select **Manage Status Types**.

7. The Account Status Change Types window opens. There are two ways to delete a type:

   - Right-click the type to access a pop-up menu, and from the menu select **Delete**.

   8. Highlight the row by clicking the name. Within the **Actions** ribbon group click the **Delete** button.

9. Once you click **Delete**, a message box displays verifying that you really want to delete the type. Click **Yes** within the box to continue or **No** to cancel the operation.

Status Change Configuration

Please see the section Account Status Change Configuration in the beginning of the Unofficial Accounts section.

Account Status

Within this option, you can change the status of the account allowing you to suspend or close an account for different reasons. At the same time, it allows you to reopen or make the account active again. Keep in mind that when you change the account status to suspend or closed all billing stops for that account.

There are a few important notes about Account Status. For Account Status to work properly you must have turned on the 'Update Account Status' CES process and have it running at regular and frequent intervals. If CES does not run then the account status will not change. There are two dates relating to each status, the Requested and the Date Applied. The Requested Date is the date the user requested the CES process to run. The Date Applied is when the account status change took effect.

Account Status cannot be set to a date that already passed. Since the status update is directly related to a CES process if you put the effective date in the past it will update the status to the date and time the CES process was run. It can be set to a date in the future, once CES runs the process the account status changed and the action is initiated.

Viewing Account Status

1. Click the **Accounting** menu.
2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.
3. Before the Account list populates, you must either:
   - Within the search box, type the account number or portion of the number and then click the magnifying glass.
4. Click the **Show All** button.
5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Account window opens.
6. There are two ways to view the account status. First, the solid line directly beneath the ribbon displays the current status.
7. Second, click the top half of the **Account Status** button within the **Management** ribbon group.
8. The screen displays the account's complete status history.
9. There are four account statuses:
   - **Active**
10. **Suspended**
    - **Closed**

11. Reopened

There are six additional columns of information: User Name, First Name, Last Name, Effective Time, Account Status Change Type, and Date Applied.

Changing Account Status

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. Before the Account list populates, you must either:

   - Within the search box, type the account number or portion of the number and then click the magnifying glass.

   4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Account window opens.

6. Within the **Management** ribbon group, click the lower half of the **Account Status** button to access a dropdown menu. From the menu, select **Change Account Status**.

7. The New Account Status Change window opens. Complete the following fields (required fields are marked with an asterisk (*)):

   - **Status** * – click the field to access a dropdown list and from the list select one of the following:

      8. Active

      - **Suspended**

      9. Closed

      - **Reopened**

10. **Date Requested** – the field defaults to today's date. To change the date click the field to access a drop-down arrow, once clicked a calendar displays, from the calendar select the effective 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.

Keep in mind, this is a CES process so the date and time requested is when you have initiated the process to run. Once the process runs, the Date Applied will populate with actual date and time the account status was changed.

   - **Status Change Type** – click the field to access a dropdown list and from the list select the change type.

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

When you change the status of an account the yellow line directly below the ribbon displays the new account status.

Billing Tools

Within the Billing Tools ribbon group, you generate bills for the account you are currently viewing. You can adjust the bill without generating a new bill by either crediting or debiting the account. Once you generate the bill and send it out to the customer, you can apply any payment made. Payment made to an account will not show on the account until you generate a bill for the next bill cycle.

Finally, you can also rollback a bill cycle. When you perform a rollback, you are deleting the previous bill for the cycle and generating a new bill in its place. Please make sure this is the correct action, as there is no backup in place.

The first step in ensuring your billing generates properly is to make sure that the account number displays in all the necessary menu options. For Unofficial billing, the account number needs to appear in Accounts, Subscriber and on the set device or circuit.

Once the account displays on the device, you must decide what charges the account number is responsible for paying. There are four choices: All, Recurring, One-time and Call charges. This feature allows you to portion out the charges to various different organizations.

Adjustments

You handle refunds and adjustments the same way within cairs.net. You can enter a credit (refund) to the account allowing the positive balance to apply to the next generated bill. Alternatively, you debit (adjust) the account to apply a balance added to the next generated bill.

Applying a Credit or Debit

Please remember that when applying a refund to an account, the credit amount does not apply until you generate the next bill cycle.

1. Click the **Accounting** menu.
2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.
3. Before the Account list populates, you must either:

   - Within the search box, type the account number or portion of the number and then click the magnifying glass.

   4. Click the **Show All** button.
5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Account window opens, and defaults to show the Billing Account information.
6. Within the **Billing Tools** ribbon group, click the **Adjustments** button. Within the solid blue line below the ribbon, click the circle next to either:

- **Credit (Refund)** – apply funds to an account.

7. **Debit (Adjustment)** – add charges to the balance statement.

8. Within the top pane complete the following information (required fields are marked with an asterisk (*)):

   - **Adjustment Amount*** – type the adjustment amount. When you enter in the amount, type the total amount with a decimal point. If you fail to enter in the decimal point cairs.net adds one in the appropriate location, for example if you type $100, cairs.net converts that to $1.00 instead of $100.00.

9. **Adjustment Date*** – this field auto-populates with the current date. 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.

   - **Type of Service Name** – click the dropdown arrow to access a list, from the list select the Type of Service

10. **Site** – click the dropdown arrow to access a list and from the list, select the site. The site dropdown list displays the bottom-most site first. After the ~~ is the complete path to the site. Each site level is separated by a >.

   - **Organization** – click the dropdown arrow to access a list from the list, select the name of the organization. The organization dropdown list displays the bottom-most organization first. After the ~~ the complete path to the selected organization appears. Each level of the organizational tree is separated by a >. Once you select an organization, the complete path populates within the field.

11. **Note** – type any necessary information regarding why you are adjusting the account.

12. Directly below the top pane, on the right-hand side of the screen, click the **Apply Adjustment** button.

13. The information moves from the top pane to the Pending Adjustments pane.

14. When you generate the next bill, the refund or adjustment applies to the account.

Viewing Adjustment History

In order for a credit or debit to apply to an account, you must generate the bill for the next bill cycle. After generating the bill, there are two ways to view the applied adjustments.

First, within the **Billing Tools** ribbon group, click the **Refunds and Adjustments** button. Any adjustments made to the account appear in the Adjustment History pane. Cairs.net designates a credit with the amount encased in parenthesis while a debit does not have parenthesis.

Second, on the **Billing Account** screen (Show ribbon group→Billing Account button), select a bill period from the dropdown box in the middle of the screen. The bill summary displays on the lower half of the screen. Click the **Adjustments** tab to view the credits and debits applied to the account.

Creating a Bill

Within Billing Tools, you can create a bill for the account that you are currently viewing. This allows you to adjust an account and then generate an updated bill immediately.

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. Before the Account list populates, you must either:

   - Within the search box, type the account number or portion of the number and then click the magnifying glass.

   4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Account window opens.

6. Within the **Billing Tools** ribbon group, click the **Create Bill** button.

7. The Create Bill pop-up opens. Complete the following fields (required fields are marked with an asterisk (*)):

! Some of the following fields auto-populate within information you have previously designated. When you enabled and created a billing cycle, you determined the information appearing in these fields.

   - **Bill From Date*** – this field populates with the last date of the previous bill period. To change the date, click the field to access a dropdown calendar. To change the month and year click the right or left arrow. Once at the appropriate month and year, click the number to select the date. The date populates in the box.

   - **Bill To Date*** – this field populates with the current date. 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.

   - **Fiscal Year*** – this field populates with the current fiscal year. To change, click the field and type the correct fiscal year.

   - **Due Date*** – this field auto-populates with the bill due date. 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.

   - **Date Mailed** – type the date you mailed the bill or click the dropdown arrow to access a calendar. From the calendar, select the date that you mailed the bill.

   8. **Date E-mailed** –type the date you e-mailed the bill or click the dropdown arrow to access a calendar. From the calendar, select the date you e-mailed the bill.

- **Last Delivery Attempt Date** – this field displays the date that CES last attempted to deliver a bill by either method.

9. **Date Copied –** this field indicates the date the bill was copied.

- **Previous Statement Balance -** displays the balance of the previous statement for the account number

10. Once you have completed the information within the pop-up, click the **Run Bill** button to produce the bill for this account.

Viewing the Bill created for an Account Number

When you create a bill, the bill information automatically displays in the Account Balance Summary pane within the Billing Account screen. To view the detailed bill, complete the following steps:

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. Before the Account list populates, you must either:

- Within the search box, type the account number or portion of the number and then click the magnifying glass.

4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Account window opens, and defaults to show the Billing Account information.

6. Within the **Bill Summary** pane, click the **Select billing period** dropdown box (in the upper right-hand corner of the pane). From the list, select the billing period to view.

7. The **Bill Summary** pane displays the following information:

- Previous Balance

8. Current Charges

- Payments and Adjustments

9. One-time Charges

- Recurring Charges

10. Call Charges

11. Within the lower half of the screen, are several information tabs displaying various portions of the bill. View the following information by clicking the appropriate tab:

- **Balance Summary** – displays the bills generated on the account and the total charges, payments and adjustments made on the account. Any amounts seen within parentheses are credits to the account.

12. **Number/Circuit Summary** – if multiple set devices and/or circuits are associated to the account, this tab displays the device name, total one-time charges, total

recurring charges, and total call charges. To view the full details, click the plus sign (+) next to the number or circuit name.

- **One-Time Charges** – displays only the one-time charges associated to the account. Within the column on the left hand side of the screen are the view selections. To change the view, click the option button next to the name. Each of the views changes how the information is organized or grouped together.

13. **Recurring Charges** – displays only the recurring charges associated to the account. Within the column on the left hand side of the screen are the view selections. To change the view, click the option button next to the name. Each of the views changes how the information is organized or grouped together.

- **Calls** – displays a list of the call data associated to the account. Within the column on the left hand side of the screen are the view selections. To change the view, click the option button next to the name. Each of the views changes how the information is organized or grouped together.

14. **Payments** – displays a list of payments credited to the account.

- **Adjustments** – displays a list of adjustments made on the account.

Rollback a Bill

The purpose of rolling back a bill is to delete the previous bill and create a new one. Please be aware that there is not a backup of the previous bill. When you roll back a bill, you are removing the charges from the bill and placing them back into the system. This allows you to modify the bill before sending a final bill to your customers or the Subscriber Portal.

You can perform a rollback on a single account or on the entire bill. Please see the section on Generating an Entire Bill which covers how to perform a rollback on the entire bill.

Performing a Rollback

1. Click the **Accounting** menu.
2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.
3. Before the Account list populates, you must either:

    - Within the search box, type the account number or portion of the number and then click the magnifying glass.

    4. Click the **Show All** button.

5. The Accounts list opens, displaying the account matching your search criteria. Double-click the account. The Account window opens, and defaults to show the Billing Account information.
6. To verify you are on the most recent bill cycle, click the dropdown arrow in the **Select billing period** box. Cairs.net performs a rollback from the top of the list to the bottom.
7. Within the **Billing Tools** ribbon group click the **Rollback Last Bill** button.

8. A message box displays, verifying that you really want to perform the rollback. Remember a rollback deletes the last bill.

9. Click **Yes** to continue with the rollback or **No** to cancel the operation.

10. The bill cycle no longer displays in the list, allowing you to generate a new bill for this account number.

Payments

Subscribers can make payments that apply to their statement balance. Before you can accept payments, you must determine the types, methods and locations you allow within your cairs.net.

A Type is considered what type of payment you are accepting, for example, a standard payment, late payment, etc.

A Method is considered what form of payment you are accepting, for example, cash, check, credit card, etc.

A Location is considered where your customer is making the payment, for example, in office, cash box, mail, etc.

Payment and Funding Types

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. There are three ways to Manage Payment and Funding Types

   - Within the tool bar directly above the **Navigation** pane, click the **Payment and Funding Types** button

   - Within the **Actions** pane, click the **Payment and Funding Types** link.

   - Within the **Account** list, double click on the account number, The Account window opens. Within the **Billing Tools** ribbon group, click the lower portion of the **Payments** button to access a dropdown menu. From the menu, select **Manage Funding Types**.

4. With either option, the Payment and Funding Types popup opens. Click the line marked within an asterisk. Once you start typing, a new row appears allowing you to add multiple items.

5. Within the field, type-in the payment type explaining the payment types you are applying to the account. For example, a type can be a standard payment, discrepancy, bad check, etc.

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

Payment and Funding Methods

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. There are three ways to Manage Payment and Funding Methods:

   - Within the tool bar directly the **Navigation** pane, click on the **Payment and Funding Methods** button.

   - Within the **Actions** pane, click the **Payment and Funding Methods** link.

   - Within the Account list, double click on the account number, The Account window opens, within the **Billing Tools** ribbon group, and click the lower portion of the **Payments** button to access a dropdown menu. From the menu, select **Payment and Funding Methods**.

4. With either option, the Payment and Funding Methods popup opens. Click the line marked within an asterisk. Once you start typing, a new row appears allowing you to add multiple items.

5. Within the field, type-in the payment type that explains what form of payment you accept. For example, cash, check, credit, debit, etc.

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

Payment and Funding Locations

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. There are three ways to Manage Payment and Funding Locations:

   - Within the tool bar directly the **Navigation** pane, click on the **Payment and Funding Locations** button.

   - Within the **Actions** pane, click the **Payment and Funding Locations** link.

   - Within the Account list, double click on the account number, The Account window opens, within the **Billing Tools** ribbon group, and click the lower portion of the **Payments** button to access a dropdown menu. From the menu, select **Payment and Funding Locations**.

4. With either option, the Payment and Funding Locations popup opens. Click the line marked within an asterisk. Once you start typing, a new row appears allowing you to add multiple items.

5. Within the field, type-in the payment locations. For example, drop box, mail, OTC, etc.

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

Deleting a Type, Method or Location

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. There are three ways to delete a type, method or location:

    - Within the tool bar directly above the **Navigation** pane, click on the appropriate button

    - Within the **Actions** pane, click the appropriate link

    - Within the Account list, double click on the account number, The Account window opens, within the **Billing Tools** ribbon group, and click the lower portion of the **Payments** button to access a dropdown menu. From the menu, make the appropriate selection.

4. With either option, the window opens.

5. Right click the selector box next to the name, a small popup box opens and within the box click **Delete**.

6. Once you click Delete, a message box appears verifying that you really want to delete the item. Click **Yes** within the box to continue or **No** to cancel the operation.

7. Once selected, cairs.net draws a line through the name; allowing you to delete multiple items at once.

8. If you do not want to delete the item, right-click the record to access a popup menu and from the popup, click **Undelete**.

9. Once you select Undelete, a message box appears verifying that you really want to keep the item. Click Yes within the box to continue or No to cancel the operation.

10. Within the **Actions** ribbon group, click **Save & Close**.

Making a Payment

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. Before the Account list populates, you must either:

    - Within the search box, type-in the account number or portion of the number and then click the magnifying glass.

    - Click the **Show All** button.

4. The Accounts list opens to the right displaying the account matching your search criteria. Double-click the account. The Account window opens.

5. Within the **Billing Tools** ribbon group, click the upper portion of the **Payments** button.

6. The screen changes allowing you to enter in a payment to apply to the account. Within the top pane complete the following information (required fields are marked with an asterisk(*):

    - **Payment or Funding Type** – click the dropdown arrow to access a list and from the list, select the payment type.

7. **Payment or Funding Method** – click the dropdown arrow to access a list and from the list, select the payment method.

- **Payment or Funding Location** – click on the dropdown arrow to access a list and from the list, select the location where the payment was made.

- **Receipt Number*** – this field auto-populates with an invoice number. To change the number, click the field and type-in the new invoice number.

- **Received Date*** –this field auto-populates with the current date. 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.

- **Amount Due** – this field auto-populates with the current account balance.

! The next four fields work together allowing you to keep an accurate account of the funds submitted into your system. If the amount submitted is greater than the amount due, cairs.net makes the appropriate calculations and displays the amounts in the appropriate fields. For example:

Amount Due – 35.65

Amount Submitted - $40.00

Change Given - $4.35

Net Payment - $35.65

Cairs.net does not allow you to give change if the total submitted is more than the net payment. For example, if the customer submitted $30.00 but wants to pay $25.00, cairs.net does not allow this. Both fields change to the total amount submitted.

- **Amount Submitted** – type-in the total amount submitted. When entering in the amount received, type-in the total amount with a decimal point. If you fail to enter in the decimal point, cairs.net adds one in the appropriate location. For example if you type-in $100, cairs.net converts it to $1.00 instead of $100.00.

- **Change Given** – this field auto-populates with the correct change to give to the person when they have submitted more that the balance statement. For example, if the statement balance is $35.50 and the submitted amount is $36.00, this field displays -$0.50 allowing you to keep an accurate accounting of the funds entering your system.

- **Net Payment** – if the amount submitted is the same as the amount due, this field populates with the same amount.

! Cairs.net has a built in calculator. In the lower left hand corner of the top pane, click the **Calculator** button. The standard Windows calculator displays.

- **Check Number** – if the customer submitted a check for payment, type-in the check number.

- **Check Status** – click on the dropdown arrow to access a list, from the list select the check status. You have three options: Good, Bad, or Resolved.

- **Fiscal Year** – type-in the current fiscal year, or the fiscal year the payment should apply to.

- **Note** – type-in any additional payment notes.

8. Once you have completed the fields, click the **Apply Payment** button in the lower right hand corner of the pane.

! Payments made on the last day within the billing cycle are included within that billing cycle.

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9. Once applied, the payment information displays in the **Payment History** pane in the lower portion of the screen.

10. The status of the payment is Pending. A payment is not applied to a balance until you generate the next bill cycle.

Viewing Payment History

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. Before the Account list populates, you must either:

- Within the search box, type-in the account number or portion of the number and then click the magnifying glass,

- Click the **Show All** button,

4. The Accounts list opens to the right displaying the account matching your search criteria. Double-click the account. The Account window opens.

5. Within the **Billing Tools** ribbon group, click the upper portion of the **Payments** button.

6. Within the **Payment History** pane in the lower portion of the screen, view the payment(s) applied and pending on the account.

7. If the list does fully populate with all payments processed, you can search for a particular payment by typing in any portion of any field or by clicking the **Show All** button.

Late Payment Action History

On the Late Payment Action History tab you view the actions that have been taken on an account that is overdue. The Action Date, Days Past Due, Action and Description are displayed.

1. Click the **Accounting** menu.

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2. In the **Navigation** pane, click **Accounts** and then **Official Accounts**.

3. To populate the Account list, you must either:

   - Within the search box, type-in the account number or portion of the number and then click the magnifying glass.

   - Click the **Show All** button.

4. The Accounts list opens to the right displaying the account matching your search criteria. Double-click the account. The Account window opens.

5. Within the **Billing Tools** ribbon group, click the upper portion of the **Payments** button.

6. Within the **Payment History** pane, click on the Late Payment Action History tab to view the actions taken on the account for overdue payments.

7. If the list does fully populate with all actions, you can search for a particular action by typing in any portion of any field or by clicking the **Show All** button.

Editing a Payment

You can edit a payment that is pending to an account. However, once the status of the payment changes from pending the payment is no longer editable

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. To populate the Account list, you must either:

   - Within the search box, type-in the account number or portion of the number and then click the magnifying glass.

   - Click the **Show All** button.

4. The Accounts list opens to the right displaying the account matching your search criteria. Double-click the account. The Account window opens.

5. Within the **Billing Tools** ribbon group, click the upper portion of the **Payments** button.

6. Within the **Payment History** pane in the lower portion of the screen, a list of the payments made to the account appear.

7. Next to the status, click on the record selector box to access a popup menu, from the menu select Edit. The complete payment details appear in the upper pane.

8. Make the necessary changes and click on the Update Payment button in the lower right hand corner of the pane.

9. The status of the payment is Pending. A payment is not applied to a balance until you generate the next bill cycle.

Deleting a Payment

You can delete a payment that is pending to an account. However, once the status of the payment changes from pending the payment is no longer editable.

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Accounts** and then **Official Accounts**.

3. To populate the Account list, you must either:

   - Within the search box, type-in the account number or portion of the number and then click the magnifying glass.

   - Click the **Show All** button.

4. The Accounts list opens to the right displaying the account matching your search criteria. Double-click the account. The Account window opens.

5. Within the Billing Tools ribbon group, click the upper portion of the Payments button.

6. Within the Payment History pane in the lower portion of the screen a list of the payments made to the account appears.

7. Next to the status, click on the record selector box to access a popup menu, from the menu select Delete.

8. Once you click Delete, a message box appears verifying that you really want to delete the payment. Click Yes within the box to continue or No to cancel the operation.

9. The payment is removed from the Payment History pane, the total amount due return to the amount before the payment was applied.

Running a Bill – Unofficial

Within Billing Cycle History, you can view the bills have are completed or are in the process of completion for all cycles. You can also generate or schedule a bill for a cycle.

! You cannot generate a bill on a cycle if there is already one in place. If this is the case, you must Rollback the current bill to generate another. See Billing History – Official → Rolling Back a Billing Cycle.

Viewing Billing Cycle History

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. Click the plus sign (+) next to **Unofficial Accounts** to access the submenus. Click **Run Bill Requests – Unofficial**.

   A list of the bills you have asked CES to run populates within the pane on the right-hand side of the screen.

4. To view the complete information, double-click any row.

   The General – Billing Cycle History window opens. The top pane displays the same information as listed above while the lower pane breaks the bill down based on account.

5. To view the complete account information, double-click the row. The General Account's window opens. To return to the General – Billing Cycle History window, click the **X** in the upper right-hand corner of the account.

6. To view the complete account information, double-click the row. The General Accounts window opens. To return to the Billing Cycle History window, click the **X** in the upper right-hand corner of the account.

Run Bill - Unofficial

Before you can run a bill, you must set-up your Billing Cycle; this determines the dates of the billing period, run month, run date and due day of the bill. Each bill run is determined by the billing cycle.

! Within the Billing Cycle Plan, there is a Run Month and Run Day. These determine when cairs.net is allowed to generate the bill. For example, if you have the following scenario:

Bill Start Date – January 1   **Bill End Date – January 31**

Run Month – February   **Run Day – 6**

All charges between the 1st and 31st of January are included in the bill.

The bill cannot be generated before February and not before the 6th. This allows you to review and correct any issues with accounts, if necessary.

If you put a request to generate the bill before February 6th, the bill will not generate until the 6th. You will see the request as Not Yet Started, on the 6th you will see a In process status.

If you put click on the Run Bill link on the 7th, the bill runs right away, there is no wait time.

1. Click the **Accounting** menu.
2. Within the Navigation pane, click **Accounts,** then **Unofficial Accounts.**
3. Click the **plus sign (+)** next to **Unofficial Accounts** to access the submenus. Click **Run Bill Requests – Official**.
4. Before the list of bills generated or are in the process of being generated are populated in the pane to the right you must click the Show All button. The most recent bills appear at the top of the list.

! Before you run a bill, it is a good idea to make sure that no other bills relates to the billing period. Pay close attention to the Status column, this column displays whether the bill is completed, in process, or not yet started.

5. Within the Actions pane, click the Run Bill – Unofficial link

6. Once you click the link, the following message box appears:

    As stated in the message, the bill runs based on the billing cycle's run month and run day. You have the option of viewing the cycle plan by clicking the View Cycle Plan button.

7. Click on Yes to continue the run bill process, this process may take several hours to complete.

8. A status box appears with the following information:

    - Bill Status

9. Processing # of #

    - Accounts Billed

10. Account Failed

    - Account Current

11. Accounts Unassigned

    - Accounts Closed and Suspended

12. The status box stays open until the bill is completed. To view the complete details of the bill, click the View Details button. This General – Billing Cycle window opens. This window displays three panes of information:

    - General Information – this pane displays the status of the bill, including start time, total accounts processed, total bills succeeded, total bills failed, to name a few fields.

13. Bills Generated – once cairs.net generates a bill for an account, the account number lists within this pane. The pane displays such information as total payments, total charges, etc.

    - Failed Bills – if cairs.net is unable to generate a bill for an account, the account number displays within this pane. Any additional information that cairs.net can provide also displays.

14. To make sure you are viewing the most current information, click the Refresh button within the Actions ribbon group.

Schedule Bill – Unofficial

1. Click the **Accounting** menu.

2. Within the Navigation pane, click **Accounts,** then **Unofficial Accounts.**

3. Click the **plus sign (+)** next to **Unofficial Accounts** to access the submenus. Click **Run Bill Requests – Official**.

4. Before the list of bills generated or are in the process of being generated are populated in the pane to the right you must click the Show All button. The most recent bills appear at the top of the list.

! Before you schedule a bill, it is a good idea to make sure that no other bills relates to the billing period. Pay close attention to the Status column, this column displays whether the bill is completed, in process, or not yet started.

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5. Within the Actions pane, click the Schedule Bill – Unofficial link

Once clicked the following popup becomes available:

6. To schedule the bill for a future date, click on the dropdown arrow to access a calendar. There are two ways to change the date:

   • Click the right or left arrow, and once at the appropriate month and year, click the number to select the date.

7. Click the month name, a list of the months opens, from the list select the appropriate month. To change the year: click the year to access a set of up and down arrow, use the arrows to select the appropriate year. Once at the appropriate month and year, click the date.

   Within either selection, the date appears in the box.

8. Once you have the appropriate date, click the Schedule button.

9. Alternately, click the Cancel button to not schedule the bill and return to the Accounting menu.

Deleting your Billing Cycle History

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. Click the plus sign (+) next to **Unofficial Accounts** to access the submenus. Click **Run Bill Requests – Official**.

    A list of the bills you have asked CES to run populates within the pane on the right-hand side of the screen.

4. Within the list, highlight the cycle that you want to delete.

5. Within the **Actions** pane, click the **Delete Billing Cycle History** link

6. A message box opens asking if you really want to delete the history, within the box click **Yes** to continue or **No** to cancel the operation.

7. Once you click yes, the cycle history is removed from your database.

Billing History - Unofficial

Viewing your Billing History

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. Click the plus sign (+) next to **Unofficial Accounts** to access the submenus. Click **Billing History – Unofficial**.

4. A list of the bills produced populates within the right-hand pane.

5. Each row gives a summary of the Billing information. The following read-only information displays:

    - **Bill From and Bill To dates**

    6. **Total Bills Sent**

    - **Total Bills Certified**

    7. **Total Charges**

    - **Total Payments**

    8. **Total One-time, Recurring and Call Charges**

    - **Total Adjustments**

    9. **Account Type**

10. To view the account number breakdown of the above information, click the plus sign (+) next to the **Bill From Date**.

11. Within the Views pane, are several alternate view selections. Each selection organizes or groups the bills differently, to change the view click the option button next to the selection.

12. The list displays additional information pertaining to each account number. To view the complete account information, double-click the row. The General Accounts window opens.

13. If you make changes to the account number, click the **Save & Close** button within the **Actions** ribbon group to return to the Billing History Unofficial list.

! At this point, if you make any changes to the charges on the account, the Billing History will not reflect the new charges. You need to either rollback the current bill or produce a new bill for the individual account number.

Rolling Back a Billing Cycle

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounts** and then **Unofficial Accounts**.

3. Click the plus sign (+) next to **Unofficial Accounts** to access the submenus. Click **Billing History – Unofficial**.

    A list of the bills you have asked CES to run populates within the pane on the right-hand side of the screen.

4. Within the **Tools** ribbon group, click **Rollback Billing Cycle**.

! Please be aware that there is not a backup of the previous bill. When you roll back a bill, you are removing the charges from the bill and placing them back into the system.

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5. When asked if you really want to roll back the billing cycle, click **Yes** to continue or **No** to cancel the operation.

6. The status changes to **Rolled Back After Completed**.

    At this point, there is no bill for the cycle; you must run another bill for the cycle.

Exporting your Billing History

1. Click the Accounting menu.

2. Within the **Navigation** pane, click Accounts and then Unofficial Accounts.

3. Click the plus sign (+) next to Unofficial Accounts to access the submenus. Click Billing History – Unofficial.

4. A list of the bills produced populates within the right-hand pane.

5. Within the toolbar at the top of the screen, click the dropdown arrow next to Export. There are seven options to choose from:

    - **Excel (All Levels)** – exports all records to an Excel spreadsheet. If you have several account numbers `in your database, this procedure can take some time.

6. **Excel (Top Level Only)** – exports only the top level of information.

    - **Excel (Expanded Levels Only)** – exports the full detail for the expanded records to an Excel spreadsheet. The un-expanded records are in the file as a top level and you only see the summary line.

7. **Excel (Multiple Files)** – exports each bill into a separate file.

- **PDF (All Levels)** – exports all records to a PDF file. If you have several account numbers in your database, this procedure can take some time.

8. **PDF (Top Level Only)** – exports only the top level of information.

- **PDF (Expanded Levels Only)** – exports the expanded records full detail to a PDF file. The un-expanded records are in the file as a top level, and you only see the summary line.

9. **Tab-Delimited Text (Top Level Only)** – exports the top level of information into a tab-delimited text file. Once selected, the Select the location to save the Tab-delimited Text File box opens. Browse to the location, type the file name within the text box and click the Save button.

10. The file opens allowing you to save or modify the file in the appropriate program.

Accounting Entries

Within Accounting Entries, you can view a list of the components associated to each account and the related charge types. When you access the menu option, you can click on the Show All button in the upper right hand portion of the window or you can perform a search for a specific component or account. When the list opens the following information displays:

- Item Number or Name

11. Item Type

- Item Delete Date

12. Account Number

- Site

13. Organization Name and Path

- Billing Start and End Date

14. Charge Type

The component may appear in the list more than once depending on how many accounts are related to the different charge types.

By double-clicking on any record you open the Assigned Accounts and Equipment window, to learn more about associating information please see the Official Account Configuration → Account Entries section.

Calls

Within Calls you can view a wide range of your call data. Calls come into your database via UCE, where the calls are matched on a particular pattern to determine call type, duration, calling extension, called number, just to name a few. The calls are also prices based on the rate tables within UCE. There are five menu options within Calls:

- Active Calls – you can view the most recent call data

15. Reprice Calls Requests – if changes to your rate tables occur after the calls are processed, you can reprice them based on the rate tables within cairs. When you reprice calls a CES process is initiated, this menu option displays the request made and their status

- Archived Calls – you can view the archived calls, these are calls that have been billed on and archived out of your active calls

16. Call Record Archive – this menu option allows you to archive call records out of the active call database. You can archive or restore calls here.

- Rejected Calls – sometimes there may be an extension out there that does not exist within cairs, this menu option displays a list of those extension making calls and the total cost.

Active Calls

The Active Calls Section shows all current call information in the Active Calls file. Cairs.net provides optional methods for viewing call information depending on the information you are interested in. There are several view chooses within the Views pane, the Simple View is the default. This view provides detailed information about each individual call. By clicking the option button next to the any of the remaining views, you can sort the information based on the common characteristic the following options are available:

- Simple View
- Extension
- Subscriber
- Called Number
- Switch
- City
- Trunk
- Most Frequently Dialed
- Custom View

- Call Type
- Organization
- Date Called
- Site
- State
- Country
- Greatest Cost
- Greatest Duration
- Last Call

View Active Call Records

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Calls** and then **Active Calls**.

3. Depending on the amount of call records that you have within your database, the list may not populate. To populate the list, perform one of the following actions:

   - Within the search box, type any portion of a call record (site name, extension, etc.) then click the magnifying glass.

4. Click the **Show All** button.

5. Once the list populates, click the plus sign (+) next to the call type to view each call record.

6. Within the Views pane, there are 15 ways to sort (based on different characteristics) your active call database. You can refer to a view as a *sort order*. When you make a selection within the Views pane, the list on the right-hand side of the screen changes to the specified sort order. The following is a list of the different views:

   - **Simple View** – sorts the list based on account number and includes all the other views in column form.

7. **Call Type** – this is the default view. Cairs.net lists the calls by type.

   - **Extension** – sorts the list based on calling extension.

8. **Organization** – sorts the list based on the organization associated with the account number.

   - **Subscriber** – sorts the list alphabetically by the subscriber name associated with the account number.

9. **Date Called** – sorts the list based on the date the call was made.

   - **Called Number** – sorts the list based on called number.

10. **Site** – sorts the list based on the site name associated with the account number.

    - **Switch** – sort the list based on switch name associated with the account number.

11. **City** – sorts the list based on the city name associated with the account number.

    - **Country** – sorts the list based on the country name associated with the account number.

12. **Trunk** – sorts the list based on the trunk used to make the call.

    - **Greatest Cost** – sorts the list based on call price from most to least expensive.

13. **Most Frequently Dialed** – the list displays the most frequently dialed number based on duration. The called number with the highest duration displays at the top of the list.

    - **Greatest Duration** – the list displays the extension with the greatest duration of total calls.

14. **Custom View** – this selection allows you to create a custom view by dragging and dropping column headers to create a line display.

15. To change the view, click the option button next to your selection. The list changes to the appropriate selection.

16. To view all the calls within a selection, click the plus sign (+) next to the category name.

17. Use the view and the search functionality together to produce various types of reports. Once the list (report) displays, export the information to an Excel or PDF file.

Creating a Custom View

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Calls and Media Imports** > **Active Calls**.

3. Within the **Views** pane, select **Custom View**. Within the **Active Call** list, there are two panes: the top pane will show the custom line display once created, as well as all the column headers that you can choose from. The lower pane displays the report.

4. Within the top pane, click a field and drag it to the top of the pane to add it to your custom line display.

5. To remove a column header from the line display, double-click the name.

6. As you add fields to the line display, the report changes to reflect the added or deleted fields.

7. Once your custom summary is complete, you can export the information into an Excel or PDF file.

Exporting Active Calls

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Calls** and then **Active Calls.**

3. Depending on the amount of call records that you have within your database, the list may not populate. perform one of the following actions:

- Within the search box, type any portion of a call record (site name, extension, etc.) then click the magnifying glass.

4. Click the **Show All** button.

5. Once the list is populated, you can export the information.

6. Within the toolbar at the top of the screen, click the drop-down arrow next to **Export**. There are eight options to choose from:

- **Excel (All Levels)** – exports all call records to an Excel spreadsheet. If you have several call records in your database, this procedure may take a moment.

7. **Excel (Top Level Only)** – exports only the top level of information. For example, if you have sorted the list by call type, only the calls types and associated information export into an Excel spreadsheet.

- **Excel (Expanded Levels Only**) – exports the full detail for the expanded records to an Excel spreadsheet. The un-expanded records are in the file as a top level and you only see the summary line. **Excel (Multiple Files)** – exports each Call Type to a separate file.

8. **PDF (All Levels)** – exports all call records to a PDF file. If you have several call records in your database, this procedure may take a moment.

- **PDF (Top Level Only)** – exports only the top level of information. For example, if you have sorted the list by call type, only the calls types and associated information export into a PDF file.

9. **PDF (Expanded Levels Only)** – exports the expanded records full detail to a PDF file. The un-expanded records are in the file as a top level, and you only see the summary line.

- **Tab Delimited Text** (Top Level Only) – exports the top level of calls into a tab delimited text file.

10. The file opens on your screen allowing you to save or modify the file in the appropriate program.

Duplicate Calls

Often times, duplicate calls display in the active call database. Those duplicate calls can be removed from within the database.

Find Duplicate Calls

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Calls** and then **Active Calls**.

3. Depending on the amount of call records that you have within your database, the list may not populate. To populate the list, perform one of the following actions:

- Within the search box, type any portion of a call record (site name, extension, etc.) then click the magnifying glass.

4. Click the **Show All** button.

Once the list populates, you can remove the duplicate calls.

5. There are two ways to remove Duplicate Calls from within the database:

- Within the **Actions** pane, click the **Find Duplicate Calls**.

- Within the tool bar directly above the **Navigation** pane, click **Find Duplicate Calls**.

6. The Duplicate Call Record Removal Wizard displays. Select the date range for when you want to remove the duplicate calls.

7. The Date From box displays the current date. To change the date, click the field to access a drop-down calendar. To change the month and year click the right or left arrow. Once at the appropriate month and year, click the number to select the date. The date populates in the box.

8. The Date To box also displays the current date. To change the date, click the field to access a drop-down 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.

9. Once you have selected the dates, click the **Next** button in the lower right-hand corner. Alternatively, to cancel the wizard, click the **Cancel** button in the lower left hand corner.

    The search result displays a list of the duplicate calls within the Active Call database.

10. From within this screen you can modify the call records and fix any discrepancies within the calls.

11. When finished, click the **Next** button.

12. The next screen allows you to verify that you want to remove the list of call records from the database. At this point, you still have the option of cancelling the wizard by clicking the **Cancel** button in the lower left hand corner.

13. To remove the duplicate call, click the **Finish** button. The duplicate calls are removed.

Reprice Unbilled Calls

Most of the time, the calls that are collected within UCE are priced. However, the pricing structure can vary requiring you to reprice calls. This menu option allows you to reprice the calls without having to re-run the calls through UCE. Before you can reprice calls, a System Administrator needs to create the following items within System Admin →Call Record Setup:

- **Rate Types**

14. **Zone Group** (if applicable)

- **Rate Group**

15. **Dial Codes**

- **Call Types**

16. **Call Pricing Group**

Once the call record has been set up, you can create a search parameter within Active Calls and generate a request to reprice the calls using the rates established within cairs.net. Once CES receives the request, it completes the request and returns the status to Accounting →Call and Media Imports →Reprice Calls Requests.

Repricing Calls

1. Click the Accounting menu.

2. In the **Navigation** pane, click **Calls** and then **Active Calls**.

   Depending on the amount of records you have within your database, the list may not readily populate. To populate the list, perform one of the following actions:

   - Click the **Show All** button.

3. Within the search box, type any portion of the record and then click the magnifying glass.

4. Click the double drop-down arrow next to the magnifying glass. The screen changes to display the advanced search options within the top pane. Once you have created a parameter, the results of the search populate within the lower pane.

   Within the top pane, create a search parameter to narrow the field. Here are a few basic rules:

   - Next to each search field is a search criteria descriptor such as Contains, Equal to, Between, etc. This descriptor tells the system how to look for the information within the fields. You can select a different descriptor by clicking the field's descriptor button.

5. You can create a basic search parameter, for example, searching for a subscriber. Within the subscriber field, type the name or a portion of the name.

   - You can create a search parameter that includes multiple items. For example, you can search for a site and organization. To do so, type the name or a portion of the name into each field.

   Once you have entered the search parameters, the search string displays within the text box next to Show All.

6. To view the results of the search, click the magnifying glass next to the text box.

7. Once the results populate within the lower pane, click the **Reprice Calls** link within the **Actions** pane.

8. To view the submitted request, click **Accounting** →**Call and Media Imports** →**Reprice Calls Requests**.

Viewing Repricing Call Requests

1. Click the Accounting menu.

2. In the **Navigation** pane, click **Calls** and then **Reprice Calls Requests**

   A list of all the repricing requests populates. The newest request displays at the top of the list.

3. Within the status column, you can view what is happening with your request (whether or not it was executed, completed, failed, etc.).

Remove Call Ownership

When calls come into your cairs.net database, directory/account information is associated with the calls. However, that directory/account information may not be correct for the call records. In order to remove the wrong information and replace it with the correct information, three processes need to be performed:

First, you will remove the wrong information from the call records by performing the Remove Call Ownership action within **Accounts → Calls → Active Calls**.

Second, you need to update the directory and account information relating to the extension. Within Configured Items → Set Management → Configured Sets, update the information for the extension.

Finally, your cairs.net administrator can update the directory information relating to the call records. **Within System Admin → Service Management, the Update call record data process will need to be ru**n.

Once these three processes are complete, the correct information displays on the call record.

Removing Call Ownership

1. Click the Accounting menu.

2. In the **Navigation** pane, click **Calls** and then **Active Calls**.

   Before the list populates, you need to create a search parameter.

3. Click the double drop-down arrow to the right of the magnifying glass. The screen changes to display the advanced search options within the top pane. Here are a few basic rules when creating a search parameter, to narrow the field:

   - Next to each search field are search criteria descriptors: Contains, Equal to, Between. These descriptors tell the system how to look for the information. You can select a different descriptor by clicking the field's descriptor button.

4. You can create a basic search parameter, for example, searching for a subscriber. Within the subscriber field, type the name or a portion of the name.

   - You can create a search parameter that includes multiple items, for example, you can search for a site and organization. To do so, type the name or a portion of the name within each field.

5. Pay close attention to the Call Date field. The Date field allows you to remove the information relating to call records for a portion of the billing cycle. For example, the call record had a subscriber for the first 10 days of the cycle and a different subscriber for the remainder; you can remove the wrong subscriber for the first 10 days of the cycle or vice versa.

   Once you have entered the search parameters, the search string displays within the text box next to Show All.

6. To view the results of the search, click the magnifying glass next to the text box.

When you are creating a search parameter, you are creating the list of call records with the wrong directory or account information.

7. Within the **Actions** pane, click the **Remove Call Ownership** link. A message box displays saying that this a time consuming operation and are you sure you want to proceed. Click the **Yes** button to proceed or the **No** button to cancel the operation.

8. If the call records are already associated with a bill, the bill for the account number needs to be rolled back.

9. Once the call records are free of the wrong information you can now update the set and perform a call record update.

Reprice Call Requests

As you make requests to reprice calls within Active Calls, the requests are listed here. Once you make a request, CES sees the request and completes the action. Within the list, pay close attention to the Status column, this column tells you whether the request is not executed, cancelled, in process or completed.

Deleting a Request

You can delete a request that has is not in process or executed.

1. Click the Accounting menu.

2. In the **Navigation** pane, click **Calls** and then **Reprice Calls Requests**.

   Depending on the amount of records 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 then click the magnifying glass.

3. Click the **Show All** button.

4. Within the list, highlight the request to be deleted.

5. Within the **Actions** pane, click the **Delete Request** link.

   Requests that are in process or completed cannot be removed or cancelled.

6. If the request status is *Not Executed*, a message box displays telling you the request has been successfully cancelled. Click **OK** to continue.

Refresh Status

When you click the Refresh Status link within the Actions pane, the Status of each request refreshes. When a process in complete, the status changes to complete, and the records updated and records skipped columns display the appropriate numbers.

Archived Calls

The Archived Calls Section provides you with a list of Archived Calls. Use the options in the Views pane to select the view based on the specific information you are interested in. There are two main views:

- **Call Summary** – Call Summary is the default views option and provides a summary for all the archived calls in the database. You can view call information by call type and get specific information regarding these calls. A summary chart based on call type can be displayed.

7. **Simple View** – Provides detailed information about each call.

- The additional nine view options sort the call records and provide specific information you may want to view.

Viewing Archived Call Records

1. Click the Accounting menu.

2. In the **Navigation** pane, click **Calls** and then **Archived Calls**.

3. Depending on the amount of call records that you have within your database, the list may not populate. To populate the list, perform one of the following actions:

- Within the search box, type any portion of a call record (site name, extension, etc.) then click the magnifying glass.

4. Click the **Show All** button.

5. Once the list populates, click the plus sign (+) next to the call type to view each call record.

6. Within the Views pane, there are 12 ways to sort your archived call database based on different characteristics. By clicking the option button next to each selection, you change the organization of the list. For example, if you select *site,* the call records for each site display as a group. The following lists the different views:

- **Call Type** – this is the cairs.net default view.

7. **Simple View** – this list is based on account number, and includes all the other views in column form.

- **Number** – sorts the list based on the calling number.

8. **Organization** – sorts the list based on the organization associated with the account number.

- **Subscriber** – sorts the list alphabetically by the subscriber name associated with the account number.

9. **Call Date** – sorts the list based on call date.

- **Called Number** – sorts the list based on called number.

10. **Site** – sorts the list based on the site name associated with the account number.

- **Switch** – sort the list based on switch name associated with the account number.

11. **City** – sorts the based on city name associated with the account number.

- **Country** – sorts the list based on country name associated with the account number.

12. **Trunk** – sorts the list based on the trunk used to make the call.

13. To change the view, click the option button next to your selection.

14. To view all the calls within a selection, click the plus sign (+) next to the category name.

15. You can use the view and search functionality together to produce various types of reports. Once the list (report) displays, you can export the information to an Excel or PDF file.

Exporting Archived Calls

1. Click the Accounting menu.

2. In the **Navigation** pane, click **Calls** and then **Archived Calls**.

3. Depending on the amount of call records that you have within your database, the list may not populate. To populate the list, perform one of the following actions:

- Within the search box, type any portion of a call record (site name, extension, etc.) then click the magnifying glass.

4. Click the **Show All** button.

Once the list populates, you can export the information.

5. On the toolbar at the top of the screen, click the drop-down arrow next to **Export**. There are eight options to choose from (depending on the amount of call records, this process may take several minutes to complete):

- **Excel (All Levels)** – exports all call records to an Excel spreadsheet.

6. **Excel (Top Level Only)** – exports only the top level of information. For example, if you have sorted the list by call type, only the calls types and associated information export into an Excel spreadsheet.

- **Excel (Expanded Levels Only) –** exports the expanded groups full details to a PDF file. The un-expanded records are in the file as a top level only; therefore, you see only the summary line.

7. **Excel (Multiple Files) -** exports each of the groupings into a separate file. When you select this option, the Browse For Folder pop-up opens allowing you select where to save the files. Within the pop-up select the folder, and click the OK button, the files display within Windows Explorer in the designated location.

- **PDF (All Levels)** – exports the report to a PDF file.

8. **PDF (Top Level Only)** – exports only the top level of information. For example, if you have sorted the list by call type, only the calls types and associated information export into a PDF file.

- **PDF (Expanded Levels Only)** – exports the expanded records full detail to a PDF file. The un-expanded records are in the file as a top level, and you only see the summary line.

9. **Tab-Delimited Text (Top Level Only) –** exports the top level of each grouping to a tab-delimited text file.

The file opens allowing you to save or modify the file in the appropriate program.

Call Record Archive

After producing a bill for the call records, you may want to archive them out of the Active Call database. For example, once the billing process for November is complete, you can archive all the November calls into one file and work with the active December calls. This does two things: It allows you to work with the calls from one billing cycle at a time, and decreases the size of your active call database.

Alternatively, you can restore prior call records to the database. This allows you to resolve discrepancies within the call records from a previous billing cycle.

Archiving Call Records

1. Click the Accounting menu.

2. In the **Navigation** pane, click **Calls** and then **Call Record Archive**.

3. Within the **Actions** pane, click the **Archive or Restore Calls** link. The Archive Wizard displays.

4. Within the box, verify that the **Archive Call Record** option button is selected.

5. The From box displays the current date and allows you to select the archive start date. To change the date, click the field to access a drop-down 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.

6. The To box also displays the current date. This box allows you to select the archive end date. To change the date, click the field to access a drop-down 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.

7. Once you have selected the dates, click the **Next** button in the lower right-hand corner. To cancel the Archive Wizard, click the **Cancel** button in the lower left-hand corner.

8. The next screen allows you to select what call types to archive. Cairs.net automatically selects the All box. To change the selection, click the box next to any call type name. This removes the All selection and selects the call type for archive.

9. Click the **Next** button.

10. The wizard displays a summary of archived files (call types and number of records archived) including those from that date range.

11. Cairs.net does not perform the actual archive until you click the Finish button. Click the **Finish** button.

12. After clicking the Finish button, the wizard closes and takes you back to the Call Record Archive list. Within the list, you will see the archive you created, noted with the current date. In the Status column, *Processing…* displays until cairs.net completes the archive process. To view the status, click the **Refresh** button within the toolbar. When a status of complete displays in the column, cairs.net has created the archive file.

Restoring Call Records

1. Click the Accounting menu.

2. In the **Navigation** pane, click **Calls** and then **Call Record Archive**.

3. Within the **Actions** pane, click the **Archive** or **Restore Calls** link. The Archive Wizard displays.

4. Within the box, click the **Restore Call Record** option button.

5. The From box displays the current date and allows you to select the restore start date. To change the date, click the field to access a drop-down 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.

6. The To box also displays the current date and allows you to select the restore end date. To change the date, click the field to access a drop-down 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.

7. Once you have selected the dates, click the **Next** button in the lower right-hand corner. To cancel the Archive Wizard, click the **Cancel** button in the lower left-hand corner.

8. The next screen allows you to select what call types to Restore. Cairs.net automatically checkmarks the All box. To change the selection, click the box next to any call type name. This removes the All selection and selects the call type for archive.

9. Click the **Next** button.

   The wizard displays a summary of restored files (call types, and number of records restored) including those from that date range.

10. Click the **Finish** button.

   Once cairs.net completes the restoration, the calls display in the Active Call list again.

Rejected Calls

This option allows you to view the extensions that exist within your call records but do not have a matching record within your cairs.net database.

Viewing Rejected Calls

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Calls** and then **Rejected Calls**

3. The list populates to the right with the following columns of information:

   - **Extension** – displays the telephone number that exists within the call records (not within the cairs.net database).

4. **Site** – displays the site name.

   - **Total Count** – displays the total number of calls made using the code.

5. **Total Cost –** displays the total cost of the rejected calls

   - **Year – Month –** displays the year and month of the call record

6. There are three views that you can choose from the view the rejected calls, within the Views pane click on the radio button next to one of the following to change the view:

   - Rejected Calls – this is the default and displays the above listed fields related to your rejected calls

7. Unbilled Calls with Default Account – displays a list of the calls that are associated to the default account, once billed they will be moved to the next view

   - Billed Calls with Default Account – displays a list of the calls that were billed to the default account

Vendor Invoices and Media

You can now import various form of media into cairs. The imports allow you to populate your database with the charges associated to an account. You can import call, equipment and/or service charges. Once they are in your database you can generate a bill for the charges. There are six menu options within Vendor Invoices and Media:

- Vendor Invoices – this imports the invoices, this is a two-part import, one part is to import the charges the other part is to import the invoices. Once imported you will compare the charges from the invoice to those of the imported charges.

8. Advanced Vendor Media Import – this imports calls and one-time equipment charges

- Vendor Media Import -

9. Vendor Media template

- Rejected Imported Calls

10. Rejected Call Charges

The first import you can perform is for Vendor Invoices. This import brings in data related to invoices from outside vendors that you can associate to your accounts. This import

Advanced Vendor Media Import

Vendor Media Import allows you to build a template to import call records and one-time equipment or service charges into the active call database.

A few things need to be created within your database before you consider importing any call records. First, you need to add your call pricing groups into **System Admin→Call Record Setup→Call Pricing Group**. These groups allow you to apply rates to particular call types that enter your database.

Second, you need to add your call types into **System Admin→Call Record Setup→Call Types**. These allow you to match the call types from your vendors to the appropriate calls types within your database.

Third, you need to create your vendors within **Equipment & Services→Vendor**. When creating a project you need to associate the project to a vendor.

When creating an import template, you create a useable template for several different types of media imports. Two basic file types can be imported, a comma delimited test file (produced only through Microsoft Excel) and a *.csv file.

It is a good idea to look at and compare the total number of calls in your active call database after your import is complete.

When you import one-time charges, those equipment or services apply directly to the related telephone number. Each imported one-time charge needs to be associated with an equipment item so before importing make sure the equipment items exists within the database. Once imported, you can find the charges by accessing the telephone number within **Configured Items→Set Management**.

Enabling the Advanced Vendor Media Import Template Menu

To ensure the Vendor Media Template menu option is available within the Navigation pane, do the following.

1. Within the **Navigation** pane, click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **System Settings** to access the submenus.
3. Click **Settings**.
4. The list of system settings displays. Within the list, double-click **Use_Advanced_Media_Import**.
5. Click the **Setting Value,** and type **True**.
6. Log out of cairs.net then log back in.
7. Click the Accounting menu.
8. Within the **Accounting** pane, click **Vendor Invoices and Media** and then **Advanced Vendor Media Template**.

Creating a New Vendor Media Import Project

Before you can create a project, you must have either the comma delimited text file or *.csv file.

1. Click the Accounting menu.
2. Within the **Accounting** pane, click **Vendor Invoices and Media** and then **Advanced Vendor Media Import**.
3. Within the **Actions** pane, click the **Add New Vendor Media Import Project** link. The General – Vendor Media Import window opens.
4. While there are three information panes, we are only concerned with the **Project Information** pane at this time. Within in the pane, complete the following fields (required fields are marked with an asterisk (*)):

   - **Vendor Name*** – click the field to access a drop-down list and from the list, select the vendor name to associate to the project.

5. **Import Name*** – type the import name.

   - **Conversion Rate** – if applicable, click the field to access a drop-down list and from the list, select the conversion rate, if applicable. (The conversion rate is

added within System Admin →Call Record Setup →Call Pricing Group→Add Call Pricing Group).

6. **Month*** – click the field to access a drop-down list and from the list, select the month of the call record or one- time charge.

- **Fiscal Year***– type the current fiscal year.

7. **Default Install Date** - click the drop-down arrow to access a calendar, from the calendar select the date install 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.

8. Once you have completed the information, within the **Actions** ribbon group, click the **Save** button to save your information.

Create Template

9. Within the **Template Action** ribbon group, click the **Create Template** button to open the General – Vendor Media Import Template window. The Select File or Files… popup opens to allow you to select the file to model the template after. Browse to the location of the your text or .csv file. Once at the location, click the file name to select it then click the **Open** button.

10. The pop-up closes and returns you to the General – Vendor Media Import Template window. Notice the selected file contents display in the lower right-hand pane.

11. Within the **Template Information** pane, complete the following fields (required fields are marked with an asterisk (*)):

- **Disabled** – click the box within the **Disabled** field to disable the template.

12. **Vendor Name*** – this field populates with the vendor selected on the previous screen.

- **Template Name*** – type the name of the template you are creating.

13. **Import Type*** – click the field to access a drop-down list and select either **Call Import** or **One Time Charge Import.** If One Time Charge Import is selected, the following fields and panes are removed, as they are not utilized for this import type:

  Fields Removed

- **Cell Phone Import**

  14. Default Import Call Type

  Panes Removed

- **Call Type Mapping**

15. **Media Type** – click the field to access a drop-down list, from the list, select the appropriate media type, such as Fixed Width, CSV, Delimited File, etc.

- The fields following Media Type will change based upon the selected import and media types.

16. **Call Import/Delimited File** – The following fields display when the combination of Call Import/Delimited File is selected:

- **Delimiter Name** – click the drop-down arrow and select the delimiter name.

17. **Cell Phone Import** – click the box to insert a checkmark within the Cell Phone Import field to indicate the file is a cell phone import.

- **Default Import Call Type** – click the field to select the default call type to associate to all the imported calls. This allows cairs.net to associate a call type to those call records that do not have a call type or a matching call type.

18. **Model File Name** – displays the import file path. If no file was previously selected, click the **Select Model File** button within the **Template Actions** ribbon.

- **File Has Header** – click the box to insert a checkmark to indicate the file you are importing has column headers.

19. **File Header String** – if your file contains a header, the column headers populate within this field.

- **File Name Extension** – depending on the file type selected, the extension will either be .txt or .csv.

20. **File Column Count***– this field populates with the amount of columns present, if it is obvious. If not, then this field populates with one, and you need to add the additional columns in the next field.

- **Extra Columns** – after you have counted the number of columns within your file, type the additional number of columns here.

21. **Preview Row Count** – click the field to access a drop-down list and select the number of rows you want to preview in the Data Preview pane. At some points, it is necessary to view 200 or more rows to ensure the data is consistent throughout the entire file.

- **Default Type for Missing Equipment or Service** – click the field to access a drop-down list and from the list select the default equipment or service type to associate to incoming records

22. **Call Import/CSV** – The following fields display when the combination of Call Import/CSV is selected:

- **Cell Phone Import** – click the box to insert a checkmark within the Cell Phone Import field to indicate the file is a cell phone import.

23. **Default Import Call Type** – click the field to select the default call type to associate to all the imported calls. This allows cairs.net to associate a call type to those call records that do not have a call type or a matching call type.

- **Model File Name** – displays the import file path.

24. **File Has Header** – click the box to insert a checkmark to indicate the file you are importing has column headers.

- **File Header String** – if your file contains a header, the column headers populate within this field.

25. **File Name Extension** – depending on the file type selected, the extension will either be .txt or .csv.

- **File Column Count***– this field populates with the amount of columns present, if it is obvious. If not, then this field populates with one and you need to add the additional columns in the next field.

26. **Extra Columns** – after you have counted the number of columns within your file, type the additional number of columns here.

- **Preview Row Count** – click the field to access a drop-down list and from the list, select the number of rows you want to preview in the Data Preview pane. At some points, it is necessary to view 200 or more rows to ensure the data is consistent throughout the entire file.

27. **Default Type for Missing Equipment or Service** – click the field to access a drop-down list and from the list select the default equipment or service type to associate to incoming records

- **Call Import/Fixed Width** – This media file type is not used when importing calls.

28. **One Time Charge Import/Delimited File** – The following fields display when Fixed File is selected:

- **Delimiter Name –** click the drop-down arrow and select the delimiter name.

29. **Model File Name** – displays the import file path.

- **File Has Header** –click on the box to insert a checkmark to indicate the file you are importing has column headers.

30. **File Header String** – if your file contains a header, the column headers populate within this field.

- **File Name Extension** – depending on the file type selected, the extension will either be .txt or .csv.

31. **File Column Count***– this field populates with the amount of columns present, if it is obvious. If not, then this field populates with one and you need to add the additional columns in the next field.

- **Extra Columns** – after you have counted the number of columns within your file, type the additional number of columns here.

32. **Preview Row Count** – click the field to access a drop-down list and from the list, select the number of rows you want to preview in the Data Preview

pane. At some points, it is necessary to view 200 or more rows to ensure the data is consistent throughout the entire file.

- **Default Type for Missing Equipment or Service** – click the field to access a drop-down list and from the list select the default equipment or service type to associate to incoming records

33. **One Time Charge Import/CSV** – The following fields display when the combination of One Time Charge Import/Delimited File is selected:

- **Model File Name** – displays the import file path.

34. **File Has Header** –click on the box to insert a checkmark to indicate the file you are importing has column headers.

- **File Header String** – if your file contains a header, the column headers populate within this field.

35. **File Name Extension** – depending on the file type selected, the extension will either be .txt or .csv.

- **File Column Count***– this field populates with the amount of columns present, if it is obvious. If not, then this field populates with one and you need to add the additional columns in the next field.

36. **Extra Columns** – after you have counted the number of columns within your file, type the additional number of columns here.

- **Preview Row Count** – click the field to access a drop-down list and from the list, select the number of rows you want to preview in the Data Preview pane. At some points, it is necessary to view 200 or more rows to ensure the data is consistent throughout the entire file.

37. **Default Type for Missing Equipment or Service** – click the field to access a drop-down list and from the list select the default equipment or service type to associate to incoming records

- **One Time Charge Import/Fixed Width** – This media file type is not used when importing one time charges.

38. Within the **Actions** ribbon group, click the **Save** button to save your information and remain within this window.

Column Mapping

39. The next step is to associate the columns from your file to the fields within the cairs.net database. To do so, utilize the **Column Mapping** and the **Data Preview** panes.

40. In the Column Mapping pane, the number of rows matches the number of columns. Complete the following information for each row (required fields are marked with an asterisk (*)):

- **Import Column Index** – this field populates with a cairs.net created index number.

41. **Import Column Name** – this field populates with the number of the column you are matching.

- **Alternate Name** – type any alternate name information.

42. **Related Column Name** – click the field to access a drop-down list and from the list, select one of the following:

- **Call Date** – indicates the date the call was made.

43. **Call Time** – indicates the time the call was initiated.

- **Call Type** – indicates the call type, for example, INTNL, In-house, Local, etc.

44. **Extension** – indicates the telephone number that made the call or the telephone number that incurred the charge.

- **Called Number** – indicates the dialed telephone number.

45. **Duration** – indicates the call duration.

- **Cost** – indicates the call or equipment cost.

46. **City** – indicates the city of the called number.

- **State** – indicates the state of the called number.

47. **Mask** – in some columns, there may be extra information that needs to be striped before the file can be imported into the database. The mask allows you to define how the column is to be imported into you call database. The following options are available and described under the **Mask Info** tab in the lower left portion of the window. Type the mask within the **Mask** column corresponding to the desired row.

! All masks apply from left to right in the column. You can use a | character between the masks as a delimiter to combine two masks.

- **Empty** – no mask. Use the | character between masks as a delimiter to combine with other masks.

48. **Trim** – removes the space before and after the date.

- **Number** – removes anything from the data that is not a number. Also strips + and – characters.

49. **Currency** – removes anything from that data that is not a number. Leaves + and – prefix characters and interprets number surrounded by ( ) as negative values.

- **Last** – includes the last characters or digits. This must be followed by the number of characters to include as indicated by a # sign.

50. **First** – includes the first characters or digits. This must be followed by the number of characters to include as indicated by a # sign.

- **Strip** – specify a number of characters or digits to strip from the front of the data. This must be followed by the number of characters to strip as indicated by a # sign.

51. **Remove** – used to remove single characters from data. This must be followed by the single character to remove.

- **Duration** – used to format time data, a H = hour, M = minute, S = second, := = ignore. For example, if your time in the raw file looked like 0000:32.0 you would enter HHHH:MM.

52. **Date** – Used to format date data. Y=Year, M=Month, D=Date (colon):=(Ignore) Date MM/DD 12/25 will be changed to 12/25/2009 (If today is earlier than 12/25/2010 or 12/25/2010.

- **Time** – used to format time data, a H = hour, M = minute, S = second, := = ignore. For example, HH:MM:SS.

53. **Prefix** – prefix characters or digits. This mask must be followed by the number of characters to prefix. PREFIX (702)- 123-4567 will be changed to (702)-123-4567.

The following fields display if the Import Type and Media Type combination is Call Import/Delimited File:

- **Service/Equipment Type** – click the drop-down arrow and select the service or equipment type.

54. **Service/Equipment Name** – click the drop-down arrow and select the service or equipment name.

- **Part Name** – click the drop-down arrow and select the part name.

55. There are three information tabs located at the bottom of the Data Preview pane.

- **Raw Tab** – displays the information as it displays in the file from the Vendor.

56. **Formatted** – displays the information in the columns as it will be imported into cairs.net.

- **Masked** – displays the information in the masked form. This tab is helpful in getting the correct mask for the column.

57. If you are importing calls, you need to complete the Call Type Mapping pane. This pane matches the call types from your Vendor to call types within the cairs.net database. There are two columns within this pane:

- **Call Type** – click the field to access a drop-down list of the call types displaying in your Vendor raw file. Select the call type to change to the new call type.

58. **Imported Call Type** – click the field to access a drop-down list of the call types displaying within your cairs.net database. Select the new call type.

! If there is no call type within your raw file, use the **Default Import Call Type** field within the **Template Information** pane.

59. When you have completed filling in the information panes, click the **Save & Close** button within the **Action** ribbon group.

60. You are returned to the General – Vendor Media Import window. Notice the template you just created displays in the lower left hand corner of the Template Information pane.

61. The next step is to create a group, which allows you to upload the files before they are actually imported. CES completes the import process.

62. Within the Import Files pane, complete the following fields to create a group:

- **Group Name** – type a group name, for example, call records, one-time charges, CSV, etc.

63. **Template Name** – click the field to access a drop-down list and from the list select the name of the template to associate to the group. A group can contain only one template.

64. Click the plus sign (+) next to your group name. Make sure the group name and template name row remains highlighted.

65. Within the **Project Action** ribbon group, click the **Add Files** button.

66. Within the **Select File** or **Files to model the template after** pop-up, browse to the location of your text or .csv file. Once at the location, click the file name to select it, and click the **Open** button.

67. Your file name displays in the line directly below the group name. Notice the Status column says 'Not Started.' You need to upload the files so CES can import the calls into your database.

68. Within the **Project Action** ribbon group, click the **Import Now** button. This button both uploads and imports the file(s). Depending on the file size, this process may take a moment. When the process finishes, a message displays notifying you the File transfer is complete. Within the pop-up, click the **OK** button.

69. Within the **Actions** ribbon group, click the **Refresh** button. When the refresh is complete, click the plus sign (+) next to your group name. Notice the status of your file has changed to Ready to Import.

70. Within the **Actions** ribbon group, click the **Save & Close** button.

71. When CES runs again, it imports your file into the Active Call Database or into Equipment & Service for each telephone number.

Creating an Vendor Media Import Project from an Existing Template

To open an existing vendor media import template, do the following:

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Vendor Invoices and Media** > **Advanced Vendor Media Import**.

3. Within the **Actions** pane click the **Add New Vendor Media Import Project** link. The General – Vendor Media Import window opens.

4. Within in the **Import Files** pane, click the drop-down arrow and select template to use for the project.

5. Complete the following fields within the **Project Information** pane:

- **Vendor Name*** – click the field to access a drop-down list and from the list, select the vendor name to associate to the project.

6. **Import Name*** – type the import name.

- **Conversion Rate** – if applicable, click the field to access a drop-down list and from the list, select the conversion rate, if applicable. (The conversion rate is added within System Admin →Call Record Setup →Call Pricing Group→Add Call Pricing Group).

7. **Month*** – click the field to access a drop-down list and from the list, select the month of the call record or one- time charge.

- **Fiscal Year*** – type the current fiscal year.

8. Within the **Template Action** ribbon group, click the **Create Template** button. Two things happen, the General – Vendor Media Import Template window opens and the Select File or Files to model the template after pop-up opens.

9. Within the **Select File** or **Files to model the template after** pop-up, browse to the location of your text or csv file. Once at the location, click the file name to select it then click the **Open** button.

10. The pop-up closes and returns you to the General – Vendor Media Import Template window. Notice the selected file contents display in the lower right-hand pane.

11. Within the **Template Information** pane, complete the following fields (required fields are marked with an asterisk (*)):

- **Disabled** – click the box within the **Disabled** field to disable the template.

12. **Vendor Name*** – this field populates with the vendor selected on the previous screen.

- **Template Name*** – type the name of the template you are creating.

13. **Import Type*** – click the field to access a drop-down list and from the list select the import type; either a call import or a one-time charge for equipment/services import.

- **Media Type** – click the field to access a drop-down list, from the list, select the appropriate media type, such as Fixed Width, CSV, Delimited File, etc.

14. The fields following Media Type will change based upon the selected import and media types.

- **Call Import/Delimited File** – The following fields display when the combination of Call Import/Delimited File is selected:

  15. **Delimiter Name** – click the drop-down arrow and select the delimiter name.

- **Cell Phone Import** – click the box to insert a checkmark to indicate the file is a cell phone import.

16. **Default Import Call Type** – click the field to select the default call type to associate to all the imported calls. This allows cairs.net to associate a call type to those call records that do not have a call type or a matching call type.

- **Model File Name** – displays the import file path. If no file was previously selected, click the **Select Model File** button within the **Template Actions** ribbon.

17. **File Has Header** – click the box to insert a checkmark to indicate the file you are importing has column headers.

- **File Header String** – if your file contains a header, the column headers populate within this field.

18. **File Name Extension** – depending on the file type selected, the extension will either be .txt or .csv.

- **File Column Count***– this field populates with the amount of columns present, if it is obvious. If not, then this field populates with one and you need to add the additional columns in the next field.

19. **Extra Columns** – after you have counted the number of columns within your file, type the additional number of columns here.

- **Preview Row Count** – click the field to access a drop-down list and from the list, select the number of rows you want to preview in the Data Preview pane. At some points, it is necessary to view 200 or more rows to ensure the data is consistent throughout the entire file.

20. **Call Import/CSV** – The following fields display when the combination of Call Import/CSV is selected.

- **Cell Phone Import** – click the box within the Cell Phone Import field to indicate the file is a cell phone import.

21. **Default Import Call Type** – click the field to select the default call type to associate to all the imported calls. This allows cairs.net to associate a call type to those call records that do not have a call type or a matching call type.

- **Model File Name** – displays the import file path.

22. **File Has Header** – click on the box to insert a checkmark to indicate the file you are importing has column headers.

- **File Header String** – if your file contains a header, the column headers populate within this field.

23. **File Name Extension** – depending on the file type selected, the extension will either be .txt or .csv.

- **File Column Count***– this field populates with the amount of columns present, if it is obvious. If not, then this field populates with one and you need to add the additional columns in the next field.

24. **Extra Columns** – after you have counted the number of columns within your file, type the additional number of columns here.

- **Preview Row Count** – click the field to access a drop-down list and from the list, select the number of rows you want to preview in the Data Preview pane. At some points, it is necessary to view 200 or more rows to ensure the data is consistent throughout the entire file.

25. **Call Import/CSV** – The following fields display when the combination of Call Import/CSV is selected:

- **Cell Phone Import** – click the box to insert a checkmark within the Cell Phone Import field to indicate the file is a cell phone import.

26. **Default Import Call Type** – click the field to select the default call type to associate to all the imported calls. This allows cairs.net to associate a call type to those call records that do not have a call type or a matching call type.

- **Model File Name** – displays the import file path.

27. **File Has Header** – click on the box to insert a checkmark to indicate the file you are importing has column headers.

- **File Header String** – if your file contains a header, the column headers populate within this field.

28. **File Name Extension** – depending on the file type selected, the extension will either be .txt or .csv.

- **File Column Count***– this field populates with the amount of columns present, if it is obvious. If not, then this field populates with one and you need to add the additional columns in the next field.

29. **Extra Columns** – after you have counted the number of columns within your file, type the additional number of columns here.

- **Preview Row Count** – click the field to access a drop-down list and from the list, select the number of rows you want to preview in the Data Preview pane. At some points, it is necessary to view 200 or more rows to ensure the data is consistent throughout the entire file.

30. **Call Import/Fixed Width** – This media file type is not used when importing calls.

- **One Time Charge Import/Delimited File** – The following fields display when the combination of One Time Charge Import/Delimited File is selected:

31. **Delimiter Name –** click the drop-down arrow and select the delimiter name.

- **Model File Name** – displays the import file path.

32. **File Has Header** –click on the box to insert a checkmark to indicate the file you are importing has column headers.

- **File Header String** – if your file contains a header, the column headers populate within this field.

33. **File Name Extension** – depending on the file type selected, the extension will either be .txt or .csv.

- **File Column Count***– this field populates with the amount of columns present, if it is obvious. If not, then this field populates with one and you need to add the additional columns in the next field.

34. **Extra Columns** – after you have counted the number of columns within your file, type the additional number of columns here.

- **Preview Row Count** – click the field to access a drop-down list and from the list, select the number of rows you want to preview in the Data Preview pane. At some points, it is necessary to view 200 or more rows to ensure the data is consistent throughout the entire file.

35. **One Time Charge Import/CSV** – The following fields display when the combination of One Time Charge Import/Delimited File is selected:

- **Model File Name** – displays the import file path.

36. **File Has Header** –click on the box to insert a checkmark to indicate the file you are importing has column headers.

- **File Header String** – if your file contains a header, the column headers populate within this field.

37. **File Name Extension** – depending on the file type selected, the extension will either be .txt or .csv.

- **File Column Count***– this field populates with the amount of columns present, if it is obvious. If not, then this field populates with one and you need to add the additional columns in the next field.

38. **Extra Columns** – after you have counted the number of columns within your file, type the additional number of columns here.

- **Preview Row Count** – click the field to access a drop-down list and from the list, select the number of rows you want to preview in the Data Preview pane. At some points, it is necessary to view 200 or more rows to ensure the data is consistent throughout the entire file.

39. **One Time Charge Import/Fixed Width** – This media file type is not used when importing one time charges.

40. Within the **Actions** ribbon group, click the **Save** button to save your information and remain within this window.

Column Mapping

41. The next step is to associate the columns from your file to the fields within the cairs.net database. To do so, utilize the **Column Mapping** and the **Data Preview** panes.

42. In the Column Mapping pane, the number of rows matches the number of columns. Complete the following information for each row (required fields are marked with an asterisk (*)):

- **Import Column Index** – this field populates with a cairs.net created index number.

43. **Import Column Name** – this field populates with the number of the column you are matching.

- **Alternate Name** – type any alternate name information.

44. **Related Column Name** – click the field to access a drop-down list and from the list, select one of the following:

- **Call Date** – indicates the date the call was made.

45. **Call Time** – indicates the time the call was initiated.

- **Call Type** – indicates the call type, for example, INTNL, In-house, Local, etc.

46. **Extension** – indicates the telephone number that made the call or the telephone number that incurred the charge.

- **Called Number** – indicates the dialed telephone number.

47. **Duration** – indicates the call duration.

- **Cost** – indicates the call or equipment cost.

48. **City** – indicates the city of the called number.

- **State** – indicates the state of the called number.

49. **Mask** – in some columns, there may be extra information that needs to be striped before the file can be imported into the database. The mask allows you to define how the column is to be imported into you call database. The following options are available and described under the **Mask Info** tab in the lower left portion of the window. Type the mask within the **Mask** column corresponding to the desired row.

! All masks apply from left to right in the column. You can use a | character between the masks as a delimiter to combine two masks.

- **Empty** – no mask. Use the | character between masks as a delimiter to combine with other masks.

50. **Trim** – removes the space before and after the date.

- **Number** – removes anything from the data that is not a number. Also strips + and – characters.

51. **Currency** – removes anything from that data that is not a number. Leaves + and – prefix characters and interprets number surrounded by ( ) as negative values.

- **Last** – includes the last characters or digits. This must be followed by the number of characters to include as indicated by a # sign.

52. **First** – includes the first characters or digits. This must be followed by the number of characters to include as indicated by a # sign.

- **Strip** – specify a number of characters or digits to strip from the front of the data. This must be followed by the number of characters to strip as indicated by a # sign.

53. **Remove** – used to remove single characters from data. This must be followed by the single character to remove.

- **Duration** – used to format time data, a H = hour, M = minute, S = second, := = ignore. For example, if your time in the raw file looked like 0000:32.0 you would enter HHHH:MM.

54. **Date** – Used to format date data. Y=Year, M=Month, D=Date (colon):=(Ignore) Date MM/DD 12/25 will be changed to 12/25/2009 (If today is earlier than 12/25/2010 or 12/25/2010.

- **Time** – used to format time data, a H = hour, M = minute, S = second, := = ignore. For example, HH:MM:SS.

55. **Prefix** – prefix characters or digits. This mask must be followed by the number of characters to prefix. PREFIX (702)- 123-4567 will be changed to (702)-123-4567.

The following fields display if the Import Type and Media Type combination is Call Import/Delimited File:

- **Service/Equipment Type** – click the drop-down arrow and select the service or equipment type.

56. **Service/Equipment Name** – click the drop-down arrow and select the service or equipment name.

- **Part Name** – click the drop-down arrow and select the part name.

57. There are three information tabs located at the bottom of the Data Preview pane.

- **Raw Tab** – displays the information as it displays in the file from the Vendor.

58. **Formatted** – displays the information in the columns as it will be imported into cairs.net.

- **Masked** – displays the information in the masked form. This tab is helpful in getting the correct mask for the column.

59. If you are importing calls, you need to complete the Call Type Mapping pane. This pane matches the call types from your Vendor to call types within the cairs.net database. There are two columns within this pane:

- **Call Type** – click the field to access a drop-down list of the call types displaying in your Vendor raw file. Select the call type to change to the new call type.

60. **Imported Call Type** – click the field to access a drop-down list of the call types displaying within your cairs.net database. Select the new call type.

! If there is no call type within your raw file, use the **Default Import Call Type** field within the **Template Information** pane.

61. When you have completed filling in the information panes, click the **Save & Close** button within the **Action** ribbon group.

62. You are returned to the General – Vendor Media Import window. Notice the template you just created displays in the lower left hand corner of the Template Information pane.

63. The next step is to create a group, which allows you to upload the files before they are actually imported. CES completes the import process.

64. Within the Import Files pane, complete the following fields to create a group:

- **Group Name** – type a group name, for example, call records, one-time charges, CSV, etc.

65. **Template Name** – click the field to access a drop-down list and from the list select the name of the template to associate to the group. A group can contain only one template.

66. Click the plus sign next to your group name. Make sure the group name and template name row remains highlighted.

67. Within the **Project Action** ribbon group, click the **Add Files** button.

68. Within the **Select File** or **Files to model the template after** pop-up, browse to the location of your text or csv file. Once at the location, click the file name to select it click the **Open** button.

69. Your file name displays in the line directly below the group name. Notice the Status column says 'Not Started'. You need to upload the files so CES can import the calls into your database.

70. Within the **Project Action** ribbon group, click the **Import Now** button. This button both uploads and imports the file(s). Depending on the file size, this process may take a moment. When the process finishes, a message displays notifying you the File transfer is complete. Within the pop-up, click the **OK** button.

71. Within the **Actions** ribbon group, click the **Refresh** button. When the refresh is complete, click the plus sign (+) next to your group name. Notice the status of your file has changed to Ready to Import.

72. Within the **Actions** ribbon group, click the **Save & Close** button.

When CES runs again, it imports your file into the Active Call Database or into Equipment & Service for each telephone number.

Advanced Vendor Media Import Views

Import Views

To view the status of all imports including those in progress, completed, failed etc., do the following:

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Vendor Invoices and Media** > **Advanced Vendor Media Import**.

3. Within the **Views** pane, are the following views.

   - **Simple List** – displays the following information: Import Name, **Month***, **Fiscal Year***, **Vendor Name***, Vendor Email Address.

   4. **Fiscal Year** – displays the following information: **Fiscal Year***, **Month***, Total Records. This view consolidates imports by their fiscal year. Click the plus sign (+) to the left of the **Fiscal Year*** field to expand the row and display additional import details.

   - **Import Name** – displays the following information: Import Name, Total Records. This view displays imports by the import name. Click the plus sign (+) to the left of the Import Name field to expand the row and display additional import details.

   5. **Vendor Name** – displays the following information: **Vendor Name***, Total Records. This view displays imports by the vendor name. Click the plus sign (+) to the left of the Vendor Name field to expand the row and display additional import details.

6. Within the **Views** pane, click the radio button next to the desired view.

7. Depending on the amount of records 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 the search criteria then click the magnifying glass.

   8. Click the **Show All** button.

9. This information displays within the Vendor Media Import pane.

<mark>Rolling Back an Import</mark>

To roll back an import, do the following:

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Vendor Invoices and Media** then **Vendor Media Import**.

3. Within the **Views** pane, click the **All File Imports** radio button.

4. Depending on the amount of records 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 the import name or portion of the name then click the magnifying glass.

5. Click the **Show All** button.

6. Within the list double click on the project to open the General – Vendor Media Import screen.

7. With the Import Files pane, click on the plus sign next to the Template Name to view the imported projects. Highlight the project that you want to rollback.

8. Within the Project Actions ribbon group, click on the Rollback Imports button.

9. You have two choose when rolling back, you can either rollback the entire project or just roll back an individual file. To rollback the whole project click on the Yes, to rollback just an individual file click on No.

10. If the records have already been billed, you will not be able to rollback the import. In this case you could rollback the bill and then rollback the import.

11. When the project or file is rolled back the status changes Completed to Roll Back.

Retrying a Failed Import

To retry a failed import, do the following:

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Vendor Invoices and Media** > **Vendor Media Import**.

- Depending on the amount of records 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 the Vendor Media Template name or portion of the name then click the magnifying glass.

- Click the **Show All** button.

3. Within the list double click on the project to open the General – Vendor Media Import screen.

4. With the Import Files pane, click on the plus sign next to the Template Name to view the imported projects. Highlight the project that you want to retry.

5. Within the Project Actions ribbon group, click on the Retry Failed Imports button.

6. A pop-up opens displaying the following text, "All the rows failed during the last import will be reset to import again. Do you want to continue?"

7. Click **Yes** to continue with the import or **No** to cancel and close the window.

Deleting a Vendor Media Import Project

To delete a Vendor Media Import Project, do the following:

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Vendor Invoices and Media** > **Advanced Vendor Media Template**.

3. Depending on the amount of records 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 the Vendor Media Project name or portion of the name then click the magnifying glass.

4. Click the **Show All** button.

5. A list of Vendor Media Import Projects populates within the Vendor Media Import pane. Click the project to delete and within the **Actions** pane click **Delete Vendor Media Import Project**.

6. A pop-up window opens asking "Are you sure you want to delete the selected vendor media import?"

7. Click **Yes** to delete the project or **No** to close the window.

Advanced Vendor Media Import Views

There are several views within Advanced Vendor Media Imports that allow you to customize how the list of your projects is categorized. To change the view click on the radio button next to the option within the Views pans, the following view options are available:

- Simple List

8. Fiscal Year

- Project Name

9. Vendor Name

- All File Imports

You can create a search parameter to narrow the amount of information displayed or you can click on the Show All link in the upper right hand corner of the screen. To view records within a particular category, click on the plus sign. To view the detailed information for any record double click on the record.

Vendor Media Template

This menu option will only appear if you have turned off Advanced Vendor Media Imports. To do, turn off Advances Vendor Media Imports, go to System Admin →System Settings →Settings, within the list find Use Advanced Media Imports, change the setting value to False. You will have to logout of cairs.net and log back in to make the changes effective.

Enabling the Vendor Media Template Menu

To ensure the Vendor Media Template menu option is available within the **Navigation** pane, do the following.

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

2. In the **Navigation** pane, click the plus sign (+) next to **System Settings** to access the submenus

3. Click **Settings**.

4. The list of system settings displays. Within the list, double-click **Use_Advanced_Media_Import**.

5. Click the **Setting Value** and type **False**.

6. Log out of cairs.net then log back in.

7. Click the Accounting menu.

8. Within the **Accounting** pane, click **Calls and Media Imports** > **Vendor Media Template**.

Adding a New Vendor Media Import Template

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Vendor Invoices and Media** > **Vendor Media Template.**

3. Within the **Actions** pane click the **Add New Vendor Media Import Template**.

4. Within the **Select File** or **Files to model the template after** pop-up, browse to the location of your text or csv file. Once at the location, click the file name to select it then click the **Open** button.

5. The General – Vendor Media Import Template window opens.

6. While there are four information panes, we are only concerned with the Template Information pane at this time. Within in the pane, complete the following fields (required fields are marked with an asterisk (*)):

   - **Disabled**– click the box to insert a checkmark within the Disabled field to disable the template.

7. **Vendor Name*** – type the vendor name.

   - **Template Name** – click the field to access a drop-down list and from the list select the conversion rate, if applicable. (The conversion rate is added within System Admin →Call Record Setup →Call Pricing Group).

8. **Import Type*** – click the field to access a drop-down list and from the list, select either Call Import or One Time Charge Import. If One Time Charge Import is selected, the following fields and panes are removed. as they are not utilized for this import type:

   Fields Removed

   - Cell Phone Import

9. Default Import Call Type

   Panes Removed

   - Call Type Mapping

10. **Media Type** – click the field to access a drop-down list, from the list select the appropriate media type, such as Fixed Width, CSV, Delimited File, etc. The fields following Media Type will change based upon the selected media type.

- **Delimited File** – The following fields display when Delimited File is selected:

    11. **Delimiter Name** – click the drop-down arrow and select the delimiter name.

    - **Default Import Call Type** – click the field to select the default call type to associate to all the imported calls. This allows cairs.net to associate a call type to those call records that do not have a call type or a matching call type.

    12. **Model File Name** – displays the import file path. If no file was previously selected, click the **Select Model File** button within the **Template Actions** ribbon.

    - **File Has Header** –click the box to insert a checkmark to indicate the file you are importing has column headers.

    13. **File Header String** – if your file contains a header, the column headers populate within this field.

    - **File Name Extension** – depending on the file type selected, the extension will either be .txt or .csv.

    14. **File Column Count***– this field populates with the amount of columns present, if it is obvious. If not, then this field populates with one and you need to add the additional columns in the next field.

    - **Extra Columns** – after you have counted the number of columns within your file, type the additional number of columns here.

    15. **Preview Row Count** – click the field to access a drop-down list and from the list, select the number of rows you want to preview in the Data Preview pane. At some points, it is necessary to view 200 or more rows to ensure the data is consistent throughout the entire file.

    - **Default Type for Missing Equipment or Service** – click the field to access a drop-down list and from the list select the default equipment or service type to associate to incoming records

16. **CSV** – The following fields display when CSV is selected:

    - **Cell Phone Import** – this field defaults to include a checkmark indicating that you are importing cell phone data. Click the box to remove the check indicating that you are importing some other type of call data.

    17. **Default Import Call Type** – click the field to select the default call type to associate to all the imported calls. This allows cairs.net to associate

a call type to those call records that do not have a call type or a matching call type.

- **Model File Name** – displays the import file path.

18. **File Has Header** – click the box to insert a checkmark to indicate the file you are importing has column headers.

- **File Header String** – if your file contains a header, the column headers populate within this field.

19. **File Name Extension** – depending on the file type selected, the extension will either be .txt or .csv.

- **File Column Count*** – this field populates with the amount of columns present, if it is obvious. If not, then this field populates with one and you need to add the additional columns in the next field.

20. **Extra Columns** – after you have counted the number of columns within your file, type the additional number of columns here.

- **Preview Row Count** – click the field to access a drop-down list and from the list, select the number of rows you want to preview in the Data Preview pane. At some points, it is necessary to view 200 or more rows to ensure the data is consistent throughout the entire file.

21. **Fixed Width** – The following fields display when Fixed File is selected:

- Fixed Width String –

22. **Model File Name** – displays the import file path.

- **File Has Header** –click the box to insert a checkmark to indicate the file you are importing has column headers.

23. **File Header String** – if your file contains a header, the column headers populate within this field.

- **File Name Extension** – depending on the file type selected, the extension will either be .txt or .csv.

24. **File Column Count*** – this field populates with the amount of columns present, if it is obvious. If not, then this field populates with one and you need to add the additional columns in the next field.

- **Extra Columns** – after you have counted the number of columns within your file, type the additional number of columns here.

25. **Preview Row Count** – click the field to access a drop-down list and from the list, select the number of rows you want to preview in the Data Preview pane. At some points, it is necessary to view 200 or more rows to ensure the data is consistent throughout the entire file.

! If the Import Type* is One Time Charge and the Media Type* is Fixed Width the following message pop-up displays. "The media file is not suitable for fixed width. Please try another media type. "

26. Once you have completed the information, within the **Actions** ribbon group, click the **Save** button to save your information.

<u>**Create Template**</u>

27. Within the **Select File** or **Files to model the template after** pop-up, browse to the location of your text or csv file. Once at the location, click the file name to select it then click the **Open** button.

28. The pop-up closes and returns you to the General – Vendor Media Import Template window. Notice the selected file contents display in the lower right-hand pane.

29. Within the **Template Information** pane, complete the following fields (required fields are marked with an asterisk (*)):

- **Template Name*** – type the name of the template you are creating.

30. **Import Type*** – click the field to access a drop-down list and from the list select the import type; either a call import or a one-time charge for equipment/services import.

- **Cell Phone Import** – click the box to insert a checkmark to indicate that the import is for cell phones.

31. **Vendor Name*** – this field populates with the Vendor selected on the previous screen.

- **Delimiter Name** – click the field to access a drop-down list and from the list select the appropriate delimiter, for example; comma, tab, space, etc.

! If no delimiters display within the drop-down list, you need to create them. Within the Template Actions, ribbon group click the Create Delimiter button and within the Create Delimiter pop-up box, complete the following fields (required fields are marked with an asterisk (*)):

Delimiter Name – type the delimiter name.

Delimiter Text – type the delimiter symbol. If the desired symbol isn't available use the Delimiter Ascii value field.

Delimiter Ascii Value – auto-populates with the Ascii value based on the value entered into the Delimiter Text field. If no value is entered into the Delimiter Text you can type the Ascii value within this field.

! You can create but not currently delete a delimiter.

- **Media Type** – click the field to access a drop-down list and from the list, select the appropriate media type, such as Fixed Width, CSV, Delimited File, etc.

! If the Import Type* is One Time Charge and the Media Type* is Fixed Width the following message pop-up displays. "The media file is not suitable for fixed width. Please try another media type. "

- **Default Import Call Type** – click the field to select the default call type to associate to all the imported calls. This allows cairs.net to associate a call type to those call records that do not have a call type or a matching call type.

32. **Model File Name** – displays the import file path.

- **File Has Header** –click the box to insert a checkmark to indicate the file you are importing has column headers.

33. **File Header String** – if your file contains a header, the column headers populate within this field.

- **File Name Extension** – depending on the file type selected, the extension will either be .txt or .csv.

34. **File Column Count***– this field populates with the amount of columns present, if it is obvious. If not, then this field populates with one and you need to add the additional columns in the next field.

- **Extra Columns** – after you have counted the number of columns within your file, type the additional number of columns here.

35. **Preview Row Count** – click the field to access a drop-down list and from the list select the number of rows you want to preview in the Data Preview pane. At some points, it is necessary to view 200 or more rows to ensure the data is consistent throughout the entire file.

36. Within the **Actions** ribbon group, click the **Save** button to save your information and remain within this window.

Column Mapping

37. The next step is to associate the columns from your file to the fields within the cairs.net database. To do so, utilize the **Column Mapping** and the **Data Preview** panes.

38. In the Column Mapping pane, the number of rows matches the number of columns. Complete the following information for each row (required fields are marked with an asterisk (*)):

- **Import Column Index** – this field populates with a cairs.net created index number.

39. **Import Column Name** – this field populates with the number of the column you are matching.

- **Alternate Name** – type any alternate name information.

40. **Related Column Name** – click the field to access a drop-down list and from the list select one of the following:

- **Call Date** – indicates the date the call was made.

41. **Call Time** – indicates the time the call was initiated.

- **Call Type** – indicates the call type, for example, INTNL, In-house, Local, etc.

42. **Extension** – indicates the telephone number that made the call or the telephone number that incurred the charge.

- **Called Number** – indicates the dialed telephone number.

43. **Duration** – indicates the call duration.

- **Cost** – indicates the call or equipment cost.

44. **City** – indicates the city of the called number.

- **State** – indicates the state of the called number.

45. **Mask** – in some columns, there may be extra information that needs to be striped before the file can be imported into the database. The mask allows you to define how the column is to be imported into you call database. The following options are available and described under the **Mask Info** tab in the lower left portion of the window. Type the mask within the **Mask** column corresponding to the desired row.

! All masks apply from left to right in the column. You can use a | character between the masks as a delimiter to combine two masks.

- **Empty** – no mask. Use the | character between masks as a delimiter to combine with other masks.

46. **Trim** – removes the space before and after the date.

- **Number** – removes anything from the data that is not a number. Also strips + and – characters.

47. **Currency** – removes anything from that data that is not a number. Leaves + and – prefix characters and interprets number surrounded by () as negative values.

- **Last** – includes the last characters or digits. This must be followed by the number of characters to include as indicated by a # sign.

48. **First** – includes the first characters or digits. This must be followed by the number of characters to include as indicated by a # sign.

- **Strip** – specify a number of characters or digits to strip from the front of the data. This must be followed by the number of characters to strip as indicated by a # sign.

49. **Remove** – used to remove single characters from data. This must be followed by the single character to remove.

- **Duration** – used to format time data, a D=Day, H=Hour, M = Minute, S = Second (colon):= (Ignore). For example, if your time in the raw file looked like 0000:32.0 you would enter HHHH:MM.

50. **Date** – used to format date data. Y   =Year, M=Month, D=Date (colon):= (Ignore) Date MM/DD 12/25 will be changed to 12/25/2009 (If today is earlier than 12/25/2010 or 12/25/2010.

- **Time** – used to format time data. H = Hour, M = Minute, S = Second (colon):= ignore. For example, HH:MM:SS.

51. **Prefix** – prefix characters or digits. This mask must be followed by the number of characters to prefix. PREFIX (702)- 123-4567 will be changed to (702)-123-4567.

52. There are three information tabs located at the bottom of the Data Preview pane.

- **Raw Tab** – displays the information as it displays in the file from the Vendor.

53. **Formatted** – displays the information in the columns as it will be imported into cairs.net.

- **Masked** – display the information in the masked form. This tab is helpful in getting the correct mask for the column.

54. If you are importing calls, you need to complete the Call Type Mapping pane. This pane matches the call types from your Vendor to call types within the cairs.net database. There are two columns within this pane:

- **Call Type** – click the field to access a drop-down list of the call types displaying in your Vendor raw file. Select the call type to change to the new call type.

55. **Imported Call Type** – click the field to access a drop-down list of the call types displaying within your cairs.net database. Select the new call type.

! If there is no call type within your raw file, use the **Default Import Call Type** field within the **Template Information** pane.

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56. When you have completed filling in the information panes, click the **Save & Close** button within the **Actions** ribbon group. You are returned to the Vendor Media Template window.

Enabling a Vendor Media Template

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Vendor Invoices and Media** and then **Vendor Media Template**.

3. Within the **Views** pane, click the **Disabled Templates** radio button.

4. Depending on the amount of records 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 the Vendor Media Template name or portion of the name then click the magnifying glass.

5. Click the **Show All** button.

6. A list of disabled Vendor Media Templates populates within the Vendor Media Template pane.

7. Click and highlight the template within the Vendor Media Template pane and within the **Actions** pane click the **Enable/Disable Template** link.

8. A pop-up window opens asking if you want to **Enable this template?**

9. Click **Yes** to enable the template or **No** to close the pop-up window.

10. The enabled template no longer displays within disabled list but rather now displays within the enabled template list.

Modifying a Vendor Media Template

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Vendor Invoices and Media** and then **Vendor Media Template.**

3. Depending on the amount of records 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 the Vendor Media Template name or portion of the name then click the magnifying glass.

4. Click the **Show All** button.

5. A list of Vendor Media Templates populates within the Vendor Media Template pane.

6. Double-click the template to modify. The Vendor Media Import window opens.

7. Modify information as needed then click **Save** to save the information and remain on the window or **Save & Close** to save the information and close the window.

Disabling a Vendor Media Template

The disable function is for templates that are in use, but no longer usable. Without Disable, the only way to delete templates currently in use would be to roll back all the projects using that template, delete all related projects, then delete the template (not something we want to do for obvious reasons).

! Disabled templates are not available within the Template Name* drop-down field when adding a new vendor media import project group list. Additionally, files cannot be added to disabled templates.

To disable a template, do the following:

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Vendor Invoices and Media** > **Vendor Media Template**.

   Depending on the amount of records 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 the Vendor Media Template name or portion of the name then click the magnifying glass.

   - Click the **Show All** button.

3. A list of Vendor Media Templates populates within the Vendor Media Template pane.

4. Click and highlight the template within the Vendor Media Template pane and within the **Actions** pane click the **Enable/Disable Template** link.

   A pop-up window opens asking if you want to **Disable this template?**

5. Click **Yes** to disable the template or **No** to close the pop-up window.

6. The template no longer displays within the list of enabled templates.

Viewing a Disabled Vendor Media Template

To view disabled templates, do the following:

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Vendor Invoices and Media** > **Vendor Media Template**.

3. Within the Views pane, click the **Disabled Templates** radio button.

4. If the list of disabled Vendor Media Templates does not populate, either:

   - Within the search box, type the Vendor Media Template name or portion of the name then click the magnifying glass.

   5. Click the **Show All** button.

6. A list of disabled Vendor Media Templates populates within the Vendor Media Template pane.

Vendor Media Import

Vendor Media Import allows you to import call records and one-time equipment or service charges into the active call database.

A few things need to be created within your database before you consider importing any call records. First, you need to add your call pricing groups into **System Admin→Call Record Setup→Call Pricing Group**. These groups allow you to apply rates to particular call types that enter your database.

Second, you need to add your call types into **System Admin→Call Record Setup→Call Types**. These allow you to match the call types from your vendors to the appropriate calls types within your database.

Third, you need to create your vendors within **Equipment & Services➔Vendor**. When creating a project you need to associate the project to a vendor.

When creating an import template, you create a useable template for several different types of media imports. Two basic file types can be imported, a comma delimited text file (produced only through Microsoft Excel) and a *.csv file.

It is a good idea to look at and compare the total number of calls in your active call database after your import is complete.

When you import one-time charges, those equipment or services apply directly to the related telephone number. Each imported one-time charge needs to be associated with an equipment item so before importing make sure the equipment items exists within the database. Once imported, you can find the charges by accessing the telephone number within **Configured Items➔Set Management**.

Enabling the Vendor Media Import Menu

To ensure the Vendor Media Import menu option is available within the **Navigation** pane, do the following.

1. Click the **System Admin** menu.
2. In the **Navigation** pane, click the plus sign (+) next to **System Settings** to access the submenus
3. Click **Settings**.
4. The list of system settings displays. Within the list, double-click **Use_Advanced_Media_Import**.
5. Click the **Setting Value** and type **False**.
6. Log out of cairs.net then log back in.
7. Click the Accounting menu.
8. Within the **Accounting** pane, click **Calls and Media Imports** then> **Vendor Media Import**.

Viewing File Raw Data

To view all file imports by date, do the following:

1. Click the **Accounting** menu.
2. In the **Navigation** pane, click **Vendor Invoices and Media** > **Vendor Media Import**.
3. Within the **Views** pane, click the radio button next to **All File Imports**.
4. Depending on the amount of records 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 the Vendor Media Template name or portion of the name then click the magnifying glass.
5. Click the **Show All** button.
6. Within the **Vendor Media Import** pane, double-click the file to view.

7. The File Raw Data window opens and displays the data within the File Raw Data pane. The following fields display:

    • Row Number*

8. Row Data

    • Import Processed

9. Failed Status

10. Click **Save and Close** to close the window.

Completing a Vendor Media Import

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Vendor Invoices and Media** > **Vendor Media Import**.

3. Depending on the amount of records 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 the Vendor Media Template name or portion of the name then click the magnifying glass.

    4. Click the **Show All** button.

5. A list of Vendor Media Templates populates within the Vendor Media Template pane. Double-click the desired template.

6. The General – Vendor Media Import window opens.

7. Within the **Project Action** ribbon group, click **Import Now**.

8. A pop-up opens, stating the information is Importing… and the **Status** column within the lower pane changes to **Importing**.

9. Depending on the file size, this process may take a moment. When the process finishes, a message displays notifying you the File transfer is complete. Within the pop-up, click the **OK** button.

10. Within the **Actions** ribbon group, click the **Refresh** button.

11. Within the **Actions** ribbon group, click the **Save & Close** button.

12. When CES runs again, it imports your file into the Active Call Database or into Equipment & Service for each telephone number.

Retrying a Failed Import

To retry a failed import, do the following:

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Vendor Invoices and Media** > **Vendor Media Import**.

3. Depending on the amount of records 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 the Vendor Media Template name or portion of the name then click the magnifying glass.

4. Click the **Show All** button.

5. Within the **Vendor Media Import** pane, double-click the file to view. The General-Vendor Media Import window opens.

6. In the lower pane is a list of files. Double-click the file to re-import.

7. Within the **File Action** ribbon group, click the **Retry Failed Import** button.

8. A pop-up opens displaying the following text, "All the rows failed during the last import will be reset to import again. Do you want to continue?"

9. Click **Yes** to continue with the import or **No** to cancel and close the window.

Retrying a Failed Import for an Individual File(s)

To retry a failed import, do the following:

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Vendor Invoices and Media** > **Vendor Media Import**.

3. Depending on the amount of records 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 the Vendor Media Template name or portion of the name then click the magnifying glass.

4. Click the **Show All** button.

5. Within the **Vendor Media Import** pane, double-click the file to view. The General-Vendor Media Import window opens.

6. In the lower pane is a list of files. Double-click the file to re-import.

7. Within the **File Action** ribbon group, click the **Retry Failed Import** button.

8. A pop-up opens displaying the following text, "All the rows failed during the last import will be reset to import again. Do you want to continue?"

9. Click **Yes** to continue with the import or **No** to cancel and close the window.

Editing the Row Data Column

To edit the Row Data column, do the following:

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Vendor Invoices and Media** > **Vendor Media Import**.

3. Depending on the amount of records 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 the Vendor Media Template name or portion of the name then click the magnifying glass.

4. Click the **Show All** button.

5. Within the **Vendor Media Import** pane, double-click the template to view. The General-Vendor Media Import window opens.

6. In the lower pane is a list of files. Double-click the file to view.

7. The File Raw Data window opens. Click the **Row Data** column for the row you want to edit

8. Edit the information within the field then click **Save** to save the changes and remain within the **File Raw Data** window or **Save & Close** to save the changes and close the window.

Viewing Vendor Media Import Views and Status

Import Views

To view the status of all imports including those in progress, completed, failed etc., do the following:

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Vendor Invoices and Media** > **Vendor Media Import**.

3. Within the **Views** pane, are the following views

   - **Simple List**

   4. **All File Imports**

5. Depending on the amount of records 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 the Vendor Media Template name or portion of the name then click the magnifying glass.

   6. Click the **Show All** button.

A list of file imports populates within the Vendor Media Import pane. The **Status** column displays the file import status. The following statuses are possible.**Viewing Import Status**

To view the status of all imports including those in progress, completed, failed etc., do the following:

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Vendor Invoices and Media** > **Vendor Media Import**.

3. Within the **Views** pane, click the **All File Imports** radio button.

4. Depending on the amount of records 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 the Vendor Media Template name or portion of the name then click the magnifying glass.

   5. Click the **Show All** button.

6. A list of file imports populates within the Vendor Media Import pane. The **Status** column displays the file import status. The following statuses are possible.

- Roll Back

- Uploading

- Ready to Import

- Not Started

- Completed

- Importing

- Failed

Rolling Back an Import

To roll back an import, do the following:

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Vendor Invoices and Media** > **Vendor Media Import**.

3. Within the **Views** pane, click the **All File Imports** radio button.

   Depending on the amount of records 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 the import name or portion of the name then click the magnifying glass.

4. Click the **Show All** button.

5. Within the **Vendor Media Import** pane, single click the import file to roll back.

6. Within the **Actions** pane, click **Roll Back**.

7. The list of imports will clear out within the Vendor Media Import pane. To populate the list either:

   - Within the search box, type the import name or portion of the name then click the magnifying glass.

8. Click the **Show All** button.

9. The import status for the rolled back file, changes from Completed to Roll Back.

Viewing Imported Active Calls

The Imported Active Calls button displays active calls for

To view imported active calls, do the following:

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Vendor Invoices and Media** > **Vendor Media Import**.

   Depending on the amount of records 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 the import name or portion of the name then click the magnifying glass.

3. Click the **Show All** button.

4. Within the **Vendor Media Import** pane, double-click the import to view.

5. The General-Vendor Media Import window opens. Within the **Show** ribbon group, click the **Imported Active Calls** button.

6. A pop-up opens, asking "Do you want to see imported calls of the whole project (Y) or individual file (N)? Click **Yes** to see the imported calls for the entire project or **No** to be able to select individual files.

Viewing Imported Charges

To view imported charges, do the following:

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Vendor Invoices and Media** > **Vendor Media Import**.

3. Depending on the amount of records 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 the import name or portion of the name then click the magnifying glass.

4. Click the **Show All** button.

5. Within the **Vendor Media Import** pane, double-click the import to view.

6. The General-Vendor Media Import window opens. Within the **Show** ribbon group, click the **Imported Charges** button.

7. A pop-up opens, asking "Do you want to see imported calls of the whole project (Y) or individual file (N)? Click **Yes** to see the imported calls for the entire project or **No** to be able to select individual files.

8. The imported charges display on screen.

Authorization Codes

Within Authorization Codes, you can track the codes used by your subscribers or organizations to an account number. Thereby allowing you to bill for call charges incurred while using the code. Due to security concerns, this section of the software may be visible to only those involved with the distribution and billing of call charges.

Please be aware that when you are adding an authorization code to a subscriber or unofficial account, the only place to view the association is within Authorization Codes. However, if you associate an authorization code to an official account, you can view the associated code by accessing the Auth Code button within the Show ribbon group.

Adding/Modifying/Deleting

Adding an Authorization Code

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Authorization Codes**.

3. Within the **Actions** pane, click **Add New Authorization Codes** link.

4. The General – Authorization Code window opens. Complete the following fields (required fields are marked with an asterisk (*)):

   - **Authorization Code*** – there are three different ways you can generate a random authorization code:

     1. If the field is populated with the term 'Auto", cairs.net automatically generates a random code based on the settings your administrator determined in System Admin → System Settings → Auto Number Setup.

! In order to use the following two ways to generate an authorization code, the Auto Number Setup for Authorization Codes needs to be disabled.

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2. Click the field to type in the authorization code

5. You can type an 'A' in the field to have cairs.net automatically generate an 8 digit random authorization code. You can also provide a prefix to the 'A' which indicates that the authorization code must begin with the digits before the 'A', for example, if you enter 74A, the code may be 74123456 (74 + 6 digits to make an 8 digit code). If you do not want an eight digit code, you can type a number after the 'A' to indicate how long you want the authorization code to be. For example, A4, the code generated would be four digits; you can generate a code up to 16 digits long. The code does not auto-generate until you click the Save button.

- **Switch Name** – click the drop-down arrow to access a list and from the list, select the switch name

6. **Account Number*** – click the drop-down arrow to access a list of account numbers. From the list, select the appropriate number.

- **Organization Name** – click the drop-down arrow to access a list and from the list, select the name of the organization. The organization drop-down list displays the bottom-most organization first. After the ~~the complete path to the selected organization displays. In the example below, we selected Documentation, which is a child to Development and Unique. Each level of the organizational tree is separated by a >.
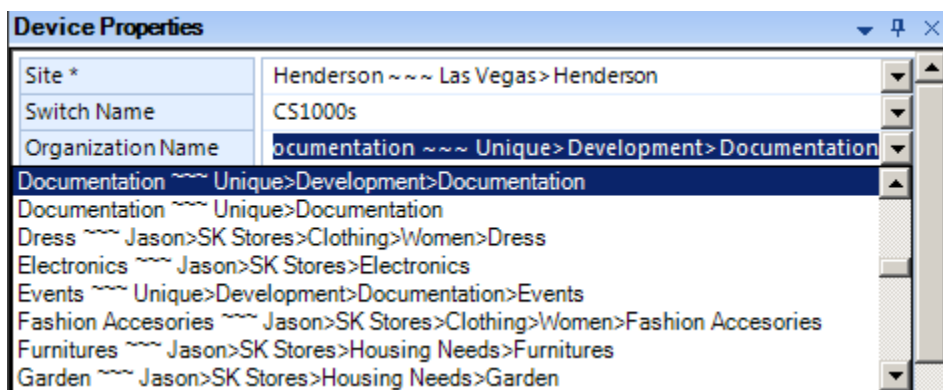
- Once you select an organization, the complete path populates within the field.

7. **Subscriber Name –** click the drop-down arrow to access a list, and from the list, select the subscriber.

- **Class of Service Name** – click the drop-down arrow to access a list, from the list, select the COS.

8. **Class of Restriction Name** – click the drop-down arrow to access a list and from the list, select the COR.

- **Class of Service** – click the drop-down arrow to access a list and from the list, select the COS Number

9. **Class of Restriction** – click the drop-down arrow to access a list and from the list, select the COR Number

- **Months Before Reuse** – type a number between 1 and 12 to indicate the number of months that have to pass before the authorization code is usable.

10. **Expiration Date** – click the field to access a drop-down calendar and from the calendar, select the date the authorization code expires. To change the date, click the field to access a drop-down 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.

- **Miscellaneous 1 – 5** – type any additional authorization code information.

11. **Sent to Switch** – this field defaults to include a checkmark to indicate that once you save the record to the cairs.net database, the appropriate scripts run to add the authorization and related information to the switch database.

- **Withdraw From Switch** – this fields defaults to include a checkmark to indicate that once you delete the record from the cairs.net database, the appropriate scripts run to delete the code from the switch database.

12. Within the **Actions** ribbon group, click the **Save & New** button to continue adding authorization codes or **Save & Close** to return to the Authorization code list.

Modifying an Authorization Code

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Authorization Codes**.

   Depending on the amount of records 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 the Authorization Code or portion of the code then click the magnifying glass.

3. Click the **Show All** button.

4. Click the Authorization Code to modify. The Authorization Code window opens.

5. Within the list, find the field to modify. If the field contains a drop-down arrow, select the new information from the list. If you click the field and a cursor becomes available, type the new information.

6. Within the **Actions** ribbon group, click **Save & Close** to return to the Authorization Code list.

Deleting and Authorization Code

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Authorization Codes**.

   Depending on the amount of records 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 the Authorization Code or portion of the code then click the magnifying glass.

3. Click the **Show All** button.

4. The Authorization Code list opens, displaying all codes. There are three ways to delete an authorization code:

   - Highlight the code in the list and within the **Actions** pane click the **Delete Authorization Codes** link.

5. Highlight the code and within the tool bar directly above the **Navigation** pane, click the red **X**.

   - Double-click the code and the Authorization Code 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 delete the code. Click **Yes** within the box to continue or **No** to cancel the operation.

Switch Communications

Sending the Authorization Code to the Switch

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Authorization Codes**.

Depending on the amount of records 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 the Authorization Code or portion of the code then click the magnifying glass.

3. Click the **Show All** button.

4. Click the Authorization Code to modify. The Authorization Code window opens.

5. Within the Run Time ribbon group, click the Go 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. Once all the required fields are completed, you have three choices:

- **Continue** – click the Continue button to send the script to the switch.

9. **Skip** – click the Skip button to make the changes within the cairs.net database but not in the switch. When you click Skip a message box displays verifying that you really want to skip running the scripts, within the box click Yes to continue or No to return to the Scripts window.

- **Cancel** – click the Cancel button to abort the operation.

10. After you click your selection, the window closes. To view whether a script was completed, click the WOPR Script History button. Pay close attention to the Status column to verify that your script ran successfully.

11. If the script failed, a message displays in the Error Message column.

Scheduling Switch Communications

You can schedule your scripts to run at any time. To do so, complete the following steps:

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Authorization Codes**.

3. Depending on the amount of records 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 the Authorization Code or portion of the code then click the magnifying glass.

4. Click the **Show All** button.

5. Click the Authorization Code to modify. The Authorization Code window opens.

6. Within the Run Time ribbon group, click the Go button.

7. The Scripts window opens displaying the list of switch scripts that commit the information to the switch.

8. 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 (required fields are marked with an asterisk (*)):

9. Click the schedule field within the top line, click the drop-down arrow to access a calendar and from the calendar click the date to select, once clicked the date displays in the field (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 time (12:00 am) also populates in the box. To change the time, click the hour, minute or am/pm to type the new time.

    The date and time display in the Schedule field.

10. Click the **Continue** button. The scripts run at the designated date and time.

11. To view whether a script was completed, click the WOPR Script History button. Pay close attention to the Status column to verify that your script ran successfully.

    If the script failed, a message displays in the Error Message column.

Deleting from the Switch

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Authorization Codes**.

3. Depending on the amount of records 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 the Authorization Code or portion of the code then click the magnifying glass.

    4. Click the **Show All** button.

5. Click the Authorization Code to modify. The Authorization Code window opens.

6. Within the Run Time ribbon group, click the Delete From Switch button.

Reports

This section provides you an area to produce different reports regarding your billing processes. There are six report types that you can generate, they are:

- **Billing Reports** – allows you to generate charge summaries for extensions, account, orgs, etc.

7. **Unofficial Bill Summary by Number –** generates a report based on item number whether a telephone number or cell phone number associated to unofficial accounts only

- **Unofficial Bill Summary by Subscriber –** generates a report on subscribers associated to unofficial accounts only.

8. **Financial Summary** – this report works in connection with Unique Financial and STARS

- **Rejected Authorization Codes** – displays a list of the authorizations codes that exist within your call records but do not have matching records within your database

9. **Payment History** – displays a list of the payments made and the associated account number

- **Billed Equipment and Service Summary** – provides a list of the equipment and services that have been billed upon, the report is based on the equipment or service name

10. **Billed Inventory** – provides a list of the account number and the associated equipment and services charges that have been billed

- **Bill Certification –** allows you to view the bills that are certified and uncertified for a particular billing cycle.

After you generate any report to the screen you can export that information into an Excel, PDF or text file.

Billing Reports

Billing reports allow you to create a variety of reports for billing data within your database. In order for you to generate a report, you must have run at least one bill. Cairs.net pulls data from the billing cycles to produce your report.

There are several different reports that you can create based on a variety of search parameters. Within the Report Setup pane, you create templates that allow you to generate the same report on a regular basis. Once a report is generate to your screen, you can then export the information to an excel spreadsheet or a PDF file.

There are five different report selections to choose from, each of the selections bases the charges and totals on a particular parameter. The five report selections are as follows:

- **Charge Summary** – displays a list of the total one-time, recurring and call charges, adjustments and the total for each account number, the grand total for all charges displays at the bottom of the list

- **Charge Summary by Extension** – displays the same information as the charge summary adding the extension/number and the total minutes and call counts. The grand total displays at the bottom of the list as well as a few average values.

- **Revenue** – displays the same information as the charge summary adding the number of statements generated for the billing dates entered as well as the payment made for each account. Again the grand total displays at the bottom of the list as well as total based on statement and account.

- **Charge Summary by Organization** – displays the same information as the charge summary adding all the organization levels and the total minutes and call counts. The grand total displays at the bottom of the list as well as a few average values.

- **Charge Summary by Org and Extension** – displays the same information as the charge summary adding the extension/number and the organization and the total minutes and call counts. The grand total displays at the bottom of the list as well as a few average values.

- **Charge Summary by Accounts Top Organization –** displays the same information as the charge summary adding only the top level organization.   All charges for lower level organizations display on the top level line.

- **Charge Summary By Rollup Organization and Account** – displays the same information as the charge summary, however, the charges for the each account number is rolled together for each organization. If an account number is associated to more than one organization, the appropriate charges are rolled into each organization.

- **Charge Summary Rollup By Organization** – displays the same information as the charge summary however; the charges for all child organizations are rolled into the charges for the parent organization. For example, if you have the organization structure of Unique → Documentation, the charges for documentation would be included in the total for Unique.

- **Charge Summary by Rollup Organization and Extension –** displays the same information as the charge summary, however, the charges for each extension is rolled into the charges for the parent organization.

Creating a Report

1. Click the **Accounting** menu.

- In the **Navigation** pane, click **Reports** > **Billing Reports**.

2. Within the right hand pane, the screen changes displaying two panes. Within the top pane complete the following field (required fields are marked with an asterisk (*):

- **Report Name*** – type the name of the report to generate. Be as specific as possible so you know what the report generates for future use.

- **Heading Text** – type the heading text for the report, this information displays at the top of the exported report.

- **Report Selection*** – click the drop-down arrow to access a list and from the list, select the type of report to generate, (please see the above descriptions).

- **Fiscal Year*** – type the fiscal year.

! If this is a one-time report and it does not generate to the screen, remove the fiscal year and try to generate the report again. If you are creating a template, save the template and then generate the report.

- **Start Billing End Date*** – click the drop-down arrow to access a calendar and from the calendar select the first date of the billing cycle. To change the month and year click the right or left arrow. Once at the appropriate month and year, click the number to select the date. The date populates in the box.

- **End Billing End Date*** – click the field to access a drop-down calendar and from the calendar select the last date of the billing cycle. To change the month and year click the right or left arrow. Once at the appropriate month and year, click the number to select the date. The date populates in the box.

- **Report Detail*** – click the field to access a drop-down list and from the list select the report detail type: Detail and Total, Detail Only, or Total Only.

- **Exclude Zero Cost** * – click the box to insert a checkmark indicating you do not want to see zero cost items within your report, leave the field blank to include all items within your report.

- **Exclude Official** * – click the box to insert a checkmark indicating you do not want to see Official Accounts within your report or leave the field blank to include official accounts.

- **Exclude Unofficial** * – click the box to insert a checkmark indicating you do not want to see Unofficial Accounts within your report or leave the field blank to include unofficial accounts.

- **Show Separate Call Types** * – click the box to insert a checkmark indicating you want your report to generate a total for each call type.

- **Show Separate Vendor Charges** * – click the box to insert a checkmark indicating that you want your report to generate a total for each Vendor.

- **Account Number** – to generate the report for a specific account number, click the drop-down arrow to access a list. From the list, select the account number.

- **TCO** – to generate the report for a specific TCO, click the drop-down arrow to access a list. From the list, select the TCO name.

- **Organization Name** – click the drop-down arrow to access a list from the list, select the name of the organization. The organization drop-down list displays the bottom-most organization first. After the ~~ the complete path to the selected

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organization displays. Each level of the organizational tree is separated by a >. Once you select an organization, the complete path populates within the field.

- **Organization Limit Scope –** click the drop-down arrow to access a list from the list select the organization scope of the report, the following three options are available:
  - o For Account Only
- Organization and Children
  - o Selected Organization Only
- **Category** – to generate the report for a specific category, click the drop-down arrow to access a list. From the list, select the category name.
- **Mission Funded*** – click the drop-down arrow to access a list and from the list, select one of the following chooses:
  - o **Yes** – includes only the mission funded accounts within the report.
- **No** – excludes mission funded accounts from the report.
  - o **Both** – includes both mission funded and non-mission funded account numbers.
- **Portal Generation Option** – click the drop-down arrow to access a list and from the list, select one of the following options:
  - o **Do Not Generate –** selecting this option does not allow cairs.net to generate your report to Subscriber Portal
- **XLS** – select this to generate an XLS version of your report to Subscriber Portal
  - o **PDF** – select this to generate an PDF version of your report to Subscriber Portal
- **Both XLS and PDF** – select this to generate both an XLS and PDF version of your report to Subscriber Portal

    If this field is left blank, cairs.net does not send any information to Subscriber Portal.

3. Within the **Report Setup** toolbar, click the **Generate Report** button. The report displays in the lower pane.

Creating a Report Template

1. Click the **Accounting** menu.
2. In the **Navigation** pane, click **Reports** > **Billing Reports**.
3. Within the right hand pane, the screen changes displaying two panes. Within the top pane, create the search parameters for your report.
4. Within the **Report Setup** toolbar, click the **Save** button.

The report name now displays in the drop-down field within the Report Setup toolbar.

Generate a report from a saved template

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Accounts** > **Billing Reports**.

3. Within the **Report Setup** toolbar, click the arrow next to (**New Report**) to access a drop-down list. From the list, select the name of the report to generate.

4. Click the **Generate Report** button.

   The report displays within the bottom pane.

Deleting a saved template

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Accounts** > **Billing Reports**.

3. Within the **Report Setup** toolbar, click the arrow next to (**New Report**) to access a drop-down list. From the list, select the name of the report to delete.

4. Click the **Delete** button.

Copy to New

This selection allows you to use an existing report template and add further search parameters onto it.

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Reports** > **Billing Reports**.

3. Within the **Report Setup** toolbar, click the arrow next to (**New Report**) access a drop-down list. From the list, select the name of the report to copy.

4. The report parameters displays within the upper pane, make any necessary modifications.

5. At this point, you can either save the template or generate the report by clicking on the appropriate button with the **Report Setup** toolbar.

Exporting your report

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Reports** > **Billing Reports**.

3. Within the **Report Setup** toolbar, click the arrow next to (**New Report**) access a drop-down list. From the list, select the name of the report to generate

   Once your report displays within the bottom pane you can export the report.

4. On the toolbar at the top of the screen, click the drop-down arrow next to **Export**. There are eight options to choose from:

- **Excel (All Levels)** – exports the report to an Excel spreadsheet.

- **Excel (Top Level Only)** – exports only the top level of information.

- **Excel (Expanded Levels Only)** – exports the full detail for the expanded records to an Excel spreadsheet. The un-expanded records are in the file as a top level and you only see the summary line.

- **Excel (Multiple Files)** – exports each account number into a separate file. When you select this option, the Browse For Folder pop-up opens allowing you select where to save the files. Within the pop-up select the folder, and click the OK button, the files display within Windows Explorer in the designated location.

- **PDF (All Levels)** – exports the report to a PDF file.

- **PDF (Top Level Only)** – exports only the top level of information.

- **PDF (Expanded Levels Only)** – exports the expanded records full detail to a PDF file. The un-expanded records are in the file as a top level, and you only see the summary line.

- **Tab Delimited Text (Top Level Only)** – exports the top level information into a tab delimited text file.

5. The file opens allowing you to save or modify the file in the appropriate program.

Unofficial Bill Summary by Number or Subscriber

These two reports allow you to view accounts associated to either a telephone number, including cell phone numbers, or accounts associated to a subscriber.

Viewing the Bill Summary by Number

1. Click the **Accounting** menu.

2. In the Navigation pane, click Reports > Unofficial Bill Summary by Number

3. Depending on the amount of records 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, this could be the account number, telephone number, etc. and then click the magnifying glass.

- Click the **Show All** button.

4. With either option the report generates to the window and is sorted by telephone number from least to greatest

5. There are six viewing options within the Views pane, each option groups or sorts the report based on a common characteristic. The following views are available:

- Simple – this is the default view, the list is sorted by telephone number

- Billing Period – sorts the list based on billing period, specifically the billing cycle state month

- Fiscal Year – sorts the list based on fiscal year

- Account Number – sorts the list based on account numbers associated to telephone numbers

- Category – sorts the list based on the category associated to each account, if applicable

- Custom Summary - this selection allows you to create a custom view by dragging and dropping column headers to create a line display.

6. To select a different view, click the option button next to the selection. If available, click the plus sign (+) next to the group to view the individual records.

Viewing the Bill Summary by Subscriber

1. Click the **Accounting** menu.

2. In the Navigation pane, click Reports > Unofficial Bill Summary by Subscriber

3. Depending on the amount of records 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, this could be the subscriber name, account number, etc. and then click the magnifying glass.

- Click the **Show All** button.

4. With either option the report generates to the window and is sorted by fiscal year

5. There are six viewing options within the Views pane, each option groups or sorts the report based on a common characteristic. The following views are available:

- Simple – this is the default view, the list is sorted by telephone number

- Billing Period – sorts the list based on billing period, specifically the billing cycle state month

- Fiscal Year – sorts the list based on fiscal year

- Account Number – sorts the list based on account numbers associated to a subscriber

- Category – sorts the list based on the category associated to each account, if applicable

- Custom Summary - this selection allows you to create a custom view by dragging and dropping column headers to create a line display.

6. To select a different view, click the option button next to the selection. If available, click the plus sign (+) next to the group to view the individual records.

Financial Summary

The Financial Summary allows you to create a report based on Site that can be exported into an XML file. Generally, the file is then sent to STARS. The two-step process allows you to create a project that you can use monthly and then run the project to create the file.

Creating a UF Summary Project

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Reports** > **Financial Summary**

3. There are two ways to add a new financial summary:

   - Within the tool bar directly above the Navigation pane, click the drop-down arrow next to New. From the list, select **Financial Summary.**

   - Within the Actions pane, click the **Add New UF Financial Summary** link.

4. With either option the General – UF Summary Project. There are two panes of information. The top pane provides the project details. The lower pane displays the complete information once you run the project.

5. Within the top pane, complete the following information for the project (required fields are marked within an asterisk (*)):

   - **Project Name** * - type the name of the project.

   - **Total Record** * - this field populates with the total number of records contained within the report after you run the project.

   - **Total Cost** * – this field populates with the total cost of the report after you run the project.

   - **Bill To Date Range From** * – click the field to access a drop-down arrow, click the arrow to access a calendar, from the calendar select the date to start the report from, for example if your report is for the month on December, the date in this field would be 12/01/2011.

   - **Bill To Date Range To** * - click the field to access a drop-down arrow, click the arrow to access a calendar, from the calendar select the date to start the report to, for example if your report is for the month on December, the date in this field would be 12/31/2011.

6. Within the **Actions,** click **Save** (to save and stay) to continue working with the project, or click **Save & Close** (to save and exit) to return to the Financial Summary list.

Adding Sites

7. Within the Show ribbon group, click the **Sites** button to associate one or more sites with the project. The window displays two panes of information; the top pane displays the sites associated to the project. 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 full name of the site.
- **Site Path** – displays the complete path of the site, this includes the parent and child sites. 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 project, find the site within the list, and double click the record, the site name now displays within the upper pane.

! Alternatively, you can click the lower portion of the sites button to access a drop-down list, from the list you can select either Select All or Unselect All. The Select All option allows you to associate all sites to the project. Whereas, the Unselect All options removes all site associations from the project.

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9. Within the **Actions,** click **Save** (to save and stay) to continue working with the project, or click **Save & Close** (to save and exit) to return to the Financial Summary list.

Deleting a UF Summary Project

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Reports** > **Financial Summary**

3. Depending on the amount of records 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, this could be the account number, telephone number, etc. and then click the magnifying glass.

- Click the **Show All** button.

4. Once the list populates, there are two ways to delete a project:

- Within the tool bar directly above the **Navigation** pane, click the red **X**.

- Click the **Delete UF Summary Project** link within the **Actions** pane.

5. Once you click Delete, a message box displays verifying that you really want to delete the account. Click **Yes** within the box to continue or **No** to cancel the operation.

Run Project

Once you create your project, you can run the project each month to produce your summary.

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Reports > Financial Summary.**

3. **Depending** on the amount of records 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, this could be the account number, telephone number, etc. and then click the magnifying glass.

    - Click the **Show All** button.

4. Once the list populates, double click the project. The General – UF Summary Project window opens.

5. Within the Tools ribbon group, click the Run Project button.

6. Depending on the amount of records you have within your database, the process may take a few minutes.

7. Once the project is complete, the summary displays within the Financial Summary pane.

8. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with billing reports, or click **Save & Close** (to save and exit) to return to the Financial Summary list.

Export to XML

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Reports** then **Financial Summary.**

3. **Depending** on the amount of records 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, this could be the account number, telephone number, etc. and then click the magnifying glass.

    - Click the **Show All** button.

4. Once the list populates, double click the project. The General – UF Summary Project window opens.

5. Within the Tools ribbon group, click the Export XML button.

6. With an XML file, there are field size limitations. Within the text box that displays, click **Yes** to enforce the restricted field size limits or **No** to retain the original field length. If you answer yes, an error may occur because some of your fields are too long. If this occurs, click **OK** in the error and try to rerun the report, answering no to the field size limitation.

7. To select the location to save the XML File, browse to location of where to save the file. Once at the location, type the name of the file in the File Name field.

8. Click the **Save** button. The file is saved.

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

Rejected Authorization Codes

This option allows you to view the authorization codes that exist within your call records but do not have a matching code within your cairs.net database.

Viewing Rejected Authorization Codes

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Reports** > **Rejected Authorization Codes.**

3. The list populates to the right with the following columns of information:

   - **Authorization Code** – displays the code that exists within the call records (not within the cairs.net database).

   - **Site** – displays the site name.

   - **Total Count** – displays the total number of calls made using the code.

4. As you create records for these within your cairs.net database, you can refresh the status of the list by clicking on the Refresh Status link within the **Actions** pane.

Payment History

Within Payment History, you can view a list of the payments made to accounts as well as some additional information.

Viewing the Payment Information

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Reports** > **Payment History**.

3. Depending on the amount of payments entered into the system, the list may or may not immediately populate. There are two ways to populate the list:

   - Within the search box, type any part of the payment history and then click the magnifying glass.

   - Click the **Show All** button.

4. The list displays either the search results or the entire list. The information displayed the complete payments details.

5. Within the Views pane, are several alternate view selections, each selection organizes or groups the payments differently, based on a common character tic. The following options are available:

   - **Simple View** – this is the default view and displays the payments made in order of received date

   - **Net Payment** – sorts the list based on the net payment amount

- **User Name** – sorts the list based on the user that entered the payment into the system

- **Amount Submitted** – sorts the list based on the total amount submitted before change is given

- **Payment Location, Method, or Type** – sorts the list based on either the location, method or type of payment

- **Received Date** – sorts the list based on the date the payment is received

- **Subscriber** – sorts the list based on the subscriber associated to the account

- **Fiscal Year** – sorts the list based on fiscal year

6. To change the view, click the option button next to the selection. If available, click the plus sign (+) next to the group to view the individual records.

Exporting Payment History

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Reports** > **Payment History**.

3. Depending on the amount of payments entered into the system, the list may or may not immediately populate. if There are two ways to populate the list:

   - Within the search box, type the any part of the payment history and then click the magnifying glass.

   - Click the **Show All** button.

   The list displays either the search results or the entire list.

4. On the toolbar at the top of the screen, click the drop-down arrow next to **Export**. There are eight options to choose from:

   - **Excel (All Levels)** – exports all records to an Excel spreadsheet. If you have several account numbers in your database, this procedure can take some time.

   - **Excel (Top Level Only)** – exports only the top level of information.

   - **Excel (Expanded Levels Only**) – exports the full detail for the expanded records to an Excel spreadsheet. The un-expanded records are in the file as a top level and you only see the summary line.

   - **Excel (Multiple Files)** – exports each bill into a separate file.

   - **PDF (All Levels)** – exports all records to a PDF file. If you have several account numbers in your database, this procedure can take some time.

   - **PDF (Top Level Only)** – exports only the top level of information.

   - **PDF (Expanded Levels Only)** – exports the expanded records full detail to a PDF file. The un-expanded records are in the file as a top level, and you only see the summary line.

- **Tab Delimited Text (Top Level Only)** – exports the top level information into a tab delimited text file.

The file opens allowing you to save or modify the file in the appropriate program.

Billed Equipment and Services Summary

Within this report, you can view the equipment items associated to a billing period, their cost and total quantity used during that period.

Viewing the Summary

1. Click the **Accounting** menu.
2. In the **Navigation** pane, click **Reports** > **Billed Equipment and Service Summary.**
3. Depending on the amount of records 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, this could be the account number, telephone number, etc. and then click the magnifying glass.
   - Click the **Show All** button.

4. The list displays either the search results or the entire list. The information displayed allows you to view the following information:

   - **Total Bills**
   - **Fiscal Year and Month**
   - **Billing Period Start and End Date**
   - **Equipment or Service Name**
   - **Organization Path**
   - **Total One-Time and Recurring Charges**
   - **Total Quantity**

5. There are two additional view choices within the Views pane, you can select to sort the listed based on Fiscal Year and Month or you can create a custom view.

- The Custom View allows you to select which column headers to include in your sort order, once a header displays in the upper pane, the list sorts automatically.

Exporting the Summary

1. Click the **Accounting** menu.
2. In the **Navigation** pane, click **Reports** > **Billed Equipment and Service Summary.**

3. Depending on the amount of records 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, this could be the account number, telephone number, etc. and then click the magnifying glass.

   - Click the **Show All** button.

   The list displays either the search results or the entire list.

4. On the toolbar at the top of the screen, click the drop-down arrow next to **Export**. There are eight options to choose from:

   - **Excel (All Levels)** – exports all records to an Excel spreadsheet. If you have several account numbers in your database, this procedure can take some time.

   - **Excel (Top Level Only)** – exports only the top level of information.

   - **Excel (Expanded Levels Only**) – exports the full detail for the expanded records to an Excel spreadsheet. The un-expanded records are in the file as a top level and you only see the summary line.

   - **Excel (Multiple Files)** – exports each bill into a separate file.

   - **PDF (All Levels)** – exports all records to a PDF file. If you have several account numbers in your database, this procedure can take some time.

   - **PDF (Top Level Only)** – exports only the top level of information.

   - **PDF (Expanded Levels Only)** – exports the expanded records full detail to a PDF file. The un-expanded records are in the file as a top level, and you only see the summary line.

   - **Tab Delimited Text (Top Level Only)** – exports the top level information into a tab delimited text file.

5. The file opens allowing you to save or modify the file in the appropriate program.

Billed Inventory

Within this report, you can view the billed equipment and service items that are associated to an account. This list provides a wide range of information from account number to charges to site name to order number.

Viewing the Summary

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Reports** > **Billed Inventory.**

3. Depending on the amount of records 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, this could be the account number, telephone number, etc. and then click the magnifying glass.

- Click the **Show All** button.

4. The list displays either the search results or the entire list. The list displays severel fields of information including, but not limited to:

   - **Account Number**

   - **Fiscal Year and Month**

   - **Total One-Time and Recurring Charges**

   - **Billing Period Start and End Date**

   - **Equipment or Service Name**

   - **Organization Path**

   - **Quantity**

5. There are two additional view choices within the Views pane, you can select to sort the listed based on Fiscal Year and Month or you can create a custom view.

- The Custom View allows you to select which column headers to include in your sort order, once a header displays in the upper pane, the list sorts automatically.

Exporting the Summary

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Reports** > **Billed Inventory.**

3. Depending on the amount of records 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, this could be the account number, telephone number, etc. and then click the magnifying glass.

   - Click the **Show All** button.

   The list displays either the search results or the entire list.

4. On the toolbar at the top of the screen, click the drop-down arrow next to **Export**. There are eight options to choose from:

   - **Excel (All Levels)** – exports all records to an Excel spreadsheet. If you have several account numbers in your database, this procedure can take some time.

   - **Excel (Top Level Only)** – exports only the top level of information.

   - **Excel (Expanded Levels Only**) – exports the full detail for the expanded records to an Excel spreadsheet. The un-expanded records are in the file as a top level and you only see the summary line.

   - **Excel (Multiple Files)** – exports each bill into a separate file.

   - **PDF (All Levels)** – exports all records to a PDF file. If you have several account numbers in your database, this procedure can take some time.

- **PDF (Top Level Only)** – exports only the top level of information.

- **PDF (Expanded Levels Only)** – exports the expanded records full detail to a PDF file. The un-expanded records are in the file as a top level, and you only see the summary line.

- **Tab Delimited Text (Top Level Only)** – exports the top level information into a tab delimited text file.

5. The file opens allowing you to save or modify the file in the appropriate program.

Bill Certification

Within this report you can view the bills that are certified or uncertified. There are few different report options. First you can view basic statistics of how many bills are certified and uncertified for a certain billing period. If you double click on any record within this list, the Bill Certification Details window opens with the complete details for the billing cycle.

Alternately, you can view a list of the bills that are certified and those that are not.

Viewing Billing Cycle Details

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Reports** > **Bill Certification**

3. Depending on the amount of entries the system, the list may or may not immediately populate. There are two ways to populate the list:

    - Within the search box, type any part of the record and then click the magnifying glass.

    - Click the **Show All** button.

4. Once the list displays, double click the billing cycle to view. The Bill Certification Details window opens. There are three panes of information: Billing Period Information, Certified Bills and Uncertified Bills

5. The Billing Period Information pane displays the following information:

    - Fiscal Year – displays the fiscal year of when the bill generated

    - From Month – this is number represents the month in which the billing period started.

    - From Day – this is the first day of the billing period

    - To Month – this number represent the month in which the billing period ends

    - To Day – this is the last day in the billing period

    - Total Certified Bills – displays the total number of bills certified for the period

    - Total Uncertified Bills – displays the total number of bills uncertified for the period

6. The Certified Bills pane lists the account number and subscriber information for the bills that have been certified. This pane also displays the certified date and any notes entered by the person who certified the bill.

7. The Uncertified Bills pane lists the account numbers that have not been certified for the billing period. This is read only information.

8. You can refresh the information displayed in any pane by clicking the Refresh button within the Action ribbon group.

Viewing Certified Bills Flat List

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Reports** > **Bill Certification**

3. Click the plus sign next (+) next to Bill Certification to access the sub-menu items.

4. Click Certified Bills Flat List, depending on the amount of entries the system, the list may or may not immediately populate. There are two ways to populate the list:

   - Within the search box, type any part of the record and then click the magnifying glass.

   - Click the **Show All** button.

5. Once the list displays you can view or export all certified bills.

Viewing Uncertified Bills Flat List

1. Click the **Accounting** menu.

2. In the **Navigation** pane, click **Reports** > **Bill Certification**

3. Click the plus sign next (+) next to Bill Certification to access the sub-menu items.

4. Click Uncertified Bills Flat List, depending on the amount of entries the system, the list may or may not immediately populate. There are two ways to populate the list:

   - Within the search box, type any part of the record and then click the magnifying glass.

   - Click the **Show All** button.

5. Once the list displays you can view or export all uncertified bills.

Accounting Tools

There are two selections within Accounting Tools. The first is Bulk Assigned Account Change, this tool allows you to change the charges related to a specific account and the devices associated. The second tool is the Payment Import, this allows you to import payments received through pay.gov.

Bulk Assigned Account Change

Within this menu option, you can modify the charges related to the account for an assignment. This can be done on a single basis or you can perform a mass change. The change is meant to update or remove charge types, organization, and or account number based on a billing start date and end date. For example, if you have an organization switch accounts mid-cycle, you can change the account information for the first half of the billing cycle.

You can also use the bulk assigned account change to remove information from an assignment.

This is a three-step process; the first step is to verify that CES is setup properly. Your cairs.net administrator can access your CES threads through System Admin → Service Management → Service Manager → Reassign Accounts. They need to remove the checkmark from the Disabled field to enable the thread to run on the next cycle.

The second step is to create a reassign request. You will first enter in the general information for the request and then you will create a search parameter to narrow down the number accounts that you are changing.

Reassign Requests

Creating a Change Accounts Request

1. Click the **Accounting** menu.
2. Within the **Navigation** pane, click **Accounting Tool** and then **Bulk Accounts Change Requests**.
3. Within the **Actions** pane, click the **Change Accounts** link

4. The Change Accounts window opens. There are two panes of information. The top pane allows you to search for the accounts that you want to change. The bottom pane is where you will type in the new information for the selected accounts.

5. You need to follow a few rules before you submit a request:

- Use the Advanced Search options. If you click the **Show All** button, all the records within the upper pane will change to the new information.

- The site name must be the same in both panes.

- It is a good idea to make a backup of your database before you run the request.

Searching for Accounts

6. Before you start to create a search parameter, lets talk about the Search Properties ribbon group, these checkboxes will help to limit the number of accounts you search through. You have the following options:

- Show All Accounts – this is the default, when you search all account types will appear

- Hide Call Accounts – place a checkmark in this box to hide all accounts that are related to a Number, you will only see account relating to Equipment & Services

- Hide Other Accounts – place a checkmark in this box to hide all accounts that are related to Equipment & Services, you will only see accounts relating to Number

- Show Historical Accounts – place a checkmark in this box to show accounts that have a billing end date.

7. After you have made you selection, you can create a search parameter, within the header of the pane, click the double arrow next to the magnifying glass. This opens the advanced search options.

8. Next to each search field is a search criteria descriptor such as Contains, Equal to, Begins With, etc. This descriptor tells the system how to look for the information within the fields. You can select a different descriptor by clicking the field's descriptor button.

9. Choose the new descriptor and type the search criteria into the field. Press **Enter**. Results matching your search criteria display.

10. Once your results appear in the lower pane, you can enter in the new information within the lower pane, complete the following information for the account change (required fields are marked with an asterisk (*)):

- **Charge Type*** – click the field to access a dropdown arrow to select the new charge type, the following options are available:

  - **All Charges**

  - **Recurring Charges**

  - **One-time Charges**

  - **Call Charges**

- **Site*** – this field needs to be the same as the field within the upper pane. Click the dropdown arrow to access a list, from the list select the site name.

- **Organization** – if you are changing the organization information, click the dropdown arrow to access the list of the organizations, from the list select the new organization. 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 >.

! If the organization you selected is associated to an account, the account number auto-populates in the account number field (official accounts only.)

- **Account Number** – if you are changing the account number for the assignment, click the dropdown arrow to access the list of account numbers, from the list select the new account number.

- **Billing Start Date*** – this populates with the current date, to change the date click the dropdown arrow to access a calendar, from the calendar select the new 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.

- **Billing End Date** – click the dropdown arrow to access a calendar and from the calendar, select the billing 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.

11. Once you have completed the information, within the Show ribbon group, click the **Reassign** button.

12. A message box displays with the total number of records that are going to be modified, within the box click Yes to continue with the request or No to cancel the request.

13. You will receive another message that the request has been sent to CES for processing.

14. Alternately, you can click on the Run Now button within the Process ribbon group, to run the CES process immediately.

Unassign Requests

Creating a Change Account Request

1. Click the **Accounting** menu.

2. Within the **Navigation** pane, click **Accounting Tool** and then **Bulk Accounts Change Requests**.

3. Within the **Actions** pane, click the **Change Accounts** link

4. The Change Accounts window opens. There are two panes of information. The top pane allows you to search for the accounts that you want to change. The bottom pane is where you will type in the new information for the selected accounts.

5. You need to follow a few rules before you submit a request:

   • Use the Advanced Search options. If you click the **Show All** button, all the records within the upper pane will change to the new information.

   • The site name must be the same in both panes.

   • It is a good idea to make a backup of your database before you run the request.

Searching for Accounts

6. Before you start to create a search parameter, lets talk about the Search Properties ribbon group, these checkboxes will help to limit the number of accounts you search through. You have the following options:

   • Show All Accounts – this is the default, when you search all account types will appear

   • Hide Call Accounts – place a checkmark in this box to hide all accounts that are related to a Number, you will only see account relating to Equipment & Services

   • Hide Other Accounts – place a checkmark in this box to hide all accounts that are related to Equipment & Services, you will only see accounts relating to Number

   • Show Historical Accounts – place a checkmark in this box to show accounts that have a billing end date.

7. After you have made you selection, you can create a search parameter, within the header of the pane, click the double arrow next to the magnifying glass. This opens the advanced search options.

8. Next to each search field is a search criteria descriptor such as Contains, Equal to, Begins With, etc. This descriptor tells the system how to look for the information within the fields. You can select a different descriptor by clicking the field's descriptor button.

9. Choose the new descriptor and type the search criteria into the field. Press **Enter**. Results matching your search criteria display.

10. Once your results appear in the lower pane, you can enter in the new information within the top pane, complete the following information for the account change (required fields are marked with an asterisk (*)):

- **Charge Type*** – click the field to access a dropdown arrow to select the new charge type, the following options are available:

  - **All Charges**

  - **Recurring Charges**

  - **One-time Charges**

  - **Call Charges**

- **Site*** – this field needs to be the same as the field within the lower pane. Click the dropdown arrow to access a list, from the list select the site name.

- **Organization** – if you are changing the organization information, click the dropdown arrow to access the list of the organizations, from the list select the new organization. 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 >.

! If the organization you selected, is associated to an account, the account number auto-populates in the account number field (official accounts only.)

- **Account Number** – if you are changing the account number for the assignment, click the dropdown arrow to access the list of account numbers, from the list select the new account number.

- **Billing Start Date*** – this populates with the current date, to change the date click the dropdown arrow to access a calendar, from the calendar select the new 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.

- **Billing End Date** – click the dropdown arrow to access a calendar and from the calendar, select the billing 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.

11. Once you have completed the information, within the Show ribbon group, click the **Unassign** button.

12. A message box displays with the total number of records that are going to be modified, within the box click Yes to continue with the request or No to cancel the request.

13. You will receive another message that the request has been sent to CES for processing.

14. Alternately, you can click on the Run Now button within the Process ribbon group, to run the CES process immediately.
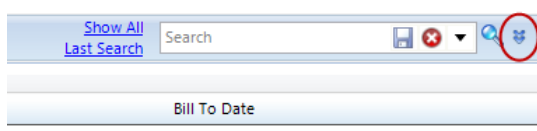
Viewing Requests

You can view the list of pending and completed requests by accessing the Bulk Accounts Change list. Click Accounting then Bulk Accounts Change, the list of request will not populate right away, you can either click Show All or type a search parameter into the field and click on the magnifying glass to populate the list. The list displays the Reassign Parameters, Status, and New Charge Type among several other fields of information. The information displayed is read only.

Payment Import

Pay.gov payments

You can use the Import External Data menu option in cairs.net to import various types of media. Specifically, you can use it to import the payments that you receive through pay.gov. The import allows you to create a sort of template that you can use to import the payments month after month. In addition, the import allows you to select only the information that you want to see within your cairs.net database.

You will need your database to meet a few requirements before you can complete an import. First, you need to define your payment types, methods, locations and check status. Second, you will to have at least one unofficial account created within the database.

It is also a good idea to place the file that you receive from pay.gov in that same location every month. This allows you to change some properties required for the import quickly.

How to Import your Pay.gov statements

1. Create a location on your local drive to place the files from pay.gov.

2. Copy the file to that location (for example: c:\Pay.gov Files).

3. Click the **Accounting** menu.

4. In the **Navigation** pane, click **Accounting Tools → Payment Import.**

5. Within the Actions pane, click the **Add New Import** link.

6. The General – Import window opens, complete the following information (required fields are marked within an asterisk (*)):

   - **Project Name** * - type the name of your import project.

   - **Connection String** – this provides cairs.net with the location, type and properties of the file that you are importing into your database.

! There are different types of connection strings that you can enter here to get your data to import, here are a few commonly used connection strings, and within each connection string, you must replace the highlighted text with the location and/or name of your file:

CSV File: Provider=Microsoft.Jet.OLEDB.4.0;Data Source=Location of your file;Extended Proerties="text;HDR=Yes;FMT=Delimited

Excel File: Provider=Microsoft.ACE.OLEDB.12.0;Data Source=Location of your file\File Name.xls;Extended Properties=Excel 8.0

Access: Provider=Microsoft.ACE.OLEDB.12.0;Data Source=Location of your file\File Name.mdb

MS SQL Server: Provider=sqloledb;Data Source=.\SQLEXPRESS;Initial Catalog=Location;Integrated Security=SSPI;

Here are the possible queries that can be used for a specific file type:

CSV File – Select * from [File Name.txt]

Excel File – select * from [Sheet1$] (if you have renamed sheet 1 within your file, replace the name)

Access – Select * from [Name]

MS SQL Server – Select * from [Name]

- **Query** * - indicates the location of where cairs.net will look in the above connection to provide the information to import, type your query location.

- **Action** * - click the field to access a drop-down list, from the list select Payments.

- **Description** – type a description of the import, if necessary.

7. Within the Actions ribbon group, click the **Save** button to save you information and allow you to continue working with the import.

8. Within the Show ribbon group, click the **Source Data** button. The screen changes to display the information that exists with the file to be imported. The information has not been imported yet.

9. Within the Show ribbon group, click the **Association** button. The screen changes to allow you to associate the fields that appear within the file to fields that appear within cairs.net

There are two panes of information; the pane on the left (External source field association) display the fields that appear in cairs.net. Within each field there is a drop-down list that displays the fields that appear within your pay.gov file.

10. For each field, click the field to access a drop-down list. Select the appropriate field association. For example, in the Account Number field you would associate it to Account Number.

11. Complete the same process for all fields, you must complete an association for the fields marked with an asterisk (*).

12. From the Default Values pane you can enter in a default for any of the fields that you want imported. For example, if you want the received date to be the date that you import the information into cairs.net, click the **Received Date** field to access a drop-down calendar, from the calendar select the date.

! The Default Value pane servers two purposes. The first is to allow you to enter in a value for a field, so when the import occurs all records will have the same value in that field. The second is to act as a fail-safe, if there is no value in the field in the pay.gov file, the value within the default field will import. For example, if the received date is blank in the pay.gov file, the date you have entered into the default value will import with the record.

13. Once you have completed your field association, click the **Import** button within the Show ribbon group.

Depending on the amount of information you have within the file, the import may take a while to complete.

The screen changes to display the information that you will import into you database, after the field association. The information is still not imported into you database. This allows you to make any changes to the associations before you import it. (Note: There is no undo once you import!)

14. There are three panes of information; the top pane displays the information before it is imported. Pay close attention to the Status column, this column will let you know

of any issues with any record. You can change any information within this pane by clicking on the field and selecting the new value.

15. Directly below the ribbon, there are several selections:

- **Imported Selected** – once you have selected the records to import, click this button.

- **Select All** – click this button to place a checkmark in the Select column for all the records within the pane, this indicates that you want to import the records into you database.

- **Select None** – click this button to remove the checkmarks from the Select column.

- **Invert Selection** – click this button to switch the checkmarks from being checked -> unchecked and unchecked -> checked.

- **Include rows with warning** – click the box to insert a checkmark to include the rows with warnings in your imported file.

- **Batch Import Limit** – the default value is 500, this means that cairs.net will import 500 records at a time and continue importing 500 records at a time until the entire file is imported.

- **Log Activity** – click the box to insert a checkmark to log the import in System Admin -> Security -> Activity Log. We do not recommend you check this box.

- **Export SQL** – you can test your import, this is not recommended unless you have a good knowledge of SQL Server.

- **Save to File** – click the button to export the information within the top pane to a text file.

16. Once you have your rows selected, click the **Imported Selected** button. Again, depending on how many records you have within your file, this may take a while.

Once cairs.net has completed the import, the bottom two panes populate with your records. The bottom pane displays the records that were successfully imported into you database.

The middle pane displays the records that failed to import into you database. The Status column displays the reason the import was unsuccessful.

At the very bottom of the screen, the import results display. You will see the total records that were successfully imported, the total records that failed, and the time it took to import them.

Imported records that failed

1. While still in the import, make sure you have the Import button highlighted in the Show ribbon group.

The middle pane displays the records that failed on your import.

The status column displays the reason the import failed, you can make the necessary adjustments to the record by clicking on the appropriate field and selecting the correct information.

2. Directly above the header there are several buttons that allow you to perform actions on the records within the pane:

   - Apply correction to selected.

   - **Select All** – click this button to place a checkmark in the Select column for all the records within the pane, this indicates that you want to import the records into you database.

   - **Select None** – click this button to clear the checkmarks from the Select column.

   - **Invert Selection** – click this button to switch the checkmarks from being checked -> unchecked, and unchecked -> checked.

   - **Save to File** - click the button to export the information within the top pane to a text file.

   - **Pop-up error** – click the box to insert a checkmark to indicate that if a record fails you would like to see the pop-up error message. Once the pop-up opens, click the **OK** button to continue, you are asked if you want to receive any further pop-ups, click the appropriate answer.

3. Once you have your rows corrected and selected, click the **Apply correction to selected** button. Depending on how many records you have within your file, this may take a while.

   Once cairs.net has completed the import, it moves the successful records to the bottom pane. The records that failed remain within the middle pane.

4. Complete the process until all records have successfully imported.

Viewing the import results within Accounts

1. Within the **Navigation** pane, click the **Accounts** menu.

2. Within the Navigation Pane, click **Accounts > Unofficial Accounts.**

3. Before the Account list populates, you must enter in search criteria to populate the list. There are two ways to populate the list:

   - Within the search box, type the account number or portion of the number then click the magnifying glass.

   - Click the **Show All** button.

4. The Accounts list opens, displaying the account that matched your search criteria. Double-click the account. The Account window opens.

5. Within the Billing Tools ribbon group, click the upper portion of the **Payments** button.

   Within the Payment History pane in the lower portion of the screen, you can view the payment applied and pending on the account.

Cairs.net applies all pending payments to the balance due when you generate the next bill. The status will then change to Applied.

Facilities

In Facilities, you access information relating to buildings, terminals, cables, pairs, and the working service supplied by those cable and pairs. The navigation pane displays four submenus: Buildings, Connections, and Sites.

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 facilities you have to start by adding your sites, then your connections and finally your buildings. Therefore, we cover Sites first followed by Connections and Buildings.

Sites

The Sites menu, located on the Navigation pane, is an important Facilities component as all cable and fiber in the database relates to a Site. Administrators define the number of Site Levels, and their names, for example, Country, State, County, and City or Division, Brigade, Regiments, and Squadrons etc. Site levels create a hierarchal relationship within CAIRS.

You can add two different sites types into the database, Root and Child. The highest or Root site is created first as the broadest level, allowing you to add sites underneath. The Child type can be either below a root or below another child. When two child sites display at the same level, they are referred to as peers.

After you add your sites, you can add your fiber and connections, buildings to a site and then connections into the building.

Managing Root Sites

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Sites**.

Adding a Root Site

3. There are three ways to add a Root Site:

- Within the toolbar directly above the **Navigation** pane, click the drop-down arrow next to **New**. select **Root Site**.

4. Within the toolbar directly above the **Navigation** pane, click the **Add Root Site** button

- Within the **Actions** pane, click the **Add Root Site** link.

5. With either option, the General - Site window opens. Complete the following fields, (required fields are marked with an asterisk (*)):

- **Parent** – this field remains blank.

! You will not have access to the Parent Site field when adding a Root Site. The root site is the highest level within your structure, and can contain both parent and child sites.

- **Site Level*** – this field auto-populates with '1' indicating the site you are adding is a root site.

6. **Site Code** – type the three-digit site code, often times, this is the abbreviation of the site name.

- **Site*** – type the site name.

7. **Resource Manager** – click the drop-down arrow to access a list and select the resource manager associated with the site.

- **Site Description** – type the site description.

8. **Commanding Officer** – click the drop-down arrow to access a list and select the commanding officer for the site.

- **Hide Site in Portal** – click the box to insert a checkmark to indicate this site is not available within Subscriber Portal.

9. **Call Pricing Group** – click the drop-down arrow to access a list and select the call pricing group to associate to the site, this in turn, associates all accounts within the site to the call pricing group.

- **Site 911 Prefix** – type the site prefix, this field will display when you run a 911 interface.

10. **Unit Value -** displays the number of units for each value. For example, 100 units (cents) in $1 or 100 pence in 1 pound

- **Billing Interval** – click the dropdown arrow to access a menu and from the menu select the interval that you will bill your call records. You can choose one-second billing, six-second billing or per minute billing.

11. **Round First Period** – click the field to insert a checkmark to indicate that your first billing period will round up, for example if you are per minute billing and your call lasts 45 seconds, the duration is rounded up to 1 minute.

- **Round to Next Period** – click the field to insert a checkmark to indicate that the billing will round up to the next period for each additional period after the first. For example, if the call is 1:45 the billing would round up to 2 minutes.

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

<u>Deleting a Root Site</u>

**To delete a root site, you must first remove the child sites and any associated assignments.

13. Within the list, highlight the site to delete. There are three ways to delete a site:

- Within the toolbar directly above the **Navigation** pane, click the red **X**.

14. Click the **Delete Site** link within the **Actions** pane.

- Double-click the site name to open the General Site window. Within the **Actions** ribbon group, click the **Delete** button.

15. Once you click Delete, a message box displays verifying that you really want to delete the site. Click **Yes** to continue or **No** to cancel the operation.

16. If there are any associations to the site, you must first re-assigned or delete them before you can continue. A warning message displays notifying you that there is existing information associated with the site.

Viewing Site History

See Common Elements → History to learn more.

Child Sites

You can add up to as many child sites as you have site level. For example, if you have 4 site levels you will be able to add up to 3 children deep. Each time you want to add an additional child whether to a parent or another child, simply highlight the site to which you are adding a site below within the list and click the Add Child Site link.

Managing Child Site

1. Click the **Facilities** menu.
2. In the **Navigation** pane, click **Sites**.

<u>Adding a Child Site</u>

3. The Sites list opens. Click to highlight the root/parent site to which you want to a child site to.
4. Once the selected root/parent site is highlighted, there are two ways to add a child site:

- Within the toolbar directly above the **Navigation** pane, click the **Add Child Site** button.

5. Within the **Actions** pane, click the **Add Child Site** link.

6. With either option the General – Site window opens. Complete the following fields (required fields are marked with an asterisk (*)):

- **Parent Site** – this field auto-populates with the name of the root or parent site.

7. **Site Level*** – this field auto-populates with the number two indicating the site you are adding is a child site.

- **Site Code** – type the three-digit site code. Often times, this is the abbreviation of the site name.

8. **Site*** – type the child site's name.

- **Resource Manager** – click the drop-down arrow to access a list and select the resource manager associated with the site.

9. **Site Description** – type the site description.

- **Commanding Officer** – click the drop-down arrow to access a list and select the commanding officer for the site.

10. **Hide Site in Portal** – click the field to insert a checkmark to indicate this site is not available within Subscriber Portal.

- **Call Pricing Group** - click the drop-down arrow to access a list and select the call pricing group to associate to the site. This in turn, associates all accounts within the site to the call pricing group.

11. **Site 911 Prefix** – type the site prefix, this field will display when you run a 911 interface.

- **Unit Value -** displays the number of units for each value. For example, 100 units (cents) in $1 or 100 pence in 1 pound

12. **Billing Interval** – click the dropdown arrow to access a menu and from the menu select the interval that you will bill your call records. You can choose one-second billing, six-second billing or per minute billing.

- **Round First Period** – click the field to insert a checkmark to indicate that your first billing period will round up, for example if you are per minute billing and your call lasts 45 seconds, the duration is rounded up to 1 minute.

13. **Round to Next Period** – click the field to insert a checkmark to indicate that the billing will round up to the next period for each additional period after the first. For example, if the call is 1:45 the billing would round up to 2 minutes.

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

Deleting a Child Site

**If the site has any child sites associated, you must first remove those sites and any associated assignments.

15. Within the list, highlight the site to delete. There are three ways to delete a site:

- Within the toolbar directly above the **Navigation** pane, click the red **X**.

16. Click the **Delete Site** link within the **Actions** pane.

- Double-click the site name to open the General Site window. Within the **Actions** ribbon group, click the **Delete** button.

17. Once you click Delete, a message box displays verifying that you really want to delete the site. Click **Yes** to continue or **No** to cancel the operation.

18. If there are any associations to the site, you must first re-assigned or delete them before you can continue. A warning message displays notifying you that there is existing information associated with the site.

Viewing Child Site History

See Common Elements → History to learn more.

File Attachments

See Common Elements → File Attachments to learn more.

Connections

The term "Connections" is a general term relating to cable and pairs, or fiber connections and paths. Note: For those familiar with Unique Communication's CAIRS 32 program, it is important to understand that CAIRS is not restricted to the labels " cables" and" pairs." For this reason, CAIRS uses the term "connections" to describe the actual transmission used for working service. In CAIRS, a connection can be copper, cat IV, or other types available at your site. A path refers to the method of transmission, for example, a path can be a pair of copper wires, or it can also be a path in a fiber. CAIRS allows you to track the connection from the frame to the binding post.

With each connection, you can view site assignment, path assignments, statistics, path ranges, etc.

A set device or circuit can exist within your database without a connection and path assignment.

When you create the different types of connections you use on your sites, you can determine whether a type is multiple channels. A multiple channel connection allows the paths to be used more than once for an assignment.

Manage Connection Types

Connection Type is the term used in CAIRS to describe each individual cable type, i.e. copper, cat IV, and etc.

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Connections**.

3. There are two ways to manage your connection types:

- Within the toolbar directly above the **Navigation** pane, click the **Manage Connection Types** button.

4. Within the **Actions** pane, click the **Manage Connection Types** link.

5. With either option, the Manage Connection Types window opens.

! If you are unable to view the Actions pane, you may need to use the scroll bar to reveal the menu choices on the right side of the Navigation pane, or using your mouse point at the Separation bar, and when the up/down arrow displays, right-click the line and hold it to pull the line down.

Adding a Connection Type

6. Click the field marked with an asterisk (*). To add a new record, complete the following fields (required fields are marked within an asterisk (*)):

   - **Connection Type*** - type the name of the connection

   7. **Multiple Channel** – click the box to insert a checkmark indicating the connections associated with this type can have multiple assignments associated with each path. If you leave the field blank, when you associate this connection type, the connection paths can be used for a single assignment.

   - **Network Device Port Type** – click on the dropdown arrow to access a list, from the list select the network device port that is associated to connection type. Network Device Port Types are used if you are tracking all your network devices such as patch panel, ethernet switches, etc. A few examples of device port types are ethernet, fiber, GBIC, SFP, etc.

8. To add another type, click the **Save** button and repeat step 5, as necessary.

Deleting a Connection Type

9. There are two ways to select the type to delete:

   - Right-click the record selector box (located just left of the name) and box, click **Delete**.

   10. Highlight the name in the list and within the A**ctions** ribbon group click the **Delete** button.

11. Once you click Delete, a message box displays verifying that you really want to delete the type. Click **Yes** within the box to continue or **No** to cancel the operation.

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

13. If you do not want to delete the connection type, right-click the record to access a pop-up menu. From the pop-up, click **Undelete**.

14. Once you select Undelete, a message box displays verifying that you really want to keep the type. Click **Yes** within the box to continue or **No** to cancel the operation.

15. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with connection types, or click **Save & Close** (to save and exit) to return to the Connection Group list.

Managing Path Usage

A usage type allows you to further define the way your paths are used. For example, your usage types may be data, voice, circuit, set device, etc.

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Connections**.

3. There are two ways to manage your path usage:

    - Within the toolbar directly above the **Navigation** pane, click the **Manage Path Usage** button.

    4. Within the **Actions** pane, click the **Manage Path Usage** link.

5. With either option, the Manage Path Usage window opens.

<u>Adding a Path Usage Type</u>

6. Click the field marked with an asterisk (*), type the name of the path usage, for example, voice, data, etc.

7. You can add multiple usage types by clicking on the row marked within an asterisk (*).

<u>Delete a Path Usage Type</u>

8. There are two ways to select the type to delete:

    - Right-click the record selector box (located just left of the name) and box, click **Delete**.

    9. Highlight the name in the list and within the A**ctions** ribbon group click the **Delete** button.

10. Once you click Delete, a message box displays verifying that you really want to delete the type. Click **Yes** within the box to continue or **No** to cancel the operation.

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

12. If you do not want to delete the usage type, right-click the record to access a pop-up menu. From the pop-up, click **Undelete**.

13. Once you select Undelete, a message box displays verifying that you really want to keep the type. Click **Yes** within the box to continue or **No** to cancel the operation.

14. Within the **Actions** ribbon group, click the **Save** (to save and stay) to continue working with path usages, or click **Save & Close** (to save and exit) to return to the Connection Group list.

Understanding the Connection Window

When you double-click any connection group, the connection window opens to the general screen. This window is divided into two panes; the top pane displays basic connection information, for example, associated site, connection name, connection type, etc. The Pick

List (lower) pane, displays a complete list of path ranges associated with the connection group.

Pick List Pane

This pane displays a complete list of the path ranges for the connection group. You should pay close attention to the Is Connected field; this field determines a few things:

- If the connection path is associated with a number, circuit or device the field populates with a Yes.
15. If the field contains a no, the connection path is not associated with an assignment.
- If the path is free of an assignment and the field still says yes, then the path is involved in dedicate plant.

When you double-click any path, an additional window opens display the paths details. Within the additional window you can modify the connectivity of the associated assignment.

Ribbon Groups

Each of the ribbon groups allows you to perform a set of functions for the connection group, for example, adding sites, viewing connection statistics, adding connection paths, etc.

Actions

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

- **Save & Close** – click this button to save the completed information and return to the Order/Troubles list.
16. **Delete** – click this button to delete the work order. This differs from cancel in that; there will not be a record of this Work Order within your database.
- **Save** – click this button to save the information you have completed and remain within the Trouble Ticket.
17. **Refresh** – click this button to add newly saved information to the work order window.

Show

Within the Show ribbon group, you can view and modify basic connection information, such as site, connection type, etc. Also you can view the complete path range and assignment details.

Quick Stats

This ribbon group allows you to view some statistics regarding the connection group, for example, path availability, building service report, etc.

Connection Paths

In Connection Paths, you are adding, modifying or deleting path ranges from the connection group.

Attach

Within the Attach ribbon group, you can attach a file to the connection group. Your CAIRS administrator pre-defines the attachable file types.

Utilities

This ribbon group allows you to perform the merge connection utility.

Connection Groups

Connection records can be added for each site. Because a connection record has multiple path assignments, CAIRS calls each connection name a 'connection group'. Once the group name is determined, you can add path assignments to the connection group. The connection group can also be associated with or added to a building record.

When you are viewing a connection group, there are two panes of information. The top pane displays the basic information for the connection, for example, connection name, site, connection type, etc. The bottom pane displays the paths and assignment information as well as the path status (reserved, working, protected, and loaded).

Adding a New Connection Group

Before you can begin to add connection groups, you need to define your connection types. When creating a connection type, you must define the whether the path is multiple channel or single channel. A multiple channel path allows for a path to be used for several different assignments, whereas, if you designated the connection type as a single channel, each path can only be used once.

1. Click the **Facilities** menu
2. In the **Navigation** pane, click **Connections**.
3. There are two ways to add a Connection Group:
   - Within the toolbar directly above the **Navigation** pane, click the drop-down arrow next to **New** and select **Connection Group**.
4. Within the **Actions** pane, click the **Add New Connection Group** link.
5. With either option, the General - Connection window opens. Within the top pane complete the following information (required fields are marked with an asterisk (*)):
   - **Site*** – click the drop-down arrow to access a list and select the site. The site drop-down list displays the bottom-most site first. After the ~~ is the complete path to the site. Each site level is separated by a >.
6. **Connection Name*** – type the connection name.
   - **Connection Type*** – click the drop-down arrow to access a list and select the connection type. This selection is important because it determines how the connection paths are used, whether multiple channel or single channel.
7. **Bandwidth** – type the connection bandwidth.
   - **Connection Definition –** type the connection definition

8. **Path Definition** – type the path definition

- **Miscellaneous Information 1 – 20** – use these fields to type any miscellaneous connection information.

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

10. At this point, you have simply created the connection group; you now need to add the connection paths. To add connection paths to this group, refer to the "Adding a Connection Path Range" section.

Deleting a Connection Group

The connection must be free of all assignments and removed from all buildings before you can delete it from the database.

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Connections**.

3. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

   - Within the search box, type the connection group name or portion of the name and then click the magnifying glass

4. Click the **Show All** button.

5. The Connection Group list opens. Within the list, highlight the connection to delete. There are three ways to delete a connection:

   - Within the toolbar directly above the **Navigation** pane, click the red **X**.

6. Click the **Delete Connection Group** link within the **Actions** pane.

   - Double-click the name to open the Connection window, 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 connection group. Click **Yes** within the box to continue or **No** to cancel the operation.

8. If the connection group is currently associated with any assignments, the assignments need to be deleted or re-assigned before you can delete. If there are assignments, a message box displays saying the connection group is currently in use.

Managing Connection Sites

At times, there is a need to associate a connection to more than one site. When you select a site within General information, you are associating to just one site. With the Sites ribbon group, you can select multiple sites within different levels of where the connection exists. This allows components to be assigned to the connection at any of the sites.

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Connections**.

3. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

   • Within the search box, type the connection group name or portion of the name and then click the magnifying glass

   4. Click the **Show All** button.

5. The Connection Group list displays. Double-click the connection name.

6. The Connection 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 with the connection. 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.

   7. **Site Path** – displays the complete path to the site. Each level is separated by a >.

   • **Site Level** – displays the site level name or number

   8. **Site Code** – displays the three-digit alphanumeric site code.

Adding a Site

9. To add a site to the connection, 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 connection. For example, if you associate a parent and want all the children associated you must associate all children site as well.

Deleting a Site

10. 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**.

11. 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.

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

13. 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**.

14. 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.

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

GPS Location

You can add GPS locations for path ranges within each connection.

Connection Paths

A connection path is the mode of transmission for the connection group. For example, if the connection is cable the path would be the wire, if the connection is fiber the path would be a strand, and so on.

After adding a connection group, you need to add the beginning and ending paths to determine the connection range. A connection path is the pair count for the cable. You can delete path ranges; however, those paths must be free of all assignments and unassociated from all buildings before CAIRS allows you to delete them.

Adding a Connection Path Range

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Connections**.

3. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

   - Within the search box, type the connection group name or portion of the name and then click the magnifying glass or press the **Enter** key on your keyboard.

4. Click the **Show All** button.

5. The Connections list displays. Double-click the connection you are adding a range to.

6. The Connection window opens. Within the **Connections Paths** ribbon group, click the **Add Range** button.

7. The Add Range pop-up opens. Complete the following fields:

   - **Beginning Path** – click the drop-down arrow to access a list and select the number of the first path within the connection.

8. **Ending Path** – click the drop-down arrow to access a list and select the number of the last path within the connection.

   - **Path Information** – type any miscellaneous path information up to 30 characters.

9. **Reserved** – click the box to insert a checkmark to reserve the entire path count or leave the field blank to indicate the paths are available for use.

   - **Working** – this field defaults to all paths working. Click the box to clear the checkmark indicating the entire path count is non-working.

10. **Protected** – click the box to insert a checkmark to protect the entire path count or leave the field blank to indicate the paths are unprotected.

- **Loaded** – click the box to insert a checkmark to indicate the entire path count is loaded or amplified. Leave the field blank to indicate a normal connection path.

11. **Path Miscellaneous 1 & 2** – type miscellaneous connection path information.

12. Within the lower half of the pop-up, click the **Save** button or click **Cancel** to return to the General – Connection window

13. Once you click **Save**, the Add Range pop-up closes and returns you to the Connection window.

14. Within the **Pick List** pane of the **General Information** window, the complete path range populates.

15. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with connection paths, or click **Save & Close** (to save and exit) to return to the Connection Group list.

Modifying a Connection Path Range

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Connections**.

3. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

   - Within the search box, type the connection group name or portion of the name and then click the magnifying glass or press the **Enter** key on your keyboard.

   4. Click the **Show All** button.

5. The Connection list displays. Double-click the connection name with the path range you want to modify.

6. The Connection window opens. Within the **Connection Paths** ribbon group, click **Modify Range**.

7. The Modify Range pop-up opens. You can perform several actions:

   - Increase the path count by selecting a new number within the Ending Path drop-down list.

8. Reserve the entire path count (insert a checkmark) or free the entire path count (clear the checkmark).

   - Make the entire path count working (insert a checkmark) or non-working (clear the checkmark).

9. Make the entire path count protected (insert a checkmark) or unprotected (clear the checkmark).

   - Make the entire path count loaded (insert a checkmark) or unloaded (clear the checkmark).

10. Type additional miscellaneous information.

- Make changes to the path counts by selecting the path numbers in the **Beginning Path** and **Ending Path** fields. For example, if you wish to mark paths 1 through 5 as protected, you would enter 1 for Beginning Path and 5 for the Ending Path. Then checkmark the **Protected** box.

11. Within the pop-up, click the **Save** button or click the **Cancel** button to stop the operation.

12. The changes you just made display within the **Pick List** pane.

Deleting a Connection Path Range

To delete a range of paths, the path numbers must be free of all assignments and removed from all buildings. It is important to remember that when you are deleting a path range you are deleting specific path numbers. For example, if you have a path count of 1 to 100, and you want to delete 25 pairs, you would have to select paths 1 to 25 or 50 to 75.

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Connections**.

3. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

- Within the search box, type the connection group name or portion of the name and then click the magnifying glass or press the **Enter** key on your keyboard.

    4. Click the **Show All** button.

5. Within the **Connection Group** list, double-click the connection name to delete.

6. The Connection window opens. Within the **Connections Paths** ribbon group, click **Delete Range**.

7. The Delete Range pop-up window opens.

8. Click the drop-down arrow within the **Beginning Path** field to access a list and select the first path in the range to delete.

9. Click the drop-down arrow within the **Ending Path** field to access a list and select the last path in the range to delete.

10. Within the pop-up, click the **Save** button or click the **Cancel** button to stop the removal of the path range.

11. The path range is removed from the connection and no longer displays within the **Pick List** pane.

Modifying a Single Connection Path

After the connection path range has been added, individual paths can be modified.

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Connections**.

3. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

- Within the search box, type the connection group name or portion of the name and then click the magnifying glass or press the **Enter** key on your keyboard.

    4. Click the **Show All** button.

5. The Connection Group list displays. Double-click the connection name.

6. The Connection window opens to General information. Within the **Pick List** pane, double-click the path number to modify.

7. The Connection Path window opens displaying three panes: Path Information, Path Appearances and Telephone/Circuit pane. The Path Appearance and Telephone/Circuit panes display Read Only information.

8. Within the Path Information pane, the connection name and path number populate with read-only information. You can modify the following fields as necessary:

    - **Path Information** – type any information regarding the path.

    9. **Reserved** – click the box to insert a checkmark indicating the path is reserved. Click the field to remove checkmark indicating the path is free to use.

    - **Working** – click the box to clear the checkmark indicating the path is non-working. If the field is blank, click the field to insert a checkmark indicating the path is working.

    10. **Protected** – click the box to insert a checkmark indicating the path is protected. Click the field to clear the checkmark indicating the path is unprotected.

    - **Loaded** – click the box to insert a checkmark indicating the path is loaded. Click the field to clear the checkmark indicating a normal path.

    11. **Path Misc 1 and 2** – type any miscellaneous path information.

12. Within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with connection paths or click **Save & Close** (to save and exit) to return to the Connection Group window.

Path Assignments

Viewing Path Assignments

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Connections**.

3. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

    - Within the search box, type the connection group name or portion of the name and then click the magnifying glass

    4. Click the **Show All** button.

5. The Connection Group list displays. Double-click the connection name.

6. The Connection window opens. Within the **Show** ribbon group, click the **Path Assignments** button.

7. The lower half of the window displays the Connection Path Assignments. The following read only information is displayed:

- **Directory Number**

8. **Circuit Name**

- **Port**

9. **Assignment Building Name**

- **Connection Name**

10. **Path Number**

- **Dedicated Plant**

11. **Connected Building Name**

- **Status**

History

Please see Common Elements → History to learn more.

Dedicated Plant

Dedicated plant allows you to leave connections and paths associations to a room and jack or a room, jack and port without having a device associated. When you create a device, by adding a room and jack or port, you are dedicating the connections and paths to those items, the connection and path cannot be used for anything else until removed from the room, jack and/or port. When you remove the device, the connections and paths stay dedicated to that room and jack.

There are two types of dedicated plant incorporated into CAIRS: Dedicated without Port and Dedicated with Port. The first type, Dedicated without Port, is the one we are all familiar with, this dedication includes room, jack, connections, and paths.

The second type, Dedicated with Port, goes one-step further and includes the port number. This means that the port number is dedicated to the connections, paths, room, and jack. If you have previously selected a port within the device properties, the dedicated plant port overrides your selection.

Within the pick list, you can see if a path is dedicated by looking at the Dedicated Plant column. This column will indicate whether the path is Dedicated with Port or Dedicated without Port.

Connection Group Statistics

You can only view the Connection Group Statistics from within the connection group itself. To view the statistics, access the connection group, then the Quick Stats ribbon group. The following reports are available:

- Path Availability – this report displays the detailed information for the path. Each path may have multiple lines depending how many terminals it is punched down in.

- Fill Percentage – this report is displayed in two forms, the top portion shows a bar graph, the lower pane displays the percentages and path status.

- Building Service – this report displays the building and terminal this connection services and the associated path count.

- Terminal Report – this report displays the terminals of where this connection is within each building.

- Connectivity Report – this report displays the device assigned to the connection as well as complete cross connect information.

File Attachments

Please see Common Elements → Attachments to learn more.

Merge Connections

You can merge connection from multiple sites into one for more accurate record keeping. In order for the merge to work, each connection name and path count has to be identical.

Please keep in mind that when you merge connections, there is no undo option.

Merging Connections

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Connections**.

3. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

   - Within the search box, type the connection group name or portion of the name and then click the magnifying glass or press the **Enter** key on your keyboard.

   4. Click the **Show All** button.

5. Within the **Connection Group** list, double-click the connection name.

6. The Connection window opens.

7. Within the **Utilities** ribbon group, click the **Merge Connection** button.

8. The connections that you can merge together display within the lower pane. Highlight the connection to merge.

9. Within the lower right-hand corner of the screen, click the **Merge Selection** link.

10. A warning message displays saying that there is no undo action. This utility merges the connections with the same that display at different sites. This deletes the other connection group. If there are merge conflicts, you must resolve those before the merge.

11. Within the warning box, click the **OK** button to continue or the Cancel button to stop the merge.

12. Once the merge is complete a box displays with the merge results:

    - If any records need to be deleted from the other site, the number of records is displays, if there is a number within this line, the merge did not occur, you must delete the records from the other site and perform the merge again.

13. Number of records moved

    - Number of records that exist only on the source connection

14. Number of blank records

15. Within the results box, click the **OK** button to return to the connection.

Connection Path Assignments

Within Path Assignments you can view the complete list of assignments for the connection path range. In addition, you can double-click any of the assignments and view and/or modify the information for the assignment. When you double-click an assignment, the Connection Path window opens. There are three panes of information:

- **Path Information** – display general path information

16. **Path Appearances** – displays a list of which terminals the path is assignment to

- **Telephone/Circuits** – displays a list of the assignments associated with the path

Within the Show ribbon group of the Connection Path window is a Connectivity button, which allows you to modify the connection group and path information for each of the assignments. This tab allows you to move a set device or circuit off the connection onto another without having to complete an entire work order.

With that in mind, please be aware that if you edit the information here there is no work order number for tracking purposes.

Viewing Path Assignments

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Connections**.

3. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

    - Within the search box, type the connection group name or portion of the name and then click the magnifying glass or press the **Enter** key on your keyboard.

    4. Click the **Show All** button.

5. The Connection Group list displays. Double-click the connection name.

6. The Connection window opens. Within the **Show** ribbon group, click the **Path Assignments** button.

7. The lower half of the window displays the Connection Path Assignments. The following read only information is displayed:

- **Directory Number**

8. **Circuit Name**

- **Port**

9. **Assignment Building Name**

- **Connection Name**

10. **Path Number**

- **Dedicated Path**

11. **Connected Building Name**

- **Status**

Viewing a Path's Details

1. In the **Navigation** pane, click **Connections**.

2. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

- Within the search box, type the connection group name or portion of the name and then click the magnifying glass or press the **Enter** key on your keyboard.

3. Click the **Show All** button.

4. The Connection Group list displays. Double-click the connection name.

5. The Connection window opens. The Connection window opens. There are two ways to select the path:

- From the **General** screen, double-click the path number within the **Pick List** (lower pane)

6. Within the **Show** ribbon group, click the **Path Assignments** button, within the **Connection Path Assignments** list, double-click the row.

7. With either option, the Connection Path window opens.

8. There are three panes of information:

- **Path Information** – display general path information

9. **Telephone/Circuits** – displays a list of the assignments associated with the path

- **Path Appearances** – displays a list of which terminals the path is assigned to and the associated terminal information

Modify an Assignment on a Path

Within a path's connectivity, you can move the assignment off the current path onto another, into another building, connection, etc. This option gives you the ability to modify all

aspects of the facilities for the assignment. Please keep in mind that when you make changes here there is no work order associated.

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Connections**.

3. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

   - Within the search box, type the connection group name or portion of the name and then click the magnifying glass or press the Enter key on your keyboard.

   4. Click the **Show All** button.

5. Within the Connection Group list, double-click the connection name.

6. The Connection window opens. There are two ways to select the path:

   - From the **General** screen, double-click the path number within the Pick List (lower pane)

   7. Within the **Show** ribbon group, click the **Path Assignments** button, within the **Connection Path Assignments** list, double-click the row.

8. With either option, the Connection Path window opens. Within the **Show** ribbon group, click the **Connectivity** button.

9. The screen changes to displays two panes of information. The pane on the left-hand side of the screen displays the assignments currently associated with the path. The pane on the right-hand side displays the connectivity of the assignment, this includes buildings, terminal, cross connects, etc. Below the **Assigned Site** field, there are two tabs, **View** and **Edit**.

10. Click the **Edit** tab, the complete connectivity for the assignment displays within the lower pane this includes any cross connects, you can modify the following information:

    - **Site** – click the drop-down arrow to access a list and select the site. The site drop-down list displays the bottom-most site first. After the ~~ is the complete path to the site. Each site level is separated by a >.

    11. **Building** – click the drop-down arrow to access a list and select the building name where the set device or circuit resides.

    - **Terminal** – if the building holds only one terminal, the field auto-populates with the terminal name. If there is more than one, click the field to access a drop-down menu.

! If the below fields are not available, click the plus sign (+) next to the Site name. The row directly beneath and indent is where the following information displays. The top line displays the current connection and path association.

- **Connection Name** – click the drop-down arrow to access a list and select the new connection name.

12. **Path Number** – click the drop-down arrow to access a list and select the path number. If multiple paths are used there will be multiple lines.

- **Path Usage** – click the drop-down arrow to access a list and select path usage

13. **Out Binding Post** – displays the appropriate out binding post location of the path selected. If the terminal uses Frame/Row/Block and Pin this field remains blank.

- **Out Frame/Row/Block/Pin** – displays the appropriate out frame location of the path selected. If the terminal uses binding post this field remains blank.

14. **In Binding Post** – displays the appropriate in binding post location of the path selected, if applicable. If the terminal uses frame location this field remains blank.

- **In Frame/Row/Block/Pin** – displays the appropriate in frame location of the path selected, if applicable. If the terminal uses binding post this field remains blank.

15. If more than one pair is used for the assignment click the row marked with an asterisk (*). This creates a new row allowing you to add the multiple paths.

16. You can continue to add cross connections by selecting another site and building name. Once selected, the connection row displays allowing you to add another connection group and path assignment.

17. Within the **Actions** ribbon group, click Save (to save and stay) to continue working with connection paths, or click **Save & Close** (to save and exit) to return to the Connection Group window.

Viewing the Set Device or Circuit

If there is an assignment existing on the connection path, you can view the detailed information for the device.

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Connections**.

3. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

- Within the search box, type the connection group name or portion of the name and then click the magnifying glass or press the **Enter** key on your keyboard.

4. Click the **Show All** button.

5. Within the **Connection Group** list, double-click the connection name.

6. The Connection window opens. There are two ways to select the path:

- From the General screen, double-click the path number within the **Pick List** (lower pane)

7. Within the **Show** ribbon group, click the **Path Assignments** button, within the **Connection Path Assignments** list. Double-click the row.

8. With either option, the Connection Path window opens.

9. Within the **Launch** ribbon group, click the available button, **Set Device, Circuit, Connection, Cisco or AS5300**.

10. The General window opens, allowing you to view and/or modify the information.

11. If you make changes, click **Save & Close** button within the **Action** ribbon group to return to the connection path window. Otherwise, click the **X** in the upper right-hand corner of the window.

Buildings

CAIRS uses the term "building" as a general term that defines the location of connections and various different equipment providing telephone service, LAN, IP connections, and non-dial tone circuits. A building also represents location types such as telephone poles, pedestals, manholes, trailers, sheds, etc. or can also be a location that provides no services and is just a method to document a place.

When you create a terminal within a building, you must designate it to use "binding posts" or as a "frame," it must be one or the other and cannot be both. When you install working service into CAIRS, you assign into the building onto the specific binding post or frame location.

Manage Building Types

Building Types describes the different types of buildings at your site, for example; Buildings, Telephone Poles, Manholes, Bunkers, MDF / DCO, IDF, Dorms, Hangers, Utility Tailors, Munitions, etc.

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Buildings**.

3. There are two ways to manage your building types:

   - Within the toolbar directly above the **Navigation** pane, click the **Manage Building Types** button.

4. Within the **Actions** pane, click the **Manage Building Types** link.

5. With either option, the Manage Building Types window opens.

! If you are unable to view the Actions pane, you may need to use the scroll bar to reveal the menu choices on the right side of the Navigation pane, or using your mouse point at the Separation bar, and when the up/down arrow displays, right-click the line and hold it to pull the line down.

Adding a Building Type

6. Click the field marked with an asterisk (*). To add a new record, complete the following fields (required fields are marked within an asterisk (*)):

   - **Building Type*** – type the name of the building type

7. **Hidden In Portal** – click the box to insert a checkmark to indicate that the building type will not be available within Subscriber Portal. Leave the field empty to indicate that the building type will be available within Subscriber Portal

8. To add another type, click the **Save** button and repeat step 5 as necessary.

Delete a Building Type

9. Within the Manage Building Type window, there are two ways to select the type to delete:

    - Right-click the record selector box (located just left of the name) to access a menu, from the menu click **Delete**.

    10. Highlight the name in the list and within the **Actions** ribbon group click the **Delete** button.

! Keep in mind that to delete a building type, all buildings assigned to the type must first be associated with another type.

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11. Once you click Delete, a message box displays verifying that you really want to delete the type. Click **Yes** within the box to continue or **No** to cancel the operation.

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

13. If you do not want to delete the building type, right-click the record to access a pop-up menu. From the pop-up, click **Undelete**.

14. Once you select Undelete, a message box displays verifying that you really want to keep the type. Click **Yes** within the box to continue or **No** to cancel the operation.

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

Manage Terminal Types

Terminal Type contains the description of the specific terminal. Some examples of terminal types are manhole, closet, post, etc. **(Note:** The terminal types must first be determined and added before adding any terminal records.)

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Buildings**.

3. There are two ways to manage your terminal types:

    - Within the toolbar directly above the **Navigation** pane, click the **Manage Terminal Types** button

    4. Within the **Actions** pane, click the **Manage Terminal Types** link.

5. With either option, the Manage Building Types window opens.

! If you are unable to view the Actions pane, you may need to use the scroll bar to reveal the menu choices on the right side of the Navigation pane, or using your mouse point at the Separation bar, and when the up/down arrow displays, right-click the line and hold it to pull the line down.

Adding a Terminal Type

6. Click the field marked with an asterisk (*), to add a new record, complete the following fields (required fields are marked within an asterisk (*)):

7. Type the new terminal type name.

8. To add another type, click the **Save** button and repeat step 6 as necessary.

Deleting a Terminal Type

9. Within the Manage Terminal Types window, there are two ways to select the type to delete:

    - Right-click the record selector box (located just left of the name) to access a menu, from the menu click **Delete**.

    10. Highlight the name in the list and within the **Actions** ribbon group click the **Delete** button.

11. Once you click Delete, a message box displays verifying that you really want to delete the type. Click **Yes** within the box to continue or **No** to cancel the operation.

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

13. If you do not want to delete the building type, right-click the record to access a pop-up menu. From the pop-up, click **Undelete**.

14. Once you select Undelete, a message box displays verifying that you really want to keep the type. Click **Yes** within the box to continue or **No** to cancel the operation.

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

Buildings Records

Before adding a new building into the CAIRS database, make sure the appropriate "building types" and "terminal types" related to the new building are in the database. For more information see, "Adding a Building Type" or "Adding a Terminal Type".

Adding a New Building

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Buildings**.

3. There are two ways to add a Building:

- Within the toolbar directly above the **Navigation** pane, click the drop-down arrow next to **New**, select **Building**.

4. Within the **Actions** pane, click the **Add New Building** link.

5. Within either option the General-Building window opens. Within the left pane complete the following information (required fields are marked with an asterisk (*)):

- **Site*** – click the drop-down arrow to access a list and select the site. The site drop-down list displays the bottom-most site first. After the ~~ is the complete path to the site. Each site level is separated by a >.

6. **Building Name*** – type the building name.

- **Directory Building Name** – type the building's common name. For example, you may know the building as 110, but the layperson may know the building as the post office. Therefore, the Directory Building Name would be Post Office.

7. **Description** – type the building description. This can include the address, cross streets, etc.

- **Building Type*** – click the drop-down arrow to access a list and select the building type. An example of a building type may be manhole, office, MDF, IDF, etc.

8. **Address Line 1-4 –** use these four fields to enter the address of the building

The following fields are specific to the NENA 2 format for our 911 Interface. When the interface is created, these fields will populate the location information for the set.

- **House Number** – type in the house number, if applicable

9. **Prefix Directional** – Type in the leading street direction prefix, valid entries are N, S, E, W, NW, NW, SE, SW

- **Street Name** – type in the street name

10. **Street Suffix** – Type in the street suffix such as AVE, St, Pkwy, etc

- **Post Directional** – type in the trailing street direction suffix, valid entries are N, S, E, W, NW, NW, SE, SW

11. **City** – type in the city name

- **State** – type in the state name

12. **County** – type in the county name

- **Country** – type in the country name

13. **ZIP –** type in the postal zip code

The next few fields will display the nearest building within set management based on coordinates.

- **Area or Zone** – type in the area or zone of the building

14. **Latitude** – type in the latitude coordinate of the building

- **Longitude** – type in the longitudinal coordinate of the building

15. **Elevation** – type in the elevation of the building

- **Switch Name** – click the drop-down arrow to access a list and select the switch name providing service to the building.

16. **Building Misc 1 – 5** – use these fields to type any miscellaneous connection information.

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

Deleting a Building

Before deleting a building, you must move all existing assignments to another building.

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Buildings**.

3. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

- Within the search box, type the connection group name or portion of the name and then click the magnifying glass or press the **Enter** key on your keyboard.

4. Click the **Show All** button.

5. When the Building list populates, highlight the building to delete. There are three ways to delete a building:

- Within the toolbar directly above the **Navigation** pane, click the red **X**.

6. Click the **Delete Building** link within the **Actions** pane.

- Double-click the name to open the Building window, 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 building. Click **Yes** within the box to continue or **No** to cancel the operation.

If a warning message displays notifying you there is still existing information associated with the building, you must delete any services still in the building. For example, if telephone numbers, electronic sets, or circuits are still working in the building, you must remove them. Further, if there are terminals in a building, you must delete the cables in the terminals and the terminals themselves before you can delete the building. In short, delete all working service of any kind.

Terminal Records

Once you have created Building records, you can then add terminal into each building. When you create a terminal, you designate it to either hold binding posts or frame locations but it cannot be both. In order for a terminal to hold frame locations, you must first create the frame; see Frame Records to learn more about adding frames to a building.

Adding a Terminal to a Building

Before adding a terminal record, verify that the respective Terminal Type exists in CAIRS. To add a new terminal type, please refer to the "Adding a Terminal Type" section.

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Buildings**.

3. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

   - Within the search box, type the building name or portion of the name and then click the magnifying glass.

4. Click the **Show All** button.

5. When the Building list opens, double-click the building name.

6. The Building window opens. Within the **Terminals** (lower) pane click the first blank row marked with an asterisk (*) to add a new record. Complete the following fields (required fields are marked with an asterisk (*)):

   - **Sort** – type a number in the field to determine where in the list the terminal displays, a one allows the terminal be listed first

7. **Terminal Name*** – type the terminal name.

   - **Terminal ID** – type the terminal identification.

8. **Terminal Type** – click the drop-down arrow to access a list and select the terminal type. An example of a terminal type may be manhole, closet, frame, etc.

   - **Terminal Description** – type the terminal description. This may include where in the building to find the terminal, cross streets, etc.

9. **Floor** – type the terminal floor number.

   - **Room** – type the terminal room number.

10. **Terminal Misc 1 - 17** – type any miscellaneous terminal information.

    - **Notes** – type any additional information.

11. To add another terminal, click the **Save** button within the **Actions** ribbon group, and then repeat step #5, as necessary.

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

Deleting a Terminal from a Building

To delete a terminal, its frames must first be deleted. (Please refer to the "Deleting a Frame from a Building" section.)

1. Click the **Facilities** menu.
2. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

   - Within the search box, type the building name or portion of the name and then click the magnifying glass.

   3. Click the **Show All** button.
4. When the Building list opens, double-click the building name.
5. The Building window opens. Within the **Terminals** pane, click the terminal to delete.
6. Right-click the terminal name to access a pop-up box and select **Delete.**
7. Once you click Delete, a message box displays verifying that you really want to delete the terminal. Click **Yes** within the box to continue or **No** to cancel the operation.
8. Once selected, CAIRS draws a line through the type allowing you to delete multiple terminals at once.
9. If you do not want to delete the terminal, right-click the record to access a pop-up menu and select **Undelete**.
10. Once you select Undelete, a message box displays verifying that you really want to keep the terminal. 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 terminal records, or click **Save & Close** (to save and exit) to return to the Building list.

Emergency Response Location (ERL)

The Emergency Response Location is the location of where an emergency responder will be dispatched to. This location should be specific enough that the responder can quickly location the caller. Why do we have this? With most phones going the way of VoIP, an ERL make it possible to assign a group of phones to a zone within a building.

Within each building you will create the ERLs. When you create a set, it will be assigned into the ERL.

Adding an ERL

1. Click the **Facilities** menu.
2. In the **Navigation** pane, click **Buildings**.
3. To populate the Buildings list, you must either:

- Within the search box, type the building name or portion of the name and then click the magnifying glass.

4. Click the **Show All** button.

5. When the Building list opens, double-click the building name.

6. The Building window opens. Within the lower pane, click on the Emergency Response Location tab.

7. Click on the blank row marked with an asterisk (*) to add a new location.

8. Enter in the following information for the ERL:

- Emergency Location Extension

9. Emergency Location Floor

- Emergency Location Room

10. Once the fields are complete, click **Save** (to save and stay) to continue working with frame records, or click **Save & Close** (to save and exit) to return to the Building list.

Frame Records

Frame records are added to a building's terminal record. (To add a terminal record, refer to the "Adding a Terminal to a Building" section.) You can then modify or delete the existing frame records.

Adding a Frame to a Building

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Buildings**.

3. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

- Within the search box, type the building name or portion of the name and then click the magnifying glass.

4. Click the **Show All** button.

5. When the Building list opens, double-click the building name. Within the **Show** ribbon group, click the **Frames** button.

6. The Frames list opens. Click the first blank row marked with an asterisk (*), to add a new record. Type the **Frame Name**.

7. In the **Terminal Name** column, use the drop-down and select the **Terminal Name.**

8. Notice that once you enter in a Frame Name, a plus sign (+) displays next to the name. Click the plus sign (+) to access the Frame Row, Block, and Pin/Frame Usage list. Click the first blank row marked with an asterisk (*), to enter the frame usage information. Complete the following Frame fields (fields marked with an asterisk (*) are required):

- **Row Number*** – type the number of the row where the frame starts.

9. **Block Number*** – type the block number.

- **Start Pin Number*** – type the starting pin number.

10. **End Pin Number*** – type the ending pin number.

- **Reserved*** – click the box to insert a checkmark to indicate the frame is reserved.

11. The remaining columns auto-populate when a range is added to a connection. To learn more, refer to the 'Adding a Range to a Building' section.

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

Deleting a Frame from a Building

1. Click the **Facilities** menu.

2. Click **Buildings** in the **Navigation** pane.

3. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

- Within the search box, type the building name or portion of the name and then click the magnifying glass.

4. Click the **Show All** button.

5. When the Building list opens, double-click the building name. Within the **Show** ribbon group, click the **Frames** button.

6. Right-click the frame name to access a pop-up box and select delete.

7. Once you click Delete, a message box displays verifying that you really want to delete the frame. Click **Yes** within the box to continue or **No** to cancel the operation.

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

9. If you do not want to delete the frame, right-click the record to access a pop-up menu. From the pop-up, click **Undelete**.

10. Once you select Undelete, a message box displays verifying that you really want to keep the frame. 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) to continue working with frame records, or click **Save & Close** (to save and exit) to return to the Building list.

Connections and Buildings

After you have built the connection groups, it is time to add those connections into the buildings and terminals that they service. Once a building has a terminal, you can add the connection group and path ranges. A connection group can exist within a building without having any associated path ranges.

Adding a connection to a building

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Buildings**.

3. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

   - Within the search box, type the building name or portion of the name and then click the magnifying glass.

4. Click the **Show All** button.

5. When the Building list opens, double-click the building name.

6. The Building window opens, displaying two panes. Within the **Terminals** pane, click the plus sign (+) next to the terminal to which you want to add the connection record.

7. Click the first blank row marked with an asterisk (*), to enter the connection groups. Complete the following Connection fields (fields marked with an asterisk (*) are required):

   - **Sort** – type a number in the field to determine where in the list the connection displays, a one allows the connection to be listed first.

8. **Connections Name** – click the drop-down arrow to access a list and select the connection name to assign it to the terminal.

   - **Distance in Feet** – type the distance (in feet), this connection runs from the MDF or IDF to the terminal.

9. **Wire Gauge** – type the connection gauge.

   - **Home Termination** – type the name of the originating connection termination.

! Tie connection and home termination. When creating a tie connection between two buildings, the home termination will be different for each connection appearance. For instance, if the connection ran from building 205 to 206, the home termination in 205 would be 206 and the home termination in 206 would be 205.

   - **Terminal Connection Description** – type the description of the terminal relating to the connection group, if necessary.

10. To add another connection, click the **Save** button within the **Actions** ribbon and repeat steps #4 and 5.

11. Once all connection groups are added, click the **Save and Close** button within the **Actions** ribbon group.

12. To add a connection range of paths that run into the building, please refer to the "Adding a Connection Range to a Building" section.

Deleting a Connection from a Building

Deleting a connection from a building is simply removing that connection group from the building record. You do not actually delete the entire connection group from the database.

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Buildings**.

3. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

    - Within the search box, type the building name or portion of the name and then click the magnifying glass.

    4. Click the **Show All** button.

5. When the Building list opens, double-click the building name.

6. The Building window opens, displaying two panes. Within the **Terminals** pane, click the plus sign (+) next to the terminal record to view all existing connection records.

7. Right-click the connection name to access a pop-up box, and select delete.

8. Once you click Delete, a message box displays verifying that you really want to delete the connection. Click **Yes** within the box to continue or **No** to cancel the operation.

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

10. If you do not want to delete the connection, right-click the record to access a pop-up menu. From the pop-up, click **Undelete**.

11. Once you select Undelete, a message box displays verifying that you really want to keep the connection. Click **Yes** within the box to continue or **No** to cancel the operation.

12. Within the **Actions** ribbon group, click the **Save** (to save and stay) to continue deleting building connections, or click **Save & Close** (to save and exit) to return to the Building list.

Connection Ranges and Buildings

A connection range refers the path numbers servicing a building. For example, a connection 1A (a 500 path connection) services building 1665, however, only paths 100 through 200 are punched down into the building. Therefore, your path range is 100 to 200. Before you can add a range into a building, the connection group must reside within the building and terminal.

Adding a Connection Range to a Building

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Buildings**.

3. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

- Within the search box, type the building name or portion of the name and then click the magnifying glass.

4. Click the **Show All** button.

5. When the Building list opens, double-click the building name.

6. The Building window opens. Within the **Connection Paths** ribbon group, click the **Add Range** button.

7. The Add Range pop-up opens. To add the range, complete the following information:

- **Terminal** – click the drop-down arrow to access a list and select the terminal to assign a connection range to. When you select a terminal, the Connection Group drop-down becomes available for selection. The right pane within the Add Range pop-up displays the connection group and paths currently existing within the terminal.

8. **Connection Group** – click the drop-down arrow to access a list and select the connection group name. Once selected, the Beginning Path, Ending Path and Frame or Binding Post drop-down boxes become available for selection.

- **Beginning Path** – this field auto-populates with the connection's beginning path. To select a different beginning path, click the drop-down arrow to access a list and select the number of the first path you are assigning into the terminal.

9. **Ending Path** – this field auto-populates with the ending connection path. To select a different ending path, click the drop-down arrow to access a list and select the number of the last path you are assigning into the terminal.

- **Don't Track Binding Post** – click the box to insert a checkmark to indicate binding post or frame location will not be tracked. Once clicked the remaining fields become unavailable.

! The next field becomes available based on how you created the terminal. If you created the terminal to hold binding post information, then the First Binding Post field becomes available, however, if you designed the terminal to hold frame locations, the Frame, First Row, First Block, and First Pin fields become available.

- **First Binding Post** – click the drop-down arrow to access a list and select the number of the first binding post containing the first path.

10. **Frame** – click the drop-down arrow to access a list and select the frame name. Once you select a Frame, the First Row drop-down box becomes available. You will also see the detailed Frame Usage information in the right-hand pane of the window. To see the non-visible information, drag the scroll bar along the bottom of the pane.

- **First Row** – click the drop-down arrow to access a list and select the first row. Once you have selected a row, the Block drop-down becomes available.

11. **First Block** – click the drop-down arrow to access a list and select the first block. Once selected, the pin drop-down becomes available.

- **First Pin** – click the drop-down arrow to access a list and select the first pin.

12. After completing all the range information, the **Save** button becomes available. Click the **Save** button to save the range and close the pop-up. Alternatively, click the **Cancel** button to stop the operation and return you to the General – Building window without adding the range.

13. Within the **Terminals** pane, a Connection Path Ranges list displays under the **Connections** list.

14. To view the complete range, click the plus sign (+) next to the **Start Path** number.

15. Within the **Actions** ribbon group, click the **Save** (to save and stay) to continue adding connection ranges, or click **Save & Close** (to save and exit) to return to the Building list.

Deleting a Connection Range from a Building

Before a connection range can be deleted from a building, the paths must be free of all assignments.

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Buildings**.

3. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

- Within the search box, type the building name or portion of the name and then click the magnifying glass.

4. Click the **Show All** button.

5. When the Building list opens, double-click the building name.

6. The Building window opens. Within the **Connection Paths** ribbon group, click the **Delete Range** button.

7. The Delete Range window opens. Use the drop-downs to select the terminal and connection group.

8. The Beginning and Ending Path auto-populate with the paths originally assigned into the terminal. From the Beginning Path, select the start path number to delete. For example, if you have a 50 pair cable and you want to delete pair 40 to 50, select 40 in the **Beginning Path** drop-down.

9. In the Ending Path drop-down list, select the end path number to delete. With the above example, the End path would be 50. Keep in mind that you cannot delete a path unless it is free of all assignments.

10. Click the **Delete** button. The pop-up closes and the range no longer displays in the Terminals pane.

Modifying a Connection Range of a Building

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Buildings**.

3. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

    - Within the search box, type the building name or portion of the name and then click the magnifying glass.

    4. Click the **Show All** button.

5. When the Building list opens, double-click the building name.

6. The Building window opens. Within the **Connection Paths** ribbon group, click the **Modify Range** button.

7. The Modify Range pop-up opens. Use the drop-down list to make the necessary changes.

8. Once you have completed modifying the range information, the Save button becomes available. Click **Save** to save the range and close the pop-up.

9. Within the **Terminals** pane, the **Connection Path Ranges** list displays under the **Connections** list.

10. To view the complete range, click the plus sign (+) next to the **Start Path** number.

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

Move a Connection Range

When you want to move a connection range there are two variations. First, you can move the connection range to a different terminal within the same building. Second, you can move the connection range to a different building that contains the same connection group.

There are a few things to consider before you start moving connection ranges. You can only move the paths that exist within the terminal, for example, if you have paths 1-10 and 21-30, you cannot move 1-30 because 11-20 do not exist in the terminal. There can be no overlapping path counts, for example, if you are moving cable 01 path 1-10 from terminal 1 to 2, terminal cannot already have path 1-10 in it.

There is an option to delete the terminal once you have moved all connection paths from the terminal. Be very careful with this option, there is no undo function.

Moving within the same building

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Buildings**.

3. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

    - Within the search box, type the building name or portion of the name and then click the magnifying glass.

    4. Click the **Show All** button.

5. When the Building list opens, double-click the building name.

6. The Building window opens. Within the **Connection Paths** ribbon group, click the **Move Range** button.

7. The Move Range pop-up opens.

8. To move a connection group and path to another terminal complete the following fields:

    - **Move From Terminal** – click the drop-down arrow to access a list of the terminals within the building list and select the terminal to move the paths from

    9. **Connection Group** – click the drop-down arrow to access a list of the connection groups within the selected terminal list and select the connection to move

    - **Beginning Path** – this field auto-populates with the first path within the connection group, to change the path, click the drop-down arrow to access a list and select the beginning path that you want to move.

    10. **Ending Path** - this field auto-populates with the last path within the connection group, to change the path, click the drop-down arrow to access a list and select the ending path that you want to move.

    - **Move To Building** – this field auto-populates with the building that you are currently in, since you are moving the path range to a different terminal within the same building, leave this field as it is

    11. **Move To Terminal** – click the drop-down arrow to access a list and select the terminal you want to move the range into

    - **Delete terminal if empty** – this field defaults to include a checkmark to indicate that once the terminal is empty, meaning it no longer has a connection group and path range, it will be deleted from the building. Pay close attention to this field as there is no undo function.

12. Once the fields are completed, the Move button becomes available. Click the Move button to complete the process. Alternatively, click the Cancel button to stop the process and return to the original connection path – terminal association.

13. Within the **Actions** ribbon group, click the **Save** (to save and stay) to continue moving connection ranges, or click **Save & Close** (to save and exit) to return to the Building list.

Moving to another building

1. Click the **Facilities** menu.

2. In the **Navigation** pane, click **Buildings**.

3. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

   - Within the search box, type the building name or portion of the name and then click the magnifying glass.

   4. Click the **Show All** button.

5. When the Building list opens, double-click the building name.

6. The Building window opens. Within the **Connection Paths** ribbon group, click the **Move Range** button.

7. The Move Range pop-up opens.

8. To move a connection group and path to another terminal complete the following fields:

   - **Move From Terminal** – click the drop-down arrow to access a list of the terminals within the building list and select the terminal to move the paths from

   9. **Connection Group** – click the drop-down arrow to access a list of the connection groups within the selected terminal list and select the connection to move

   - **Beginning Path** – this field auto-populates with the first path within the connection group, to change the path, click the drop-down arrow to access a list and select the beginning path that you want to move.

   10. **Ending Path** - this field auto-populates with the last path within the connection group, to change the path, click the drop-down arrow to access a list and select the ending path that you want to move.

   - **Move To Building** – this field auto-populates with the building that you are currently in, click the drop-down arrow to access a list and select the name of the building you want to move the connection range to

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! When you want to move a connection path from one building to another, the same connection must exist within both buildings.

   - **Move To Terminal** – click the drop-down arrow to access a list and select the terminal you want to move the range into

   11. **Delete terminal if empty** – this field defaults to include a checkmark to indicate that once the terminal is empty, meaning it no longer has a connection group and path range, it will be deleted from the building. Please pay close attention to this field as there is no undo function.

12. Once the fields are completed, the Move button becomes available. Click the Move button to complete the process. Alternatively, click the Cancel button to stop the process and return to the original connection path – terminal association.

13. Within the **Actions** ribbon group, click the **Save** (to save and stay) to continue moving connection ranges, or click **Save & Close** (to save and exit) to return to the Building list.

Deleting the terminal if empty

When you move a range, pay close attention to the Delete terminal if empty checkbox. By default, this box is checked to indicate that once the terminal is empty it will be deleted from the building. Click the box to clear the checkmark to leave the terminal within the building even if it is empty.

Building Statistics

CAIRS offers a quick way to look at a building's statistics. With the Quick Stats ribbon group of the building the following 4 reports are available:

- **Path Availability** – displays the Number/Circuit/Device, the connection name, the path numbers, the status (in use, spare, reserved, or bad) of the path numbers, terminal names, binding posts, and frame information for a given building.

14. **Connection Service** – this report displays all the connections and ranges assigned to the building

- **Fill Percentage** - this report is displayed in two forms, the top portion shows a bar graph, the lower pane displays the percentages and path status of each connection

15. **Connectivity Report** – this report displays only the connection paths that are associated to a device whether a directory number or circuit.

Connectivity

Connectivity allows you to view all the connections that are created within your database. The list displays the device, whether a set or circuit, and the associated facilities information including all cross connects. You can double click on any record to open the Connectivity window, within this window you can manipulate the facilities.

You can also create new dedicated plant records. For a record to be dedicated you have to take the connection all the way to the room and jack in the assigned building. This kind of record is called Dedicated without port. The other type of dedicated plant, is dedicated with port, this means you are dedicating the connection from the port all the way to the room and jack in the assigned building. This report displays which records are 'Dedicated' or 'Not Dedicated'.

Viewing Connectivity

1. Click the **Facilities** menu.

2. Click the **Connectivity** menu on the **Navigation** pane.

3. Depending on the amount of records you have within your database, the list may not immediately populate. To populate the list, perform one of the following actions:

    - Within the search box, type the building name or portion of the name and then click the magnifying glass.

    4. Click the **Show All** button.

5. Within the list, you can view the complete connectivity for the device. As you scroll to the right, the cross connects are listed.

6. The Terminal Position, Building and Terminal are bolded, these are the location of where the device is located. All cross connects work from this location back to the MDF.

Creating a New Dedicated Plant

1. Click the **Facilities** menu.

2. Click the **Connectivity** menu on the **Navigation** pane.

3. Within the Actions pane, click on the Add New Dedicated Plant link.

4. The Connectivity – Detail window opens. The window will look familiar as it is a copy Facilities pane you see in Sets and Circuits. There are two sections of information the top pane displays a few basic items regarding the connectivity and dedicated plant. The lower half allows you to assign the complete facilities package with cross connects.

5. Within the top section, complete the following fields the required fields are marked with an asterisk (*):

    - **Assigned Site** – click on the dropdown arrow to access a list of the sites, there are two columns of information. The first column displays the site that you are associating, the second column is the complete path to the site this includes the parents of the site. You can either scroll through the list to find the site or you can type in any portion of the site name within the textbox, once the site appears, click on the name to associate to the device. The site name displays in the field.

    6. **Assigned Building** * – click the drop-down arrow to access a list, you can either scroll through the list to find the building or you can type in any portion of the building name into the textbox, once the building name appears, click on the name to associate to the device. The building name appears in the field.

    - **Alternate Location –** type in any alternate location information relating to the device. This field can appear in the 911 interface

    7. **Directory Building Name** – this field auto-populates with the Directory Building Name that appears on the Building Record. The Directory Building name is

defined as the common name for the building, for example, the assigned building name is 100 and the directory building name is Post Office. This field is read only.

- **Floor** – type the floor number, if applicable.

8. **Room** – type the room number, if you are creating a dedicated plant you must enter a room number

- **Jack** – type the jack number, if you are creating a dedicate plant you must enter a jack number

9. **Connectivity Misc 1**-3 – use these fields to enter in any other information regarding this connection that you want to track

- **Dedicated Plant *** – click the arrow to access a drop-down list, from the list select the type of dedication. The field automatically defaults to 'Dedicated Without Port'. You can change the selection to 'Dedicated with Port' by clicking the dropdown arrow and making the selection.

10. **Latitude** – type in the latitude coordinate of the building

- **Longitude** – type in the longitudinal coordinate of the building

11. **Elevation** – type in the elevation of the building

12. It is a good idea to save the changes you have just made, within the Actions ribbon group click on the Save button.

13. Within the lower pane there are three tabs of information; Edit, Dedicated Plant and Imported Data By Path.

14. The Edit tab allows you to change the connectivity to the device. There are two lines of information for each portion of the connection. The top line displays the following information, when you change any field in this row it will cause the rest of the section to be delete.

- **Site** – click on the dropdown arrow to access a list of the sites, there are two columns of information. The first column display the site that you are associating, the second column is the complete path to the site this includes the parents of the site. You can either scroll through the list to find the site or you can type in any portion of the site name within the textbox, once the site appears, click on the name to associate to the device. The site name displays in the field.

15. **Building** – click the drop-down arrow to access a list, you can either scroll through the list to find the building or you can type in any portion of the building name into the textbox, once the building name appears, click on the name to associate to the device. The building name appears in the field.

- **Terminal Name** – if the building contains only one terminal this field auto-populates with terminal name. If the field is blank click on the dropdown arrow to access a list of terminals, you can either scroll through the list to find the terminal or you can type in any portion of the name within the textbox, once the terminal

appears, click on the name to associate to the device. The terminal name displays in the field.

16. In the second row allows you to add the connection and path information, click on the row marked with an asterisk (*) to add a new connection or click into any field to edit the information. The following fields are available:

- **Connection Name** – click the drop-down to access a list, you can either scroll through the list to find the connection or you can type in any portion of the name within the textbox in the upper right hand corner of the dropdown, once the connection appears, click on the name to associate to the device. The name displays in the field

17. **Path Number** – this field auto-populates with the next available path in the terminal. To change this selection, click the drop-down arrow to access a list, there four several columns of information that display the binding post or frame location of the path.

- **Path Usage** – click the drop-down arrow to access a list, you can either scroll through the list to find your selection or you can type in any portion of the name within the textbox in the upper right hand corner of the dropdown, once your selection appears, click on the name to associate to the connection. The name displays in the field. This is a list that is pre-defined within Facilities and indicates how the path is being used, for example, data, voice, transmit, etc.

18. **Out Binding Post** or **Out Frame Location** – these fields auto-populate with number(s) corresponding to the path number. This information is defined within Facilities; each terminal is designed with either a Binding Post or Frame Location. This field is a Read Only field.

- **In Binding Post or In Frame Location** – these fields auto-populate within number(s) corresponding to the path number. This information is defined within Facilities; each terminal is designed with either a Binding Post or Frame Location. This is a Read Only field.

19. You can continue to add-in cross connect buildings, terminals, and connection information for the device by entering in another site, building name, and terminal.

20. The Dedicated Plant tab allows you to view all existing dedicated plant within your database. You can click on any record in the list to load the complete connectivity to view or edit.

21. The Nearest Building tab lists the building that are closest to the Assigned Building based on latitude and longitude coordinates.

22. Once you have added the complete plant connectivity, within the Actions ribbon group, click **Save** (to save and stay) to continue working with this connectivity, or click **Save & Close** (to save and exit) to return to the Connectivity list.

Switches

The Switches menu manages and monitors switch information and connectivity. You must first create a switch record before doing any switch provisioning through CAIRS. This switch record allows you to manage switch connectivity, properties, port numbers, and general switch features including feature key maps, speed dial and office hunt groups.

After creating a switch record, you can add a connection record. The connection record connects you to your switch via Secure Maintenance Access (SMA), a MML interface allowing secure emulator-type access.

Within Switches, you create port groups to which you add port numbers. Port numbers are equivalent to EQNs for the EWSD switch, and LENs for the Nortel switch/PBX platform. The port number status is viewed and changed here (ex. Bad, Active, Spare). It should be noted that you CAIRS administrator imports your port numbers into your database through the Data Sync Center.

Additionally, you can define Class of Service (or DSN Access for EWSD switch types) and Class of Restriction (or PTT Access for EWSD switch types).

For EWSD switches, you create and manage Switch Data reports, Speed Dial Groups, and Line Class Codes in the switch record. You can also view the switch's Feature Key Maps.

There are two menu items within the Switches Navigation pane that will not be covered in this manual, Traffic & Alarms and MoraleMinder. These two options are add-ons to the CAIRS program.

The Import Core Data menu options allow a Unique Communications representative to create your database by importing you data into CAIRS.

The Exporting menu option allows you and a Unique Communications representative a means to troubleshoot issues that may occur within your database.

Switch Settings

From the Switches menu, you add and view basic and common switch settings. What really connects CAIRS to the switch is Unique Communication's WOPR-ASI service. Your CAIRS administrator manages the automatic switch interface that communicates CAIRS requests to the switch via scripts. When you create a connection record in a switch, you essentially define the parameters WOPR-ASI needs to communicate with the switch.

There are four switch settings within the Actions pane:

- **View Switch Settings** - displays the setting type and associated switch category.

- **Manage Common Settings** - allows you to view and delete just the common settings. You can also add the initial value for a common setting.

- **Manage Class of Service Name** - allows you to create the drop-down list that defines the switch's available Class of Services.

- **Manage Class of Restriction Name** - allows you to create the drop-down list that defines the switch's available Class of Restriction.

You will need to define each of these before you can start to add your switch records into the database.

Switch Settings

Adding Switch Settings

A switch technician or CAIRS administrator is responsible for adding and configuring the switch settings. You should always consult your switch technician before modifying any settings.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. There are two ways to open the View Switch Settings window:

   - Within the toolbar directly the Navigation pane, click the **View Switch Settings** button.

   - Within the Actions pane, click the **View Switch Settings** link.

4. The View Switch Settings window opens.

5. Within the View Switch Settings pane, click the row marked with an asterisk (*) to add a new record. Configure the following fields (required fields are marked with an asterisk (*):

   - **Setting Type*** – click the drop-down arrow to access a list and from the list, select either: None, General, or Common.

   - **Setting Category*** – type the setting category.

   - **Setting Name*** – type the specific setting name.

   - **Switch Type** – type the setting switch type.

   - **Data Type** – click the drop-down arrow to access a list and from the list, select the data type: String, Number, or Boolean.

   - **Description** – type a brief setting description.

   - **Help** – type any additional help comments.

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

Removing Switch Settings

You can remove all existing switch settings through the View Switch Settings action link within the Switches Menu.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. There are two ways to open the View Switch Settings window to delete a setting:

   - Within the toolbar directly the Navigation pane, click the **View Switch Settings** button.

   - Within the Actions pane, click the **View Switch Settings** link.

4. The View Switch Settings window opens, find the setting you want to delete and click the row to highlight.

5. 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 setting. Click Yes within the box to continue or No to cancel the operation.

Modifying a Switch Setting

A switch technician or CAIRS administrator is responsible for adding and configuring the switch settings and should be consulted before adding any settings.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. There are two ways to open the View Switch Settings window to delete a setting:

   - Within the toolbar directly the Navigation pane, click the **View Switch Settings** button.

   - Within the Actions pane, click the **View Switch Settings** link.

4. The View Switch Settings window opens, find the setting to modify, make the necessary changes.

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

Common Switch Settings

Viewing Common Switch Settings

You can view all switch settings through the View Switch Settings Actions link located within the Switches menu. You can also view just the common settings through the Manage Common Settings Action link.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. There are two ways to open the Manage Common Settings window:

   - Within the toolbar directly the Navigation pane, click the **Manage Common Settings** button.

   - Within the Actions pane, click the **Manage Common Settings** link.

4. The Manage Common Settings window opens. Depending on the number of settings you have within your database, the list may or may not immediately populate. There are two ways to populate the list if needed:

   - Within the search box, type any portion of the record and then click the magnifying glass.

   - Click the Show All button.

5. Alternately, you can click any column header to sort the records in alphabetical or numerical order.

6. When you are finished viewing the record, click Save & Close to exit.

Deleting a Common Switch Setting

Please consult your switch technician or CAIRS administrator before deleting any parameters or common switch settings as deletion can interfere with switch connectivity.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. There are two ways to open the Manage Common Settings window:

   - Within the toolbar directly the Navigation pane, click the **Manage Common Settings** button.

   - Within the Actions pane, click the **Manage Common Settings** link.

4. The Manage Common Settings window opens. In the Manage Common Settings pane, find and click the setting to delete. (This window displays only settings with a setting type set to 'Common' as displayed in the Setting Type column.)

5. There are two ways to delete a setting:

   - Highlight the record within the list and click the Delete button within the Actions ribbon group.

   - Right-click the record to access a pop-up menu and from the menu select Delete.

6. Once you click Delete, a message box appears verifying that you really want to delete the setting. Click Yes within the box to continue or No to cancel the operation.

7. Once selected, CAIRS draws a line through the item allowing you to delete multiple settings at one time.

8. If you do not want to delete the setting right-click the record to access a pop-up menu and from the pop-up click Undelete.

9. Once you click Undelete, a message box appears verifying that you really want to undelete the setting. Click Yes within the box to continue or No to cancel the operation.

10. To complete either process, click the Save (save and stay) button or Save & Close, within the Actions ribbon group, to return to the Switches list.

Class of Service

Manage Class of Service Name

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. There are two ways to open the Manage Common Settings window:

   - Within the toolbar directly the Navigation pane, click the **Manage Class of Service Name** button.

   - Within the Actions pane, click the **Manage Class of Service Name** link.

4. The Manage Class of Service Name window opens. Click the top row, marked with an asterisk (*) to add a new record. You can add multiple items at once by clicking the row with the asterisk. Type the class of service name.

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

Delete Class of Service Name

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. There are two ways to open the Manage Common Settings window:

   - Within the toolbar directly the Navigation pane, click the **Manage Class of Service Name** button.

   - Within the Actions pane, click the **Manage Class of Service Name** link.

4. There are two ways to delete a class of service:

   - Highlight the record within the list and click the Delete button within the Actions ribbon group.

   - Right-click the record to access a pop-up menu and from the menu select Delete.

5. Once you click Delete, a message box appears verifying that you really want to delete the record. Click Yes within the box to continue or No to cancel the operation.

6. Once selected, CAIRS draws a line through the item allowing you to delete multiple records at one time.

7. If you do not want to delete the record, right-click the record to access a pop-up menu and from the pop-up, click Undelete.

8. Once you select Undelete, a message box appears verifying that you really want to undelete the record. Click Yes within the box to continue or No to cancel the operation.

9. To complete either process, click the Save (save and stay) button or Save & Close, within the Actions ribbon group, to return to the Switches list.

Class of Restriction

Manage Class of Restriction Name

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. There are two ways to open the Manage Common Settings window:

   • Within the toolbar directly the Navigation pane, click the **Manage Class of Restriction Name** button.

   • Within the Actions pane, click the **Manage Class of Restriction Name** link.

4. The Manage Class of Restriction Name window opens. Click the top row, marked with an asterisk (*) to add a new record. Type the class of restriction name. You can add multiple items at once by clicking the row with the asterisk.

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

Delete Class of Restriction Name

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. There are two ways to open the Manage Common Settings window:

   • Within the toolbar directly the Navigation pane, click the **Manage Class of Restriction Name** button.

   • Within the Actions pane, click the **Manage Class of Restriction Name** link.

4. There are two ways to delete a Class of Restriction:

   • Highlight the record within the list and click the Delete button within the Actions ribbon group.

   • Right click the record to access a pop-up menu and from the menu select Delete.

5. Once you click Delete, a message box appears verifying that you really want to delete the record. Click Yes within the box to continue or No to cancel the operation.

6. Once selected, CAIRS draws a line through the item allowing you to delete multiple records at one time.

7. If you do not want to delete the records, right-click the record to access a pop-up menu, and from the pop-up, click Undelete.

8. Once you select Undelete, a message box appears verifying that you really want to undelete the record. Click Yes within the box to continue or No to cancel the operation.

9. To complete either process, click the Save (save and stay) button or Save & Close, within the Actions ribbon group, to return to the Switches list.

Switch Records

To keep track of switches at your site(s), add switch records within the Switches menu. As you add a switch record into CAIRS, provide switch type, manufacturer, software load, trunk routes, and install information. Once the basic switch record is added, add: connection records and create SMA, import port numbers (EQN) into CAIRS, indicate the site(s) using the switch, class of service (DSN Access for EWSD), class of restriction (PSTN Access for EWSD), line class codes, and create speed dial groups within the switch record.

You can also modify and delete existing switch records, view script history, data files, and feature key maps.

Before adding a switch into your database, Unique Communication needs to import the software load information for each switch type. You will provide a company representative a file containing the information. Once the information is successfully imported, you can start adding your switches into the database. If the software load information changes in the future, a Unique Communications representative can talk you through the process of updating the imported information.

Adding a New Switch Record

Manage your switches by creating a record for each one within the Switches menu. Once you add a switch record, you can expand and add connections, import port numbers (EQN), and perform all other switch related functions.

1. Click the Switches menu

2. In the Navigation pane, click Switches.

3. There are two ways to open the General – Switch window to add a new record:

    - On the toolbar directly above the **Navigation** pane, click the drop-down arrow next to **New**. From the list, select **Switches**.

    - Within the **Actions** pane, click the **Add New Switch** link.

4. The General - Switch window opens. There are two panes of information; the top pane displays general switch information. The lower pane displays the various connections to the switch.

5. Within the top pane, complete the following switch information (required fields are marked with an asterisk (*)):

    - **Manufacturer*** – click the drop-down arrow to access a list and from the list, select one of the following switch manufacturers:

- Nokia Siemens Networks
- Avaya
- Cisco
- Tadiran Telecom
- Nortel
- Lucent
- Other

- **Switch Type*** – click the drop-down arrow to access a list and from the list, select one of the following switch types:

• Unknown		• EWSD	
• HiPath		• CS2100	
• CS1000 M1		• Ayava	
• Lucent 5ESS		• Hardware	
• SL100		• Unified Communications Manager	
• Tadiran		• AS5300	

! We have hard-coded the Manufacturer and Switch Type into the software, you cannot edit these fields.

- **Software Load*** – click the drop-down arrow to access a list and from the list, select the appropriate switch software version.

- **Switch Name*** – type the switch name.

- Cache Behavior for API – click on the drop-down arrow to access a list and from the list, select one of the following options:

    - Do Not Cache – This is the default setting; you have to have a connection to the switch to get the data for the set. No data will be stored in the database.

    - Load from Cache No Live Data No Edit – A sync with the switch needs to be performed to put data in the cache, once there you will be able to see the data. Most of the fields will be read only, however, you will be able to edit the fields that do not update the switch.

    - Load from Cache Edit Live Data – A sync with the switch needs to be performed to put data into the cache, once there you will be able to see the data. To edit a phone, you must click the "Load Live Data" button first.

    - Load from Live First – Phone data initially loads from the switch. If the switch connection is not available, you can load data from the cache by clicking the "Load Cached Data" button. This will be read only information until the connection is re-established.

- **Use Routing** – click the box to insert a checkmark to indicate the switch uses routing. This field is for Nortel switches and system-wide moves only. If you check this, the next three fields are required.

- **DSN Trunk Route** – type the DSN trunk route (Note: a required field for system wide moves on the Nortel platform).

- **Commercial Trunk Route** – type the commercial trunk route (Note: a required field for system wide moves on the Nortel platform).

- **Message Trunk Route** – type the message trunk route (Note: a required field for system wide moves on the Nortel platform).

- **Description** – type an optional switch description.

- **Install Date** – type the switch installation date.

- **Port HASU Summary Prefix Length –** type in the value for the number of characters in the Port field that are used to group the ports together, for example, if you are using the port HOST 00 0 00 00, the value would be nine. When you generate the Spare Port Combined Summary the report is grouped by HOST 00 0.

- **Port HASU Summary Detail Prefix Length -** type in the value for the number of characters in the Port field that are used to group the ports together, for example, if you are using the port HOST 00 0 00 00, the value would be nine. When you generate the Spare Port Detailed Summary the report is grouped by HOST 00 0.

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

! When adding a EWSD switch type, after clicking Save, you are asked if you want CAIRS to automatically create the DSN/PSTN access codes. Click Yes to have CAIRS automatically create or No to create the codes manually.

Viewing Switch Records

View existing switch records within the Switches menu.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list displays, you can sort it based on a few common characteristics. There are four views you can choose from within the Views pane and each sorts or categorizes the switches based on the common element. The following views are available:

    - **Simple List** – the default view. The records are listed in alphabetical or numerical order.

    - **Site** – sorts the list based on associated sites. If a switch is associated to multiple sites, the record appears under all headings.

    - **Manufacturer** – sorts the list based on manufacturer name.

    - **Switch Type** – sorts the list based on switch type.

5. To change the view, within the views pane click the option button next to the selection. The list changes to your appropriate selection. Click the plus sign (+) next to the heading to view the expanded list.

6. To view an individual record, double-click the row to open the General – Switch screen.

Deleting a Switch Record

In order to delete a switch record, the switch must be free of all assignments. CAIRS offers two ways to delete a switch record:

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

    - Click the **Show All** button.

4. Once the list displays, highlight the switch you want to delete. There are two ways to complete the deletion:

    - Within the tool bar directly above the Navigation pane, click the red X.

    - Double-click the switch name within the list. The General – Switch 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 switch. Click Yes within the box to continue or No to cancel the operation.

Switches and Site Association

Once you create a switch record, add site(s) using the switch associated with that switch record. This switch-site association helps you keep track of switches for a given site. When

a site no longer uses a particular switch, you can disassociate the site from the switch record.

Adding Site Association

Site(s) using a particular switch can be added to a switch record from within the Switches Menu.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

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 switch. 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 an organization within the Search Organization 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.

6. To add a site to the switch, 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.

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

Deleting a Site

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the **Show** ribbon group, click the **Sites** button.

6. Within the top pane, right site 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.

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

8. 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**.

9. 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.

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

Switch Script History

CAIRS tracks all switch script requests. You can view the name of the user who requested the script, the script name, the request date, the status of the request, and any notification or error messages.

Viewing Switch Request History

View any scripts requested from a switch through the switch record in the Switches Menu.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

- Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Show ribbon group, click the Script History button.

6. The Switch Request History pane displays detailed information about previous script requests. The window is divided into four information panes. Selecting a Switch Script History record populates relevant information in the Comm Log, Event Log, and Trace Log panes.

- **Switch Script History** – displays the following information:

  - **Order Number** – displays the work order number for which the script was processed.

  - **User Name*** – displays the name of the user that executed the script.

  - **Script Name*** – displays the name of the script that was run.

  - **Request Date*–** date and time the user sent the request to the switch.

  - **Status*** – whether the script succeeded or failed.

  - **Start Date** – if a script is scheduled to run in the future, this field displays the start date.

  - **Return Value** – script values returned to CAIRS display here.

  - **Notification Message** – WOPR-ASI sends messages to CAIRS while processing a request. These messages let CAIRS know what stage of the running script. If a WOPR-ASI script fails, this column displays the most recent message sent from WOPR-ASI to CAIRS. These messages can be useful for troubleshooting script or communication errors.

  - **Warning Message** – if WOPR-ASI encounters an error that does not cause the script execution to fail the message is displayed here.

  - **Error Message** – if a WOPR-ASI script fails, this column displays the error message. This is also useful for troubleshooting script or communication errors.

- **Comm Log** – displays the communication between WOPR-ASI and the Switch. This allows you to see the actual commands sent to the switch and the data it returns from.

- **Event Log** – displays messages sent from WOPR-ASI that tell the user what stage the script is in. Again helpful for troubleshooting errors.

- **Trace Log** – displays information used to debug scripts and switch communication. Normally this pane will not contain information.

7. Within the Actions ribbon group, click Save (to save and stay) to continue working with the switch record or Save and Close to return to the switches list.

Viewing Switch Request History Lists

To view either the Basic History List or Detailed History List, do the following,

Basic History

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

    -   Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Show ribbon group, click the lower portion of the Script History button to access a drop-down menu, from the menu select Basic History List. The Basic History list includes the following fields:

    -   Order Number
    -   Script Name*
    -   Status*
    -   Return Value
    -   Warning Message

    -   User Name*
    -   Request Date*
    -   Start Date
    -   Notification Message
    -   Error Message

Detailed History

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

    -   Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Show ribbon group, click the lower portion of the Script History button to access a drop-down menu, from the menu select Detailed History List. The Detailed History displays the same information listed above with the addition of the Parameter Name.

Class of Service

Class of Service determines your telephone system's service set up based on dialing plan. For example, internal calls require only the extension, or may require the extension and a preceding number. Outside calls may require a preceding code number (i.e. 9 or 98, etc).For EWSD switches, class of service is DSN Access.

You can add, modify, and delete a switch's Classes of Service within the Switches Menu.

Adding a Class of Service

You can add a class of service to an existing switch record through the Switches Menu.

1. Click the Switches menu.
2. In the Navigation pane, click Switches.
3. Depending on the amount of records 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 then click the magnifying glass.
   - Click the **Show All** button.
4. Once the list populates, double-click the record to open the General – Switch window.
5. Within the Show ribbon group, click on the Class of Service button. The screen changes to display the different classes associated with the switch.
6. Click the top row marked with an asterisk (*) to add a new record. Type the following class of service information (required fields are marked with an asterisk (*)):
   - **Class of Service** – type the switch code for the class of service (commonly, the code is numeric, however, if you have an EWSD the code can be alpha-numeric).
   - Description – type a brief class description.
   - **Class of Service Name** – click the field to access a drop-down list and from the list select the class of service name (if there are no names within the list, you can add them through Switches → Actions pane → Manage Class of Service Name).
7. To continue adding multiple items, click the row marked with an asterisk (*).
8. Within the Actions ribbon group, click Save (to save and stay) to continue working with the switch record or Save and Close to return to the switches list.

Deleting a Class of Service

Before deleting a class of service, it must be free of all assignments.

1. Click the Switches menu.
2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Show ribbon group, click on the Class of Service button. The screen changes to display the different classes associated with the switch.

6. Within the Show ribbon group, click the Class of Service button. The screen changes to display the different associated switch classes.

7. Within the Class of Service list, right-click the class of service to delete. A small pop-up menu opens. Click **Delete** within the box.

8. Once you click Delete, a message box appears verifying that you really want to delete the record. Click Yes within the box to continue or No to cancel the operation.

   Once selected, CAIRS draws a line through the item allowing you to delete multiple records at one time.

9. If you do not want to delete the record, right-click the record to access a pop-up message. Click **Undelete**.

10. Once you select Undelete, a message box appears verifying that you really want to undelete the record. Click Yes within the box to continue or No to cancel the operation.

11. To complete either process, click the Save (save and stay) button or Save & Close, within the Actions ribbon group, to return to the Switches list.

Modifying a Class of Service

You can modify a class of service through the switch record within the Switches menu. When you modify a class of service, the change reflects throughout the CAIRS system.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Show ribbon group, click on the Class of Service button. The screen changes to display the different classes associated with the switch.

6. Click the class of service to modify and make the necessary modifications.

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

TGAR/Class of Restriction

Class of Restriction covers how your telephone system controls alternative calling capabilities following the acceptance of the class of service already allowed. For example: after getting an outside line, the telephone set may be restricted to local calls only, or it may be restricted to local and 800 #s, or it may be restricted to all internal country calls but not international calls.

For EWSD switches, class of restriction is PSTN access. (Please refer to PSTN Access sections.)

You can add, modify, and delete switch classes of restriction within the Switches Menu.

Adding a Class of Restriction

A class of restriction can be added to a switch record.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Show ribbon group, click on the TGAR button. The screen changes to display the different classes associated with the switch.

6. Click the top row, marked with an asterisk (*) to add a new record. Type the following class of restriction information (required fields are marked with an asterisk (*):

   - **TGAR** – type the switch code for the class of restriction (commonly, the code is numeric; however, if you have an EWSD the code can be alpha-numeric).

   - **Description** – type a brief class description.

   - **Class of Restriction Name** – click the field to access a drop-down list and from the list select the class of service name (if there are no names within the list, you can add them through Switches →Actions pane → Manage Class of Restriction Name).

7. To continue adding multiple items, click the row marked with an asterisk (*).

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

Deleting a Class of Restriction

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Show ribbon group, click on the TGAR button. The screen changes to display the different classes associated with the switch.

6. Within the Show ribbon group, click the TGAR button. The screen changes to display the different associated switch classes.

7. Within the TGAR list, right-click the record to delete. A small pop-up menu opens. Click **Delete** within the box.

8. Once you click Delete, a message box appears verifying that you really want to delete the record. Click Yes within the box to continue or No to cancel the operation.

   Once selected, CAIRS draws a line through the item allowing you to delete multiple records at one time.

9. If you do not want to delete the record, right-click the record to access a pop-up message. Click **Undelete**.

10. Once you select Undelete, a message box appears verifying that you really want to undelete the record. Click Yes within the box to continue or No to cancel the operation.

11. To complete either process, click the Save (save and stay) button or Save & Close, within the Actions ribbon group, to return to the Switches list.

Modifying a Class of Restriction

When you modify the name of a class of restriction, the change reflects throughout the CAIRS system.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

- Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Show ribbon group, click on the TGAR button. The screen changes to display the different classes associated with the switch.

6. Click the class of restriction to modify and make the necessary modifications.

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

Configured Sets

Configured switch sets can be viewed through the switch record. All sets are added through the Configured Items menu, but you can view the sets for each switch through the Switches menu.

Viewing Configured Sets of a Switch

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

- Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Show ribbon group, click the Configured Sets button. Depending on the number of sets associated with the switch, the list may or may not populate right away. To populate the list, 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.

6. The list displays the configured sets and their information (read only). All configured sets are added through the Configured Items menu.

7. You can sort the information, based on any of the column headers by clicking the heading. This sorts the list first in alphabetical order, click again to sort in reverse order.

WOPR Integration

Global Variables

Switch settings are added and deleted through the 'View Switch Settings' action with initial values configured individually for each switch. Before making any switch setting changes, please consult your switch technician or CAIRS administrator. The initial switch type values must be configured in order for WOPR-ASI to communicate with the switch properly.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

    - Click the **Show All** button.

4. Once the list populates, double-click the switch to modify. The Switch screen opens.

5. Within the toolbar, directly above the ribbon, click the WOPR Integration tab, the tab changes, but the information within the pane remains.

6. Click the Global Variables button within the ASI ribbon group. The screen changes and displays the Global Variables defined within CAIRS.

7. There are three ways to find the variable to define:

    - Scroll through the list.

    - Within the search box, type any portion of the record and then click the magnifying glass (to return to the full list, click the red X within the textbox).

    - Click any column header to sort the list alphabetically or numerically in either normal or reverse order.

    - Once you have found the variable, click the Initial Value field, and enter in the appropriate information.

8. Within the toolbar, directly above the ribbon, click the Switch tab. The screen changes displaying general switch information.

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

Default Initial Value

Clicking the Default Initial Value button resets the initial values back to their default values. You can see what the default value is by looking in the Description field. Use this button with caution as it overrides any Initial Values changes you have made. Click the Save button for your changes to take effect.

WOPR Monitor

The WOPR Monitor shows the last time the individual WOPRs checked in looking for work and ensures the WOPRS are up, running, and ready to process requests. Every time a WOPR computer checks in, the date/time field is modified to reflect the activity. If a WOPR does not check in at a pre-determined time, the text turns an auburn color indicating the WOPR has been slow to check in, or missed 1 or more check-in times. If the number of missed check-in times exceeds a pre-determined amount, the text will turn red indicating the WOPR is most likely not functioning. Causes for this could be a computer problem, network disconnection or perhaps a WOPR software issue. The following columns, of read only information, display within the WOPR Monitor.

- Switch Name
- Time Between Updates
- Switch Instance Number
- Last Refresh Time
- In Process
- Requested By User

- Local Update Time
- Switch Computer Name
- Needs Refresh
- Last Process Check Time
- Process Script Name

UCE Monitor

The UCE Monitor shows the last time the individual WOPRs checked in looking for work and ensures the WOPRS are up, running, and ready to process requests. Every time a WOPR computer checks in, the date/time field is modified to reflect the activity. If a WOPR does not check in at a pre-determined time, the text turns an auburn color indicating the WOPR has been slow to check in, or missed 1 or more check-in times. If the number of missed check-in times exceeds a pre-determined amount, the text will turn red indicating the WOPR is most likely not functioning. Causes for this could be a computer problem, network disconnection or perhaps a WOPR software issue. The following columns, of read only information, display within the WOPR Monitor.

- Switch Name
- Last Updated
- Current Status
- Last collected

If you click on the plus sign (+) next to the switch name more detailed information regarding the status appears.

Switch Connections

After adding the switch record, add a connection record to connect to your switch via Secure Maintenance Access (SMA), an MML interface allowing secure emulator-type phone switch access.

SMA provides users secure remote phone switch access via a MML command line form that displays switch data and allows users to enter switch commands (much like a terminal emulator such as HyperTerminal). Through the Switches Menu, Administrators and switch technicians have a secure phone switch interface.

Adding a Connection Record

You must first establish a switch record through the Switches menu before adding a connection record for that switch. (Please refer to the "Adding a New Switch Record" section for detailed instructions.)

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. There are two ways to create a new connection:

   - Within the Show ribbon group, click the lower portion of the Switch button to access a drop-down list and from the list select New Connection.

   - Within the Connections pane, double-click the row marked with an asterisk (*).

6. With either option, the Switch Connection Details window opens. Complete the necessary fields (required fields are marked with an asterisk (*):

   - **Connection Key*** – click the field to access a drop-down list and from the list, select the connection key. The following options are available:

     - **Core Login**

     - **OSSgate**

     - **Rlogin**

     - **Rlogin Core**

     - **SSH**

     - **Standard**

   - **Switch Computer Name** – type the WOPR computer name.

   - **Switch Instance Number** – type a one if only one instance of WOPR is running with the switch (most common). In some instances, more than one instance of WOPR may be running.

- **Connection Type*** – click the field to access a drop-down list and from the list, select the connection type. The following options are available:
  - **Login Only**
  - **IP**
  - **CommPort**
  - **IP SSH**
  - **Web Service**
- **User Name*** – type the username used to access the connection specified.
- **Access Code** – type the password used to access the connection specified.
- **IP Address** – type the IP address if connecting via IP. If not, leave blank.
- **IP Port** – type the IP port if connecting via IP. If not, leave blank.

! The following seven settings are all comm port settings.

- **Comm Port** – type the comm port number if connecting via comm port. If not, leave blank.
- **Data Bits** – type a value, if necessary.
- **Parity** – type a value, if necessary.
- **Stop Bits** – type a value, if necessary.
- **Baud Rate** – type a value, if necessary.
- **Use RTS** – click the box to insert a checkmark to use RTS, if necessary.
- **Use XOn XOff** – click the box to insert a checkmark to use XOn XOff, if necessary.
- **Client IP or Host Name** – type in the IP or Host Name of the switch
- **Connection Priority** – type the connection priority, most times it is a 1 meaning this is the first connection used. If more than 1 connections are present number them sequentially starting with 1.
- **Dedicated SMA** – click the box to insert a checkmark to indicate the connection is dedicated for SMA only.
- **Passthrough Devise** - click the box to insert a checkmark to indicate that this connection uses a passthrough devise such as a Teleboss.

7. Click the Save button.

8. Within the Connections pane of the Switch window, your new connection appears within the list. Connections dedicated as SMA appear with 'SMA' in the first column. Refer to Creating SMA Connection to learn more about establishing the connection.

Deleting a Connection Record

Within the Switches Menu, you delete a connection record tied to a switch record. The connection record must be free of all assignments before deleting the connection.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   • Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Connections pane, click the connection to delete.

6. Once the selected connection is highlighted, click the lower portion of the Switch button to access a drop-down list and from the list select Delete Connection.

7. Once you click Delete, a message box appears verifying that you really want to delete the record. Click Yes within the box to continue or No to cancel the operation.

8. Within the Actions ribbon group, click Save (to save and stay) to continue working with the switch record or Save and Close to return to the switches list.

Viewing and Modifying an Existing Connection Records

You can view all existing connections of a switch record through the Switches Menu.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   • Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Connections pane, double-click the record to view.

6. Make any necessary changes, click the Save button. The connection details window closes and returns you to the General – Switch window.

7. Within the Actions ribbon group, click Save (to save and stay) to continue working with the switch record or Save and Close to return to the switches list.

SMA

Secure Maintenance Access (SMA) provides users secure remote phone switch access via a MML command line form that displays switch data and allows users to enter switch commands (much like a terminal emulator such as HyperTerminal). Through the Switches menu, Administrators and switch technicians have a secure phone switch interface.

In order for SMA to function correctly, CAIRS requires 1) a switch and a connection record correctly configured for SMA, and 2) the user to have permission to access this switch record from his/her profile. Once configured, the MML command line form, titled SMA Command, becomes available. The following section explains how to use this form.

User Permission

A CAIRS administrator can give a user permission to access a switch and SMA. To grant a profile switch and SMA access refer to the steps below:

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 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 – indicates the switch name. Click the plus sign (+) next to the switch name to view the associated sites.
   - Selected – indicates the profile has access to view the related switch information.
   - Grant SMA Permission – indicates the profile can create a SMA switch connection.
7. Within the Selected column, click the box to insert a checkmark to indicate the profile can access the switch.
8. Within the Grant SMA Permission column, click the box to insert a checkmark to indicate the profile can make an SMA connection for the switch.
9. Within the Actions ribbon group, click Save (to save and stay) to continue working with the switch record or Save and Close to return to the switches list.

The SMA Command Form

Accessing the SMA Command Form

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Connections pane, click the SMA labeled button.

! If you do not see the SMA Button, then the connection record is not dedicated to SMA. To dedicate the connection, double-click the record to open the Connection Details window. Find the Dedicated SMA row, click the field to enter a checkmark indicating the connection is now dedicated. Click the Save button to return to the connections pane, SMA now appears within the button.

6. The SMA Command window opens.

Understanding the SMA Command Form

The following section overviews the different elements comprising the SMA Command Form.
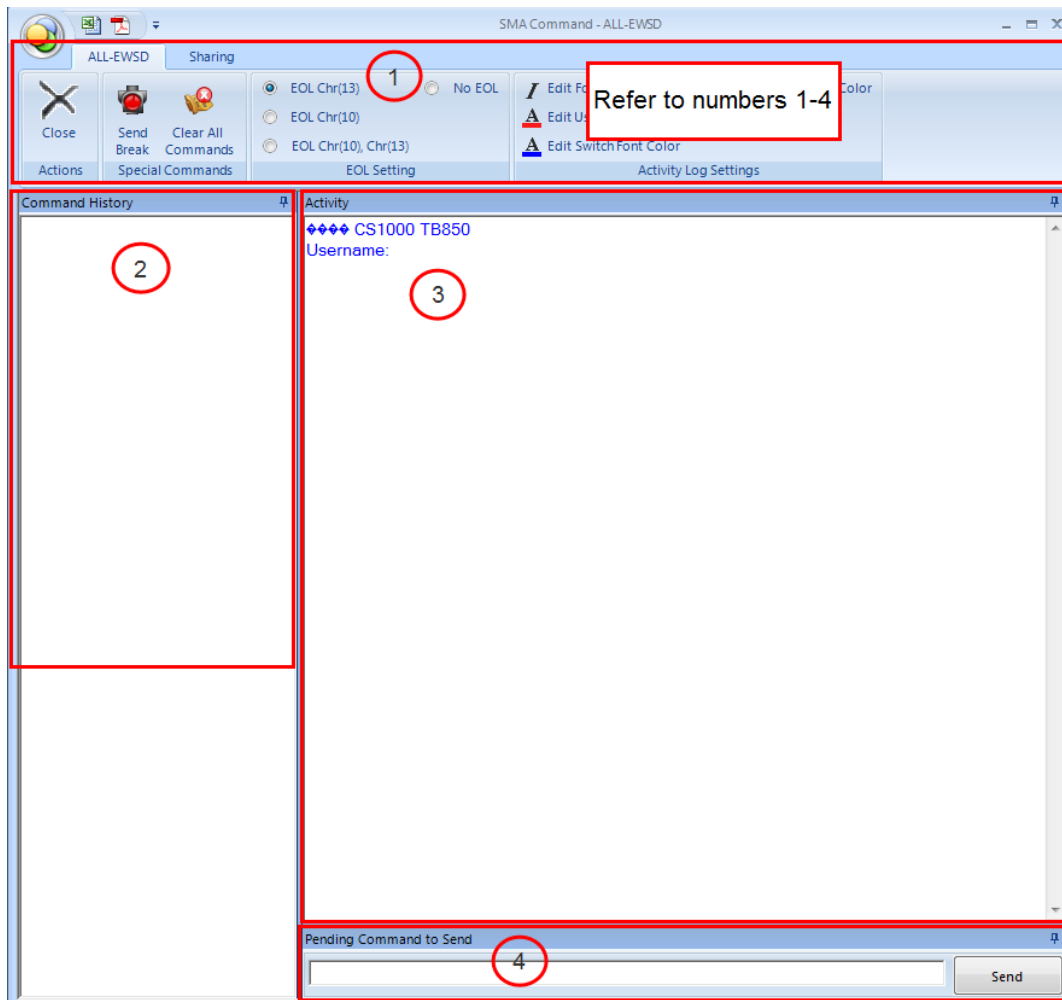
1. **SMA Ribbon** – Contains various ribbon groups and elements.

2. **Command History Pane** – Displays a history of entered commands for the current session.
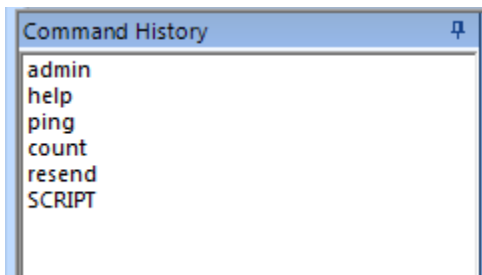
These commands can then be single-clicked within this pane to reenter them into the Pending Command to Send field or double-clicked to send them to the switch.

3. **Activity Pane** – Displays session status, activity and information.

4. **Pending Command to Send** – Commands and information are typed in this field and appear in the Activity pane after pressing Enter on the keyboard or clicking the Send button.

Logging In to the Switch

After the SMA Command Form opens, a Username prompt appears within the Activity pane. Type the Username within the Pending Command to Send field and either press Enter on your keyboard or click the Send button to the right of the Pending Command to Send field.

! In SMA when a user starts a session with an SL100 the switch won't present the user with a login prompt until its port is active. Clicking the Send Break button activates the port.

After entering the Username, type the password into the Pending Command to Send field and either press Enter on your keyboard or click the Send button to the right of the Pending Command to Send field.
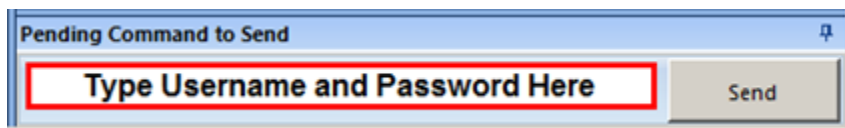
The session will time out within a short period of inactivity. If the session disconnects, close the SMA Command Form and click the SMA button within the Connections section of the Switch window. Re-enter your username and password. The screenshot below shows the messaging when the session begins to disconnect and then disconnects.
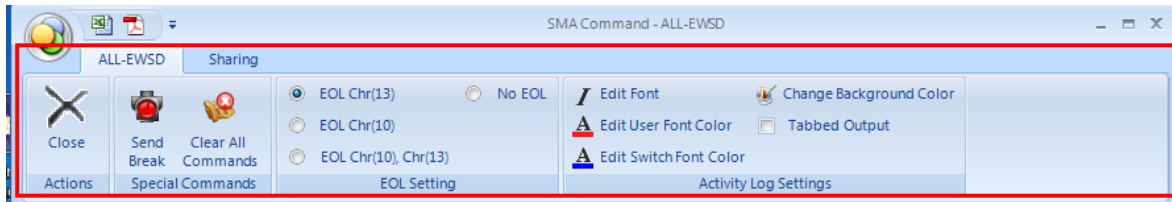

Once the session disconnects, a message displays informing you the session has been closed due to inactivity.

SMA Command Form Ribbon

The following section overviews the SMA Command Form Ribbon.

The SMA Command Form Ribbon, contains four Ribbon Groups.

- Actions
- Special Commands
- EOL Setting
- Activity Log Settings

We will now review each of these Ribbon Groups and their elements.

Actions Ribbon Group

The Actions Ribbon Group contains the Close element.

Close – when clicked, closes the SMA Command Form window.

Special Commands Ribbon Group

The Special Commands Ribbon Group contains the Send Break and Clear All Commands elements.

- **Send Break** - When dealing with serial communications on older systems like an SL100 telephone switch, the serial port on the switch needs to be 'woken up' to allow a user to login.

  A Send Break command tells the Comm Port to break the circuit or interrupt the current signal. This activity on the Serial Port lets the system know it needs to do something like give a login prompt or stop output.

  In SMA when a user starts a session with an SL100 the switch will not present the user with a login prompt until its port is active. Clicking the 'Send Break' button activates the port.

! The SL100 is the only device using the Send Break feature.

- **Clear All Commands** – When you click on this button, all commands within the Command History pane are cleared out.

EOL Setting Ribbon Group

An End of Line (EOL) character is a special character or sequence of characters signifying the end of a line of text. The name comes from the fact that the next character appears on a new line directly below the previous line of text. The EOL Setting Ribbon Group contains:

- **EOL Chr(13)** – CHR(13) is selected when accessing a M1 or a CS1000.
- **EOL Chr(10)** – CHR(10), is available for future use by Unique Communications.

- **EOL Chr(10), EOL Chr(13)** – The most commonly selected option.

- **No EOL** – When selected, no EOL is used. Typically used with Teleboss.

Activity Log Settings Ribbon Group

The Activity Log Settings Ribbon Group contains the Edit Font, Edit User Font Color, Edit Switch Font Color, Change Background Color, and Tabbed Output options.

- **Edit Font** – When clicked, a pop-up opens with font controls, including font type, style, size, and effects. When finished making your selection click OK to save the changes or Cancel to cancel your selection(s).

- **Edit User Font Color** – When clicked a pop-up opens with color choices. The selected color applies to the text/commands entered by the user.

  Clicking the Define Custom Colors >> button, expands the pop-up to show additional color controls that allow the user to adjust Hue, Saturation, Luminosity, and the amount of Red, Green and Blue. When finished making adjustments, click Add to Custom Colors. The customized color is then added to the Custom Color pallet and is available for future selection.

  When finished, click OK to save the changes or Cancel to cancel your selection(s).

- **Edit Switch Font Color** – When clicked a pop-up opens with color choices. The selected color applies to the text displayed by the switch.

  Clicking the Define Custom Colors >> button, expands the pop-up to show additional color controls that allow the user to adjust Hue, Saturation, Luminosity, and the amount of Red, Green and Blue. When finished making adjustments, click Add to Custom Colors. The customized color is then added to the Custom Color pallet and is available for future selection.

  When finished, click OK to save the changes or Cancel to cancel your selection(s).

- **Change Background Color** – When clicked a pop-up with color choices.

  Clicking the Define Custom Colors >> button, expands the pop-up to show additional color controls that allow the user to adjust Hue, Saturation, Luminosity, and the amount of Red, Green and Blue. When finished making adjustments, click Add to Custom Colors. The customized color is then added to the Custom Color pallet and is available for future selection.

  Select the desired background color and click OK to make the change. The screenshot below shows a SMA Command window with the Switch Font Color changed to white, the User Font Color changed to a dark blue and the Background Color changed to black.
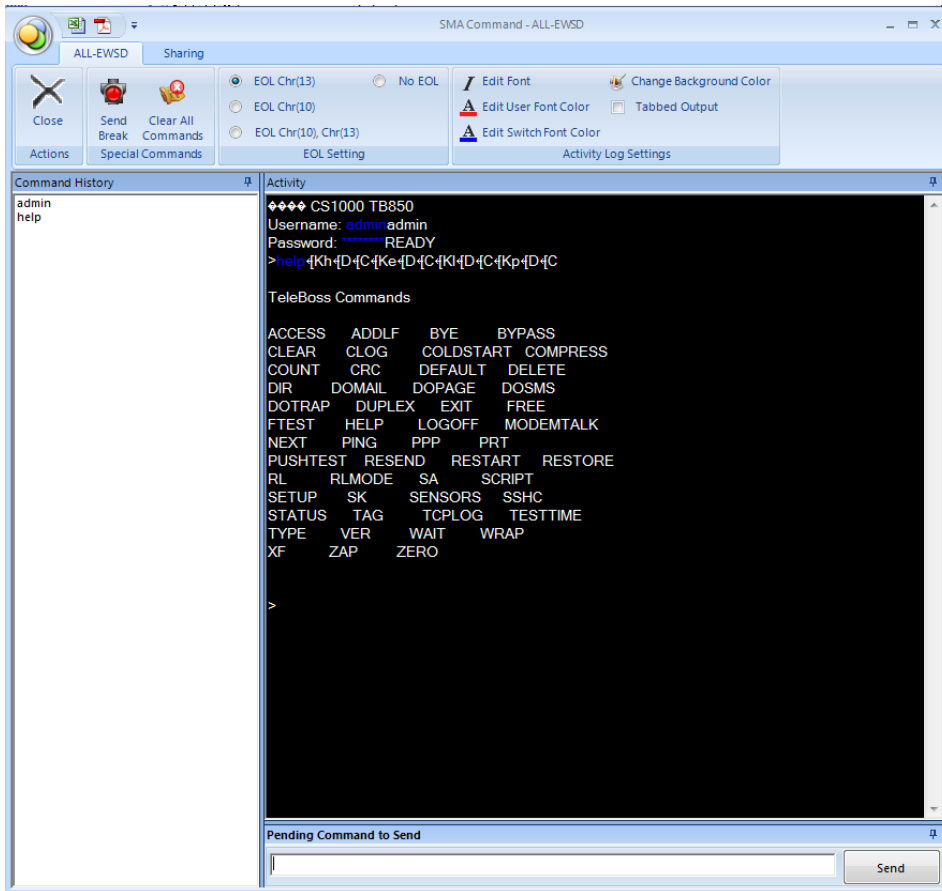
- Tabbed Output – allows the displayed switch's data to be formatted or unformatted based upon the enabling or disabling of the Tabbed Output menu.

Export the SMA Session Report

1. While connected to the active SMA session, click the PDF icon in the upper left hand corner of the SMA Command window.

2. A PDF displaying a record of the SMA session opens.

Viewing the SMA Log

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

    - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Show ribbon group, click the lower portion of the Switch button to access a drop-down menu and from the menu select SMA History.

6. The Switch SMA Sessions window opens displaying a history of all SMA Sessions.

7. Double-click a record to open the Switch SMA Log Details window. Click Close to return to the SMA Sessions window.

8. Click Close within the Switch SMA Sessions window to return to the General Switches window.

Terminating a SMA Connection

Type, EXIT within the Pending Command to Send field and either press Enter on your keyboard or click the Send button to the right of the Pending Command to Send field.

Closing the SMA Command Form

Click the Close button within the Actions ribbon group or click the X in the upper right hand corner of the window.

Port Groups and Port Numbers

Port numbers in CAIRS are the equivalent to EQNs for the EWSD switch, and LENs for the Nortel switch/PBX platform. Note that your switch port numbers can only be imported into CAIRS through the Switch Sync function. When the port numbers are initially imported, CAIRS creates a default port group called "Import" and puts all numbers into that group within the Switches menu. You can create your own port groups and then move port numbers from the "Import" group into your groups.

You can view port numbers status (ex. Bad, Active, Spare) and mark bad port numbers here in the Switches menu.

Port Groups

Adding a Port Group

Adding a port group is creating a group name. Once the group name is created, you can move individual port numbers into that group from an existing group. (As mentioned before, port number from your switch can only be imported into the CAIRS system through the Switch Sync. When the port numbers are initially imported, CAIRS creates a default port group called "Import" and puts all port numbers into that group. You can then create a port group and move port numbers from the "Import" group into your group.)

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

- Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Ports ribbon group, click the upper portion of the button (Depending on your switch, the button name changes, for example, the button name may be EQN, TN, LEN, etc.)

6. Click the top row, marked with an asterisk (*), to add a new record. Type the following Port Group information (required fields are marked with an asterisk (*):

   - **Port Group Name *** – type in the port group name.

   - **Description** – type in a brief group description.

   - **Site** – click the field to access a drop-down list and from the list select the site associated with the group.

   - **Port Group Mask** – type the mask for the port numbers, for example, 10 n nn nn, this required every port number to begin with the number 10, space a single number, space and so on.

7. To continue adding multiple items, click the row marked with an asterisk (*).

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

Deleting a Port Group

Before deleting a port group, all port numbers within that group must be assigned to a different port group. Please refer to "Assigning Port Numbers to a Port Group."

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Ports ribbon group, click the upper portion of the button (Depending on your switch, the button name changes, for example, the button name may be EQN, TN, LEN, etc.) The screen changes to display the port groups.

6. Right click the group to delete and from the pop-up menu select Delete.

7. Once you click Delete, a message box appears verifying that you really want to delete the record. Click Yes within the box to continue or No to cancel the operation.

Once selected, CAIRS draws a line through the item allowing you to delete multiple records at one time.

8. If you do not want to delete the record, right-click the record to access a pop-up message. Click **Undelete**.

9. Once you select Undelete, a message box appears verifying that you really want to undelete the record. Click Yes within the box to continue or No to cancel the operation

10. To complete either process, click the Save (save and stay) button or Save & Close, within the Actions ribbon group, to return to the Switches list.

Port Number

Assigning Imported Port Numbers to a Port Group

When the initial data sync is performed and the port numbers from the switch imported into CAIRS, CAIRS creates a default port group (called 'Import') and assigns all port numbers into that default group. If you wish to create different groups, add a new port group first. See "Adding a Port Group" section. Once a new port group has been added, port numbers can be moved from one group into another.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

    - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Ports ribbon group, click the upper portion of the button (Depending on your switch, the button name changes, for example, the button name may be EQN, TN, LEN, etc.) The screen changes to display the port groups.

6. Within the list, click the plus sign (+) next to the group name to display a list of ports. Find the port number within the list and click the record selector box next to the number. To select multiple rows, click the first number, press and hold the Shift button on your keyboard, and then click each additional number.

7. Once you have the proper numbers highlighted, click the group, and drag and drop it into the different group.

8. Click the plus sign (+) next to the group name to view the number, you moved into the group.

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

Adding a New Port Numbers to a Port Group

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   • Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Ports ribbon group, click the upper portion of the button (Depending on your switch, the button name changes, for example, the button name may be EQN, TN, LEN, etc.) The screen changes to display the port groups. Within the list of port groups, click on the port group that you want add a range to, this highlights the group.

6. Within the Ports ribbon group, click the lower portion of the button to access a drop-down menu and from the list select Add a range to a group

7. The Add Port Range window opens, there are three panes of information:

   • **Configure Port Range** – within this pane you will define the characteristics of the range

   • **Preview** – Once you have completed the top pane, you can preview your range before assigning it to the group

   • **Controls and Help** – this pane defines the wildcards available for the mask

8. Within the Configure Port Range pane, complete the following fields (required fields are marked with an asterisk (*):

   • **Card Type*** – click on the field to access a drop-down list, from the list select one of the following card types:

      • Analog

      • Digital

      • ISDN

      • IP

      • Unknown

      • Multi Mode Analog Digital

   • **Card Name*** – type the card name

   • **Start Option***–click on the field to access a drop-down list, from the list select one of the following options:

- Ground

- Loop

- Unknown

- **Bad*** – this field remains blank to indicate that the range is usable. Click on the field to insert a checkmark to indicate that the range you are adding is un-usable.

- **Multi Mode Service Type** *– click the field to access a drop-down list, from the list select one of the following options:

  - Both

  - Analog Only

  - Digital Only

- **Reusable** * – this field defaults to contain a checkmark to indicate that once the port is free of an assignment it can be reused. Click the field to remove the checkmark to indicate that the port cannot be reused.

- **Beginning Port Name*** – type the name of the first port

- **Ending Port Name*** – type the name of the last port

- **Port Mask*** – this field populates with the mask that is associated with the port group, click on the field and type the correct information. Within the bottom pane of the window, is the help section for creating a mask, you can use the following rules to create the correct mask for your port range:

  - For alphabetical characters use the letter 'A'

  - For a space or special character use the exact character, for example if you use a slash, in the mask you would type '\'

  - For a numerical character use the letter 'N'

  - For a hexadecimal character use the letter 'H'

9. Once you have completed the top pane of information, click the Generate Preview button. The middle pane displays a list of the ports that match the characteristics you defined.

10. If the list is correct, click the Add Range button. This adds the range into the group, once the process is successful a message box appears, within the box, click Yes to add or modify another range or click No to view your port group and range.

11. To view the added range, click on the plus sign (+) next to the port group name, a list of ports appears below the port group name.

Deleting a Range from a Port Group

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

- Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Ports ribbon group, click the upper portion of the button (Depending on your switch, the button name changes, for example, the button name may be EQN, TN, LEN, etc.) The screen changes to display the port groups. Within the list of port groups, click on the port group that you want delete a range from, this highlights the group.

6. Within the Ports ribbon group, click the lower portion of the button to access a drop-down menu and from the list select Delete a Range from group.

7. The Delete Port Range window opens, there are three panes of information:

- **Configure Port Range** – within this pane, you will define the characteristics of the range.

- **Preview** – once you have completed the top pane, you can preview your range before deleting it from the group.

- **Controls and Help** – this pane defines the wildcards available for the mask.

8. Within the Configure Port Range pane, complete the following fields (required fields are marked with an asterisk (*):

- **Card Type*** – click the field to access a drop-down list and from the list select the matching card type of the range that you want to delete.

- **Card Name*** – type the card name.

- **Start Option*** – click the field to access a drop-down list and from the list select the matching option.

- **Bad*** – this field can remain blank.

- **Multi Mode Service Type** *– click the field to access a drop-down list, from the list select one of the following options:

  - Both

  - Analog Only

  - Digital Only

- **Reusable *** – this field defaults to contain a checkmark to indicate that once the port is free of an assignment it can be reused. Click the field to remove the checkmark to indicate that the port cannot be reused.

- **Beginning Port Name*** – type the name of the first port that you want to delete.

- **Ending Port Name*** – type the name of the last port that you want to delete.

- **Port Mask*** – this field populates with the mask that is associated with the port group, DO NOT make any changes to this field. This field must match the appearance of the port range in order for you to delete them.

9. Once you have completed the top pane of information, click on the Generate Preview button. The middle pane displays a list of the ports that will be deleted.

10. If the list is correct, click the Delete Range button. Once the ports are deleted, a pop-up opens verifying the number of ports deleted, click Ok to continue.

11. Another message box opens verifying the operation was successful, within the box click Yes to modify another range or click No to return to the port group list.

12. To view the range, click the plus sign (+) next to the port group name. A list of ports appears below the port group name.

Viewing All Port Numbers

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Ports ribbon group, click the lower portion of the button to access a drop-down menu and from the list select All Ports (Depending on your switch, the button name changes, for example, the button name may be EQN, TN, LEN, etc.) The screen changes to display the port groups.

6. Within the list, click the plus sign (+) next to the port group name to view the associated port numbers.

Port Usage and Status

Viewing the Port Usage Summary

Within the Switches Menu, you can view a switches port numbers usage summary. You can see the total number of port numbers for each port type. You can also see the number of port numbers that are in use.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

- Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Ports ribbon group, click the lower portion of the button to access a drop-down menu and from the list select Port Usage. (Depending on your switch, the button name changes, for example, the button name may be EQN, TN, LEN, etc.)

6. The screen changes to display the port usage details. The top pane displays the ports number details, including port types, total ports, used, free, bad and percentages.

7. The lower pane displays the same information in a bar graph.

Viewing Bad Ports

You can see which switch port numbers are bad within the Switches Menu.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

- Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Ports ribbon group, click the lower portion of the button to access a drop-down menu and from the list select Bad Ports (Depending on your switch, the button name changes, for example, the button name may be EQN, TN, LEN, etc.) The screen changes to display the port groups.

6. Within the list, click the plus sign (+) next to the port group name to view the bad port numbers. (If the plus sign disappears when you click it, it means the port group does not have any bad port numbers).

7. There is a checkmark in the Bad column for each bad port. To make the port good again, remove the checkmark.

8. Within the Actions ribbon group, click the Save button (save and stay).

Viewing Active Ports

The active ports are port numbers that have been assigned to sets. You can view active port numbers of a switch within the Switches Menu.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Ports ribbon group, click the lower portion of the button to access a drop-down menu, from the list select Active Ports (Depending on your switch, the button name changes, for example, the button name may be EQN, TN, LEN, etc.) The screen changes to display the port groups.

6. Within the list, click the plus sign (+) next to the port group name to view the associated active port numbers. (If the plus sign disappears when you click on it, it means the port group does not have any active port numbers).

7. For each active port, the Bad column is blank, to make the port bad, checkmark the box in the bad column.

8. Within the Actions ribbon group, click the Save button (save and stay).

Viewing Spare Ports

Spare ports are unassigned port numbers. You can view the spare port numbers within the Switches menu.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Ports ribbon group, click the lower portion of the button to access a drop-down menu and from the list select Spare Ports (Depending on your switch, the

button name changes, for example, the button name may be EQN, TN, LEN, etc.) The screen changes to display the port groups.

6. Within the list, click the plus sign (+) next to the port group name to view the associated active port numbers. (If the plus sign disappears when you click it, it means the port group does not have any spare port numbers).

Changing the Port Status

When a port number is bad, you can mark that number as 'Bad' within the Switches Menu. You can also change the 'bad' status if the port number is no longer bad.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

    - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Ports ribbon group, click the upper portion of the button (Depending on your switch, the button name changes, for example, the button name may be EQN, TN, LEN, etc.) The screen changes to display the port groups.

6. Within the list, click the plus sign (+) next to the port group name to view the associated port numbers.

7. Within the Bad column, remove the checkmark to activate the port or insert a checkmark to indicate the port as bad.

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

Viewing Spare Port Combined Summary

Before you can run this report, you must complete the Port HASU Summary Prefix Length and the Port HASU Summary Detail Prefix Length fields within the general switch information pane (Show ribbon group →Switch button). This report displays the groups (determined by the prefix lengths) and the total number of ports available within each group.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

- Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Ports ribbon group, click the lower portion of the button to access a drop-down menu and from the list select Spare Ports Combined Summary (Depending on your switch, the button name changes, for example, the button name may be EQN, TN, LEN, etc.) The screen changes to display the port groups.

6. There are two parts to this report, the general information displays the Card Name, Port Prefix and the total available ports.

7. When you click the plus sign (+) next to the Card Name, the report expands to display the Detailed Summary, this displays all the available port numbers.

Viewing Spare Port General Summary

Before you can run this report, you must complete the Port HASU Summary Prefix Length and the Port HASU Summary Detail Prefix Length fields within the general switch information pane (Show ribbon group →Switch button). This report displays the groups (determined by the prefix lengths) and the total number of ports available within each group.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

- Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Ports ribbon group, click the lower portion of the button to access a drop-down menu and from the list select Spare Port General Summary (Depending on your switch, the button name changes, for example, the button name may be EQN, TN, LEN, etc.) The screen changes to display the port groups.

6. This report displays the Card Name, Port Prefix and the total available ports.

Viewing Spare Port Detailed Summary

Before you can run this report, you must complete the Port HASU Summary Prefix Length and the Port HASU Summary Detail Prefix Length fields within the general switch information pane (Show ribbon group →Switch button). This report displays the groups

(determined by the prefix lengths) and the total number of ports available within each group.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Ports ribbon group, click the lower portion of the button to access a drop-down menu and from the list select Spare Port Detailed Summary (Depending on your switch, the button name changes, for example, the button name may be EQN, TN, LEN, etc.) The screen changes to display the port groups.

6. This report displays the Card Name, Port Prefix and each available reports for all groups.

Data Sync

The Data Sync button in the Reports ribbon group allows users to create, modify or view Data Sync projects for the switch. A data sync project allows the user to maintain a current CAIRS database by downloading data from the switch and verifying that that data is in CAIRS i.e. Ports, DN's, Button Features, Groups, Set Types etc.

To access the Data Sync projects for a switch:

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Reports ribbon group, click the Data Sync button.

6. The Data Synchronization pane displays information about existing Data Sync projects. Double - clicking a Data Sync project opens a separate window containing project details.

Creating a New Data Sync Project

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Click the Data Sync drop down button and select add data sync. A new window opens labeled General – Import. Complete the following fields (required fields are marked with as asterisk (*)):

   - **Project Name*** – type the project name.

   - **Switch Name*** – click on the drop-down arrow to access a list and from the list; select the switch with which you wish to sync.

   - **Script Name*** – click the drop-down arrow to access a list and from the list, select the script needed to perform the sync.

   - **Action*** – click the drop-down 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.

   - **Auto Update** – click the field to insert a checkmark in the box allowing auto-update.

   - **Description** – type a project description.

   - **Comparison Type** – click the drop-down 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.

6. At this point, you should save your progress, within the Actions ribbon group, click Save (save and stay) to continue working with the sync or Save & Close (save and exit) to return to the Switch

Data Sync Ribbon Groups

The following ribbon groups contain additional buttons that open properties which are required to complete a Switch Sync Project.

Show ribbon group

- The Script Arguments button is reserved for future development.

- The Association button allows you to import an association file (provided by Unique Communication Solutions). The associations built by this file are required for a sync project to function properly.

- The Recurrence button allows the user to create a schedule for executing switch syncs.

- The Switch Sync Log button contains a log about the status of current and previously executed syncs. This allows you to see when the switch sync has completed.

Synchronize ribbon group

- The Sync Now button executes the current switch sync project.

- If you have already received a report from the switch containing the information for the switch sync project you can sync from that text file by clicking the Sync From File button

- It is possible to resync switch data that has already been saved in Cairs, this may be used if the associations have been changed, but there is no new data from the switch. To resync saved switch data click the Resync From Existing Report Button

Report ribbon group

- The Sync Results button displays the data synced from the switch that is not in Cairs, the data in Cairs that is not in the switch, the data the is unable to sync and the reason for the failure and the data from the switch that is already in sync with Cairs. Once the data has been downloaded from the switch and appears here you can complete the project by clicking the Sync Out of Sync Records button

- The Formatted Switch Report button displays the data from the switch organized into columns for easier viewing

- Once all the properties of the Switch Sync Project have been entered, click the Save and Close button.

EWSD Only

DSN Access (EWSD only)

DSN Access (class of service for EWSD switch types) determines your telephone system's service set up based on dialing plan. For example, internal calls require only the extension, or may require the extension and a preceding number. Outside calls may require a preceding code number (i.e. 9 or 98, etc).

Within the Switches Menu, DSN access can be added to and deleted from EWSD Switch records.

Adding a DSN Access

Add DSN access to EWSD switch records within the Switches menu,

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Show ribbon group, click the DSN Access button. The screen changes to display the different types of associated switch access.

6. Click the top row, marked with an asterisk (*) to add a new record. Type the following information for the DSN Access (required fields are marked with an asterisk (*):

   - **DSN Access** – type the switch code for the access (commonly, the code is numeric only, however, if you have an EWSD the code can be alpha-numeric).

   - **Description** – type a brief class description.

   - **DSN Access** – click the field to access a drop-down list and from the list select the DSN Access name (if there are no names within the list, you can add them through Switches→ Actions pane→ Manage Class of Restriction Name).

7. To continue adding multiple items, click the row marked with an asterisk (*).

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

Deleting a DSN Access

A DSN access record can be deleted from a EWSD switch record. The DSN access must be free of all assignments.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

    - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Show ribbon group, click the DSN Access button. The screen changes to display the different types of associated switch access.

6. Right click the access to delete and from the pop-up menu select Delete.

7. Once you click Delete, a message box appears verifying that you really want to delete the record. Click Yes within the box to continue or No to cancel the operation.

    Once selected, CAIRS draws a line through the item allowing you to delete multiple records at one time.

8. If you do not want to delete the record, right-click the record to access a pop-up message. Click **Undelete**.

9. Once you select Undelete, a message box appears verifying that you really want to undelete the record. Click Yes within the box to continue or No to cancel the operation

10. To complete either process, click the Save (save and stay) button or Save & Close, within the Actions ribbon group, to return to the Switches list.

Modifying a DSN Access

When a DSN access name is modified, the change reflects throughout the CAIRS system.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

- Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Show ribbon group, click the DSN Access button. The screen changes to display the different types of associated switch access.

6. Within the Show ribbon group, click the DSN Access button. The screen changes to display the types of access associated with the switch.

7. Click the access to modify and make the necessary modifications.

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

PSTN Access (EWSD only)

PSTN Access determines how your telephone system controls alternative calling capabilities following the acceptance of the allowed DSN Access. For example: after getting an outside line, the telephone set may be restricted to local calls only, or be restricted to local and 800 #s, or it may be restricted to all internal country calls but not international calls.

PSTN Access can be added to and deleted from EWSD switches. To modify or delete PSTN access, it must be free of all assignments.

Adding a PSTN Access

You can add a PSTN Access to a EWSD switch record within the Switches Menu.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

- Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Show ribbon group, click the PSTN Access button. The screen changes to display the different types of accesses associated with the switch.

6. Click the top row, marked with an asterisk (*), to add a new record. Type the following PSTN Access information (required fields are marked with an asterisk (*):

- **PSTN Access** – type the switch code for access (commonly, the code is numeric, however, if you have an EWSD the code can be alpha-numeric).

- **Description** – type a brief class description.

- **PSTN Access** – click the field to access a drop-down list and from the list select the PSTN Access name (if there are no names within the list, you can add them through Switches →Actions pane →Manage Class of Restriction Name).

7. To continue adding multiple items, click the row marked with an asterisk (*).

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

Deleting PSTN Access

PSTN Access is deleted from a EWSD switch record within the Switches Menu. The PSTN Access must be free of all assignments before deletion.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

    - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Show ribbon group, click the PSTN Access button. The screen changes to display the different types of associated switch access.

6. Right click the access to delete and from the pop-up menu select Delete.

7. Once you click Delete, a message box appears verifying that you really want to delete the record. Click Yes within the box to continue or No to cancel the operation.

    Once selected, CAIRS draws a line through the item allowing you to delete multiple records at one time.

8. If you do not want to delete the record, right-click the record to access a pop-up message. Click **Undelete**.

9. Once you select Undelete, a message box appears verifying that you really want to undelete the record. Click Yes within the box to continue or No to cancel the operation

10. To complete either process, click the Save (save and stay) button or Save & Close, within the Actions ribbon group, to return to the Switches list.

Modifying PSTN Access

You can modify the PSTN Access of a EWSD switch record within the Switches Menu.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

    - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the Show ribbon group, click the PSTN Access button. The screen changes to display the different types of associated switch access.

6. Click the access to modify and make the necessary modifications.

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

Switch Data

You can view reports showing different switch data dumps. You can use these dump reports to synchronize the data in the CAIRS database with data from the switch. The CAIRS administrator must first perform a data sync in order for CAIRS to retrieve the data required for these reports.

For the EWSD switch, the following reports are available:

- EQN – displays the port numbers in the switch.

- Feature Key Map – displays feature templates available to a set.

- Full Switch Dump – displays all the active telephone numbers in the switch.

- MultiLine Hunt Group – displays the hunt groups of a switch.

- Parsed Set Device & Parsed Remote DN – parsed syncs are those that the user has taken and formatted to another file type, or separated out into different files.

Viewing a Report

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

    - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the EWSD ribbon group, click the Switch Data button to access a drop-down list and from the list select the appropriate report to view.

6. The Report Viewer window opens displaying the report. There are two information panes within the window; the right hand pane displays the report information and within the left hand pane there may be alternate views. To switch between views, click the name.

7. When you have finished viewing, click the Close button.

Viewing Feature Key Maps of EWSD Switch

You can view Feature Key Maps for each EWSD switch record.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   • Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the EWSD ribbon group, click the Feature Key Maps button.

6. The screen changes to display the maps associated with this switch. To view the details (read only), click the plus sign (+) next to the map name.

Speed Dial Groups (EWSD only)

Add speed dial groups and members to a EWSD switch record within the Switches Menu.

A speed dial group is a shared group of shortcuts to numbers. A group is just an analog number and the speed dial feature is added to this analog number to place members at certain positions between 20 and 49. For example, 21-2160266 would allow any user that has access to this speed dial group to be able punch 21 and the switch would dial 2160266. A member of the speed dial group is not necessarily a number on the switch. It can be the number to the post office. The way users get access to this speed dial group is by adding the "Shared Speed Dial 30" feature to their line (in the Set Management menu) and specifying the analog line (the speed dial group Directory Number) that was used in creating the group. They would then have access to this group and all its speed dial codes. (Please refer to the Configured Items Menu section on instructions on adding a feature to a Feature Key Map, Set Templates, and then to a configured set.)

Groups

Adding a Speed Dial Group

A speed dial group is an analog number with an added speed dial feature. This speed dial feature is available for EWSD switches. Once a group is created, the members (or telephone numbers) can be added. Any user who has access to this speed dial group can 'speed dial' those members. The user can get this speed dial feature by adding the "Shared Speed Dial 30" feature to their set.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the EWSD ribbon group, click the lower portion of the Speed Dial button to access a drop-down list and from the list select Add Group.

6. The Set Management–[Configured Set Details] window opens.

7. In the Device Properties pane, configure the following fields (required fields are marked with an asterisk (*):

   - Site* – click the field to access a drop-down list and from the list select the site (the site should be the same site associated to the switch).

   - Directory Number* – click the field to access the Directory Number Plans table. There are three ways to populate the table:

     - Click the drop-down arrow within the Number Plan field and from the list select the plan. Once selected, either click Next to have CAIRS automatically select the next number in the sequence or click the Show All button to select the appropriate number.

     - Within the Search textbox, type the number or portion of the number and click the magnifying glass.

     - Within the lower pane, click Click Here to view all the numbers.

     - Once your number is found, double-click the number. The pop-up closes and your number populates within the field.

   - EQN – click the field to access the Port Groups table. There are three ways to populate the table:

- Click the drop-down arrow within the Port Groups field and from the list select the plan. Once selected, click Next to have CAIRS automatically select the next number in the sequence or click Show All button to select the appropriate number.

- Within the Search textbox, type the number or portion of the port number and click the magnifying glass.

- Within the lower pane, click Click Here to view all the port numbers.

- Once your number is found, double-click the number. The pop-up closes and your number populates within the field.

- DSN Access – click the field to access a drop-down list and from the list, select a DSN Access.

- DSN Access Name – click the field to access a drop-down list and from the list, select a DSN Access Name.

- PSTN Access – click the field to access a drop-down list and from the list, select a PSTN Access.

- PSTN Access Name – click the field to access a drop-down list and from the list, select a PSTN Access Name.

- CXGRP – click the field to access a drop-down list and from the list, select the Centrex Group name.

- RAX: (Rate Area Index) – this parameter specifies the Rate Area to which a subscriber is assigned. It is combined with LCC to define line treatment and billing. Enter a single value between 1 and 255.

- Description – type a brief speed-dial group description.

8. Within the Actions ribbon group, click Save or click the Go button within the Run Time ribbon group.

9. The script confirmation window opens displaying the switch scripts used to commit this change to the switch.

10. Click the plus sign (+) next to the script name to expand. Enter in the required fields for that script. (Fields marked with an asterisk (*) are required.)

11. If you want to schedule a future time to commit this addition to the switch, go to the Schedule column of the script name. Use the drop-down to enter a date and time.

12. If you want to commit now, click Continue. A status window opens and when the script status reaches 100%, the script is committed in the switch.

13. Back in the Set Management–[Configured Set Details] window, click Save & Close to return to the switch.

Viewing Speed Dial Groups of a Switch

You can view speed dial groups of a switch within the Switches Menu.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the list, double-click the Switch to view, the General – Switch window opens.

6. Within the EWSD ribbon group, click the upper portion of the Speed Dial button. The screen changes to display the following information for each group:

   - Speed Dial Name

   - Port Number

7. To view the complete details, double-click any name to open the Set Management – Configured Set Details window.

Deleting a Speed Dial Group

Delete a speed dial group from a EWSD switch record within the Switches Menu. However, before you delete the group associated dependents must first be re-assigned.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the EWSD ribbon group, click the upper portion of the Speed Dial button. The screen changes to display the information for each group. To view the complete details, double-click any name to open the Set Management – Configured Set Details window.

6. The Set Management–[Configured Set Details] window opens. Within the Actions ribbon group, click Delete button.

! When you click Delete, you are not only deleting the speed dial group, you are also deleting the entire set. Make sure this is the action you want to complete, as there is no undo!

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7. Once you click Delete, a message box appears verifying that you really want to delete the set. Click Yes within the box to continue or No to cancel the operation.

8. The script confirmation window opens and displays the switch scripts that will commit this change to the switch.

9. Click the plus sign (+) next to the script name to expand. Enter in the required fields for that script. (Fields marked with an asterisk (*) are required.

10. If you want to schedule a future time to commit this addition to the switch, go to the Schedule column of the script name. Use the drop-down to enter a date and time.

11. If you want to commit now, click Continue. A status window opens and when the script status reaches 100%, the script is committed in the switch.

12. Back in the Set Management–[Configured Set Details] window, click Save & Close to return to the switch.

Members

Adding a Member to a Speed Dial Group

A member of a speed dial group is a telephone number, not a port number in the switch. For example, if you have a number for the post office and that number is 101-123-4566, you can add this number to a member position of 21. Then every time you want to call the post office, you need to only dial 21. These members are added to a speed dial group within a switch record.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the EWSD ribbon group, click the upper portion of the Speed Dial button. Double-click the group you want to add members to. The Set Management–[Configured Set Details] window opens.

6. Within the Members ribbon group, click the Members button to access a drop-down menu and from the list select Add Member.

7. The Add Speed Dial Group Member pop-up opens. The Positions field automatically populates with the next number in order (the positions start with 20 and end with 49). To change the number, click the field and type the new information. In the Number field, type the telephone number.

8. Click Save to close the pop-up.

9. Within the Actions ribbon group, click the Save button. Within the Run Time ribbon group, click the Go button to send the information to the switch.

10. The script confirmation window opens displaying the switch scripts used to commit this change to the switch.

11. Click the plus sign (+) next to the script name to expand. Enter in the required fields for that script. (Fields marked with an asterisk (*) are required.).

12. If you want to schedule a future time to commit this addition to the switch, go to the Schedule column of the script name. Use the drop-down to enter a date and time.

13. If you want to commit now, click Continue. A status window will open. When the script status reaches 100%, the script is committed in the switch.

14. Back in the Set Management–[Configured Set Details] window, click Save & Close to return to the switch.

Viewing Members of a Speed Dial Group

You can view the numbers that are setup for speed dial within a speed dial group. The speed dial groups and members are tied to a switch record within the Switches menu.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

    - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the EWSD ribbon group, click the upper portion of the Speed Dial button. Double-click on the group you want to add members to. The Set Management–[Configured Set Details] window opens.

6. There are two information panes; the Device Properties pane displays the speed dial group details and the Speed Dial Members pane displays the member's position and telephone number.

7. When you are finished viewing, click Save & Close to exit to return to the switch.

Deleting a Member from a Speed Dial Group

You can delete a speed dial number (a member) from a speed dial group within a switch record.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the EWSD ribbon group, click the upper portion of the Speed Dial button. Double-click the group you want to add members to. The Set Management–[Configured Set Details] window opens.

6. Within the Speed Dial Members pane, click the member you want to delete. This highlights the selection.

7. Within the Members ribbon group, click the Members button to access a drop-down menu and from the list select Delete Member.

8. The member is removed from the Speed Dial Members pane.

9. Within the Actions ribbon group, click the Save button. Within the Run Time ribbon group, click the Go button to send the information to the switch.

10. The script confirmation window opens and displays the switch scripts that will commit this change to the switch.

11. Click the plus sign (+) next to the script name to expand. Enter in the required fields for that script. (Fields marked with an asterisk (*) are required.)

12. If you want to schedule a future time to commit this addition to the switch, go to the Schedule column of the script name. Use the drop-down to enter a date and time.

13. If you want to commit now, click Continue. A status window opens and when the script status reaches 100%, the script is committed in the switch.

14. Back in the Set Management–[Configured Set Details] window, click Save & Close to return to the switch.

Line Class Code (EWSD only)

Line class codes are added to and deleted from EWSD switches within the Switches Menu. Before you can add a line class code, you must first add DSN and PSTN Access records to the switch record. (Please refer to the DSN and PSTN Access sections.)

Adding a Line Class Code

A line class code is added to a EWSD switch using existing DSN Access and PTT Access.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

- Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the EWSD ribbon group, click the Line Class Code button. The screen changes to display the different codes associated with the switch.

6. Click the top row, marked with an asterisk (*) to add a new record. Type the following information for the Line Class Code (required fields are marked with an asterisk (*):

- Line Class Code – type the new Line Class Code name.

- DSN Access – click the field to access a drop-down list and from list select the associated DSN Access.

- PSTN Access – click the field to access a drop-down list and from list select the associated PSTN Access.

- Set Name – type the Set Name for this Line Class Code.

7. To continue adding multiple items, click the row marked with an asterisk (*).

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

Deleting a Line Class Code

A line class code can be deleted from a EWSD switch. The line class code must be free of all assignments before you can delete it.

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

- Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the EWSD ribbon group, click the Line Class Code button. The screen changes to display the different codes associated with the switch.

6. Right click the code to delete and from the pop-up menu select Delete.

7. Once you click Delete, a message box appears verifying that you really want to delete the record. Click Yes within the box to continue or No to cancel the operation.

8. Once selected, CAIRS draws a line through the item allowing you to delete multiple records at one time.

9. If you do not want to delete the records, 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 undelete the record. Click Yes within the box to continue or No to cancel the operation.

11. To complete either process, click the Save (save and stay) button or Save & Close, within the Actions ribbon group, to return to the Switches list.

Modifying PSTN Access

1. Click the Switches menu.

2. In the Navigation pane, click Switches.

3. Depending on the amount of records 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 then click the magnifying glass.

    • Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Switch window.

5. Within the EWSD ribbon group, click the Line Class Code button. The screen changes to display the codes associated with the switch.

6. Click the code to modify and make the necessary modifications.

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

Feature Management

Feature Management allows the user to manage features that are available within your multiple switch types. When a switch supports a feature, each switch requires a different code; within feature management, you can manage the different codes within one screen. Additionally, you can manage the dependencies and decision makers for the feature.

Add New Switch Feature Management

1. Click the Switches menu.
2. In the Navigation pane, click Feature Management.
3. Within the Actions pane, click the Add New Switch Feature Management link.
4. The General – Feature Management window opens.
5. There are three panes of information:

   - General Feature Information
   - Switch Features, Decision Makers and Feature Dependencies
   - Add Feature Code

6. Within the General Feature Information pane, type the name of the feature, for example Call Forward, Auto Display, etc.
7. Within the Switch Feature, Decision Makers and Feature Dependencies pane, complete the following information (required fields are marked with an asterisk (*):

   - Switch Type* – click the field to access a drop-down list and from the list, select the switch type for this particular feature. Once you select a switch type, a new line populates at the top of the list allowing you to keeping adding information. Keep in mind that you can use this same feature for multiple switch types, with each new line representing a new switch.

   - Group Feature Name – if the feature you're adding belongs to a certain group of features (optional and most leave this blank)

   - Manufacturer Feature Name – the switch acronym used for the feature (CFB, AUD, ABDA, BUZZ, etc.)

   - Feature Category* – you must create the feature for each possible category this feature can be used for. Click the field to access a drop-down list and from the list, select one of the following.

     - Analog – select this option if this is an analog feature.

- Digital – select this option if this is a digital feature.

- ISDN – select this option if this is an ISDN feature.

- IP – select this option if this is an IP feature.

- Key – select this option if the feature is added to a key as a key feature opposed to a phone feature.

- Add Sort Order – type the sort order for adding the feature to a set. The sort order indicates the position in which CAIRS adds the feature to the set. An Add Sort Order of 2 will indicate this feature is added before any feature with a Add Sort Order of 3.

- Delete Sort Order – type the sort for deleting the feature from the set. A Delete Sort Order of 2 will indicate this feature is removed before any feature with a Delete Sort Order of 3.

- Hybrid Digital* – click the box to insert a checkmark indicating the feature is a hybrid digital

8. It is a good idea to save your progress so far, within the Actions ribbon group click the Save button.

9. The next step is to define any decision -makers related to the feature. Click the plus sign (+) next to the switch name. A group of lines open below.

10. Within the first line, and if applicable, complete the following fields (required fields are marked with an asterisk (*):

- Decision Field Name – requires prompts from the switch when adding this feature.

- Value – all of the possible answers to the decision prompt.

- Field Help – optional area to provide feedback to the users for each decision value.

- Always Pick From List – a checked box indicates the list of values under the decision are the ONLY possible answers for the switch prompt.

11. Within the second line, click the field to access a drop-down list and from the list, select the dependency feature.

12. Click the SAVE button prior to completing the third line, if you don't, the Manufacturer Feature Line will be blank in the next step.

13. With the third line complete the following fields (required fields are marked with an asterisk (*):

- Software Load* – click the field to access a drop-down list and from the list, select the appropriate software load associated with the switch

14. Again, it is a good idea to save your progress, within the Actions ribbon group, click the Save button.

15. Before any CAIRS can add any feature into the switch, you much enter the code or language that the switch understands.

16. Within the first line, click a line to highlight the feature you want to add the code to. This is an important step because you can manage the same feature for several switches within this window.

17. Within the Add Feature Code pane, type the code required by the switch to properly install this feature on the set.

18. At the same time, you can enter in the Delete Feature code information. Within the lower part of the pane, click the Delete Feature Code tab. The pane changes to allowing you to type the code to delete the feature from the set.

19. Within the Actions ribbon group, click the Save & New button to clear the screen to allow you to continue adding features or click on the Save & Close button to return you to the main menu.

Modify Switch Feature

1. Click the Switches menu.

2. In the Navigation pane, click Feature Management

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list populates, double-click the record to open the General – Feature Management window.

5. Modify the necessary information.

6. Within the Actions ribbon group, click the Save & Close button to return you to the main menu.

Delete a Switch Feature

1. Click the Switches menu.

2. In the Navigation pane, click Feature Management

3. Depending on the amount of records 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 then click the magnifying glass.

   - Click the **Show All** button.

4. Once the list populates, highlight the feature management record that you want to delete. There are three ways to delete the record:

- Within the Actions pane, click the Delete Switch Feature Management link.

- Within the toolbar at the top of the window, click the red X.

- Double-click the record to open the Feature Management window. Within the Actions ribbon group, click on the Delete button

5. With either option, a message box opens verifying that you really want to delete the feature management record. Click Yes to continue deleting or No to cancel the operation.

6. When you click Yes, the feature is removed from the Feature Management list.

Set Type Management Utility

The Set Type Management Utility allows you create the various sets that you will use within your database. Essentially, you are creating a template that the user will see when adding, changing or deleting the set.

Please contact Unique Communication Solutions technical support for further details.

Import Core Data

This menu options allows a Unique Communication Representative to import data from an Access database into your CAIRS database. Please do not perform any function within this menu without the assistance of a Unique Communications representative.

Exporting

The three exporting options, Export Features, Export Set Types, and Export WOPR Scripts are used for basic setup and troubleshooting. For each of the menu options, there are two actions, you can export the list into different files, meaning that CAIRS creates a few file for each record within the list. Second, you can export the list into one file. When you click on either Action link, you are asked to Browse to the location of where to save the file and to name the file, once you click Save CAIRS generates the file and notifies you when the file

is complete. Depending on the amount of information you have within your database, the process may take a few minutes.

Directory/Organization

The Directory/Organization Menu provides the tools to manage group and organization relationships within your database. As well as to manage your internal phone book. There are three menu options within Directory/Organization.

Organizations allows you to create and manage your organizational structure. You can add parents, child and peer organization and their related account information.

The **DSN Directory** provides a place within the software to keep track of commonly used DSN numbers. These number are manually entered by users; they do not come from Configured Items.

The **Phone Book** provides a place for your operators to look up telephone numbers and their related directory information. All numbers here come from your configured items.

Organizations

Before you can start adding organizations into your database, your administrator must first determine your levels. The organizational levels are the structure of your site, for example, org, sub-org, department, and unit.

The three main organization categories are:

1. **Parent:** a Parent Organization is the highest level in your organization structure. It is referred to as a parent because it can have dependent organizations below it.

2. **Child Organization:** a Child Organization is subordinate to another organization. A Child Organization always belongs to another organization and is one level lower than the organization to which it belongs. You can add a child to a parent or another child organization.

3. **Peer Organization:** a Peer Organization is at the same level as the organization to which it is associated, it is more of a support organization. It is not a sub-ordinate or child of the organization. A peer organization can be at any level within your organization levels.

You must first add the Parent Organization and then its Peer and/or Children organizations.

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.

Managing Organization Levels

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

2. In the **Navigation** pane, click the plus sign (+) next to **System Settings**. Click **Organization Levels**.

Adding a New Level

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**.

   4. Within the toolbar directly above the **Navigation** pane, click the **Add Level** button.

   - Within the **Actions** pane, click the **Add Level** link.

5. The General – Org Level window opens.

6. 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.

Deleting a Level

7. Within the Organization Levels list.

8. 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.

9. 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.**

   10. 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.

11. 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.

12. 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

13. Click **Save & Close** (to save and exit).

Your Organizational Structure

Once you or your administrator have created your organization levels, it is time to create/modify your organizations. You can start by creating your parent organizations and adding the children and/or peers.

All organizations, whether a parent or a child, are listed within the Organization list. The list may not readily populate, so to view the complete list of organizations click on the Show All link. When the list populates, pay close attention to the organization path column to determine whether the organization is a parent, child or peer. All child organizations have a parent listed followed by a > and then the child name. If there are multiple levels, each child is separated by a >. If an organization is a peer to another, the peers are separated by a ^.

Adding a New Organization

1. Click the Directory/Organization menu.

2. Within the Navigation pane, click **Organizations.**

3. There are two ways to add an organization:

    - Within the toolbar directly above the Navigation pane, click the drop-down arrow next to New, then select Organizations

    4. Within the Actions pane, click Add New Organization.

5. With either option the General – Organization window opens.

6. There are three panes of information:

    - Organization Information – contains basic organization information, such as parent name, organization level, organization name, etc.

    7. Related Accounts – displays a list of accounts associated with the organization

    - Child/Support Peer Organizations – The bottom pane is divided into two tabs, the first tab, Child Organizations, displays a list of the children associated to the parent. The Support Peer tab displays a list of the peer or support level organization associated to the organization.

8. Within the Organization Information pane complete the following fields (required fields are marked with an asterisk (*)):

    - **Parent Name** – If you are adding a parent level organization, this field remains blank. However, if you are adding a child, click the drop-down arrow to access a list of parents orgs and from the list select the appropriate org name.

9. **Organization Level***– this field is read only and will change based on the information in the parent name field as well as your organization level names. For example, if you have a two level of org and sub-org and you select a parent org, when you save the record this field changes to read Sub-Organization.

- **Code** – type the Organization code.

10. **Organization Name*** – type-in the organization name.

- **Abbreviation** – type the Organization abbreviation, if applicable.

11. **Sort Position** – the organization list defaults to sort alphabetically. The Sort Position field allows you to change the way the organization list sorts. This does not affect how the parent organizations appear in the list but only affects how the children and peers are listed beneath a parent. For example, if you have a parent organization, with A, B, and C children, you can place a sort order of 1 in C, 2 in B, and 3 in A. Therefore, the children would be listed as C, B, and A. Each entry within a group must have a number if you are going to use this field. Blank fields are always listed first.

- **Org Misc 1-5** – there are several open fields for entering miscellaneous organizational information.

12. **TCO -** click the drop-down arrow to access a list, from the list select the TCO to associate to the organization.

- **Commanding Officer** – click the drop-down arrow to access a list, from the list select the commanding officer to associate to the organization.

13. **Resource Manager** – click the drop-down arrow to access a list, from the list select the resource manager to associate to the organization.

- **Billing Rollup** – click the box to insert a checkmark to indicate that when running billing reports the charges for the child organizations will roll-up and be included in the parents. This field defaults to empty meaning that all levels will have their own report.

14. **Inactive** – click the box to insert a checkmark to indicate that the organization is inactive. Instead of deleting the organization and reading in the future, you can make it inactive and then reactivate. This field defaults to empty meaning the organization is active within your database.

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

Adding Related Accounts

16. Within the Related Accounts pane, click on the field marked with an asterisk (*), a complete list of your accounts displays. There are two ways to find an account:

- Within the Search Text box, type any portion of the account number into the field. As you type in your search criteria, the list changes to display the matching accounts

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17. You can scroll through the account list by clicking on the scroll bar on the right-hand side of the box.

18. Once you have found the correct account click on the row. The account number populates in the field.

19. You can continue to add accounts related to the organization by clicking on the field marked with an asterisk (*).

20. At this point it is a good idea to save your progress, within the **Actions** ribbon group, click **Save** (to save and stay) to continue working with this organization, or click **Save & Close** (to save and exit) to return to the Organizations list.

Adding a Child or Peer

21. Within the bottom pane, click on the appropriate tab to add either a child or peer organization.

22. Click on the field marked with an asterisk to add a child or peer, complete the following fields (required fields are marked with an asterisk (*)):

- **Code** – type the Organization code.

23. **Organization Name*** – type-in the organization name.

- **Abbreviation** – type the Organization abbreviation, if applicable.

24. **Sort Position** – the organization list defaults to sort alphabetically. The Sort Position field allows you to change the way the organization list sorts. This does not affect how the parent organizations appear in the list but only affects how the children and peers are listed beneath a parent. For example, if you have a parent organization, with A, B, and C children, you can place a sort order of 1 in C, 2 in B, and 3 in A. Therefore, the children would be listed as C, B, and A. Each entry within a group must have a number if you are going to use this field. Blank fields are always listed first.

- **Org Misc 1-5** – there are several open fields for entering miscellaneous organizational information.

25. **Commanding Officer** – click the drop-down arrow to access a list, from the list select the commanding officer to associate to the organization.

- **Resource Manager** – click the drop-down arrow to access a list, from the list select the resource manager to associate to the organization.

26. **Billing Rollup** – click the box to insert a checkmark to indicate that when running billing reports the charges for the child organizations will roll-up and be included in the parents. This field defaults to empty meaning that all levels will have their own report.

- **Inactive** – click the box to insert a checkmark to indicate that the organization is inactive. Instead of deleting the organization and reading in the future, you can make it inactive and then reactivate. This field defaults to empty meaning the organization is active within your database.

27. You can continue to add children/peers by clicking on the row marked with an asterisk (*).

28. When finished working with the organization, click **Save & Close** (to save and exit) to return to the Organizations list.

Add/Modify an Account Number to an Organization

1. Click the Directory/Organization menu.

2. Within the Navigation pane, click Organizations.

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. The Organization list opens, displaying all organizations. Double click on the organization to associate an account to.

6. The General – Organization window opens.

7. Within the Related Accounts pane, click on the field marked with an asterisk (*), to access a drop-down list of the accounts within your database.

8. There are two ways to find an account:

    - Within the Search Text box, type any portion of the account number into the field. As you type in your search criteria, the list changes to display the matching accounts

9. You can scroll through the account list by clicking on the scroll bar on the right hand side of the box.

10. Once you have found the correct account click on the row. The account number populates in the field.

11. You can continue to add accounts related to the organization by clicking on the field marked with an asterisk (*).

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

Editing an Organization

When you are viewing an organization, there are three options within the Edit Parent ribbon group for modifying your organizations, they are:

- Make me a Child

13. Make me a Peer

- Remove the Parent

Make me a Child

1. Within the Edit Parent ribbon group, click on the Make me a Child button.

2. The Organization Information pane becomes available, click the Parent Name field to access a drop-down list and from the list select the name of the parent organization.

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

Make me a Peer

1. You will need to select an organization to make a peer to, within the Parent Name field in the Organization Information pane, click the drop-down arrow to select the peer.

2. Within the Edit Parent ribbon group, click on the Make me a Peer button.

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

4. When you make the organization a peer nothing changes on the screen, the only change you will see if that in the organization list, the peer now appears next to the other organization divided by a ^.

Remove the Parent

1. Within the Edit Parent ribbon group, click on the Remove the Parent button.

2. All upper level organizations associations are removed and the selected organization is now a parent.

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

Open Parent

When you are viewing any child or peer organization you can quickly open the parent organization. Within the Other Actions ribbon group, click on the Open Parent button. The Parent Organization opens in an additional window.

Deleting an Organization

You can delete an organization if there are no associations within the database. If the organization has children those need to be deleted before the parent or higher levels can be deleted. This goes for subscribers, accounts, sets, anything associated to the organization, all records need to be removed from the organization before you can delete.

1. Click the Directory/Organization menu.

2. Within the Navigation pane, click Organizations.

3. Depending on the amount of records 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 then click the magnifying glass.

    4. Click the **Show All** button.

5. The Organization list opens, displaying all organizations. There are three ways you can delete an organization:

    - Highlight the Organization within the list, and on the toolbar directly above the Navigation pane, click the red X.

    6. Highlight the Organization within the list, and within the Actions pane click the Delete Organization link.

    - Within the list, double-click the Organization name to open the General - Organization window. Within the Actions, ribbon group click the Delete button.

7. With either of the options, once you click Delete a message box appears asking if you really want to delete the organization, click Yes to continue or No to cancel the operation.

Organization's Customer Codes

Managing Customer Codes

1. Click the Directory/Organization menu.

2. Within the Navigation pane, click Organizations.

3. Depending on the amount of records 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 then click the magnifying glass.

    4. Click the **Show All** button.

5. The Organization list opens, displaying all organizations. Double-click the name to open the General - Organization window.

6. Within the Show ribbon group, click the Customer Code button. The screen changes to display a list of the codes associated to the organization.

Adding a Customer Code

7. Click on the field marked with as asterisk to access a dropdown list of customer codes. From the list, select the code to associate to the organization.

8. To search for a particular code, type-in any portion of the record into the search textbox as you type the results will display on the screen.

Deleting a Customer Code

9. Right-click the record selector box next to the customer code to access a menu from the menu click on **Delete.**

10. Once you click Delete, a message box appears verifying that you really want to delete the code. Click **Yes** within the box to continue or **No** to cancel the operation.

Once selected, CAIRS draws a line through the entire row allowing you to delete multiple codes at once.

11. If you do not want to delete the type, right-click the record to access a pop-up menu and click **Undelete.**

12. Once you select Undelete, a message box appears verifying that you really want to keep the type. 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 working with the organization, or click **Save & Close** (to save and exit) to return to the Organizations list.

Organization's Call Records

View an Organization's Calls

1. Click the Directory/Organization menu.

2. Within the Navigation pane, click Organizations.

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. The Organization list opens, displaying all organizations. Double-click the name to open the General - Organization window.

6. Within the Show ribbon group, click the Calls button.

7. The window displays the following information for each call type:

    - **Call Type** – call type name.

8. **Total Calls** – the total number of calls made.

    - **Total Cost** – the total cost of calls.

9. **Total Call Duration** – the total duration of call in minutes.

10. At the bottom of the list is a total for all call charges. To view the details for each call type, click the plus **(+)** sign next to the call type name. To return to the default view, click the minus (-) sign next to the call type name.

11. You can export or print the call data by clicking the **Sharing** tab at the top of the screen. There are 3 export formats:

- **PDF** – you can export the total report, expanded bands only or primary band to a PDF file. Once selected the PDF file generates to your screen, you can save the file to any location.

12. **Excel** – you can export the total report, expanded bands only or primary band to an Excel spreadsheet. Once selected, Excel opens with your report, you can save the file to any location.

- **Print** – you can send the entire report, expanded bands only or primary band report a printer. Once selected the Print box displays allowing you to choose your printing options.

13. **Text** – you can export the total report, expanded bands only or primary bands to a tab delimited text file. Once selected, the Select the location to save the Tab-delimited Text File box opens. Browse to the location, type the file name within the text box and click the Save button.

Organization Sets

You can view all the sets that are associated to the organization by clicking on the Sets button within the Show ribbon group. If there are several sets related to the organization the list may not readily populate, click on the Show All link in the upper right-hand corner to view all the sets. Alternatively, you can search for a set by typing any portion of the record into the textbox and then click on the magnifying glass. Once populated, you can see the primary number plus related directory information. This is read only information.

Organization Circuits

You can view all the circuits that are associated to the organization by clicking on the Circuits button within the Show ribbon group. If there are several circuits related to the organization the list may not readily populate, click on the Show All link in the upper right-hand corner to view all the circuits. Alternatively, you can search for a circuit by typing any portion of the record into the textbox and then click on the magnifying glass. Once populated, you can see the circuit name and related circuit information. This is read only information.

Organization Work Orders

You can view all the work orders related to the organization by clicking on the Work Orders button within the Show ribbon group. If there are several work orders related to the organization the list may not readily populate, click on the Show All link in the upper right-hand corner to view all the work orders. Alternatively, you can search for an order by typing any portion of the record into the textbox and then click on the magnifying glass. Once populated, you can see the work order and related work order information. This is read only information.

Organization History

Please see Common Elements →History.

Organization Attachments

Please see Common Elements → Attachments.

Export Organizational Directory

The Organizational Directory allows you to export the organization and related subscriber information. There are a couple of options when exporting, you can narrow the field by creating a search parameter, you export the entire directory, or you can highlight a row in the tree and export only that row.

1. Click the Directory/Organization menu.

2. Within the Navigation pane, click **Organizations.**

3. You have a few options when it comes to exporting the information:

   - You can narrow the amount of information to export by performing a search, within the textbox at the upper right-hand corner of the Search All Organizations pane, type the search information.

     4. You can highlight a row within the Search All Organizations pane

   - You can export the entire organizational directory

5. Once you have created a search parameter you can export the directory using on the following methods:

   - On the toolbar at the top of the page, click the **Export Organizational Directory** button.

   - In the Actions pane, click the **Export Organizational Directory** link.

   Either option creates a PDF document.

6. At this point, you can either save the document or print it.

7. To close the document, click the red **(X)** in the top right had corner of the window to return to the Directory/Organization list.

Org Chart

In addition to exporting your organization directory, there is the Org Chart. When you click on the Org Chart link within the Actions pane, a new window opens with your complete organization chart. The chart displays the parents and children. This is read only.

Organization Views

There are three views to choose from when viewing your organization structure. The default view is the simple list, this view displays all organizations at any level. Next to each organization name is the path that shows the parent organization followed by the children.

The basic lookup view displays the organization name only. The last view is the organization tree. This view displays the parent as the main level, to view the children click on the plus (+) sign next to the parent name. If children have children continue to click on

the plus (+) sign until all levels are visible. To return a level to just the parent, click on the minus (-) sign next to the parent name.

DSN Directory

The DSN Directory offers a place to store commonly asked for DSN telephone numbers that you do not want to track within your Configured Items. The information listed here, does not reflect on any information within your CAIRS database. This information resides in a completely separate database. When you add, modify and delete information here you simply add a listing within an in-software telephone book. You can export this information to either an Excel or PDF file.

Manage Country, State or Region List

These lists allow you to classify your DSN listings so you can view them based on a particular category. The process to add and remove each of the lists is the same so we will cover the process once.

Managing a Country, State or Region

1. Click the Directory/Organization menu.
2. Within the Navigation pane, click **DSN Directory.**
3. There are two ways to manage your lists:

    - On the toolbar directly above the Navigation pane, click the **Manage (Country, State, or Region) List** button.

    4. Within the Actions pane, click the **Manage (Country, State, or Region) List** link.

5. With either option, the Manage (Country, State, or Region) List window opens.

<u>Adding a Country, State or Region</u>

6. Click the field marked with an asterisk **(*)**. Type the name of the country, state or region
7. To add another type, click the Save button and repeat step five, as necessary.

<u>Deleting a Country, State or Region</u>

8. There are two ways to select the record to delete:

    - Right-click the record selector box (located just left of the name) and click **Delete.**

    9. Highlight the name in the list and within the Actions ribbon group click the **Delete** button.

10. Once you click Delete, a message box displays verifying that you really want to delete the record. 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 records at once.

12. If you do not want to delete the name, right-click the record to access a pop-up menu. Select **Undelete.**

13. Once you select Undelete, a message box displays verifying that you really want to keep the record. 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, or click **Save & Close** (to save and exit) to return to the Directory/Organization list.

DSN Directory List

Adding a New Operator DSN

1. Click the **Directory/Organization** menu.

2. Within the Navigation pane, click **DSN Directory.**

3. Within the Actions pane, click the **Add New Operator DSN** link.

   The General DSN Directory window opens.

4. Within the window, complete the following fields for the new listing (required fields are marked with an asterisk **(*)**):

   - **DSN Listing** – type the name of the listing, for example, Fort Hood, Camp Foster, etc.

5. **Keyword** - type a name or description that allows your operators to perform a quick search on the telephone number. For example, if the telephone number belongs to the Library you would type Library into this field for an easier 411 search.

   - **City *** - type the name of the city of where the listing is located

6. **State** – click the drop-down arrow to access the list of states created within your database, from the list select the state name

   - **Commercial Exchange** – type the commercial telephone exchange

7. **DSN Telephone *** - type the DSN telephone number

   - **DSN Operator Number** – type the DSN operator number

8. **Country** – click the drop-down arrow to access a list of countries created within the database, from the list select the country name

   - **Is 4 Wire** – click the box to insert a checkmark to indicate that this is a 4 wire DSN listing, leave the field blank to indicate that it is a 2 wire listing

9. **Publish Listing** – this field default to contain a checkmark to indicate that the listing is published within the directory, click the box to remove the checkmark to indicate that this listing is non-published

   - **Protected Record** – click the box to insert a checkmark to indicate that this is a protected record, leave the field blank to indicate that the record is unprotected

10. **Per Minute Rate** – type the rate per minute

- **Region** – click the drop-down arrow to access a list of regions created within the database, from the list select the region name

11. **Notes** – use this field to type any additional notes regarding the listing.

12. Within the **Actions** ribbon group, click **Save & New** (to save and stay) to continue adding DSN operators, or click **Save & Close** to return to the DSN Directory.

Editing the DSN Directory List

1. Click the **Directory/Organization** menu.

2. Within the Navigation pane, click **DSN Directory.**

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. There are two ways to edit the list:

- On the toolbar directly above the Navigation pane, click the **Edit DSN Directory List** button.

6. Within the Actions pane, click the **Edit DSN Directory List** link.

With either option the DSN Directory window opens.

7. The list of the existing listings populates. Click the field and either type or select the new information.

8. You can add a new record within this list by clicking on the row marked with an asterisk and completing the information within the row, required fields are in bold and marked with an asterisk.

9. Within the **Actions** ribbon group, click **Save** to continue working with the listings or click **Save & Close** to return to the DSN Directory.

Deleting a DSN Listing

1. Click the **Directory/Organization** menu.

2. Within the Navigation pane, click **DSN Directory.**

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. Once the list populated, highlight the DSN Listings that you want to delete, then, within the Action pane, click the **Delete Operator DSN link.**

6. Once you click Delete, a message box displays verifying that you really want to delete the listing. Click Yes within the box to continue or No to cancel the operation.

Viewing the DSN Directory

There are a few different views to choose from when looking at the information within the DSN Directory. The following view options are available:

*   **Basic Lookup** – the list displays the DSN Listing only.

7. **Simple List** – this is the default view, this displays the listings in numerical order from least to greatest.

*   **Country** – this list sorts the DSN Directory by country.

8. **State** – this list sorts the DSN Directory by State.

*   **Region** - this list sorts the DSN Directory by State.

9. **City** - this list sorts the DSN Directory by State.

To select a different view, click the option button next to the selection. Before the list populates you must either search for a listing by typing in the record or portion of the record into the search box then click the magnifying glass. Alternatively, you can click the Show All link to display all listings.

If there are multiple listings below a heading, click the plus **(+)** sign next to the name to expand the records.

Exporting the DSN Directory

1. Click the **Directory/Organization** menu.

2. Within the Navigation pane, click **DSN Directory.**

3. Depending on the amount of records 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 then click the magnifying glass.

4. Click the **Show All** button.

5. On the toolbar at the top of the screen, click the **drop-down** arrow next to Export. There are seven options to choose from:

*   **Excel (All Levels)** – exports all records to an Excel spreadsheet.

6. **Excel (Top Level Only)** – exports only the top level of information.

*   **Excel (Expanded Levels Only)** – exports the full detail for the expanded records to an Excel spreadsheet. The un-expanded records are in the file as a top level and you only see the summary line.

7. **Excel (Multiple Files)** – exports each bill into a separate file.

*   **PDF (All Levels)** – exports all records to a PDF file.

8. **PDF (Top Level Only)** – exports only the top level of information.

- **PDF (Expanded Levels Only)** – exports the expanded records full detail to a PDF file. The un-expanded records are in the file as a top level, and you only see the summary line.

9. **Tab-Delimited Text (Top Level Only)** – exports the top level of information into a tab-delimited text file. Once selected, the Select the location to save the Tab-delimited Text File box opens. Browse to the location, type the file name within the text box and click the Save button.

The file opens allowing you to save or modify the file in the appropriate program.

Phone Book

The Phone Book allows your operators to quickly access information relating to telephone numbers from the Configured Items → Set Management/Cisco/Avaya section of CAIRS. The phone book provides basic directory information related to the set.

There are two ways to populate the phone book. First is a CES process that runs in the background that takes the directory information and automatically populates the phonebook. The process can run nightly to populate new or changed directory information. The second way is to manually build listings into the phone book.

Based on privileges, operators can make changes or accepts changes to certain fields related to the listing. Once changes are made, they can be accepted and sent to populate the set within Configured Items.

Directory Transfer Manager

The easiest way to populate the Phone Book is to setup CES to perform a Directory Transfer Manager. This service copies all the existing telephone numbers within your Configured Items – Set Management/Cisco/Avaya to the Phone Book.

Within System Admin → Service Management → Service Manager, your CAIRS administrator can setup the Directory Transfer Manager to transfer new switch records into the Phone Book. When it transfers the telephone numbers, they will come into the phone book as unassigned; your operators can assign them according to the proper section. The phone book section allows them to categorize the listings by how they want to look up the information.

The phone book sections are added within Edit/Rearrange Phone Book. You will assign each site a section code, name and sort order.

Creating Section Names

Before you can start assigning your listings into phone book sections, you must first create the sections. A section can be anything that groups a set of like numbers together. For example, if your site has multiple units, each unit could have its own section. The sections are used for the printed version of the phone book.

1. Click the **Directory/Organization** menu.
2. Within the Navigation pane, click **Phone Book.**

3. Within the Actions pane, click **Edit/Rearrange Phone Book.**

The Phone Book window opens, displaying a list of the sites that are within your database.

4. Next to each site name is the section information. In order for the telephone numbers assigned to a site, you must complete the following fields, all fields are required:

- **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. Each site level is separated by a >.

5. **Section Code** * - type the code for the section name; this can be the abbreviation for the section name. This allows your operators an alternate means to search for the listing information.

- **Section Name** * - type the section name for the site. This field should be specific enough that your operators know what telephone numbers are within each section, for example, Barracks, Flight Line, etc.

6. **Sort Order** * - this field automatically populates with next sort order

- **New Page** * - click the box to insert a checkmark to indicate that if you are exporting and/or printing the phone book, each new section starts on a new page.

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

Assigning a Listing a Section

1. Click the **Directory/Organization** menu.

2. Within the Navigation pane, click **Phone Book.**

3. Within the Views pane, click the **Unassigned** option button.

4. Depending on the amount of records 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 then click the magnifying glass.

5. Click the **Show All** button.

6. The list displays all the listings that do not have a section assigned.

7. Double-click any record to open the Phone Book listing window.

8. Within the Section Name field, click the **drop-down** arrow to access a list, from the list select the section name to associate to the telephone listing

9. Complete any other fields as necessary.

10. Within the Actions ribbon group, click the **Save & Close** button to return to the Unassigned List.

11. Notice that the telephone number no longer displays within the list of Unassigned numbers.

Search Tags

To make searching for listings within your phone book quicker, you can add search tags to each listing. A search tag is a common element between 1 or more listings. For example, you create a tag of 'fast food' and apply to all the fast food restaurants on your site, or a tag of 'medical' and apply to all clinics and hospitals. You can create and apply a tag to individual listings or you can Bulk Manage Search tags and apply tags to multiple listings at once.

Each listing can have more than one tag associated.

Individual Search Tag

1. Click the **Directory/Organization** menu.
2. Within the Navigation pane, click **Phone Book.**
3. Within the Views pane, click the **Simple List** option button.
4. Depending on the amount of records 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 then click the magnifying glass.

5. Click the **Show All** button.
6. Within the list, double click on the listing to apply the tag onto.
7. There are two ways to add a tag to a listing.

   - Within the Add Existing Search Tag pane, the existing tags are shown in individual boxes. To add a tag to the listing, click on the box.

8. Within the Frequent Search Tags pane, click on the field marked with an asterisk, type-in the search tag
9. Within the Actions ribbon group, click on the Save button to continue working with the listing or click on the Save & Close button to return to the main menu.

Bulk Manage Search Tags

1. Click the **Directory/Organization** menu.
2. Within the Navigation pane, click **Phone Book.**
3. Within the Actions pane, click on the Bulk Manage Search Tags link
4. The Bulk Manage Phone Book Search Tag window opens. There are 3 panes of information:

   - Search Criteria

5. Apply Tag to Matching Listing

- Matching Listings

6. The first step is to create a search parameter for only the listings that you want to be included within the tag, this is done in the Search Criteria pane.

7. There are several fields available to search on, you can search on multiple fields and as you click out of the field the matching listings will populate in the pane. In the example below, we search on telephone numbers that start with a 21 and are in building 100 in Henderson HQ.

8. Once your listings appear in the pane, you can apply a tag.

9. Within the 'Apply Tag to Matching Listing' pane, click on the appropriate tag. You will need to verify that you want to add the search tag to all the matching listings. Click 'Yes' to continue.

10. To view all the numbers associated to a tag, click on the Search Phone Book link in the Actions pane on the Navigation pane.

11. The Phone Book Search window will open, within the Frequent Search Tabs pane click on the tag. The associated listings will appear in the Matching Listings pane.

Searching the Phone Book

1. Click the Directory/Organization menu.

2. Within the Navigation pane, click Phone Book.

3. Within the Actions pane, click the Search Phone Book link

4. The Phone Book Search window opens. There are four panes of information:

- Frequent Search Tags

5. Search Criteria

- Selected Result

6. Matching Listings

7. Within the Frequent Search Tags pane, you can quickly search for listing associated to each tag by clicking on the appropriate tag box. The listing appear in the Matching Listings pane.

8. You can further refine you search by entering information into the Search Criteria pane. There are several fields that you can use to refine you search. When you enter text into any field it will search on the exact text you enter. For example, if you enter 21 into the Telephone Number field, the matching listings will all start with 21.

9. The following wild card searches are available:

- % - match on any characters

10. _ - match on a single character

- [characters] – match on character in the between the brackets

11. [^characters] or [!characters] – match on any character not contained within the brackets

To view the search help within CAIRS, click on Phone Book Search within the toolbar to access the ribbon group, then click on the Search Help button.

12. The listings only appear after you have typed the information into the field and click out of the field or pressed the enter key on your keyboard.

13. The first listing will display in the Selected Results pane, this pane is read only. To change to another listing, click on the row within the Matching Listing pane.

Phone Book Listings

Your operators can track telephone listings that do not appear within the Set Management portion of the CAIRS database. They can add, modify, and delete listings. Please keep in mind that if operators add a listing here it will not show anywhere else within the CAIRS database.

Creating a new listing

1. Click the **Directory/Organization** menu.

2. Within the Navigation pane, click **Phone Book.**

3. There are two ways to add a new listing into the phone book:

- On the toolbar directly above the Navigation pane, click the **drop-down** arrow next to New. From the list, select **Phone Book.**

    4. Within the Actions pane, click **Add New Phone Book Listing.**

5. With either option, the General - Phone Book window opens.

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6. Within the window, complete the following information (required fields are marked with an asterisk **(*)**):

- **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. Each site level is separated by a >.

7. **Section Name** – click the drop-down arrow to access a list of the sections associated to the site, from the list select the section name.

- **Organization Name** - click the drop-down arrow to access a list from the list, select the name of the organization. The organization **drop-down** list displays the bottom-most organization first. After the ~~the complete path to the selected organization displays. In the example below, we selected Documentation, which is a child to Development and Unique. Each level of the organizational tree is separated by a >.

8. **Telephone Number** – type the telephone number.

- **Job Title** – type the job title or description.

9. **Office Symbol** – type the office symbol.

- **Building Name** – click the drop-down arrow to access a list, from the list select the building name.

10. **Room** – type the room number.

- **Sort Order** * - this field defaults to 0, (telephone numbers are listed in numerical order). To have this record display at the top of the list, type a **1** in this field. You can number each record according to position within the list from 1 to 999.

11. **Keyword** - type a name or description that allows your operators to perform a quick search on the telephone number. For example, if the telephone number belongs to the Library, you would type *Library* into this field for an easier 411 search.

- **Publish Listing** – this field default to contain a checkmark to indicate that the listing is published within the directory, click the box to remove the checkmark to indicate that this listing is non-published

12. The **Print Building Number** through **Trailing Digit Count** are fields that are used if you want to export the phone directory and import it into a third-party product.

- **Civilian Telephone Number** – type the civilian telephone number

13. **Comm Number** – type the Comm number

- **Subscriber –** click on the field to access a drop-down list of the subscribers within your database. You can either search for the subscriber by typing any portion of the record within the textbox, as you type the list modifies to display your results. Alternatively, you can scroll through the list to find the subscriber name. Once at the subscriber, click on the name to associate to the listing.

14. **Phone Book Misc 1-6 –** use these fields for any information relating to the phone book listing

- **Directory Misc 1 – 10 –** use these fields for any information relating to the directory information for the listing

15. **Set Misc 1 – 20** – use these field for any information relating to the set information

16. Within the **Actions** ribbon group, click **Save & New** (to save and stay) to add another listing, or click **Save & Close** (to save and exit) to return to the Phone Book list.

Deleting a listing

1. Click the **Directory/Organization** menu.
2. Within the Navigation pane, click **Phone Book.**
3. There are three ways that you can delete a record from the phone book:

- Highlight the phone book listing within the list and on the toolbar directly above the Navigation pane click the red **X.**

4. Highlight the phone book listing within the list and within the Actions pane click the **Delete Phone Book Listing** link.

- Within the list, double-click the record. The Phone Book window opens. Within the Actions, ribbon group click the **Delete** button.

5. Once you click Delete, a message box displays verifying that you really want to delete the listing. Click **Yes** to continue or **No** to cancel the operation.

Viewing a listing

There are few ways to access a listing to view. You can perform a search from the Search Phone Book link, this will display matching listings based on your search criteria or tags. The listings that display provide you with read only information.

Alternatively, you can search the entire phone book from the phone book list next to the navigation pane. Next to the search text box, click on the double down arrow to access a set of fields that you can search from. Within any of the fields type-in the search parameter, you can also click on the box that says 'contains' next to each field and select a clarifier (such as Begins with, Equal to, Greater than, etc.). Once your parameter is created, click on the magnifying glass in the upper right-hand corner of the pane. The matching listings will display within the list. To view the complete details for the listing, double click on the row to open the details window.

Listing Discrepancies

Often times there are discrepancies from what the phone book says and what the switch says. Based on privileges operators can change information for a listing. When you access a listing, the Listing Discrepancies pane, displays two columns the phone book fields and the set management fields. The fields that are different appear in bold type. In the

example below, the set management field for subscriber is populated however, the phone listing is not.
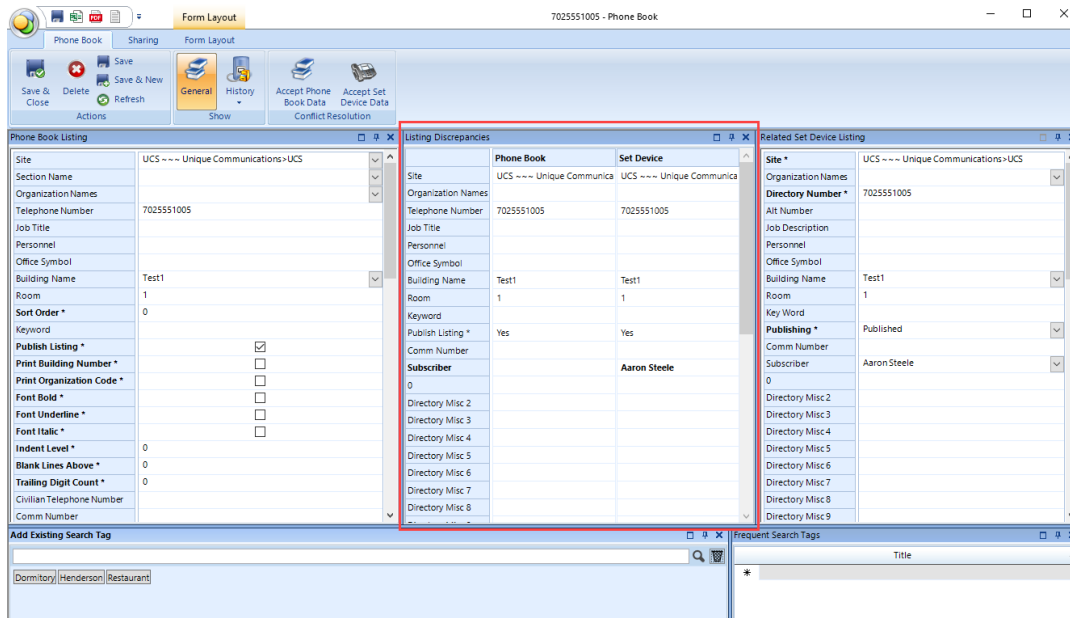
Conflict Resolution

When differences exist in either the phone book or in set management, the operators can choose to update their listing by clicking on one of the buttons with the Conflict Resolution ribbon group. The two options available are:

- Accept Phone Book Data – this will accept all the changes made within the phone book and transfer the changes into the Set Device listing.

6. Accept Set Device Data – this will accept the data that is in the Set Device listing and overwrite any data that may have existed in the phone book.

With either option, once clicked the data will overwrite any existing or missing information. To save the changes, click on the Save button.

Making Changes to a Listing

Again, based on privileges, operators can make changes to the listing and send those changes to the set management portion of CAIRS. To do so, they simply type in the new information within the Phone Book Listing pane. Once complete, they will click on the Accept Phone Book Data. The Listing Discrepancies pane will change to display the new information. To save the changes, click on the Save button.

Exporting the Phone Book

1. Click the **Directory/Organization** menu.
2. Within the Navigation pane, click **Phone Book.**

3. On the toolbar directly above the Navigation pane, click the **drop-down** arrow next to Export. The following options are available when exporting the phone book (only the applicable export options are listed):

- **Excel** (All Levels) – exports all records to an Excel spreadsheet.

4. **PDF (**All Levels) – exports the report to a PDF file.

- **Tab-Delimited Text** (Top Level Only) – exports the top level of each grouping to a tab-delimited text file.

5. The file opens in the appropriate program allowing you to save or print the information.

Viewing the Phone Book

There are a few different views to choose from when looking at the information within the phone book. The following view options are available:

- **Basic Lookup** – this is the default view; this will display the telephone number only.

6. **Simple List** – this displays the listings in numerical order from least to greatest.

- **Maintenance** – this list sorts the listings by their associated site, section code and section name.

7. **Unassigned** – this list displays the listings that were added through the Directory Transfer Manager, these are the listings that need a section name assigned before you can view them in the phone book.

- **Detailed** – this list provides more details for each listing.

- **Directory Differences** – this view provides a list of the listing that have a discrepancy between the phone book and the set device data.

Toll Tickets

The Toll Ticket System is designed to charge back Operator Assisted phone calls. When a call is placed from an Operator Station, the call is billed to the operator's unit, not to the people actually making the phone call/s. With Toll Tickets, calls can now be tracked and the charges automatically re-directed and billed to the appropriate parties.

Toll Ticket Setup

Before toll tickets can be issued, your system administrator must setup a few settings. They are:

- UseTollTicketOption – the Setting Value must be set to True.

8. Control Number Mask – Default Toll Ticket Control Number (standard control numbers).

- VIP Control Number Mask – Default Toll Ticket Control Number (VIP control numbers). For those who need to make operator-assisted phone calls, but who do not have a

billing account inside the organization generating the call. Used at the discretion of the operators.

Manage Operator Phone Numbers

ALL operator work-station phone numbers that could appear in a call record as the extension that placed the call need to be entered into the Phone Number field. Operators are frequently grouped into stations. The phone numbers for each station can be designated by alpha or numeric characters.

1. Click the Directory/Organization menu.

2. Within the Navigation pane, click Toll Tickets → Toll Ticket Views.

3. There are two ways to access the Manage Operator Phone Number window:

   - On the toolbar directly above the Navigation pane, click the Manage Operator Phone Numbers button.

   4. Within the Actions pane, click the Manage Operator Phone Numbers link.

5. With either option, the Manage Operator Phone Numbers window opens.

<u>Adding a Phone Number</u>

6. In the Manage Operator Phone Numbers list pane, click the top row, marked with an asterisk (*) to add a new phone number.

7. Associate an alpha or numeric character to each operator station, then for each phone number, add the character in the Station * column.

<u>Deleting a Phone Number</u>

8. There are two ways to delete a phone number:

   - Right Right-click the record selector box next to the number to access a menu from the menu click on **Delete.**

   9. Highlight the name in the list and within the Actions ribbon group click the **Delete** button.

10. Once you click Delete, a message box appears verifying that you really want to delete the number. Click **Yes** within the box to continue or **No** to cancel the operation.

    Once selected, CAIRS draws a line through the entire row allowing you to delete multiple numbers at once.

11. If you do <u>not</u> want to delete the number, right-click the record to access a pop-up menu and click **Undelete.**

12. Once you select Undelete, a message box appears verifying that you really want to keep the number. 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 numbers, or Save & Close (to save and exit) to return to the Toll Tickets Management list.

Adding TCO Control Numbers

When a TCO uses all assigned control numbers before the end of the month, you can assign new control numbers.

1. Click the Directory/Organization menu.

2. Within the Navigation pane, click Toll Tickets > TCO Groups' Control Numbers.

3. There are two ways to add Control Numbers:

4. On the toolbar above the Navigation pane, click the Add Control Numbers for TCO button.

   - Within the Actions pane, click the Add Control Numbers for TCO link.

   5. With either option, the Add Control Numbers for a Particular TCO window displays.

6. Within the window, complete the following fields:

   - Select TCO - click the drop-down arrow to access a list, select the TCO.

   7. Number of Control Numbers to Add – type the quantity of Control Numbers you want to add or use the standard monthly quantity that is displayed in the field.

8. Click the Create Control Numbers button to add the Control Numbers to a TCO's list.

9. A notification pop-up displays, confirming your Control Numbers were created successfully. Click OK.

10. The Add more Control Numbers for a Particular TCO window remains open. You can continue to add additional Control Numbers for other TCOs, or click the Exit button to return to the Toll Ticket Control Numbers list.

! If you add more control numbers than you need, you can delete the numbers, or leave them in queue for future calls. Each month, the standard quantity of control numbers will be exported to the account. Unused Control Numbers are marked as expired at the end of each month.

Creating and Completing a Single Toll Ticket

1. Click the Directory/Organization menu.

2. Within the Navigation pane, click Toll Tickets →Toll Ticket Views.

3. Within the Actions pane, click Add New Toll Ticket Main.

4. The Toll Ticket [Detail] window opens.

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5. Type the control number obtained from your Telephone Control Officer (TCO) in the Control Number field.

6. Click the Validate button.

7. The Control Number is instantly validated and assigned to the associated TCO Group.

8. Within the Ticket Type ribbon group, click Single Ticket. The Ticket Type * field populates with the call type.

9. Within the Regular Toll Ticket pane, complete the following fields (required fields are marked with an asterisk (*)):

   - From Number * – the number of the person initiating the call.

10. Called Number * – the number the operator is calling (must exactly match the number that is called).

   - Calling Party * – the name of the person making the call.

11. Called Party * – the name of the person receiving the call.

   - Called Party Location * – location of outgoing call (Ex. Residence).

12. Connection Made TimeStamp – auto-populates the date/time the call was connected once the Call Connected button is clicked.

   - The call is then placed.

13. If the party answers, within the Call Actions ribbon group, click the Call Connected button.

14. Once the call is connected, it is not necessary to monitor single calls. Within the Call Actions ribbon group, click Call Completed.

15. Once you select Call Completed, a message box displays asking if you want to save and close the Toll Ticket. Click Yes to continue.

16. The Control Number is now marked as *Used.*

! Single calls are instantly marked as completed. Click the Call Completed button within the Call Actions ribbon group.

Toll Ticket Conference Calls

Creating the Conference Call Toll Ticket

1. Click the Directory/Organization menu.

2. Within the Navigation pane, click Toll Tickets →Toll Ticket Views.

3. Within the Actions pane, click Add New Toll Ticket Main link.

4. The Toll Ticket – [Detail] window opens.

5. Within the VIP ribbon group, click the Control Number button.

6. The control number auto-populates in the Control Number field, and is instantly validated and assigned to the VIP TCO Group.

7. Within the Ticket Type ribbon group, click the Conference Ticket button.

8. A bottom pane, Conference Call Toll Ticket, has now been added to the main window.

9. Within the Conference Call Toll Ticket pane, complete the following fields (required fields are marked with an asterisk (*)):

    *   Requestor Phone Number * – type the number of the person requesting the conference call.

10. Requestor * – type the name of the person requesting the conference call.

    *   Requestor Duty Location – type the location of the person requesting the call.

11. Scheduled Date Time – type the date and time the conference call is scheduled to begin.

    *   Reminder Date Time – type the date and time you would like a reminder of the conference call to display (reminder will be sent to ALL operators).

12. Connection To Requestor Made Time Stamp – auto-populates the date/time the call was connected once the Call Connected button is clicked.

13. You can add a reminder to the conference call by typing the date and time you would like the reminder to display in the Reminder Date Time field. A reminder pop-up will display in the bottom of the screen. All operators will receive the reminder notice in case the operator who created the ticket is unavailable at the time of the call.

Adding Participants to a Conference Call

The names and phone numbers of participants who have previously been involved in a conference call ticket are maintained in CAIRS, in the Available Participants NOT part of conference call (add if they don't exist) list.

1. Within the Available Participants NOT part of conference call (add if they don't exist) list, double-click the name of the participant you would like to add to the new call. They have now been added to the Participants who will participate in the conference call list.

2. Within the Actions ribbon group, click Save & Close (to save and exit) to return to the Toll Tickets Management list.

You can add a *new* participant at any time by typing each caller's information (name, phone number, rank, and location) in the Available Participants NOT part of conference call (add if they don't exist) list.

1. Within the Available Participants NOT part of conference call (add if they don't exist) list complete the following fields (required fields are marked with an asterisk (*)):

    *   Name * – type the name of the participant.

2. Phone Number * – type the phone number the participant will be calling in on.

• Rank – type the rank of participant.

3. Location – type the location of participant.

4. Within the Actions ribbon group, click Save before continuing.

5. Within the Available Participants NOT part of conference call (add if they don't exist) list, double-click the newly added name. They have now been added to the Participants who will participate in the conference call list.

6. Within the Actions ribbon group, click Save & Close (to save and exit) to return to the Toll Tickets Management list.

Connecting a Conference Call

1. Click the Directory/Organization menu.

2. Within the Navigation pane, click Toll Tickets > Toll Ticket Views.

3. The Toll Tickets Management list displays.

4. To open the Toll Ticket, double-click the appropriate IDNumber *.

5. Within the Participants who will participate in the conference call list, begin calling each participant using the phone number listed next to their name.

6. Within the Participants who will participate in the conference call list, complete the following fields:

• Not Available – click the box to insert a checkmark next to a participant's name when they are unavailable to participate in the call.

7. No Answer – click the box to insert a checkmark next to a participant's name when they do not answer the call.

• Connect Date Time – click in the Connect Date Time field to record the date and time the participant was connected to the conference call.

8. When all participants have been connected to the call, click the Call Connected button within the Call Actions ribbon group.

9. Once the call has ended and all participants have disconnected from the call, within the Call Actions ribbon group, click Call Completed.

10. A pop-up message displays asking if you would like to save and close the Toll Ticket. Click Yes.

11. The ticket is now marked as "used" and is viewable from the All Toll Tickets list within the Toll Tickets Management pane.

Deleting a Toll Ticket

Only Toll Tickets that are in an Active status ("Available") can be deleted. Completed Toll Tickets ("Used") cannot be deleted.

1. Click the Directory/Organization menu.

2. Within the Navigation pane, click Toll Tickets > Toll Tickets Views.

3. The Toll Tickets Management list displays.

4. There are several ways to delete a Toll Ticket:

   - Right-click the record in the list, and select Delete from the pop-up menu.

   5. Highlight the ticket number in the list, and within the Actions pane, click the Delete Toll Ticket Main link.

   - Highlight the name in the list, and on the toolbar directly above the Navigation pane, click the Delete button.

6. With any of these options, a message box displays verifying that you want to delete the selected toll tickets. Click Yes to continue (the information will be removed from CAIRS) or No to cancel the operation.

Global Reporting

Setup

Before you can start to use Global Reporting, there are a few things that need to be setup. First there are a couple of System Settings your CAIRS administrator will need to address:

- Use Global Reporting – this needs to be set to true to turn on the Global Reporting function.

- Global Report Maximum Export Rows – this setting determines the number of rows that CES will process into a file before it saves that file and starts a new one. The minimum value is 500 rows, the maximum value is 1,000,000. As a default we set the value to 50,000 rows.

- Limit Global Reports by Profile – this allows you to limit who can use global reporting. If set to true only System Administrators and Profiles that are granted access will be able to use this feature.

- Show Global Reports when Opening Menu – if set to true, when a user opens any menu option they see the list of global reports. If set to false, they will have to open global reports.

- Always Reset Search – the setting should be set to False, this will generate the report without having to click on Show All. If set to True, the columns headers will only display until you click on Show All.

Once your reports are generated they need a place to go, the next two settings determine where files are saved and if they can be emailed.

- Bill Distribution Folder Path from CES – this is the location of where your reports will be saved.

- Email Settings – if you want to be able to email the reports from inside of CAIRS, you will need to setup the email settings. These settings are located in System Settings → Email Settings. You will need access to your SMTP Server to allow emails to be sent.

In order to make this whole thing run, you will need to turn on the CES process. The Custom Report Distribution process will need to be set to By Cycle Time and the Cycle Period will need to be set to 60 sec. This means that every minute CAIRS looks to see if a report needs to be generated, if so it will automatically generate to the folder location set above.

Profile Limitations

If you limit the use of Global Reporting to just a few people, you can limit the access based on Profile. For this to occur, you will need to set the 'Limit Global Reports by Profile' setting to True. In Profiles, it is a good idea to create a new profile that can be assigned to those that you want to have access to Global Reporting.

In the Profile, in Menus and Actions, click on the All Actions radio button in the Actions privileges pane. In the Global Custom Reports row, click all 5 columns to give this profile access to view and run reports.

If you only want users to be able to view the custom reports, only check Allow List.

Metadata

The last thing that needs to be setup is to import the 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, function two, 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, your System Administrator will need to navigate to System Admin → System Settings → within the actions pane is the Import System Metadata link. Once you 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.

Understanding the Custom Report Builder

Before we start creating reports, let's talk a little about the Custom Report Builder. The Custom Report Builder allows you to create the report and determine what happens to the report once its generated.

The top portion of the window allows you to name and describe your report. The next line determines where the report will be generated to, there are a couple of options we will talk about later. The bottom portion of the screen is where you build the actual report.

The bottom portion has a few tabs:

- Report Setup
- Distribution List
- Distribution Schedule
- Distribution Message
- Options

Report Setup

There are 3 panes of information. The Data Sources pane displays all the tables that are related to the section of software that you are currently accessing. Remember that metadata we talked about, this is where that comes into play. The metadata narrows the number of tables you see here to only those that apply to the menu option. As you select sources the associated fields populate in the Available Fields pane. As you double click on fields, they are placed in the next pane, the Selected Fields pane. This pane displays the actual columns you will see in your report. The Available Fields pane displays all the fields that are in the table that you have selected in the Data Sources pane.

Distribution Tabs

The three distribution tabs work together when you have selected to email the report. This list tab allows you to enter in all the emails of the people you want to receive this report. The schedule determines how often the report is emailed to the recipients. The message tab is where you build the body of the email, this contains the subject and message body.

Options Tab

The options tab gives you a few more options for generating your report. The first is Show Data on Generate, once you have created your reports and they appear within the Global Reports menu you can simply click on the report name and the data will generate right to your screen.

The second option is Use Stable Paging. When turned on this alleviates the likelihood that you will see duplicate records when scrolling through your report. However, this will slow down the generation of your report substantially. Turning this feature on is not recommended especially if there is a lot of data within your database, such as call records.

Reports

Global Report is not available for all sections of CAIRS, it will only appear in the sections that can provide a reliable report.

Creating a New Report

Within the Global Reports menu, click on the green plus (+) sign at the top of the pane.

1. The Custom Report Builder opens.

2. Within the textboxes at the top enter in the following information:

   • Report Name – type in the name of the report, it is a good idea to be as specific as possible so you can easily identify the report for later use.

   3. Report Description – type in a brief description of the report, for example Monthly Call Report for LDist, INTNL, FTS, Calls

4. The next selection is to determine where the file will be generated to, there are 3 options:

   • Current Menu – this selection generates the report to your screen only

   5. Web Folder – this selection generates the report to the folder location we determined in the settings.

   • Email – if your email settings are setup properly, CAIRS will email the report to the people you have listed in the Distribution Group (don't worry, we will get to this in a bit)

6. Off to the right off the screen, is the Dashboard Chart Type selection box, you can choose whether to display the data in either a Pie or Bar Chart. You can leave the field blank or select none to not include a chart in your report at all.

7. The next step is to determine what fields you want within your report. If you are not already on the Report Setup tab, click on the tab to display the 3 panes of information.

8. Within the Data Sources pane, select the table that you want to pull the data from, there can be several levels of tables, to view the sub-tables click on the small triangle to the left of the table name. Once at the table, click on the checkbox to view the fields within that table.

9. Within the Available Fields pane, double click on the fields to add to your report. They will appear in the far-right hand pane.

10. You can continue to add as many fields as necessary in your report.

11. As you click through and select different tables in the data sources pane, they will appear as lines in the available fields pane. To view the fields within a unselected line, click on the small triangle next to the table name.

12. Once you have the fields selected, there are two options, you can save the report or you can generate the report.

13. When you save the report, the report builder closes and your report now appears in the Global Reports pane. To run the report, simply click on the report name and the data will appear in the list pane.

14. When you click on the Generate Report button, the report builder closes and your report is generated to the list pane. Please keep in mind that your report is not saved when using this option.

Modifying a Report

All the reports that you have saved will appear within the Global Reports pane. To modify a report, click on the Cog in the Custom View Title Bar at the top of the pane. Next to each report name you will now see a few buttons. To modify the report, click on the cog next to the report name. The Custom Report Builder opens allowing you to make any changes.

Deleting a Report

All your existing reports appear in the Global Reports pane. To delete a report, click on the cog in the Custom View Title Bar at the top of the pane. Next to each report name you now see a few buttons. To delete the report, click on the red minus sign just to the right of the report name. You are asked if you really want to delete the report, click yes to continue or no to cancel the operation. Your report is removed from the pane.

Exporting a Report Setup

There may be a time when you want to share a report that you have created with other CAIRS users. At the bottom of the Custom Report Builder is the Export Report Setup button. To export the report, click on the button to open the Save As popup opens. Browse to the location of where you want to save the file to, this can be on your local drive or a shared network drive. Once at the location click on the Save button your file is saved and popup closes.

Importing a Report Setup

Within the Custom View Title Bar, click on the down pointing arrow. Browse to the location of where the report setup is located. Once at the location, click on the file name and then the Open button. The report builder will open with the report details. You can either save the report setup or simply generate the report.

If the report is not related to your current menu option a message will display telling you, CAIRS cannot import and will give you the related menu option.

Copying a Report

Often times you may want the same information in two different reports. The copy report allows you to copy the complete report setup into a new report. To copy a report, click on the gear in the blue line at the top of the Global Reports pane. Next to each report, 3 options appear, click on the green plus (+) sign to the report name. The Custom Report Builder options with an exact replica of the, you can make any necessary changes. When

you save the report, it is a good idea to rename the report, CAIRS will automatically name the report 'Copy of ….'.

Alternatively, when you are in the Custom Report Builder, you can click on the Copy Report button in the lower portion of the pane. This will open an additional Custom Report Builder. Make any necessary modification to the setup and Save the report. Again, when you save the report it is a good idea to rename the report.

Field Options

For each field within your report, there are a few columns of information, they are:

- Move Up/Down – the first column allows you to move the fields up and down within your line display. To move up click on the up arrow. To move down click on the down arrow

15. Delete – click on the red minus sign to delete the field from the report

- Field – this displays the field name, this field is read only

16. Custom Caption – this column allows you to replace the field name with the text you enter into this field.

- Aggregate Option – this dropdown allows you to perform a few functions on the field within your report such as sum, group by, avg, etc. We will talk about all these in the Aggregates section.

17. Primary ID – this will be used for a future release. If checked the field will be added to a recent fields pane for quickly adding to a report.

- Format – this column is used for date and time fields that are in your report, you can choose how you want the field to be displayed. There are three options:
  - o Date Only
  - o Time Only
  - o Date and Time
- Source Path – this display the table path that was taken to get to the field. The path can sometimes be long so you may have to widen the column to view the complete path.

Searching

You can place a search parameter on the report to narrow down the amount information displayed. The parameter can be simple or you can go more in-depth and use the enhanced search capabilities. To place a search parameter on your report, within the Selected Fields pane, click on the Search tab.

Creating a Search Parameter

1. Within the Custom Report Builder, click on the Search Tab in the Selected Fields pane.

2. Before adding a field to search on, you will need to make a choice on how you want CAIRS to match on each field. There are two options available are:

- All Must Match – all the fields within the search tab must match some or all of the parameter. For example, if the two search fields are Primary Number and IP Address, both fields must have some sort of matching data to appear in the report.

3. Any Can Match – any of the fields within the search tab can match any portion of the parameter

4. Using the Data Sources and Available Fields pane, select a field(s) to perform a search on, double click on the field to add it to the Selected Fields pane.

5. Once in the field, there are a few selections you can make for each search field,

6. Within the first dropdown box, you select an aggregate to group or categorize your field together. There are 6 aggregates available:

- None

7. Count

- Sum

8. Min

- Max

9. Avg

10. Next, you can use a special search character to narrow down the field even further. There are several search options available:

- Equal To
- Greater or Equal
- Begins With
- Has Data
- Not Equal
- Greater Than
- Ends With

- Contains
- Less or Equal
- Is Empty
- Not Contains
- != (not equal)
- Less Than

11. The final textbox allows you to enter in the search criteria for your report, for example, if your field is IP Address you can type-in a 10.10 and any IP address that contains 10.10 anywhere will appear in your report

12. Once your search parameter is complete you can save the report or generate the report to your screen.

Enhanced Search Capabilities

There are several enhanced search parameters that you can use when creating your report. To view the search help, click on the question mark in the blue bar within the Global Reports pane, a webpage appears with all the different searches you can perform.

When you are on the Search Tab, you will be able to use any of the below operators. These will limit the amount of information that will appear in your report. The following operators are available for each field you have selected:

Character	Operation
=	Equal – finds the exact match ie: =2160266
<> !=	Not Equal – finds values that do not equal the information typed into the search field ie: <>10.00
>	Greater Than – this can be both alpha and numeric ie: >100
>=	Greater Than or Equal To - this can be both alpha and numeric ie: >=25.00
<	Less Than - this can be both alpha and numeric ie: >1500.00
<=	Less Than or Equal To - this can be both alpha and numeric ie: <=c
:	Contains – the colon finds any record that contains this value. this operator will slow down your search significantly, please try not to use this. ie: :bldg
!	Not Contains – does not contain anything within the search field ie: !INTNL
;	Starts with or Begins with ie: ;216
{Between}	Searches between two values for example {Between} 20 AND 100 ie: {Between}2160266 AND 2163000
|	Ends with ie: |100

Additional Search Capabilities

Parenthesis: you can use () to further refine your search

AND or Space: you can use AND in a search parameter to return two or more values. For example, =100 AND 200 or =100 200 300. Using a space between the two values returns the same result.

OR: you can use or to return results that match either parameter. For example: 216 OR 372

You can combine the AND, OR and Space operators to search on multiple items. For example, you can search on INTNL AND LDist.

Date Searches – you can perform several date searches using the above operators. However, there are a few others to keep in mind, you can search for specific time periods:

- Today

13. Yesterday

- "This Week"

14. "Last Month"

- "This Month"

15. "Last Month"

- "This Year"

16. "Last Year"

When using these date parameters, the quotes must appear in the search field.

Sort

You can place a sort order on your report so the most important information appears at the top of the list. When you place a sort order on a field it will first list the numerical rows followed by alphabetical rows.

To create a sort order

1. Within the Custom Report Builder, click on the Sort Tab in the Selected Fields pane.

2. Using the Data Sources and Available Fields pane, select a field(s) to sort on, double click on the field to add it to the Selected Fields pane.

3. Once the field(s) is selected, there are a few selections you can make for each sort field:

    - Reverse Order – as a default the report will be sorted based on number order least to greatest, then in alphabetical order. By checking this box, you reverse the order so the report starts at the letter Z, then numerically from highest to lowest.

    4. Aggregate Options – these selections allow you to perform function for each field within your sort order, please keep in mind that some of these functions may be

better used in your display then sort order. The following aggregate options are available:

- o Group By – groups rows based on a common element within the field, for example organization name or building number
- o Count – returns a count based on a common element
- o Sum – adds the field values together, this function only works on field that contain numerical data
- o Max – sorts based on the greatest number first
- o Min – sorts based on the smallest number first
- o Avg – return the average of the field values, this function only works on fields that contain numerical data

5. Once your report setup in complete, you can Save the report or generate the report (does not save the report setup) to your screen.

Aggregates

There are a few aggregates that you can use when creating your reports. An aggregate allows you to group or categorize fields together based on a common trait. For example, you can group all set devices together based on set type. The aggregates available are the following:

- Group By – groups rows based on a common element within the field, for example organization name would group all like organizations together
6. Count – returns a count based on a common element, for example telephone type would return how many of each type you have assigned in your database.
- Sum – adds the field values together, this function only works on field that contain numerical data
7. Max – sorts based on the greatest number first
- Min – sorts based on the smallest number first
8. Avg – return the average of the field values, this function only works on fields that contain numerical data

There are a few rules to live by when using aggregates:

1. If one field has an aggregate all fields need an aggregate
2. Numeric aggregates are not allowed on text fields

Emailing Reports

You may run a series of reports each month that you want to have emailed to various recipients. Before CAIRS can email anything out, your CAIRS administrator will need to setup all your Email Settings in System Settings, this will require giving CAIRS access to your SMTP Server.

Once your email settings are correct, you can start to send reports. Before we talked about where you want each report to be generated to, whether to your screen, web folder or emailed. You will need to check the box next to Email. Next you will determine who gets the email and when they get them as well as the body of the email.

Another setting that we talked about was the maximum number of rows that will be included in one report when exporting the report into Excel. The default is set to 50,000 rows. Keep in mind that if your report is more than 50,000 rows, the recipients will get multiple emails.

Distribution List

This list determines who will be sent the email with the attached report.

Creating a Distribution List

1. Within the Custom Report Builder, click on the Distribution List tab.

2. At the top of the pane is a blank line to allow you to add email addresses, enter the following information:

   - Email Address

3. Name

4. If you want to add more than one email address, use the blank line at the bottom of the list.

5. Once entered it is a good idea to name and save you report.

Distribution Schedule

Within this tab, you will determine how often the report will be generated and sent to the recipients.

1. Within the Custom Report Builder, click on the Distribution Schedule tab.

2. There are three sections within the tab:

   - Start Time

3. Recurrence Pattern

   - Recurrence Range

4. First, let's determine the Start Time, this is the time of day the report will start to generate. If this is a lengthy report, it is a good idea to start the report when there is not a lot of CAIRS usage. Click on the dropdown arrow to access a list of time, from the list select time. The times list is in half hour increments.

5. To change the time, simply click into the field and type in a new time. The time needs to be entered in the HH:MM AM or PM format.

6. Next is the recurrence pattern, first let's determine the frequency. When you choose a frequency whether daily, weekly, monthly or yearly, the recurrence selections change.

- Daily – there are two selections. Every # day – you choose the number of days between the email or Every Weekday.

7. Weekly – first you will choose how many weeks are in-between the email, this defaults to 1. Next, you will choose what day of the week the email is sent on, this default to the current day

- Monthly – when you select monthly, you get a few different selections:

  o Days: you determine what day of the month and the number of months in-between the emails.

    **If you choose the 31st of every month, for those months ending in 30 days the report will generate on the 30th.

  o On the – you will determine on which weekday whether 1st, 2nd, 3rd, 4th or last to send the emails. You will also determine the number of months in-between.

- Yearly – the first selection to make is how many years in-between the email, this defaults to 1. There are two additional selections:

  o Month – you choose what month and day of the month to send the email. From the first dropdown, choose the month and then type in the day. This defaults to your current month.

  o On the – you determine which weekday of the month whether 1st, 2nd, 3rd, 4th or last to send the emails. For example, on the second Tuesday of every May.

8. The last step is to determine the Recurrence Range, this tells CAIRS when to start sending and stop sending this email. Within the Start dropdown select the date that you want the emails to start being sent to the recipients.

9. Next is the end date, you can either choose to select no end date or select a date to end the emails by. To select a date, click on the half arrow buttons to move forward/reverse one month at a time. To select another date, click on the full arrow button to access a calendar, from there select the future date to stop the emails.
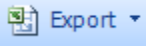
Distribution Message

The final step in setting up the emails is to create the subject and body of the email being send to the recipients. In the Distribution Message tab, type-in the Subject and Body of the mail. When the email is sent the report will be as an attachment.

Collapse Automatically

In the lower portion of the Global Reports pane is a checkbox that allows you to determine if the list will Collapse Automatically. If checked, the Global Reports list collapses after the user runs the report. This is checkbox is not meant to collapse the pane, just the list. The list will remain collapsed until the user clicks on the double arrow at the top of the pane.

Shortcuts

1. By clicking on the **CTRL + F11** keys, the main form will move to the top left of the primary monitor.

2. Back and Forward Arrows - these arrows allow you to navigate between the areas of the software that you have accessed since you logged in. Once you close the software, the buttons refresh and you start from scratch upon login.

3. New – Click the drop-down arrow to access a list of the items that you can create, it does not matter where you are in the software, and however, the menu option you are currently in appears first in the list.

4. Export – Click this button to export the information contained within the list pane to a excel, pdf, or tab delimited file.

5. Print – Click this button to print the information contained within the list pane

6. Delete – When you highlight a record within the list pane and click this button, you can delete that record. This option is only available in specific menus.

7. Refresh – Click to refresh the information within the list.

8. Home – Click on the button to return to the main menu list.

9. User Favorites – You can add your most frequently visited menu options into your favorites. To add a menu, navigate to the menu with the navigation pane, then click the User Favorites button and drag and drop the menu item into the list pane. You can add any level of sub-menu!

10. System Favorites – This is similar to user favorites, however, these favorites are system wide, meaning that every user (with proper access rights) can see them.

    Just to the right of the System Favorites icons is a small drop-down arrow, when you click the arrow an 'Add or Remove Buttons' option appears. This allows you to customize what icons you see on your toolbar!

11. **CRTL + C** – allows you to copy the information within a row by clicking within the row, highlighting the information and pressing CTRL + C on your keyboard. When at the destination, click within the row and press the **CTRL + V** on your keyboard to paste the information.