

## Getting Started

The Reports function provides you with several reporting tools that enable you to monitor portal activity. The tools include:

### Item Level Query -

Runs item level queries to view job information for email, fax, SMS, or voice notification jobs you submit.

### Scheduled Reports -

Runs scheduled, time-based reports to review job details for successfully and unsuccessfully submitted jobs.

### Activity Report -

Searches for and displays fax activity based on email address, billing code, customer reference, or group name.

This guide walks you through the basic functions for using these reporting tools.

## Using Item Level Query

The Item Level Query function enables you to search for and display the details related to a job or group of jobs. This function can query and display both “live” data and meta data.

You can access and review:

- Meta data up to 90 days after a job is accepted.
- Actual data up to 30 days after a job is accepted.

You can also resend an item within a job up to 30 days after the job is accepted. Some of the job details you can query are:

- Fax Type, Status, Number
- User or Group who Sent or Received the Fax
- Job Number
- Subject of the Fax
- Billing Code and/or Customer Reference
- Caller ID of the Sender

Do the following:

1. Access the <https://myportal.opentext.com> link and login using your User ID and Password.
2. From the main menu, click **Reports > Message Management**.

The Item Level Query page opens.

### To Run an Item Level Query

Do the following:

1. Specify any and/or all of the following information:

**Faxes** – Entry, Completion, Start.

Time period – Date and Time Range, In the last # of days, This week or month, Last week or month.

**Fax Status** – Active, Scheduled, or Complete.

**Sent/Received by User or by Group** – Select Search icon to find the user or group you want.

**All Users** –To include all users in the report.

**Job Number** - Unique number assigned to the job when it is accepted.

**Sent with Subject** – Subject line of the fax.

**Sent to Fax Number** – Fax number to which the fax was sent.

**Sent with File Name** – File name associated with the fax.

**Billing Code** – Billing or department code you can include when creating the job (Optional).

**Customer Reference** – Identification code you can include when creating the job (Optional).

**Received by Fax Number** – The dialed number.

**Received from Fax Number** – Caller ID of the sender.

2. Click **Run Query**.

A listing of details that match the criteria you specified display.

3. Review the query results.
4. Do any or all of the following:
  - Export Query Results
  - Resend an Item
  - Cancel Jobs Still in Progress
  - Clear the Displayed Query Results

### To Export Item Level Query Results

You can export the results from an Item Level Query to a .csv file on your local machine.


1. After running an Item Level Query, click **Export Results**.

This action can take several minutes.

- Follow the on-screen instructions to save the results as a .csv file on your local machine.

## To Resend a Job

You can resend a job up to 30 days after the job is accepted. Jobs that meet this requirement have the Resend Item icon displayed in the Actions column of the Item Level Query listing.

Item Status	Last Attempt	History	Actions
cc Sent	2014-09-30 19:58:26	n/a	

- Locate the job in the Item Level Query listing.
- Locate and click **Resend Item** icon for the job.

The Resend Item dialog opens.

Resend Item

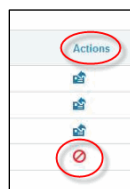
Resend To: 8667415418  
Report: None  
Deliver When: Send Now

Cancel Submit

- Select the Report type.
  - Summary
  - Detail
  - Exception
  - Conditional
- Select Delivery time.
  - Send Now
  - Scheduled  
Specify the date, time, and time zone.
  - Off-peak
- Click **Submit**.  
The selected job is resent.

## To Cancel Job Items Still in Progress

You can cancel items within a job that are still in the process of being delivered. Items that meet this requirement have the Cancel icon displayed in the Actions column of the Item Level Query listing.



- Locate the job in the Item Level Query listing.
- Locate and click **Cancel** icon for the job.  
A confirmation message displays.
- Click **OK**.  
The processing of the job is cancelled and the job is removed from the queue.

## To Clear Displayed Query Results

To clear the displayed query results so you can perform another using different values, click **Reset**.  
The Item Level Query page is cleared of job results. You can specify different values to run another query.

## Using Scheduled Reports

The Scheduled Reports function enables you to schedule time-based reports so you can review job information for successfully and unsuccessfully submitted jobs.

Failures Only Report – searches for and displays the following information for unsuccessfully processed jobs:

- Job Number
- Customer Reference
- Billing Code
- Item Reference

Standard Reports – search for and display the following information for successfully processed jobs:

- Job Number
- Customer Reference
- Billing Code

Do the following:

- Access the <https://myportal.opentext.com> link and login using your User ID and Password.
- From the portal dashboard, click **Reports > Message Management**.  
The Item Level Query page opens.
- Click **Schedule Reports** tab.

The Scheduled Reports page opens.

Item Level Query

Scheduled Reports

Schedule a Report
Reset

Report

Deliver To

Period

Options

Failure Only - Item level report showing system info, Customer Reference, Billing Code and Item Reference for unsuccessful attempts.
topper@opentext.com
Previous Day at 01:00, US Eastern time
Send report even if no activity, CSV

## To Schedule a Report

When you schedule a report you can specify the job information to include, where to send the report, the file format for the report, and the period of time the report should cover.

- From the Scheduled Reports page, click **Schedule a Report**.  
The Detail portion of the page displays.

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Report Name

Report Description

Deliver To

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Report Options

Schedule Cancel

- Specify the following:

**Report Name** - Select the report type.

**Deliver To** – Select report destination.

- Email
- Stored List
- FTP
- SFTP
- HTTP
- HTTPS

**Delivery Format** – Select the format for the report.

- CSV – Report sent as an attachment.
- CSV (zipped) - Report sent as zipped attachment.
- Email Body – Report is included in the body of the email.
- Pull (Email Only) – Email sent with a link to the report.

**Report Period** – Select the time period for the report.

- Previous Day
- Prior 7 Days and Day & Time Generated
- Previous Month
- Month to Date

**Report Options** – Select check box to send report even if no activity.

- Click **Schedule**.

The report parameters selected display in the list of scheduled reports.

### To Modify a Scheduled Report

- From the Scheduled Reports page, locate and select the report you want to modify.
- Modify the report parameters. See *To Schedule a Report* section for more information.
- Click **Save Changes**.  
The report is updated with the changes and re-displays in the list of scheduled reports.

### To Delete a Scheduled Report

- From the Scheduled Reports page, locate and select the report you want to delete.
- Click **Delete**.
- From the Confirm Delete dialog, click **Delete**.  
The report is removed from the list of scheduled reports.

## Using Activity Report

The Activity Report lets you search for and create a report of fax activity by email address, billing code, customer reference, or group name.

### To Run an Activity Report

- Select **Reports > Activity Report**.  
The Activity Report listing opens.

- Specify the criteria for the report.

#### Search by:

Email address - to which the fax was sent.  
Billing or department code - included with the fax.  
Customer Reference ID – code included with the job.  
Group Name – group whose activity you want to run a report.

#### Search Text:

Relates to the field selected.

#### Start/End Dates:

Start and end dates for the report.

#### Quick Search:

Type an appropriate character string, such as activity date or email address, to locate a specific activity report. Use a wildcard value (\*) to perform a partial search.

- Click **Search**.

All Activity Reports that match your search criteria display.

## Open Text Customer Support

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