



# HOW TO CREATE AN ADHOC GROUP

There will be reports that you want to view, for example, by department. Your company structure may already have been entered on the system and other groups already setup within LUMBERJACK. These groups will be shown in the **Create Group** window.

| Group Name       | Group of   | User        | Updated                 |
|------------------|------------|-------------|-------------------------|
| All Cost Centres | Groups     | focom staff | 15:17:30 Mon 25/10/2010 |
| All Departments  | Groups     | focom staff | 15:17:28 Mon 25/10/2010 |
| All Lines        | Trunks     | focom staff | 16:23:50 Mon 25/10/2010 |
| CC: 123-ABC-456  | Extensions | focom staff | 15:15:17 Mon 25/10/2010 |
| CC: 234-BCD-567  | Extensions | focom staff | 15:15:53 Mon 25/10/2010 |

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They will also appear in the **Group** drop down list on the **PBX and Group** tab of a report setup, where you will notice that they are separated into groups of the same type: System Groups (which are automatically populated); Groups; Extensions; Operators; Trunks; Filters; PBXs; Agents; Desks; Account Codes; and Pin Numbers.

Detailed Report: Enter name of new report

Date and Time | **PBX and Group** | Filtering | Columns | Name and Folder | Confirm

Pbx: All PBXs

Group: [No group] (dropdown menu open)

Restrict group: [ ]

Interval: [ ]



There may be times, however, when you need to create an adhoc group of extensions, lines, etc in order to run a report.

## To CREATE YOUR ADHOC GROUP

Select **Reports>Create Group** then expand **Create New Group**.

| Group Name      | Group of   | User        | Updated                 |
|-----------------|------------|-------------|-------------------------|
| All Departments | Groups     | focom staff | 11:47:28 Tue 16/08/2011 |
| CC: 123-ABC-456 | Extensions | focom staff | 15:15:17 Mon 25/10/2010 |
| CC: 234-BCD-567 | Extensions | focom staff | 15:15:53 Mon 25/10/2010 |
| CC: 345-CDE-678 | Extensions | focom staff | 15:15:39 Mon 25/10/2010 |

Select the element that you want to create a group of, then click **[Create]**. Each group can only contain one type of element.

To create a completely new group, click on the (+) and work through the instructions.

**- Create New Group**

What do you want to create a group of?

- Groups This will allow groups to be grouped together, this will form a free form hierarchy.
- Extensions This will allow extensions to be grouped together.
- Operators This will allow operators to be grouped together. Some switched report operators as extensions.
- Trunks This will allow trunks to be grouped together.
- Agents This will allow agents to be grouped together. Most switches do not contain agents.
- Desks This will allow desks to be grouped together. Most switches do not contain desks.
- Account Codes This will allow account codes to be grouped together. Not all switched contain account codes.
- PIN Numbers This will allow pin numbers to be grouped together. Not all switches contain pin numbers.
- Filters This will allow filters to be grouped together. This allows complex reports to be generated
- PBXs This will allow PBXs to be grouped together.

Create



In the **Items Available** drop-down list select the PBX that contains the elements that you want to group together. Your group can contain elements from more than one PBX.

If the elements you are grouping are current, then ensure you select the PBX from the **Active items in** section of the list

Once you have selected the PBX a list of available elements will appear

Select the elements you want from the available list then click the  (right arrow) – the selected element(s) will then appear in the **Items Selected** box on the right.

You can select **individual elements** or you can use the standard Windows commands to select a **consecutive block** of elements (click the first element then shift+click the last element) or a **non consecutive block** (click the first element then Ctrl+click each additional element you want).



Once all your required elements are in the **Items Selected** box, enter a name in the **Group Name** box then click **[Add]**.

The screenshot shows a dialog box titled "Group" with the subtitle "Enter name of new group". On the left, under "Items Available", there is a dropdown menu set to "PBX" and a list of names: 6001 Jamie Dodger, 6002 Krem Karamell, 6003 Miss Moffat, 6004 Candice Tor, 6005 Dr Foster, 6006 Vol O'Von, 6007 Boy Blue, 6008 Jack Horner, 6009 Bo Peep, and 6010 Gary Baldi. On the right, under "Items Selected", the list contains 6001 Jamie Dodger and 6003 Miss Moffat. In the center, there are four red arrows pointing outwards. At the bottom, the "Group Name" field contains "Special Project". The "Add" button is highlighted with a blue border.

Once added, the group name will appear in the band at the top, and the command buttons in the bottom band will change to include **[Delete]**, **[Protect]**, **[Update]** etc.

The screenshot shows the same dialog box, but now the title bar includes "Special Project". The "Items Available" dropdown is set to "Select PBX to view" and is empty. The "Items Selected" list remains the same. The "Group Name" field still contains "Special Project". The "Add" button has been replaced by a row of buttons: "Back", "Show Structure", "Delete", "Protect", "Update", and "Add".

Once you have added your group you will be able to select it on the **PBX and Group** tab when creating reports.