

Vision V2 Call  
Statistics & Reporting  
User Manual

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## Change History

<b>Version</b>	<b>Date</b>	<b>Reason for Change</b>
2.0	15/04/2016	Initial Release

## Introduction

VISION is a web-based call statistics platform that allows users to generate and analyse call statistics for services operating on our Telsis platform. The system provides near real-time statistics on the performance of your business, with data taken directly from Call Detail Records (CDRs) generated by our call handling equipment.

VISION is ideal for Telecommunications Operators, Premium Rate Service Providers, Call Centres and Network Capacity Resellers. Extremely easy to use and packed with useful statistics, VISION provides you with a true insight on the performance of your operation.

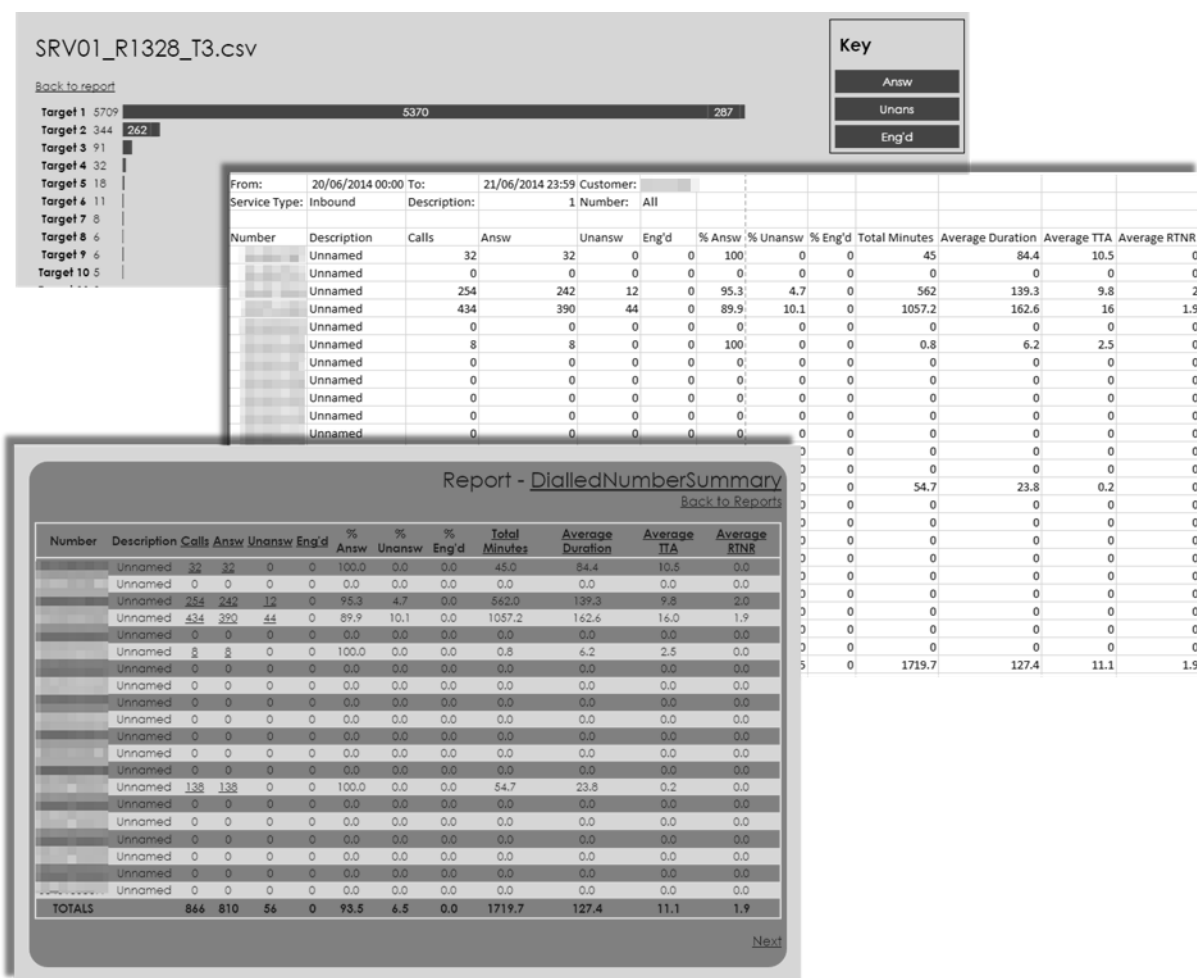


Figure 1 Statistical report forms (from top: graphical, downloaded and normal).

## Accessing Vision

### Browser Requirements

Any modern browser which has support for HTML5 should be able to run Vision, this includes browsers such as Google Chrome, Mozilla Firefox, and Internet Explorer. Please note, that JavaScript and Session cookies within the browser options must be enabled.

## Useful Software

Report downloads are presented in a Comma Separated Value (CSV) file format. A spreadsheet application such as Microsoft Excel can be used to import CSV files, which can then be used for further analysis or graphing.

## Assumed User Experience

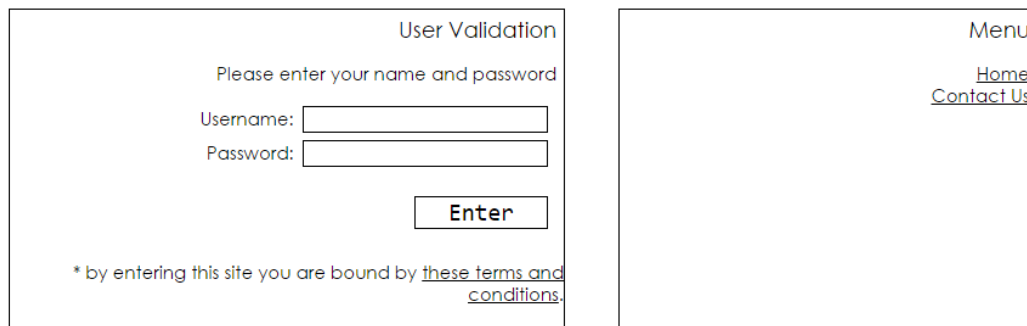
It is assumed that users have significant previous experience in browsing and downloading files from the Internet. In addition, it is assumed that users are familiar with the CSV file format, and how to import these into their own analysis package.

## Logging on & Navigation

### Logging On

Your service provider (or your company's nominated VISION administrator) will make available the URL to the VISION login page, together with a Username and Password to log you onto the VISION system.

Once at the login page, the user validation fields and a link to view the terms and conditions are presented as in figure 2.



The image shows two side-by-side screenshots of a web interface. The left screenshot is titled 'User Validation' and contains the following text: 'Please enter your name and password', 'Username: [input field]', 'Password: [input field]', and an 'Enter' button. Below the input fields is a note: '\* by entering this site you are bound by [these terms and conditions](#).' The right screenshot is titled 'Menu' and contains two links: 'Home' and 'Contact Us'.

Figure 2 User Validation Page

Take note of the site's terms and conditions and continue only if you agree to be bound by them. If you agree with the terms and condition, enter your Username and Password in the relevant fields, and press enter.

If you entered your Username and Password correctly, you will be directed to the VISION Main Menu page (*refer to section Main Menu*).

**Note:** If you have an existing login from the previous version of Vision, once your details have been entered you will be asked to change your password. You will then be taken to the change password screen where you will need to enter your original password and your new password.

**Note:** All passwords will automatically expire after 90 days and users will be prompted to enter a new password; the new password will have to be one that hasn't been previously used.

If however, your username and/or password are entered incorrectly, or if the username doesn't exist, then the user validation page will be presented again, as shown below in figure 3.

The figure shows two side-by-side screenshots. The left screenshot is a message box titled "Invalid User Validation Credentials". The right screenshot is a "User Validation" form. The form has the title "User Validation" and the instruction "Please enter your name and password". It contains two input fields: "Username:" with the value "tester" and "Password:". Below the fields is an "Enter" button. At the bottom of the form, there is a note: "\* by entering this site you are bound by [these terms and conditions.](#)". To the right of the form is a "Menu" section with two links: "Home" and "Contact Us".

Figure 3 User validation failure message

Carefully enter your Username and Password again and click on enter. If this problem persists, and you are sure that the correct Username and Password was entered, contact your nominated VISION administrator or your service provider.

**Note:** If your password is entered incorrectly 3 times, your account will be locked. Please contact your Vision Account Manager to unlock your account.

## Main Menu

Once you have successfully logged onto the VISION system, you will be directed to the system's main menu page. This page is divided into 4 sections:

- **Generate/View Reports:** Provides links to the various reports that are available as well as a link to view any reports that have been generated.
- **Customer Maintenance:** Provides functionality for customer account creations, number entry and customer allocations.
- **Configuration:** Bulletin Management, Customer Configurations and changing password.
- **Search:** Search through CDRs for a specific call including all inbound/outbound legs and number lookup – search for a number and see which customer the number is allocated to.

The Main Menu is the starting point for all reports, searches and customer maintenance screens. All pages within VISION have a link back to the Main Menu in the main navigation bar.

Every page, along the top right-hand corner will have a menu as shown in figure 4. This menu provides quick access back to the main menu, viewing reports, viewing the help and logging out of the VISION system.

Your Company Ltd

telecoms

[Main Menu](#) [View Reports](#) [Help](#) [Logout](#) (shout)

Figure 4 Shortcut Menu

## Generating/Viewing Reports

You can generate a report as a one-off, as and when you need it, or you can create schedules so a new report will be done out of business hours so it's ready when you need it. You can set up daily, weekly, monthly or quarterly scheduled reports.

### Generating a New, One-off Report

From the main menu, select one of the available reports from the "Generate Reports" section. You should be taken to the filter page (shown in figure 5 below) for this report where you can define what data is shown, such as date range, specific CLI or Target number, call duration and clear down

**Dialled Number Summary**

<p style="text-align: center;">&lt; <b>April 2016</b> &gt;</p> <table border="1" style="width: 100%; text-align: center;"><thead><tr><th>Su</th><th>Mo</th><th>Tu</th><th>We</th><th>Th</th><th>Fr</th><th>Sa</th></tr></thead><tbody><tr><td></td><td></td><td></td><td></td><td></td><td>1</td><td>2</td></tr><tr><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td></tr><tr><td>10</td><td>11</td><td>12</td><td></td><td></td><td></td><td></td></tr></tbody></table>	Su	Mo	Tu	We	Th	Fr	Sa						1	2	3	4	5	6	7	8	9	10	11	12					<p style="text-align: center;"><b>Date/Time</b></p> <p>From: <input type="text" value="12/4/2016"/></p> <p>To: <input type="text" value="12/4/2016"/></p> <p>Start Time: <input type="text" value="00:00"/> <input type="button" value="v"/></p> <p>End Time: <input type="text" value="23:59"/> <input type="button" value="v"/></p>	<p style="text-align: center;"><b>Configuration</b></p> <p>Service Type: <input type="text" value="Inbounds"/> <input type="button" value="v"/></p> <p>Customer: <input type="text" value="Select Customer"/> <input type="button" value="v"/></p> <p>Description: <input type="text" value="All"/> <input type="button" value="v"/></p> <p>Number: <input type="text"/></p>
Su	Mo	Tu	We	Th	Fr	Sa																								
					1	2																								
3	4	5	6	7	8	9																								
10	11	12																												

<p style="text-align: center;"><b>Detailed Filter</b></p> <p>Calling Party Number: <input type="text"/></p> <p>Target Number: <input type="text"/></p> <p>Duration: <input type="text"/> - <input type="text"/></p> <p>Call Result: <input type="text" value="All"/> <input type="button" value="v"/></p>	<p style="text-align: center;"><b>Generate Report</b></p> <p>Show Unique Columns:</p> <p>Report Name: <input type="text" value="DialledNumberSummary"/></p> <p>Destination Email Address: <input type="text"/></p> <p>Do you wish to schedule a new report based on these options? <input type="text" value="Daily"/> <input type="button" value="v"/></p> <p><b>Yes Please</b> No - this is a one off</p>
---	--

cause.

Fill in the report filters as required. Please be aware that VISION will only allow you to pick a date range within the last 6 months.

The destination email defaults at the customer level that is set by your service provider or your company's nominated VISION administrator. You can change the destination email address, but this will need to be changed each time you generate a report. If you require this email address to be



permanently changed, please contact your service provider or company's nominated VISION administrator).

Once you have your filter prepared, press the "No – this is a one off" button. At this point you should be taken to the Reports Page as shown below in figure 6.

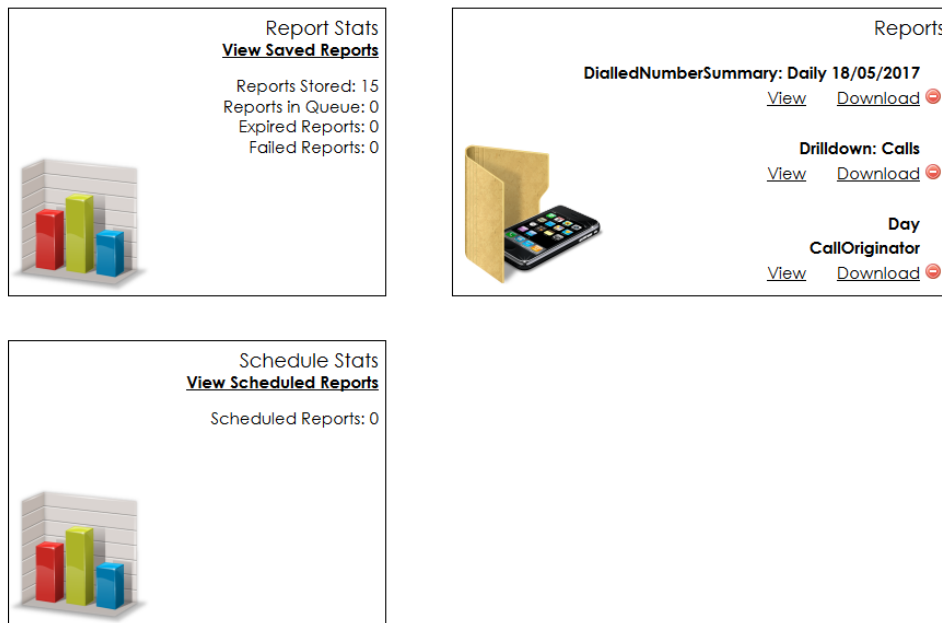


Figure 6 Report Requested - View Reports Screen

You may notice the state change from Queued, Assigned, In Progress and Ready. The speed at which the statuses change will depend on other reports that are being generated at the time by the VISION system and how much data has to be processed to generate the report.

Once the report has been completed, you should receive an email along with a CSV file attached containing your report, or if you prefer, from the View Reports screen (shortcut on menu bar in the top right) you can view the report in the browser. From here you can also choose to download the report. Note that the download you will receive will be the same CSV file that you received in an email.

If the report fails, you should receive an email notification informing you of the problem or you can hover your mouse over the report state and you should then see a tooltip appear with a description of the problem. You can either retry the report or go back to the report filters page to try again. If you continue to get failures, please contact your service provider or your nominated VISION administrator.

### Creating Scheduled Reports

From the main menu, select a report type from the Generate Reports section. Again, fill in the report details in the filter page as show in figure 5.

In the dropdown, select the schedule type, select Daily, Weekly, Monthly or Quarterly. When you have filled in you report filter as required, press the "Yes Please" button. You should be taken to the view reports page.

On the View Report page you will see a report is Queued (it may be generated straight away depending on how busy the VISION system is with other reports). Under the scheduled reports, you will see the name of the report and when it is next scheduled to be generated. All reports that are generated from the schedule will be generated outside of business hours.

Once the report generation is completed, you will receive the email with the CSV attachment as normal, as well as View/Download link in the “View Reports” page.

## Report Filters

As mentioned above, the report filter is used to filter out certain aspects of call stats to only show you the relevant data that you need.

At the top half of the filter page (shown above in figure 5) are the normal filter settings which are considered to be the basic filter parameters that are useful in all reports. In the detailed filtered section in the bottom left-hand corner are extended filters which offer greater searching capabilities. Please be aware that detailed reports could take longer to generate than basic reports, although this will depend on the type of filters being applied, the number of calls that need to be searched and the report type etc. Each available field is described below:

Field	Applicable To	Description	Required
Start Date	All	Start date of report	Yes
Start Time	All	Start time of report	Yes
End Date	All	End date of report	Yes
End Time	All	End time of report	Yes
Service Type	Dialled number, Daily, Simultaneous Calls, Call Search	Select the type of service to report against. If applicable, select either Inbound (Number translation) or Outbound (In-Direct Access). Inbound service is the only (and default) selection for all other reports not listed.	Yes
Customer	All	Users with sub-customers will be able to select customer from the drop down list	Yes
Description	All	Used to limit the search to numbers with a specific description. Description are assigned to a number by the user (Refer to “Customer Maintenance” section of the manual	Yes
Number	All	Used to input a B Party number. Either a full number can be entered or part of a number (e.g. you can enter 012 and all numbers starting 012 will be found)	No
Interval	Daily Report	Used to select the interval for the Daily Report. Select 15 Mins, Hourly or 3 Hourly to generate a report grouped into the interval selected over the date range. Select Daily to generate a report grouped by day and display on a daily basis over the selected date range.	No
Origin By	Call Originator	Select to create the originator report based upon STD code (+ extended), Post Code, Town, County or Country.	No
<b>Detailed Filter</b>			
Calling Party Number	All (except for Call Originator)	Limit the report to calls originating from the supplied full/partial number. Note: For reasons of privacy protection laws, only the first 7 numbers are used in this search, unless your organisation is registered to use full Calling Party Numbers (CLl’s).	No
Target Number	Dialled Number, Daily, Call Originator, Simultaneous Calls	Used to limit the report to calls that are delivered to a full/partial target number.	No

Duration Greater Than	All	Used to limit the report to calls of duration greater than the value supplied (in Seconds).	No
Duration Less Than	All	Used to limit the report to calls of duration less than the value supplied (in Seconds).	No
Call Result	All	Used to limit the report to calls with a specific result (i.e. Answered, Engaged, Unanswered)	No

## Report Speed

There are many factors that can affect the speed of report generation, including date range, range of numbers, number of total calls, and more. Within the VISION statistics system, most reports are generated from individual call records, but two reports (Dialed Number and Daily with normal filter settings only) are generated with pre-processed data (refer to individual report descriptions in section "Reports"). The pre-processed reports will be generated much faster than reports generated from the individual call records. As a simple rule, the date range, range of numbers and volume of calls have significant impact on the speed of report generation.

## Reports

An important aspect of all reports is understanding how and when a call is counted. All statistics in VISION are based upon the start time of each call, from the time that the call is received by the network. Every call is counted regardless of whether it is answered, engaged or unanswered.

Each report is presented in tabular form, which will contain some of the following headings:

Header	Description	Units
% Ans	Percentage of total calls answered	%
% Eng	Percentage of total calls engaged	%
% Unans	Percentage of total calls unanswered	%
Answ	Total number of calls answered	(Count)
AvgDur	Average Duration for answered calls	Seconds
AvgRTNR	Average Ring Time No Reply (i.e. average unanswered ring time)	Seconds
AvgTTA	Average Time To Answer for answered calls	Seconds
Calls	Total number of calls received/delivered	(Count)
Call Attempts	Total number of calls offered to a target	(Count)
Description	Description attributed to the number by the user	(Text)
Eng'd / Engaged	Total number of calls that were engaged	(Count)
Max Sim Calls	Maximum number of Simultaneous Calls that occurred in Period	(Count)
Max Time	Time when Maximum Simultaneous Calls occurred in Period	Time (24H)
Not Valid	Number of calls that have an invalid originating telephone number	(Count)

Number	Dialled (Inbound service) / Originating number (Outbound Service)	(Text)
Origin By:	Selected origin type (STD Code, STD Code+, PostCode, Town, County or Country)	(Text)
Suggested Lines Req	Suggested Lines Required to meet call demand when unique engaged calls are also used in calculation	(Count)
Target Number	Target Number that calls were offered to	(Text)
Time Interval	Time Interval covered by report row	Date/Time
Total Mins	Total answered call Minutes	Minutes

As mentioned under the “Report Speed” section, the reports are generated from two sources of data, which has an impact on report generation speed. The Dialled Number Summary and Daily reports, without detailed filters, are generated from pre-processed data. Hence, these reports are generated much faster than other reports, especially over larger date ranges, such as 1 month. All other reports require a more powerful search, and are generated from individual call records, hence take longer to generate.

All inbound calls are made up of two parts, an Inbound Leg and an Outbound to Target Leg, where the switch attempts to connect the Caller through to the Called Party via the Target provided.

In the following reports, the figures are calculated from either the inbound leg of a call, or one or more outbound legs (i.e. target reports). In each of the reports below, the leg on which the report is based will be noted.

The following sub-sections cover each report in detail, describing the results for each report.

### Dialled Number Summary

Data Source:

1. Pre-processed data (Normal filter)
2. Call records (Extended Filter)

#### **Service Type: Inbound (e.g. Number Translation)**

Presents a statistics report for all calls made to your numbers. The report is based upon the Inbound Leg.

#### **Service Type: Outbound (e.g. IDA):**

Presents a statistics report for all calls made from your registered numbers as part of an Outbound service (e.g. Indirect Access). The report details the volume of calls originating from numbers within your organisation.

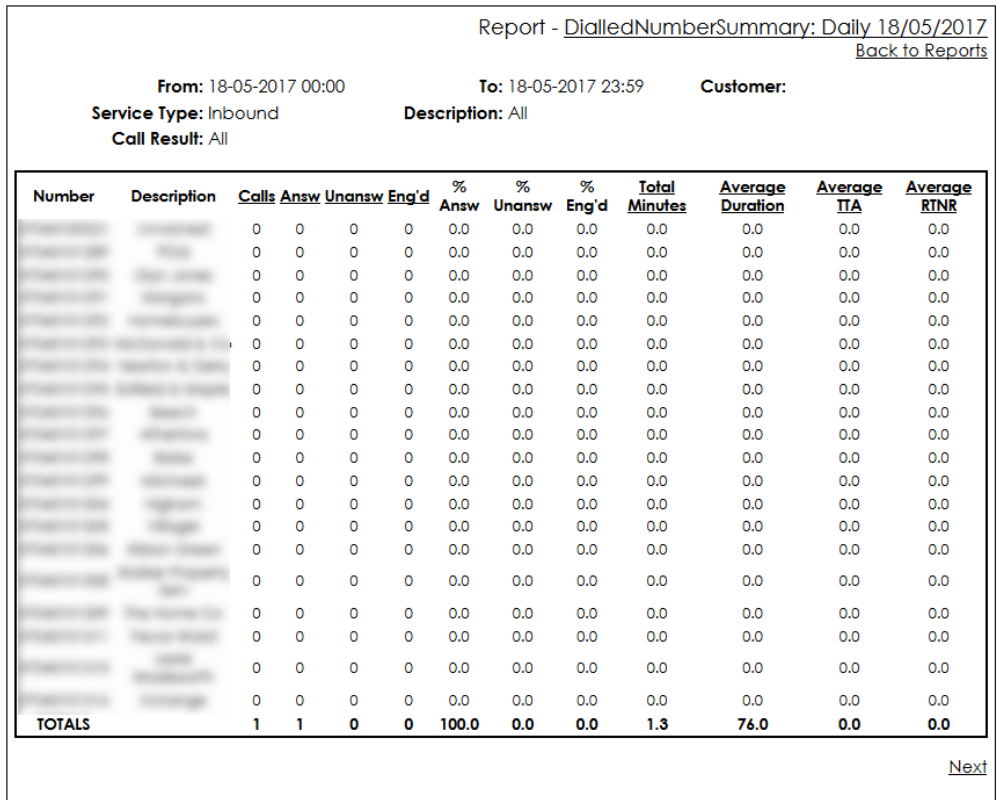


Figure 7 Sample Dialed Number Summary

Note: Report results are based on the inbound leg of calls

From the table above you can click on the report title to download the CSV (note that the CSV will be the same as what was originally emailed).

Any column headings that are underlined can be clicked to display a graph.

Any number within the table which is underlined can be clicked to generate a drilldown. The drilldown will show the individual legs for that number/description.

## Target Summary

Data Source:

1. Call Records (All Filter Settings)

### Service Type: Inbound (e.g. Number Translation)

Presents a report summarising call attempts made to your target numbers. The report is based upon the outbound leg.

Report - <u>TargetSummary: Daily 18/05/2017</u>											
From: 18-05-2017 00:00				To: 18-05-2017 23:59				Customer: .			
Service Type: Inbound				Description: All							
Call Result: All											
<a href="#">Back to Reports</a>											
<u>Target Number</u>	<u>Call Attempts</u>	<u>Answ</u>	<u>Unans</u>	<u>Eng'd</u>	<u>% Ans</u>	<u>% Unans</u>	<u>% Eng</u>	<u>Total Mins</u>	<u>AvgDur</u>	<u>AvgTIA</u>	<u>% AvgRTNR</u>
IN Feature (521590000)	<u>1</u>	<u>1</u>	0	0	100.0	0.0	0.0	1.3	76.0	0.1	0.0
<b>TOTALS</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>100.0</b>	<b>0.0</b>	<b>0.0</b>	<b>1.3</b>	<b>76.0</b>	<b>0.1</b>	<b>0.0</b>

Figure 8 Sample Target summary report

Notes: Report results are based upon the outbound leg(s) of calls.

### Service Type: Inbound Only

This report details the number of calls presented to your targets, the total of which could be significantly greater than the number of calls to the dialled numbers, especially for services including cyclic hunt groups. This report may include targets presented to an automated voice response service such as Call Record and Announcements.

Any column heading which is underlined can be clicked to display a graph of the results.

Any number which is underlined in the table can be clicked to generate a drilldown. The drilldown will include all of the inbound and outbound legs.

## Target Overflow Summary

Data Source:

1. Call Records (All filter settings)

### Service Type: Inbound (e.g. Number Translation)

Presents a statistics report for all call attempts that were presented to a target but not necessarily to a specific target. Provides details of how unanswered and engaged call attempts to the targets cascade or overflow to the next target in line. For example, in a cyclic hunt group, all calls will be presented to their first target. Then all unanswered calls will be presented to a second target and so on, etc.

Report - <a href="#">TargetSummary</a> <a href="#">Back to Reports</a>											
From: 01-05-2017 00:00			To: 22-05-2017 23:59			Customer: Promo Cloud					
Service Type: Inbound			Description: All								
Call Result: All											
<u>Target Number</u>	<u>Call Attempts</u>	<u>Answ</u>	<u>Unans</u>	<u>Eng'd</u>	<u>% Ans</u>	<u>% Unans</u>	<u>% Eng</u>	<u>Total Mins</u>	<u>AvgDur</u>	<u>AvgITA</u>	<u>% AvgRTNR</u>
	<u>1</u>	<u>1</u>	0	0	100.0	0.0	0.0	0.5	28.3	18.7	0.0
	<u>1</u>	<u>1</u>	0	0	100.0	0.0	0.0	1.2	72.7	9.4	0.0
	<u>1</u>	0	<u>1</u>	0	0.0	100.0	0.0	0.0	0.0	0.0	0.0
Call Record (521709003)	<u>2</u>	<u>2</u>	0	0	100.0	0.0	0.0	2.3	70.1	0.1	0.0
Announcement (521890000)	<u>5</u>	<u>5</u>	0	0	100.0	0.0	0.0	0.3	4.2	0.1	0.0
<b>TOTALS</b>	<b>10</b>	<b>9</b>	<b>1</b>	<b>0</b>	<b>90.0</b>	<b>10.0</b>	<b>0.0</b>	<b>4.4</b>	<b>29.1</b>	<b>3.2</b>	<b>0.0</b>

Figure 9 Sample Target Overflow Summary Report

Note: Report results are based upon the outbound leg(s) of calls

### Service Type: Inbound only

- This report does not include calls made available to automated voice response services
- All calls will be targeted to target 1. Then all unanswered and engaged calls will be passed on to target 2 and subsequently on to target 3, target 4 etc., until the call is answered or the caller hangs up. The target numbers represented by target 1 are not necessarily all the same Target Number.

Any column headings that are underlined can be clicked to display a graph.

Any number in the table which is underlined can be clicked to generate a drilldown report which will show the inbound and outbound leg details.

## Daily Report

1. Pre-processed data (Normal filter)
2. Call records (Extended Filter)

### Service Type: Inbound (e.g. Number Translation)

Presents a statistics report for all calls made to your numbers within the time interval specified. The chosen filter setting 'Interval' will affect how the report is presented.

### Service Type: Outbound (e.g. IDA)

Presents a statistics report for all calls made from your registered numbers as part of an Outbound service (e.g. Indirect Access). The report details the volume of calls originating from numbers within your organisation, within the time interval specified. The filter setting 'Interval' will affect how the report is presented.

Report - <a href="#">DailyReport</a> <a href="#">Back to Reports</a>											
From: 22-05-2017 00:00				To: 22-05-2017 23:59				Customer:			
Service Type: Inbound				Description: All							
Interval: Hourly				Call Result: All							
Time Interval	Calls	Answ	Unans	Eng'd	% Ans	% Unans	% Eng	Total Mins	AvgDur	AvgTTA	AvgRTNR
00:00 - 00:59	94	78	13	3	83.0	17.0	3.2	508.6	391.2	2.8	0.0
01:00 - 01:59	100	63	29	8	63.0	37.0	8.0	395.9	377.0	4.4	0.0
02:00 - 02:59	67	50	14	3	74.6	25.4	4.5	236.7	284.0	5.6	0.0
03:00 - 03:59	77	57	18	2	74.0	26.0	2.6	88.3	92.9	5.8	0.0
04:00 - 04:59	64	53	11	0	82.8	17.2	0.0	358.6	406.0	3.8	0.0
05:00 - 05:59	90	84	6	0	93.3	6.7	0.0	515.9	368.5	4.0	0.0
06:00 - 06:59	217	211	6	0	97.2	2.8	0.0	1398.4	397.7	3.9	0.0
07:00 - 07:59	645	581	48	16	90.1	9.9	2.5	3395.9	350.7	3.2	0.0
08:00 - 08:59	2940	2740	172	28	93.2	6.8	1.0	10136.9	222.0	3.9	0.0
09:00 - 09:59	7963	7323	444	196	92.0	8.0	2.5	28657.6	234.8	4.4	0.0
10:00 - 10:59	8200	7261	723	216	88.5	11.5	2.6	28129.3	232.4	4.4	0.0
11:00 - 11:59	8221	7063	1000	158	85.9	14.1	1.9	26500.0	225.1	4.5	0.0
12:00 - 12:59	7389	6476	767	146	87.6	12.4	2.0	25618.1	237.4	4.4	0.0
13:00 - 13:59	6840	5936	682	222	86.8	13.2	3.2	22074.7	223.1	4.5	0.0
14:00 - 14:59	947	832	102	13	87.9	12.1	1.4	1660.8	119.8	4.9	0.0
15:00 - 15:59	0	0	0	0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
16:00 - 16:59	0	0	0	0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
17:00 - 17:59	0	0	0	0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
18:00 - 18:59	0	0	0	0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
19:00 - 19:59	0	0	0	0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>TOTALS</b>	<b>43854</b>	<b>38808</b>	<b>4035</b>	<b>1011</b>	<b>88.5</b>	<b>9.2</b>	<b>2.3</b>	<b>149675.6</b>	<b>231.4</b>	<b>4.4</b>	<b>0.0</b>

[Next](#)

Figure 10 Sample Daily Report (Interval: Hourly)

#### Notes:

Report results are based on the inbound leg of calls.

- When the 'Interval' filter setting is set to '15 Mins', 'Hourly', or '3 Hourly', the report displays the time range as specified in the filter (Start Time to End Time) and contains call counts for all calls made **within** the selected time interval **over** all days specified in the filter (Start Date to End Date).
- When the 'Interval' filter setting is set to 'Daily', the report displays the date range as specified in the filter (Start Date to End Date) and contains call counts for **each day**.



- When 'Detailed Filter' is selected, only the time intervals containing call counts are displayed.

## Call Originator

Data Source:

1. Call records (All filter settings)

### Service Type: Inbound (e.g. Number Translation)

Presents a statistics report for all calls made to your numbers based upon the origin of the calls, selectable by STD code, postcode, town, county or country. The report is based upon the Inbound Leg.

Report - <a href="#">CallOriginator</a> <a href="#">Back to Reports</a>												
From: 01-01-2017 00:00				To: 22-05-2017 23:59				Customer:				
Service Type: Inbound				Description: All								
Call Result: All				Origin PrefSt								
STD Code	<u>Calls</u>	<u>Answ</u>	<u>Unansw</u>	<u>Eng'd</u>	<u>% Answ</u>	<u>% Unansw</u>	<u>% Engag'd</u>	<u>Total Minutes</u>	<u>Average Duration</u>	<u>Average TTA</u>	<u>Average RTNR</u>	
0113	<u>3</u>	<u>1</u>	<u>2</u>	0	33.3	66.7	0.0	0.05	3.2	1.1	0.6	
0118	<u>1</u>	<u>1</u>	0	0	100.0	0.0	0.0	0.65	39.1	23.0	0.0	
01403	<u>1</u>	<u>1</u>	0	0	100.0	0.0	0.0	0.15	8.7	23.1	0.0	
01422	<u>2</u>	<u>1</u>	<u>1</u>	0	50.0	50.0	0.0	2.56	153.8	44.9	44.9	
0151	<u>4</u>	<u>2</u>	<u>2</u>	0	50.0	50.0	0.0	0.11	3.3	1.1	1.1	
0161	<u>24</u>	<u>4</u>	<u>20</u>	0	16.7	83.3	0.0	3.53	52.9	6.9	1.4	
01758	<u>2</u>	<u>2</u>	0	0	100.0	0.0	0.0	1.22	36.7	25.9	0.0	
0191	<u>1</u>	<u>1</u>	0	0	100.0	0.0	0.0	0.07	4.0	23.2	0.0	
01926	<u>1</u>	0	<u>1</u>	0	0.0	100.0	0.0	0.00	0.0	0.0	33.0	
01952	<u>5</u>	<u>5</u>	0	0	100.0	0.0	0.0	3.75	45.0	2.0	0.0	
0208	<u>13</u>	<u>5</u>	0	<u>8</u>	38.5	0.0	61.5	3.91	46.9	9.6	0.0	
02380	<u>3</u>	<u>3</u>	0	0	100.0	0.0	0.0	7.51	150.2	6.0	0.0	
028	<u>3</u>	<u>2</u>	<u>1</u>	0	66.7	33.3	0.0	0.22	6.5	3.1	6.2	
MOBILES	<u>40</u>	<u>30</u>	<u>5</u>	<u>5</u>	75.0	12.5	12.5	49.61	99.2	10.7	64.4	
UNKNOWN	<u>86</u>	<u>84</u>	<u>2</u>	0	97.7	2.3	0.0	9.69	6.9	0.3	14.2	
<b>TOTALS</b>	<b>189</b>	<b>142</b>	<b>34</b>	<b>13</b>	<b>75.1</b>	<b>18.0</b>	<b>6.9</b>	<b>83.0</b>	<b>35.1</b>	<b>4.4</b>	<b>13.7</b>	

Figure 11 Sample Call Originator report

Note: Report results are based on the inbound leg of calls.

### Service Type: Inbound Only

- The report is based upon the 'Origin', the type of which is selected in the drop down list next to 'Origin By' in the report filter. You can choose from STD Code, STD Code+ (extended STD code; includes greater resolution), Post Code, Town, County and Country.
- Only origins that have calls attributed to them will be shown in the report.
- Any column headings that are underlined can be clicked to view a graph of the results.
- Any number within the table that is underlined can be clicked to generate a drilldown report. This will show all inbound and outbound legs for the selected Origin.

## Simultaneous Call Report

Data Source:

1. Call records (All filter settings)

### Service Type: Inbound (e.g. Number Translation)

This report analyses all calls made **to** your numbers to count the maximum number of active simultaneous calls. Then a calculation is performed that includes engaged calls, to produce the suggested number of lines required to cope with peak call demand.

### Service Type: Outbound (e.g. IDA)

This report analyses all calls made **from** your registered numbers, to count the maximum number of active simultaneous calls. Then a calculation is performed that includes engaged calls, to produce the suggested number of lines required to cope with peak call demand.

Report - <a href="#">SimultaneousCalls</a>						
<a href="#">Back to Reports</a>						
From: 10-05-2017 00:00		To: 22-05-2017 23:59		Customer:		
Service Type: Inbound		Description: All				
Call Result: N/A						
Time Interval	Call Count	Max Sim Calls	Max Time	Engaged	Uniq Engaged	Suggested Lines Req
10-05-2017 0:00:00	0	0	0	0	0	0
10-05-2017 1:00:00	0	0	0	0	0	0
10-05-2017 2:00:00	0	0	0	0	0	0
10-05-2017 3:00:00	0	0	0	0	0	0
10-05-2017 4:00:00	0	0	0	0	0	0
10-05-2017 5:00:00	0	0	0	0	0	0
10-05-2017 6:00:00	0	0	0	0	0	0
10-05-2017 7:00:00	0	0	0	0	0	0
10-05-2017 8:00:00	1	1	08:17:41	0	0	1
10-05-2017 9:00:00	1	1	09:41:04	0	0	1
10-05-2017 10:00:00	0	0	0	0	0	0
10-05-2017 11:00:00	1	1	11:30:17	0	0	1
10-05-2017 12:00:00	3	2	12:08:45	0	0	2
10-05-2017 13:00:00	2	1	13:18:53	0	0	1
10-05-2017 14:00:00	0	0	0	0	0	0
10-05-2017 15:00:00	1	1	15:15:17	0	0	1
10-05-2017 16:00:00	1	1	16:08:33	0	0	1
10-05-2017 17:00:00	0	0	0	0	0	0
10-05-2017 18:00:00	0	0	0	0	0	0
10-05-2017 19:00:00	0	0	0	0	0	0

[Next](#)

Figure 12 Sample Simultaneous Call report

Note: Report results are based on the inbound leg of calls.

The Call Count column is the total number of calls that were active within the hour, including calls carried over from the previous hour/s. The Max Sim Count is the maximum number of simultaneous calls that were found to be active within the hour, and Max Time is the time at which the maximum was counted. Active calls in this report are considered to be calls that are either Answered or Ring Time No Reply (phone rings but is not answered). Call duration is taken to be the total seconds from call seize time to clear down (i.e. includes call set-up and normal call duration).

Engaged is the total number of engaged calls that occurred in the hour and Uniq Engaged is the total number of engaged calls received by unique callers within the hour. The Suggested Lines Required is

then calculated by applying the average active call length to each unique engaged call encountered, thus assuming that all calls were answered.

Any column headings that are underlined can be clicked in order to view a graph of the results.

Any numbers within the table that are underlined can be clicked to generate a drilldown which will show all inbound and outbound legs during the selected time period.

### Common Misinterpretations

The reports presented in VISION were created to produce meaningful results for a broad range of services. The consequence of this is that not all results in all reports are meaningful to all services, and thus misinterpretation can occur. This section lists common misinterpretations that could occur:

#### **1: Applicable to:**

Any service with multiple outbound legs, e.g. cyclic hunt group used in Homeworker Solution. (This does not include calls that are first answered with an automated announcement, and then directed only to a single target.)

#### **Occurs:**

For all reports based on the final outcome of calls, when 'Detailed Filter' is selected and a target number is specified.

#### **Problem description:**

As the reports are based on the final outcome of a call, the actual outcome of the individual target will be ignored unless the target was the last attempted target. Specifying a target in this instance simply limits the report to calls that were offered to the target. As each call is offered to multiple targets, this report becomes meaningless. For example, the target in question is engaged, but the next target answers the call. The outcome of this call is answered.

#### **2: Applicable to:**

All services that could attempt multiple outbound legs (example Homeworker Solution).

#### **Occurs:**

When viewing reports that are based upon inbound and outbound call records. The total calls column count differs between reports.

#### **Problem description:**

When a call is made, only one inbound leg is recorded. However, there will be one or more attempted outbound legs, until a successful call answer is achieved, or until the caller closes down the call. Thus, the 'Call Attempts' count in reports based upon outbound legs will be greater than the number of 'Calls' count listed in reports based upon inbound legs.

#### **3: Applicable to:**

All non-IDA reports with unique caller's columns.

#### **Occurs:**

When viewing unique caller statistics

#### **Description:**

The "unique callers" is an important report for Customers. By providing both answered and failed Unique Callers, e.g. 200 calls, 150 answered, 50 calls failed , Total of 120 unique callers, 110 callers answered (therefore 10 calls were repeat callers answered) 10 callers failed to be answered.

The 50 failed calls are therefore made up of callers who failed but then subsequently got answered and 10 callers who tried 1 or more times and never

## Call Search

The call search facility allows users to be able to search on all calls to provide call information in the form of a call log. You can generate a call log by going to the Main Menu and selecting “Search for Call Log” under the search section in the bottom right. You should see the filter page as shown below:

**Call Search Filter**

<
**May 2017**
>

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

**Date/Time**

From:

To:

Start Time:

End Time:

**Configuration**

Service Type:

Customer:

Description:

Number:

Result Limit:

**Detailed Filter**

Calling Party Number:

Target Number:

Duration:

-

Call Result:

**Generate Report**

Report Name:

Destination Email Address:

Do you wish to schedule a new report based on these options?

Figure 13 Call Log Search Filter

In figure 13 above, in the top right-hand corner are the standard report filters. These are the basic report filters. In the bottom left-hand corner are the detailed filters. Using any of the filters within the detailed filter section could cause the report generation to be slower; this will depend heavily on time range, number of calls that need to be searched etc.

Each field is described below

<b>Field</b>	<b>Description</b>	<b>Required</b>
Start Date	Start date of report period	Yes
Start Time	Start time of report period	Yes
End Date	End date of report period	Yes
End Time	End time of report period	Yes
Service Type	Select the type of service to search against. Select either Inbound (Number translation) or Outbound (In-Direct access)	Yes
Customer	Users with sub-customers will be able to select customers from the drop down list.	Yes (Where applicable)
Description	Used to limit the search to numbers with a specific description. Descriptions are assigned to a number.	No
Number	Enter the phone number or part of a phone number to filter on. For example you can enter 012 and all numbers starting 012 will be in the report.	No
Results Limit	Used to limit the number of calls to include in the report.	Yes
<b>Extended Filter</b>		
Calling Party Number	Limit the report to calls originating from the supplied full/partial number. Note: For reasons of privacy protection laws, only the first 7 numbers are used in this search, unless your organisation is registered to use full Calling Party Numbers (CLI's).	No
Target Number	Used to limit the report to calls that are delivered to a full/partial target number.	No
Duration Greater Than	Used to limit the report to calls of duration greater than the value supplied (in seconds).	No
Duration Less Than	Used to limit the report to calls of duration less than the value supplied (in seconds).	No
Call Result	Used to limit the report to calls with a specific result (i.e. Answered, Engaged, Unanswered)	No

## Search Output Format

Each call search is presented in a tabular form which will contain the following headings.

Header	Description	Units
Date	Date of call Start time	Date
Time	Time of call Start time	Time (24 H)
Number	Dialled number of call	Text
CLI	Caller CLI (Caller Line Identification). Limited to 5 characters unless licensed to view this information.	Text
Target N	Target number to which the call was presented when attempting to deliver the call. 'N' signifies the attempt number to receive an answer from a target..	Text
Duration	Call Duration	Seconds
Result	Call clear down result (Answered, Unanswered, Engaged)	Text

Report - [Drilldown: 00:00 - 00:59 Answ](#)  
[Back to Reports](#)

**From:** 22-05-2017 00:00      **To:** 22-05-2017 23:59      **Customer:**  
**Service Type:** Inbound      **Description:** All  
**Interval:** Hourly      **Call Result:** All

Date	Time	Number	CLI	Duration	Result	Target	Duration	Result	Legs
22-05-2017	00:00:35	00000000	00000000	31.3	Answered	00000000	22.5	Answered	
22-05-2017	00:01:02	00000000	00000000	17.4	Answered	00000000	16.1	Answered	
22-05-2017	00:01:26	00000000	00000000	12.4	Answered	00000000	5.6	Answered	
22-05-2017	00:01:38	00000000	00000000	47.4	Answered	00000000	46.7	Answered	
22-05-2017	00:01:42	00000000	00000000	18.9	Answered	00000000	17.6	Answered	
22-05-2017	00:01:48	00000000	00000000	352.2	Answered	00000000	349.6	Answered	
22-05-2017	00:02:04	00000000	00000000	46.2	Answered	00000000	29.6	Answered	
22-05-2017	00:02:45	00000000	00000000	58.5	Answered	00000000	56.7	Answered	
22-05-2017	00:02:54	00000000	00000000	118.7	Answered	00000000	117.4	Answered	
22-05-2017	00:03:11	00000000	00000000	402.5	Answered	Announcement (521890000)	1.3	Answered	<a href="#">+ Legs</a>
22-05-2017	00:03:35	00000000	00000000	15.3	Answered	00000000	14.7	Answered	
22-05-2017	00:03:41	00000000	00000000	306.8	Answered	Announcement (521890000)	1.3	Answered	<a href="#">+ Legs</a>
22-05-2017	00:03:41	00000000	00000000	12.0	Answered	00000000	11.8	Answered	
22-05-2017	00:04:01	00000000	00000000	1876.4	Answered	Announcement (521890000)	18.8	Answered	<a href="#">+ Legs</a>
22-05-2017	00:04:29	00000000	00000000	60.7	Answered	00000000	59.2	Answered	
22-05-2017	00:04:41	00000000	00000000	1876.6	Answered	Announcement (521890000)	18.8	Answered	<a href="#">+ Legs</a>
22-05-2017	00:05:34	00000000	00000000	12.1	Answered	00000000	6.0	Answered	
22-05-2017	00:05:49	00000000	00000000	45.3	Answered	00000000	44.2	Answered	
22-05-2017	00:06:47	00000000	00000000	16.4	Answered	00000000	15.0	Answered	
22-05-2017	00:07:11	00000000	00000000	128.1	Answered	00000000	126.8	Answered	

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Figure 14 Sample Call Search results

Drilldown reports can contain 1 or more outbound legs, by default, the inbound leg and the first outbound leg is shown in the report as shown in fig. 14 above.

If you want to view the remaining outbound legs you can do so by pressing the button to the right of the row “+ Legs”, as shown in the screenshot below in fig. 15.

Report - [Drilldown: 00:00 - 00:59 Answ](#)  
[Back to Reports](#)

**From:** 22-05-2017 00:00      **To:** 22-05-2017 23:59      **Customer:**

**Service Type:** Inbound      **Description:** All  
**Interval:** Hourly      **Call Result:** All

Date	Time	Number	CLI	Duration	Result	Target	Duration	Result	Legs
22-05-2017	00:00:35			31.3	Answered		22.5	Answered	
22-05-2017	00:01:02			17.4	Answered		16.1	Answered	
22-05-2017	00:01:26			12.4	Answered		5.6	Answered	
22-05-2017	00:01:38			47.4	Answered		46.7	Answered	
22-05-2017	00:01:42			18.9	Answered		17.6	Answered	
22-05-2017	00:01:48			352.2	Answered		349.6	Answered	
22-05-2017	00:02:04			46.2	Answered		29.6	Answered	
22-05-2017	00:02:45			58.5	Answered		56.7	Answered	
22-05-2017	00:02:54			118.7	Answered		117.4	Answered	
22-05-2017	00:03:11			402.5	Answered	Announcement (521890000)	1.3	Answered	<a href="#">- Legs</a>
							392.4	Answered	
							8.0	Unanswered	

Figure 15 Sample Call Search results with Outbound Legs expanded

## Downloading Reports

The results of the call search and all the reports are downloadable, therefore allowing users the ability to present the result in their own format, or perform further analysis.

A report can be downloaded in two ways. Either from the “View Reports” screen, under the title there is the link to download, or if you instead go to view the report in the browser, the title of the report can be clicked to perform the download. You will also have a version of this report in your email inbox.

The browser will either ask you whether you want to just open the file or save it somewhere, some browsers will automatically download the file to your downloads folder.

The file has a .csv extension. A spreadsheet application such as Microsoft Excel will provide the best view of the data plus allow you to perform further analysis on the report data.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	From:	20/06/2014 00:00	To:	20/06/2014 23:59	Customer:								
2	Service Type:	Inbound	Description:	all	Number:	All							
3													
4	Number	Description	Calls	Answ	Unansw	Eng'd	% Answ	% Unansw	% Eng'd	Total Minutes	Average Duration	Average TTA	Average RTNR
5			110	98	12	0	89.1	10.9	0	221.5	135.6	13.3	1.8
6			76	72	4	0	94.7	5.3	0	130.9	109.1	12.2	0.5
7			154	146	8	0	94.8	5.2	0	286.8	117.8	12.6	1
8			82	74	8	0	90.2	9.8	0	220.4	178.7	12	2
9			130	118	12	0	90.8	9.2	0	279.1	141.9	16.8	1.8
10			112	100	12	0	89.3	10.7	0	218.5	131.1	16.1	1.3
11			144	132	12	0	91.7	8.3	0	287.6	130.7	11.7	1.7
12			10	10	0	0	100	0	0	15.1	90.4	10.6	0
13		R	112	104	8	0	92.9	7.1	0	158.7	91.6	11.3	1
14			120	116	4	0	96.7	3.3	0	204.3	105.7	12.7	1
15			8	8	0	0	100	0	0	34	255	11.8	0
16			82	74	8	0	90.2	9.8	0	135.3	109.7	12.6	1
17			0	0	0	0	0	0	0	0	0	0	0
18			230	220	10	0	95.7	4.3	0	457	124.6	12.5	2
19			120	118	2	0	98.3	1.7	0	248.9	126.6	12	1
20			178	176	2	0	98.9	1.1	0	449.6	153.3	13.7	2

Figure 16 Example downloaded results imported into spreadsheet

Please be aware that some applications will strip off leading zeros off telephone numbers. This is because the application assumes that a numeric data field is an actual number and therefore removing the insignificant preceding zero. This problem can be overcome (in Microsoft Excel for example) by first using the import wizard to specify the Number column containing the telephone number as 'Text'.

## Graphing

Certain columns within each report can be represented in a graphical (bar chart) form. The following three graphs are available in all reports excluding the simultaneous call report:

1. Total Calls – Presents a graph of the total number of calls separated by colour into Answered, Unanswered and Engaged.
2. Total Minutes – Presents a graph of the total minutes.
3. Averages – Presents a chart with the three averages, separated by colour into Average Duration, Average Time To Answer (AvgTTA), and Average Ring Time No reply (AvgRTNR).

The availability of the graphs within any report is signified by the column heading being underlined. When you mouse over this heading the mouse pointer will change to a hand.

## Customer Maintenance

Depending upon your user privilege settings, you will get access to one or more maintenance pages. The maintenance pages give access to change your password, edit number descriptions, and if applicable, the ability to manage other user logins for your organisation. Users configured as resellers will have the ability to manage sub-customer accounts, and to allocate numbers to these accounts. There are also extra maintenance pages for system administrators to add numbers to the system, and to set up other maintenance options.

### Change Password

All users have the ability to change their own password, as long as the current password is known. Click on 'Change Password' under the Configuration section of the Main Menu. The password change screen is shown in figure 17.



Change Password

User Name

Current Password

New Password

Confirm Password

Recommendations

Passwords **must** be between 8-20 characters  
Passwords **must** contain a mixture of uppercase,  
lowercase, numeric and special characters  
Passwords **must** be unique for each account  
Forgotten passwords **cannot** be retrieved - only reset

*Figure 17 Change password submit page*

To change your password, enter your current password, followed by your new password in the next two input boxes. New passwords must be at least 8 characters in length. Click on the 'Submit' button to apply the new password, for which a confirmation or error message will appear.

## Edit Number Descriptions

This maintenance option is available if you are the current owner of a number, i.e. a number that is being directly used by your organisation. Thus, a reseller will not be able to control number descriptions for their sub-customers.

Click on 'Edit Number Description' under the 'Customer Maintenance' section of the Main Menu.

The screenshot shows two main sections: 'Personal Description List' and 'Number Descriptions'.

**Personal Description List**

Description 1	
Description 10	
Description 11	
Description 12	
Description 13	
Description 14	
Description 15	
Description 16	
Description 17	
Description 2	
Description 3	
Description 4	
Description 5	
Description 6	
Description 7	
Description 8	
Description 9	
Unnamed	

At the bottom of this list is an 'Add Description' button and an 'Add' button.

**Number Descriptions**

Select Description:

Number	Description	Assign
1	Unnamed	<input type="checkbox"/>
2	Unnamed	<input type="checkbox"/>
3	Unnamed	<input type="checkbox"/>
4	Unnamed	<input type="checkbox"/>
5	Unnamed	<input type="checkbox"/>
6	Unnamed	<input type="checkbox"/>
35	Unnamed	<input type="checkbox"/>
36	Unnamed	<input type="checkbox"/>
37	Unnamed	<input type="checkbox"/>
244	Unnamed	<input type="checkbox"/>
245	Unnamed	<input type="checkbox"/>
246	Unnamed	<input type="checkbox"/>
266	Unnamed	<input type="checkbox"/>
1001	Unnamed	<input type="checkbox"/>
1002	Unnamed	<input type="checkbox"/>
1003	Unnamed	<input type="checkbox"/>
1004	Unnamed	<input type="checkbox"/>

At the bottom right of this table is an 'Apply' button.

Annotations: An arrow points from the 'Add Description' button to the 'Personal Description List' table. Another arrow points from the 'Apply' button to the 'Number Descriptions' table.

Figure 18 Edit Number Descriptions Page

The 'Personal Description List' area is used to add or delete descriptions that can be assigned to your numbers. To add a description, simply enter a description in the text box (up to 20 characters), and click on 'Add' button. The new description will now appear in the 'Personal Description List' table.

To delete a description, click on the delete button (the red circle) to the right of the description to be deleted. You will get asked to confirm, once you have, the description is removed from the list.

To apply a description to a number, follow these three steps:

1. Select a description from the dropdown box next to 'Select Description'. All the descriptions in the description list will appear in the dropdown box.
2. Tick each box in the 'Assign' column for each number that the selected description will be allocated to.
3. Click on the 'Assign' button to apply the new descriptions.

The description listed next to each number will be displayed in the Dialed Number Summary report next to the respective number. The description will also be available in the 'Description' filter option for all reports.

## User Management

The User Management option is available to the system administrator (known as Master User) for your organisation and to other users whom are granted this privilege by the system administrator. The User Management pages are used to manage login privileges, allowing the user to create, edit and delete other users within your organisation. Click on 'User Management' under Customer Maintenance. An example is shown in figure 19 below.

## User Setup

Select User  
 User Name  
 User Management  
 Customer Management  
 Number Management

TestUser  
 TestUser  
 Limited Edit  
 View Only  
 Full Edit

Edit Delete

Create New User

Figure 19 User Setup Selection Page

## Creating New User

To create a new user, click the "Create New User" button as shown in figure 19 above. You should see the screen as shown in figure 20 below.

User Setup

User Name  
 User Password  
 Repeat Password

User Management  
 None  Create Only  Limited Edit  Full Edit

Customer Management  
 None  View Only  Full Edit

Number Management  
 None  View Only  Full Edit

Add New User Cancel

**User Management**  
 This privilege allows users to manage Login details, for members of your organisation, to access your statistics (i.e. access to these pages). The **Create Only** privilege will allow the new user to create other new users with access to the statistics pages only. **Limited Edit** will allow the user to create other users with Number and Customer Management View Only privileges. **Full Edit** will allow the user to create other users with Full Edit privileges.

**Customer Management**  
 This privilege allows users gain 'View Only' or 'Full Edit' access to view or create/edit/delete Customer Accounts.

**Number Management**  
 This privilege allows users to gain 'View Only' or 'Full Edit' access to the Number Management pages. These pages are used to allocate/de-allocate numbers to your Customer Accounts.

Figure 20 Add New User Setup Screen (including reseller full edit settings)

To create a new user, enter a username, a user password (repeat in both boxes) and then select the user management, customer management and number management settings as applicable. On the right of the user setup box you will find some help about what each privilege means.

Generally only a few people in your organisation should be granted full privileges, whilst the majority of users will have all the privilege settings set to 'None'.

Once the new user settings are complete, click on the 'Add New User' button to attempt to create the new user in VISION. If the attempt to add the new user is unsuccessful, an error/warning message and the reason will be displayed. If the new user was successfully created, the previous user selection screen will appear, and the addition of the new user to VISION is confirmed.

### Editing a User

To edit a user, first select the user to be edited in the dropdown box next to 'Select User' (refer to figure 19), the page will refresh with the selected users details.

The Master User is identified by the '>' and '<' symbols enclosing the username, and the logged on user identified by the '-' symbols enclosing the user name. For safety reasons, the master user cannot be edited.

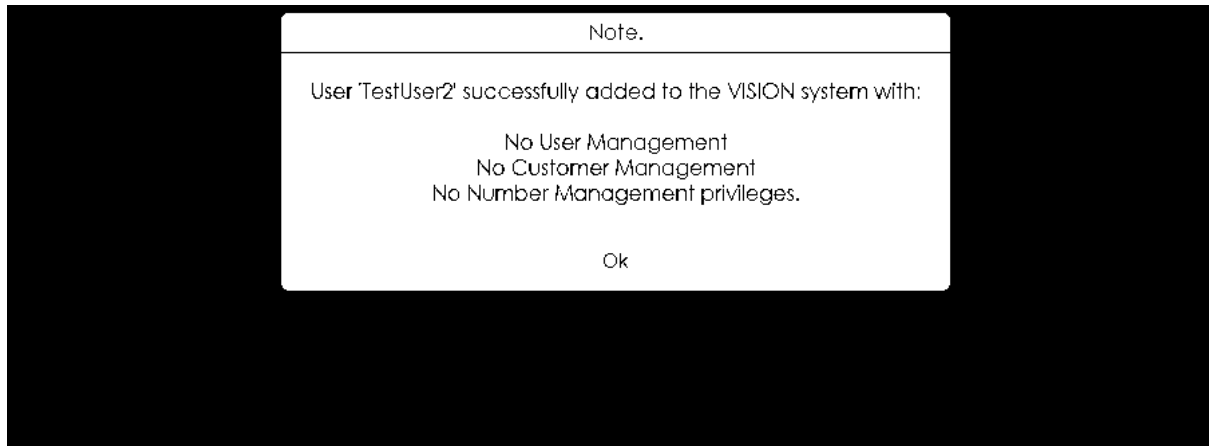
Click on 'Edit' to proceed to the 'Edit User' setup page, which is very similar to the 'Add User' setup page (refer to figure 20), but with the completed user settings completed against the relevant settings. Simply amend the users' settings as required and click on the 'Apply' button to apply the changes to the VISION system. If the attempt to update the users' settings was unsuccessful, the previous user selection will appear.

### Notes:

- As a precaution, users are unable to amend their own 'User Management' settings.
- To leave user password unchanged, leave the password fields blank.

## Deleting a User

To delete a user, first select the user to be deleted in the dropdown box next to 'Select User' and the page will refresh with the user's current details. The Master User is identified by the '>' and '<' symbols enclosing the user name, and the logged on user is identified by the '-' symbols enclosing the user name. For safety reasons, the Master User and the current logged on user cannot be deleted from the system.



*Figure 21 User Deletion with Confirm*

To delete the user, click on the 'Delete' button. You will be prompted to confirm that the user should be deleted (figure 21). Select 'OK' to continue with the deletion, or 'Cancel' to cancel and return back to the user details. If 'OK' is selected, the user will be deleted from VISION and a confirmation message will appear.

## Customer Account Setup

The Customer Account Setup option is available to the system administrator (known as Master User) of organisations acting as resellers and to other users who are granted this privilege by the system administrator. The Customer Account Setup pages are used to manage sub-customer/reseller accounts, allowing the user to create, edit and delete sub-customers of your organisation. A reseller in VISION is basically a sub-customer who has the privilege to create their own sub-customers and to allocate numbers to their sub-customers.

Click on the 'Customer Account Setup' under the Customer Maintenance section from the main menu. Some users may have read-only privilege access to this page and therefore, will not have the 'Create New Customer', 'Edit' and 'Delete' buttons will be displayed as shown in figure 21.

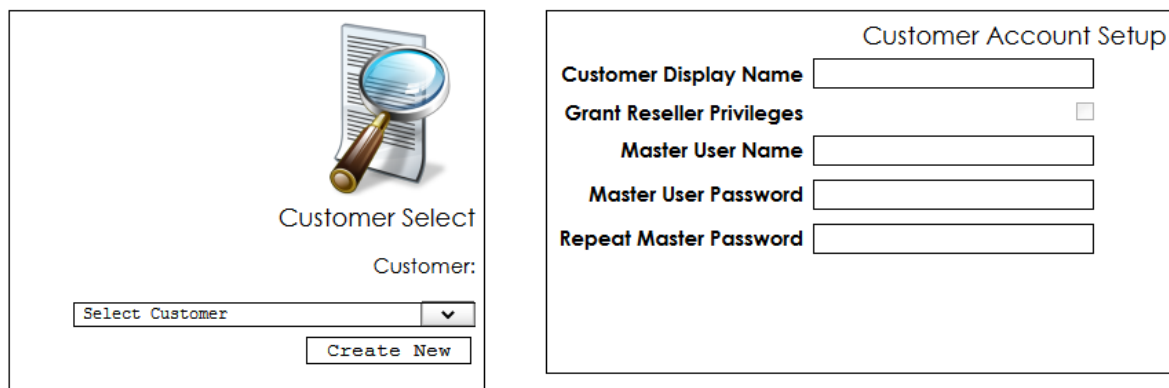


Figure 22 Customer Account Setup selection page

## Create New Customer/Reseller

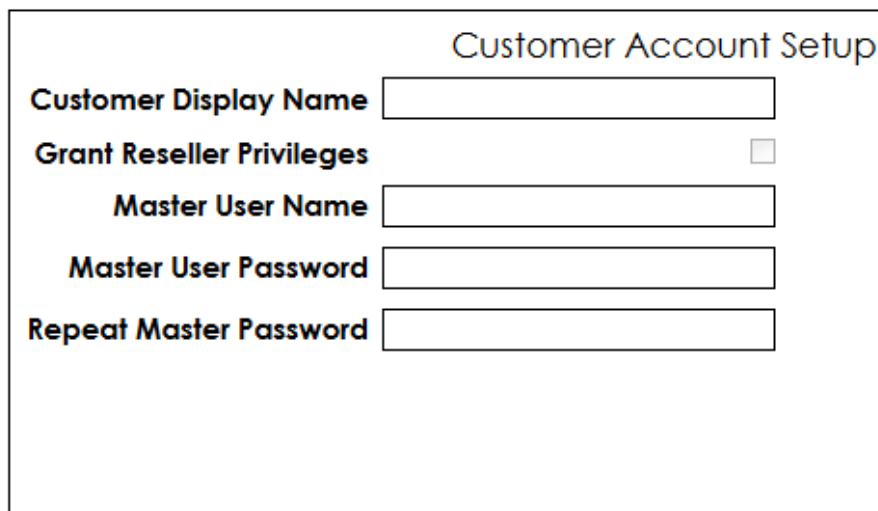


Figure 23 Create Customer Screen

Click on the new 'Create New Customer' button to proceed to the 'Add Customer Account' setup page as shown in figure 22.

To add a customer account, begin by entering a 'Customer Display Name', which is the name that will be displayed in the top right-hand corner as the logout link. Next, check the 'Grant Reseller Privileges' checkbox if applicable. Only check the checkbox if the new sub-customer will want to create their own sub-customers, i.e. act as a reseller. If you are unsure, leave the check box unchecked as this can be amended later if needed.

Complete the sub-customers account details by adding a 'Master User Name' and Master Password (confirm password in both boxes). This sets up the Master User login that will be the VISION system administrator within the sub-customer's organisation.

Once the new sub-customer's details are complete, click on the 'Create' button to attempt to create the new customer and user in the VISION system. If the attempt to add the new customer and user is unsuccessful, an error/warning message and reason will be displayed. If the new customer and user were successfully created, the previous customer selection screen will appear, and the addition of the new sub-customer and user to the VISION system will be confirmed.

### Edit Customer/Reseller

To edit a sub-customer (or reseller), first select the sub-customer in the dropdown box next to 'Select Customer' (ref figure 21), the page will then refresh with the sub-customers current details.

Click on 'Edit' to proceed to the 'Edit Customer Account' setup page, which is very similar to the 'Add Customer Setup' setup page (ref figure 22), but with the current sub-customer's details completed against the relevant setting. Simply amend the sub-customer's details as required and click on the 'Apply' button to apply the changes to the VISION system. If the attempt to update the sub-customer's details is unsuccessful, an error/warning message and reason will be displayed. If the sub-customer's details were successfully updated, the previous sub-customer selection screen will appear, with confirmation of the sub-customer's updated details.

#### Notes:

- Updating a sub-customer includes updating both the sub-customer details (if applicable), followed by updating the Master User details (if applicable). Therefore, there will be two confirmation messages when applying an update.
- To leave the sub-customer's passwords unchanged, leave the password fields blank.
- When a sub-customer is granted reseller privileges, and then the privileges are revoked (i.e. changed from YES to NO), the sub-customer is granted read-only privileges to their sub-customers and number allocation pages.

## Delete Customer/Reseller

To delete a sub-customer, first select the sub-customer to be deleted in the dropdown box next to 'Select Customer' (ref figure 19) and the page will refresh with the sub-customer's details.

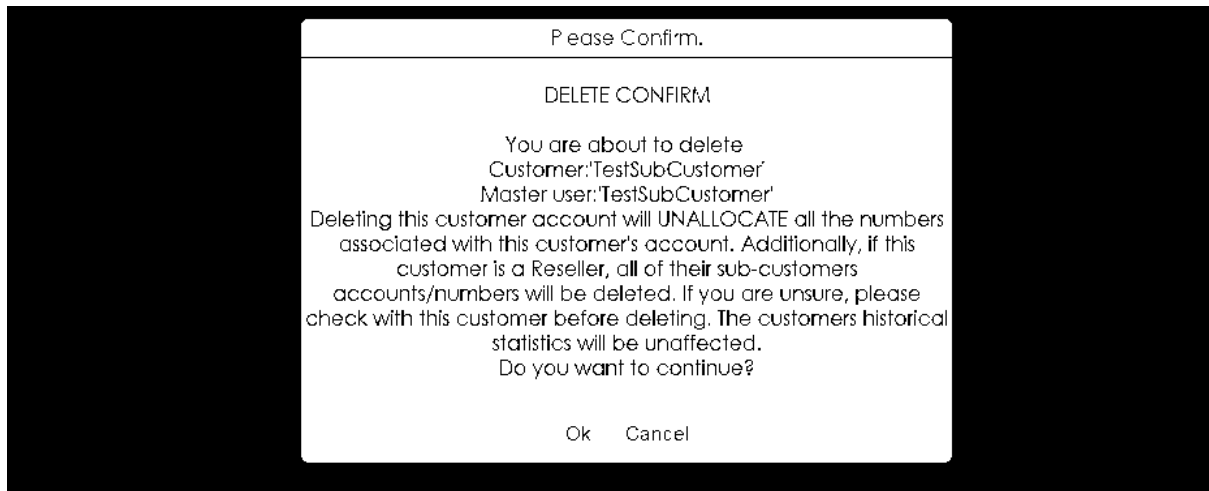


Figure 24 Delete customer confirmation box

If the deletion is confirmed, the sub-customer will be deleted from VISION and a confirmation message will appear. Depending upon the number of sub-customers that the deleted sub-customer has (if acting as a reseller), a confirmation message will appear for the deletion of each further sub-customer account.

### Notes:

- When a sub-customer account is deleted, the actual customer and associated users are not deleted from the VISION system. The sub-customer's users will still be able to login to VISION to view historic statistics for 6 months.



## Customer Number Management

To enable sub-customers to view statistics for telephone numbers that they use, the telephone numbers need to be allocated to the sub-customers account. The Customer Number management pages are used to allocate and de-allocate telephone numbers to/from sub-customers. The Customer Number management page is available to the system administrator (known as Master User) of organisations acting as resellers, and to other users whom are granted this privilege by the system administrator. Click on 'Customer Number Management' under Customer Maintenance in the Main Menu to go to the number allocations page as shown in figure 25 below.

The screenshot shows the 'Number Allocations' interface. At the top left, there is a 'Select Customer' dropdown menu. Below it is a 'Filter to allocate numbers' section with two input fields for 'Unallocated Prefix Match' and 'Allocated Prefix Match', and buttons for 'Apply Filter' and 'Clear Filter'. The main area is titled 'Number Allocations' and is split into two columns: 'Unallocated Numbers' and 'Allocated Numbers'. The 'Unallocated Numbers' list shows several numbers (e.g., 0113, 0115) with checkboxes. Between the lists are buttons for 'Move Selected', 'Move All', and 'Move Selected' in both directions, along with a note 'Use Ctrl and/or Shift to select multiple numbers'. At the bottom, there are counters for '3123/3123 Numbers' and '/ Numbers', and an 'Apply' button.

Figure 25 Number Allocations Page

The page has a dropdown customer selection box, two telephone number list boxes and buttons to move selected numbers between the two.

### Number Allocation

To allocate telephone numbers to a sub-customer, follow the three steps below:

1. Select the sub-customer using the 'Select Customer' dropdown selection box. The page will refresh with the numbers available for allocation on the left, and numbers already allocated to the sub-customer on the right.
2. Select numbers to be allocated in the 'Unallocated Numbers' list box, and move them over to the 'Allocation Numbers' list box using the 'Move Selected ->' button. To select multiple numbers, hold down the Shift or Ctrl keys and click on the numbers. Alternatively, to move all the unallocated numbers, click on the 'Move All' ('>>') button and select OK to confirm. The selected numbers will be transferred from the left to the right allocation list box (this may take some time for a large set of numbers).
3. Click on the 'Apply' button to apply the number allocation for the selected sub-customer. The page will be refreshed when the numbers have been applied and the allocated numbers will appear in the 'Allocated Numbers' list box.

## Number De-allocation

Number de-allocation from a sub-customer is similar to number allocation, and is completed by following the below three steps:

1. Select the sub-customer using the 'Select Customer' dropdown selection box. The page will refresh with the allocated numbers appearing in the 'Allocated Numbers' list box on the right.
2. Select numbers to be allocated in the 'Allocated Numbers' list box and move them over to the 'Unallocated Numbers' list box using the 'Move Selected <-' button. To select multiple numbers, hold down the Shift or Ctrl keys and click on the numbers. Alternatively, to move all the unallocated numbers, click on the lower 'Move All' ('<<') button and select OK to confirm. The selected numbers will be transferred from the right to the left allocated list box (this may take some time for a large set of numbers).
3. Click on the 'Apply' button to apply the number de-allocation for the selected sub-customer. The page will be refreshed when the numbers have been applied, and the de-allocated numbers will appear in the 'Unallocated Numbers' list box.

### Notes:

When a sub-customer is deleted using the 'Customer Account Setup' page, all allocated numbers are automatically de-allocated for the selected customer.

## Allocated/Unallocated Number Filtering

When you are allocating and de-allocating numbers, you can filter both lists of numbers to only show a certain prefix to make it easier to find the number you need to manage.

To do this, select a customer, the list of numbers that are allocated to the selected customer will be displayed in the right side box. Note this may take some time, depending on the amount of numbers allocated.

Then enter the prefix for the allocated numbers and the prefix for the unallocated numbers and press apply. You should see the numbers in both boxes only show telephone numbers starting with your prefix.

The screenshot shows a web interface for managing number allocations. On the left, there is a 'Select Customer' dropdown menu. Below it is a 'Filter to allocate numbers' section with two input fields: 'Unallocated Prefix Match' and 'Allocated Prefix Match'. At the bottom of this section are 'Apply Filter' and 'Clear Filter' buttons. The main area is titled 'Number Allocations' and contains two columns: 'Unallocated Numbers' and 'Allocated Numbers'. The 'Unallocated Numbers' list shows 15 numbers, all starting with '0113' or '0115'. The 'Allocated Numbers' list shows 7 numbers, all starting with '0166', '0191', '0800', or '0844'. Between the two lists are several action buttons: 'Move Selected' (with a right arrow), 'Move All' (with a right double arrow), 'Move Selected' (with a left arrow), and 'Move All' (with a left double arrow). Below these buttons is a note: 'Use Ctrl and/or Shift to select multiple numbers'. At the bottom of each list are labels: '3123/3123 Numbers' for the unallocated list and '13/13 Numbers' for the allocated list. An 'Apply' button is located at the bottom center of the interface.

Notes:

- You do not need to enter a prefix for both allocated and unallocated numbers, if you wish to

Figure 26 Number Allocation/De-allocation Filtering

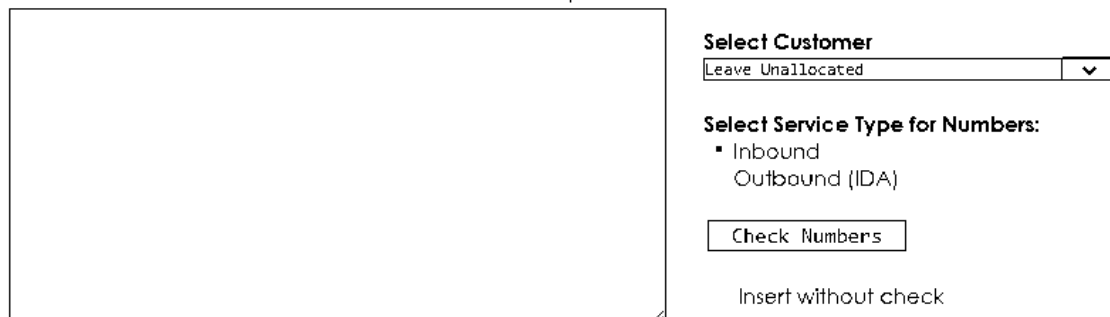
filter on only allocated numbers for example, you can leave the unallocated numbers text box blank.

## Number Entry

The Number Entry page is a system administrator function and is not available to customers/resellers. Numbers in the VISION system are usually allocated to customers/resellers via the Number Management System (NMS). The page allows the privileged user to add new numbers that are not presented via the NMS, into the VISION system to enable statistics collection for the numbers

### Number Allocations

Please enter or paste a comma/tab/newline/colon/semi-colon separated list of numbers to be inserted into the stats system:



Clicking on 'Check Numbers' will arrange (and clean if necessary) the entered/pasted Numbers into a comma separated list. This facility allows the numbers to be checked by the user before committing the Numbers to the VISION system. To insert the numbers without the check facility, tick the 'Insert without check' box.

Figure 27 Number Entry

There are five steps to follow in order to enter numbers into the VISION system:

1. Enter or paste the new numbers in a delimited format (e.g. fields separated by comma, tab, newline, colon, semi-colon)
2. **Without** ticking the 'Insert without check' checkbox, click on the 'Check Numbers' button. This will perform pre-validation checks on the numbers entered/pasted and will remove unnecessary characters. Any characters not recognised will display a validation and inform which characters failed the validation. The list will be returned in a comma-separated format, and the 'Insert without check' checkbox will be ticked.
3. In the select customer drop down, you can either leave all numbers as unallocated or allocate all of these numbers to a specific customer
4. Select which service type these numbers are for, e.g. inbound or outbound IDA. Note that inbound is the default selected option.
5. Check through the number list returned from step 2 and verify the contents. Ensure that the 'Insert without Check' checkbox is ticked and click on 'Insert' button. A prompt will appear asking for confirmation to add the number for the service type specified. If OK to continue press the 'OK' button to confirm the addition of the numbers to the VISION system.

Following insertion of the new numbers, a confirmation message will appear detailing the count of numbers inserted and the count of duplicates encountered if applicable. Duplicates will not be accepted by the System and will be disregarded.

Notes:

- Step 2 above is optional, but highly recommended. To skip step 2, check the 'Insert without check' checkbox, and the button will change to 'Insert'.