



Hosted VoIP Phone System

Blue Platform

Call Detail Reporting User Guide

Table of Contents

| | | |
|-------|--|----|
| 1 | Call Details | 2 |
| 2 | Accessing Call Details..... | 2 |
| 3 | Query Call Details | 3 |
| 3.1 | User Field (Group Administrator Access Required) | 4 |
| 3.2 | Sort by..... | 4 |
| 3.3 | Date Range..... | 5 |
| 3.4 | Include | 5 |
| 3.5 | Search by Full or Partial Telephone Number | 6 |
| 3.6 | Create Report | 7 |
| 3.7 | Exporting..... | 8 |
| 3.7.1 | Email to | 8 |
| 3.7.2 | Export to PDF | 9 |
| 3.7.3 | Export to CSV | 10 |
| 4 | Last 20 Calls | 11 |

1 Call Details

The Hosted VoIP Phone System Admin Portal provides the users and administrators with the ability to Query Call Details and to obtain Call Detail Records (CDRs) for users and groups within their organization.

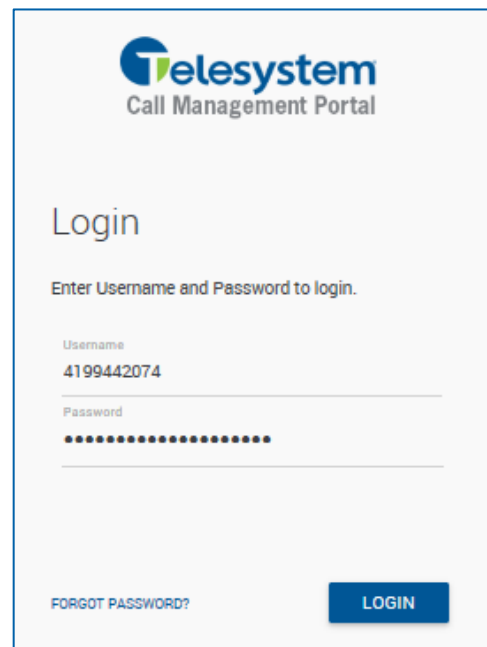
From a user level, you will have the options for: Query Call Details or Last 20 Calls.

As a group administrator, you will only have the Query Call Details option.

Administrators may produce CDRs for individual users, Hunt Groups, or Call Centers as well as their entire group.

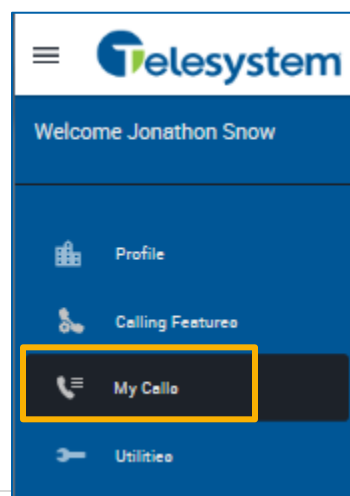
2 Accessing Call Details

As a user, you may access your call detail records by logging in with your personal login credentials.



The image shows the login page of the Telesystem Call Management Portal. At the top is the Telesystem logo and the text 'Call Management Portal'. Below this is the heading 'Login' followed by the instruction 'Enter Username and Password to login.' There are two input fields: 'Username' with the value '4199442074' and 'Password' with masked characters. At the bottom left is a link for 'FORGOT PASSWORD?' and at the bottom right is a blue 'LOGIN' button.

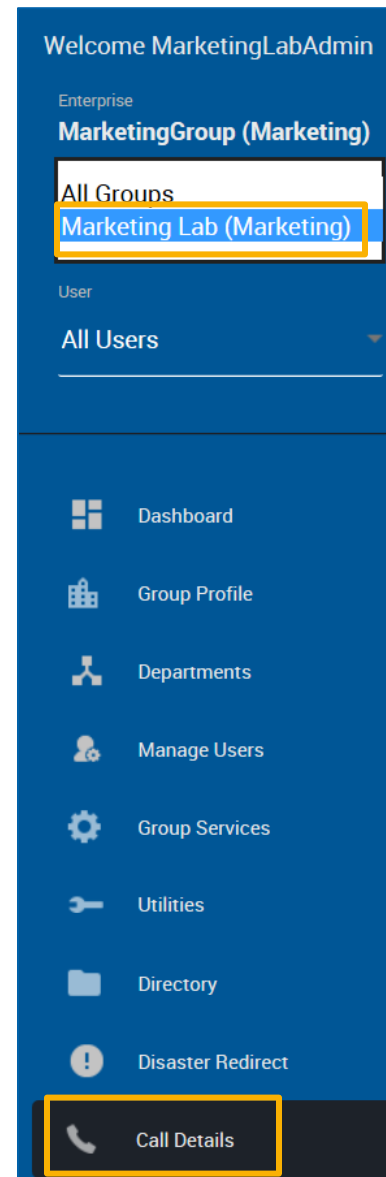
Once logged-in as a user, click the **My Calls** tab.



If you would like to log-in as an administrator, log-in with your administrative credentials.

Once Logged-in as an Administrator:

1. Select the group drop-down menu and choose the group you want Call Details for.



2. Click the **Call Details** tab.

3 Query Call Details

When querying call details, an array of options will be available. Options include:

- User field (Group Administrator Access Required)
- Sort by
- Date range
- Include
- Search by full or partial telephone number

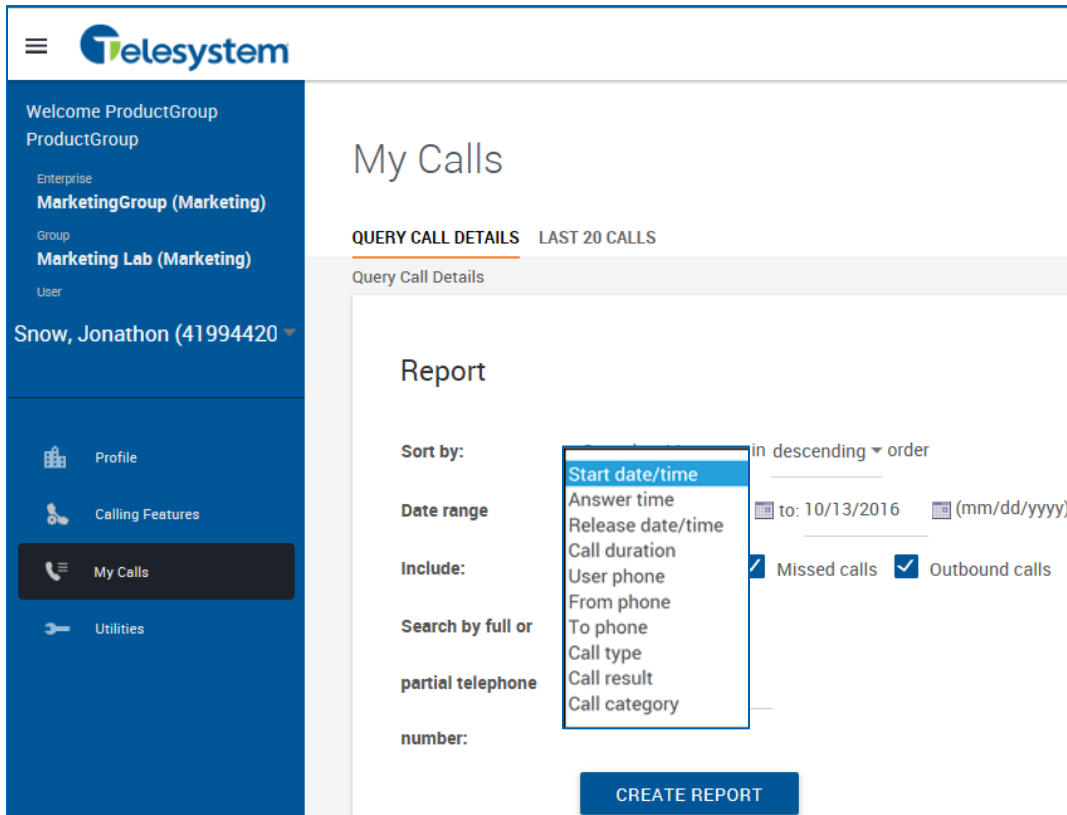
3.1 User Field (Group Administrator Access Required)

This option will allow you to select a specific user you want to generate the report for or you may select all of the users in your group. This must be done as one or all; you cannot select multiple options from this dropdown list.

NOTE: Non-admin users will only have the ability to run call detail queries on themselves. This field will not be available.

3.2 Sort by

This option will allow you to select specific criteria to generate your report.



The screenshot shows the Telesystem web interface. On the left is a blue sidebar with a menu containing 'Profile', 'Calling Features', 'My Calls' (highlighted), and 'Utilities'. The main content area is titled 'My Calls' and has two tabs: 'QUERY CALL DETAILS' (active) and 'LAST 20 CALLS'. Below the tabs is a 'Query Call Details' section. It includes a 'Report' title, a 'Sort by:' dropdown menu (open, showing options: Start date/time, Answer time, Release date/time, Call duration, User phone, From phone, To phone, Call type, Call result, Call category), a 'Date range' field with a calendar icon and the text 'to: 10/13/2016 (mm/dd/yyyy)', an 'Include:' section with checkboxes for 'Missed calls' and 'Outbound calls', a 'Search by full or partial telephone number:' field, and a 'CREATE REPORT' button at the bottom.

The following options are available when sorting:

- Start date/time
- Answer time
- Release date/time
- Call duration
- User phone
- From phone
- To phone
- Call type
- Call result
- Call category

Each of these may be sorted in descending or ascending order. Users may only choose one option to sort by.

3.3 Date Range

The date range allows for calendar dates to be selected for the period of time that you would like your results to include. Date range is formatted in the following format: mm/dd/yyyy. Users may click the calendar icon next to each text box and select a date by clicking on it within the pop up calendar.

The screenshot shows the 'My Calls' interface. On the left is a sidebar with the Telesystem logo, a welcome message for 'ProductGroup', and navigation links for 'Enterprise MarketingGroup (Marketing)', 'Group Marketing Lab (Marketing)', and 'User Snow, Jonathon (41994420)'. Below these are links for 'Profile', 'Calling Features', 'My Calls' (highlighted), and 'Utilities'. The main content area is titled 'My Calls' and features a calendar for 'October 2016'. The calendar shows dates from 1 to 31, with the 13th highlighted. Below the calendar, there are tabs for 'QUERY CALL DETAILS' and 'LAST 20 CA'. The 'QUERY CALL DETAILS' tab is active, showing a 'Report' section. This section includes a 'Sort by:' dropdown set to 'Start', a 'Date range' field with 'from: 10/06/2016' and 'to: 10/13/2016' (with a calendar icon), and an 'Include:' section with three checked checkboxes: 'Inbound calls', 'Missed calls', and 'Outbound calls'. There is also a 'Search by full or partial telephone number:' field and a 'CREATE REPORT' button.

3.4 Include

You will have the option to indicate the types of calls you would like included in the query. The following options are available:

- Inbound calls
- Missed calls
- Outbound calls

Check or uncheck the box preceding the option as desired.

This is a close-up of the 'Include:' section from the screenshot. It shows the label 'Include:' followed by three checkboxes, all of which are checked. The options are 'Inbound calls', 'Missed calls', and 'Outbound calls'.

3.5 Search by Full or Partial Telephone Number

You will have the option to only return results for a specific phone number or partial phone number. If you only want to see calls made to 419-724-9898, you can type “4197249898” into the field labeled “Search by full or partial telephone number”.

Search by full or
partial telephone 4197249898
number:

NOTE: When searching for a number, do not add dashes, periods, or spaces. Just enter the 10 digits for the phone number as a string and perform the search. The output will match the search results exactly.

If you want to search for calls made to the 734 area code, you can type “734” into the box labeled “Search by full or partial telephone number”. Be aware that anytime the string “734” shows up in your call history, it will return the result. So a search for “734” will return 4195550734 as well as 7345551212.

Search by full or
partial telephone 734
number:

3.6 Create Report

The **Create Report** button will cause the query to run based on the criteria you have entered. The data will display at the bottom of the page in HTML format.

| INDEX | ENTERPRISE | GROUP | DEPARTMENT | ACCOUNT CODE | USER ID | PHONE NUMBER | CALL TYPE | CALLING NUMBER | CALLED NUMBER | CALLER NAME | CALL DATE | CALL TIME | ANSWER DATE/TIME | RELEASE DATE/TIME | CALL DIRECTION | CALL DURATION | ANSWER INDICATOR | CALL CATEGORY | SPECIAL CALL TYPE |
|-------|----------------------------|---------------------------|------------|--------------|---------------------------|--------------|-----------|----------------|---------------|-------------|------------|-----------|---------------------|---------------------|----------------|---------------|------------------|---------------|-------------------|
| 1 | MarketingGroup (Marketing) | Marketing Lab (Marketing) | | 413578 | 4199442073@combuckeye.com | +14199442073 | Normal | +14199442073 | 4197243718 | | 10/28/2016 | 03:14 PM | 10/28/2016 03:14 PM | 10/28/2016 03:14 PM | Originating | | No | local | |
| 2 | MarketingGroup (Marketing) | Marketing Lab (Marketing) | | 123456 | 4199442073@combuckeye.com | +14199442073 | Normal | +14199442073 | 4197243718 | | 10/28/2016 | 03:03 PM | 10/28/2016 03:03 PM | 10/28/2016 03:03 PM | Originating | | No | local | |
| 3 | MarketingGroup (Marketing) | Marketing Lab (Marketing) | | 413562 | 4199442073@combuckeye.com | +14199442073 | Normal | +14199442073 | 4197243887 | | 10/28/2016 | 01:55 PM | 10/28/2016 01:55 PM | 10/28/2016 01:55 PM | Originating | | No | local | |

The end result will contain the following information:

| | |
|--------------------------|--|
| Index | The index will identify which row of data you are displaying. |
| Enterprise | Indicates what Enterprise within the organization the User ID is assigned to. |
| Group | Indicates what Group of the Enterprise hierarchy the User ID is assigned to. |
| Department | Indicates what Department of the Group hierarchy the User ID is assigned to. |
| Account Code | Unsupported field |
| User ID | The User ID is your phone number set as a fully qualified domain name. Example <i>4195551212@combuckeye.com</i> |
| Phone Number | Your phone number with the +1 prefix. For example <i>+14195551212</i> |
| Call Type | Displays "Normal" |
| Calling Number | This will display the phone number party that originated the call. The format will display the same as the Phone Number field. |
| Called Number | This will display the phone number of the party that received the call. The format will display the same as the Phone Number field. |
| Caller Name | This will display the caller ID name of the party you are speaking with if that caller is part of your Enterprise Directory. |
| Call Date | Displays the date of the call. The date is displayed in MM/DD/YYYY format. |
| Call Time | Displays the time of the call. The time is displayed in a 12-hour format with a leading 0 for single digit hours. AM and PM is not specified. |
| Answer Date/Time | Displays the date when the call was initially answered with the time for when the call was answered. This information will only display if the receiving party actually answers the phone. Unanswered calls will not display a result. The date and time follow the same formatting as the Call Date and Call Time . |
| Release Date/Time | This displays the time when the call was terminated. An unanswered call will display a release date and time. The date and time follow the same formatting as the Call Date and Call Time . |
| Call Direction | Indicates if the call is Originating (outgoing) or Terminating (incoming) from your perspective. |
| Call Duration | Displays the amount of time you participated in the call. This is shown in HH:MM:SS format. |
| Answer Indicator | Indicates if the call was answered with a Yes or No , or if the call went to voicemail (Yes – Post Redirection). |
| Call Category | Values such as: Interlata, intralata, local, other, private |
| Special Call Type | Indicates if a call feature was used in order to handle this call. |

NOTE: The HTML output is only capable of displaying 500 entries. If your report criterion exceeds 500 entries it is advised that you use of the "Export" options available below or narrow your date range.

3.7 Exporting

Users have the option to export data for use outside of the portal via three methods:

- Email
- PDF
- CSV

3.7.1 Email to

The email to option provides a user with the ability to select report criteria and then specify an email address to which the report details will be sent to.

Export

After you enter an email address, click the **Submit** button. You will see a notification to the right of the button that the report is being generated and then a notice that will show “Email sent”. If there is a problem with the email address in the **Email to:** field you will see a message that states: “Please provide valid email”. The email address must follow the standard format such as: ‘name@email.com’.

3.7.2 Export to PDF

Using the **Export report to PDF** option will allow you to set the criteria as desired and then generate the report with a PDF layout. This option is good if you are interested in a report that provides all of the included data in an easy to read PDF document. The data cannot be manipulated and the document can be shared and read by any device with a PDF reader.

To export a report to PDF, set the desired report criteria and then click on the **Submit** button next to **Export report to PDF**.

Export

Email to:

SUBMIT

Export report to PDF SUBMIT

Export report to CSV SUBMIT

You will immediately see a notification that the portal is preparing the report followed by a download link and the file size.

Export

Email to:

SUBMIT

Export report to PDF SUBMIT Download PDF (2 Kb)

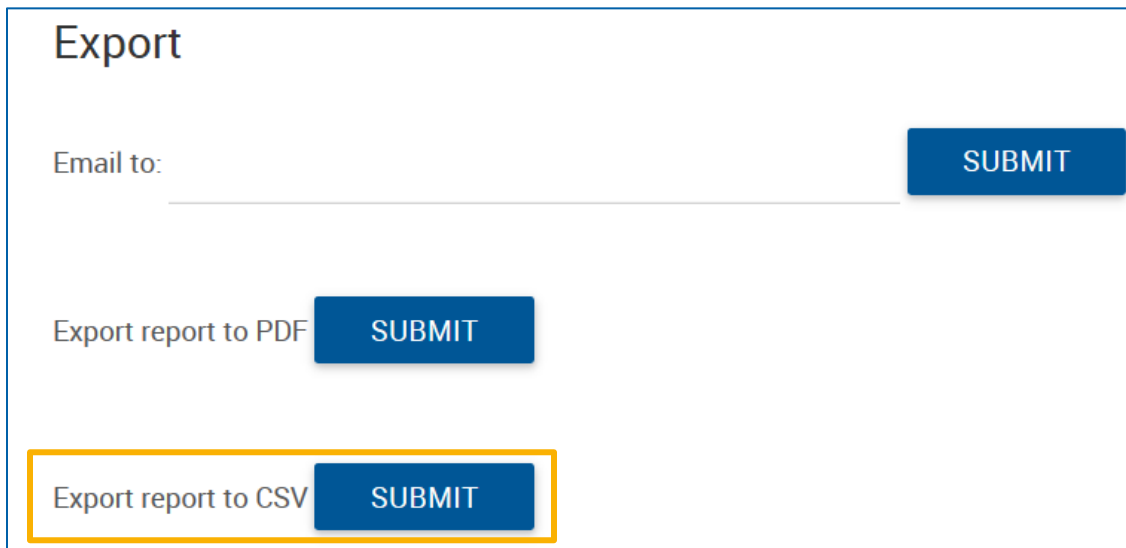
Once you click on the download link, you will be presented with your browser's default download options which will determine where the file is saved to your local computer.

NOTE: Additional software may be required to view the downloaded file. Please contact your system administrator for assistance.

3.7.3 Export to CSV

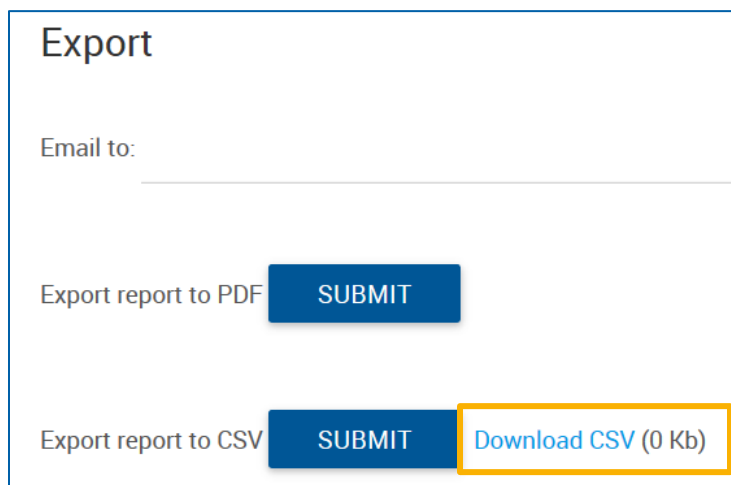
Using the **Export to CSV** option will allow you to generate a report and receive the output in a Comma Separated Value (CSV) format. The CSV format allows for users to access the data in a spreadsheet editor such as Microsoft Excel®. From there, unnecessary data can be removed or additional data can be added. Users may sort the data from within the application or import the data to a database and manage it from software such as Microsoft Access®.

To export a report to CSV, set the desired report criteria and then click on the **Submit** button next to **Export report to CSV**.



The screenshot shows a form titled "Export". It contains three rows of options, each with a text label and a blue "SUBMIT" button. The first row is "Email to:" followed by a text input field and a "SUBMIT" button. The second row is "Export report to PDF" followed by a "SUBMIT" button. The third row is "Export report to CSV" followed by a "SUBMIT" button. The third row is highlighted with a yellow rectangular border.

You will immediately see a notification that admin portal is preparing the report followed by a download link and the file size.



The screenshot shows the same "Export" form as above. In this state, the "SUBMIT" button next to "Export report to CSV" is highlighted with a yellow rectangular border. To the right of this button, a new link "Download CSV (0 Kb)" has appeared, also highlighted with a yellow rectangular border.

Once you click on the download link, you will be presented with your browser's default download options which will determine where the file is saved to your local computer.

NOTE: Additional software may be required to view and edit the downloaded file. Please contact your system administrator for assistance.

4 Last 20 Calls

The **Last 20 Calls** option will automatically generate a report of the last 20 calls associated with the user login. The data is provided in HTML format. You will also have the option to email the data or export it to **PDF** or **CSV**.

| My Calls | | | | | | | | | | | | | | | | | | | |
|---|----------------------------|---------------------------|------------|--------------|---------------------------|--------------|-----------|----------------|---------------|---------------------------------------|------------|-----------|---------------------|---------------------|----------------|---------------|------------------|---------------|-------------------|
| QUERY CALL DETAILS LAST 20 CALLS | | | | | | | | | | | | | | | | | | | |
| Last 20 Calls | | | | | | | | | | | | | | | | | | | |
| Export | | | | | | | | | | | | | | | | | | | |
| Email to: <input type="text"/> | | | | | | | | | | <input type="button" value="SUBMIT"/> | | | | | | | | | |
| Export report to PDF | | | | | | | | | | <input type="button" value="SUBMIT"/> | | | | | | | | | |
| Export report to CSV | | | | | | | | | | <input type="button" value="SUBMIT"/> | | | | | | | | | |
| INDEX | ENTERPRISE | GROUP | DEPARTMENT | ACCOUNT CODE | USER ID | PHONE NUMBER | CALL TYPE | CALLING NUMBER | CALLED NUMBER | CALLER NAME | CALL DATE | CALL TIME | ANSWER DATE/TIME | RELEASE DATE/TIME | CALL DIRECTION | CALL DURATION | ANSWER INDICATOR | CALL CATEGORY | SPECIAL CALL TYPE |
| 1 | MarketingGroup (Marketing) | Marketing Lab (Marketing) | | 413678 | 4199442073@combuckeye.com | +14199442073 | Normal | +14199442073 | 4197243718 | | 10/28/2016 | 03:14 PM | 10/28/2016 03:14 PM | | Originating | | No | local | |
| 2 | MarketingGroup (Marketing) | Marketing Lab (Marketing) | | 123456 | 4199442073@combuckeye.com | +14199442073 | Normal | +14199442073 | 4197243718 | | 10/28/2016 | 03:03 PM | 10/28/2016 03:03 PM | | Originating | | No | local | |
| 3 | MarketingGroup (Marketing) | Marketing Lab (Marketing) | | 413562 | 4199442073@combuckeye.com | +14199442073 | Normal | +14199442073 | 4197243887 | | 10/28/2016 | 01:55 PM | 10/28/2016 01:55 PM | | Originating | | No | local | |
| 4 | MarketingGroup (Marketing) | Marketing Lab (Marketing) | | 413456 | 4199442073@combuckeye.com | +14199442073 | Normal | +14199442073 | 4197243718 | | 10/28/2016 | 01:53 PM | 10/28/2016 01:54 PM | 10/28/2016 01:54 PM | Originating | 00:00:01 | Yes | local | |
| 5 | MarketingGroup (Marketing) | Marketing Lab (Marketing) | | | 4199442073@combuckeye.com | +14199442073 | Normal | +14197249800 | 4197243887 | | 10/28/2016 | 01:46 PM | 10/28/2016 01:46 PM | 10/28/2016 01:46 PM | Originating | 00:00:08 | Yes | local | Sequential Ring |
| 6 | MarketingGroup (Marketing) | Marketing Lab (Marketing) | | | 4199442073@combuckeye.com | +14199442073 | Normal | +14197249800 | 4197243718 | | 10/28/2016 | 01:45 PM | 10/28/2016 01:46 PM | 10/28/2016 01:46 PM | Originating | | No | local | Sequential Ring |
| 7 | MarketingGroup (Marketing) | Marketing Lab (Marketing) | | | 4199442073@combuckeye.com | +14199442073 | Normal | +14197249800 | +14199442073 | Cablessystem | 10/28/2016 | 01:45 PM | 10/28/2016 01:46 PM | 10/28/2016 01:46 PM | Terminating | 00:00:08 | Yes | | |