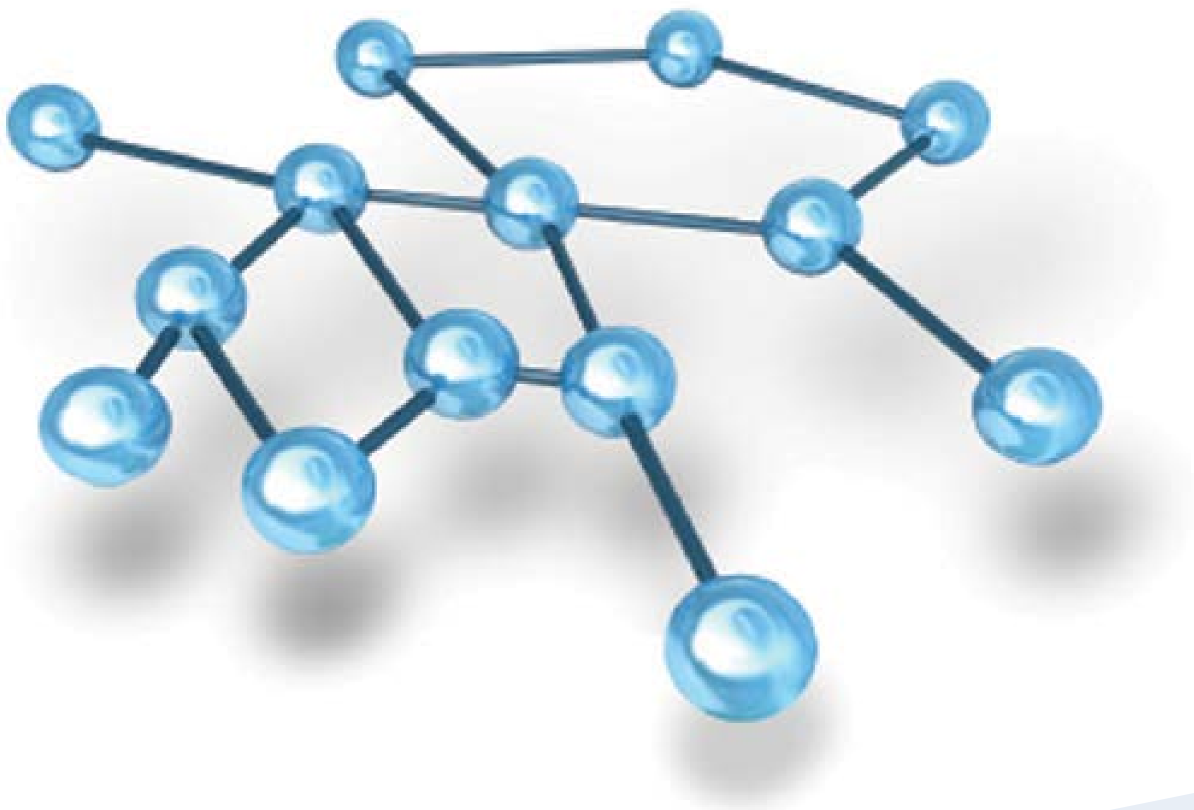
@comm
Call Accounting Made Simple



User Guide

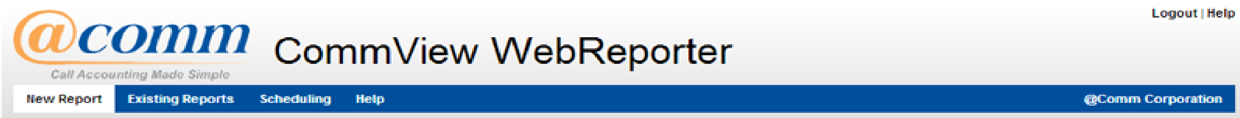
CommView Web – Hosted Service

Web Reporter - Customer Hosted Application

Document Number: 52011600201

Date: 1.2.2014

Part I – Intro



Welcome to the CommView family of call accounting reporting from @Comm! This document shall serve as a user guide for those individuals with login access to either the CommView Web hosted service or for the WebReporter module of a customer-premise CommView installation. Where there is a difference in the options or presentation, this document shall be annotated. For consistency, functions for both solutions from this point forward shall reference CommView Web.

The typical system administrator is provided with an advanced user configuration. With this entitlement, you are able to request a large variety of reports, conveniently organized into libraries. You may also apply an extensive level of filtering to your report requests, in order to be very selective about the returned results of your query.

@Comm's CommView Web was created with a single prevailing guideline for its users: Make the data easy to find and easy to distribute. We hope your experience supports this overriding goal.

<u>What You Need</u>

Assuming that you have received a login ID and password to an operational and configured CommView Web service, all that you need is a computer that has Internet access with one of the following browsers: **Microsoft's Internet Explorer, Apple Safari, Mozilla Firefox or Google Chrome.** For best performance, high speed Internet access is preferred. It is also highly recommended that you have a current version of **Adobe's Acrobat Reader (free download)**.

Report recipients may benefit from ensuring that a properly configured email application is present on the workstation used to review reports as well as Microsoft Word, Microsoft Excel and Business Objects Crystal Reports Viewer 2011 (free download) for viewing reports sent by file.

<u>What You Should Remember</u>

@Comm's CommView Web runs on very efficient, secure, high-performance web servers scaled to your needs and applications. Likewise WebReporter utilizes the IT infrastructure you have devoted to this application. In order to get the most efficient use of the service please remember these easy guidelines:

1. **BE SELECTIVE** – Call Reports will be presented to you nearly instantly in most cases. Do everything you can to isolate the data you require by applying any of the filtering options available (and discussed in this guide.) This will optimize the performance of the system for your needs. In particular choose a date range that satisfies your requirements but does not

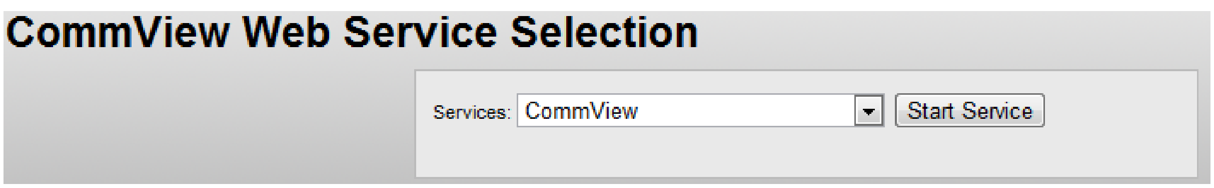
exceed them. For example don't ask for an entire year of data if all you require is the most recent month of data. ***Taking a few seconds to be selective may save you many minutes of time waiting for data you don't really care about***. Careful selection can reduce the number of rows or pages returned for some requests from millions to hundreds or even dozens.

2. **BE SECURE** – Remember to use the **Logout** option on the report screen to end your session when you are finished or are going to walk away from your desk for a while. This will prevent unauthorized use of your account as well as free up any concurrent seat licenses your company has subscribed to for this service. Session timeouts exist for this purpose but logging out is more secure and efficient. ***Your failure to logout may temporarily prevent another user in your company from gaining access to login***.

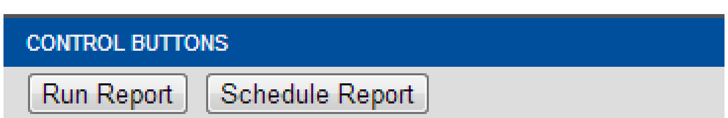
A QUICK GUIDE TO VIEWING REPORTS

In a few mouse clicks you can retrieve data from the CommView Web online database and view it on your screen through your web browser. Here's how:

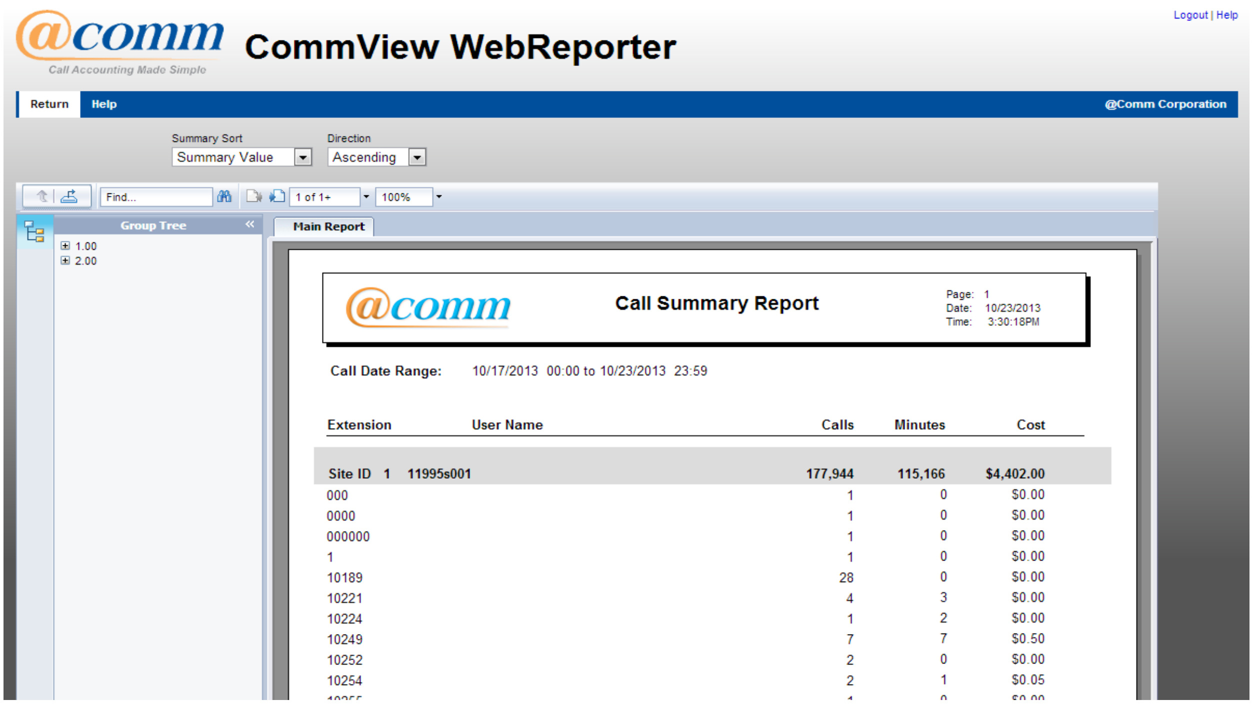
- Login to the CommView Web Service using your assigned User Name and Password. *(See Part II for more info on this.)* To start the CommView service click **Start Service**.



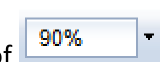
- Click the **Run Report** button. In a few seconds, you will be presented with a summary report with drill-down of all calls, organized by extension (Billing ID is default OuterSort) and date (default Inner Sort). The report contains all calls occurring within the past 7 days.



Below is a sample of the report you will see when you follow the instructions above:



You may use the scroll bar on the left side of the report to traverse the navigation tree showing various extensions with calls. Or, you may click on an extension number in the navigation tree on the left to immediately take you to that page in the report.

You may also change the viewing zoom option from the default of 

to some other value to adjust the size of the report page in your browser window.

Remember, each report option (summary, detail, org., special) is simply a different view of the same data you have selected. You may want to take a little time to experiment with each of these report options to become familiar with the various viewing formats available in CommView Web. This may help you be better prepared for responding to different report requests in the future.

REPORT MAIN TOOLBAR

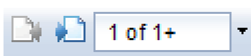
The toolbar at the top of all report viewer pages allows you to quickly achieve these functions:

Each toolbar icon is described below:

 Disable or Enable the Navigation Tree on the left side of the page

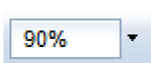
 Export report data to a variety of formats

 Traverse back up from a drilldown page



View a specific page number. The dropdown provides quick access to the first or last page of the report

Search for a specific page number, name or any text



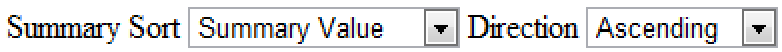
Change the viewing zoom option from the default of 90%

SUMMARY TOOLBAR

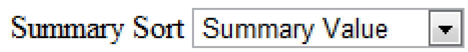
CommView Web has a special summary toolbar for manipulating the display of summary rows of data in the Summary Library of reports. You may now resort rows based on many of the available column headers in each report. For example, you may wish to resort the report by cost or by minutes in descending order.

NOTE: Each request of the summary toolbar is submitted to the web server as a new report request. Therefore the time required to present a resorted report does not differ from the original time it takes to present a report. Please be patient.

The summary tool bar is described below:

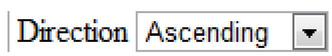


Choose Summary Sort Criteria

Choose the summary sort criteria from the drop down list: 

(Choices include: Summary Value, Summary Text, Call Count, Minutes, and Cost).

Choose Sort Direction

Choose the direction for sort: 

(Choices include: Summary Value, Summary Text, Call Count, Minutes, and Cost).

Sort Defaults

For you convenience, the summary toolbar uses these default values for sorting rows:

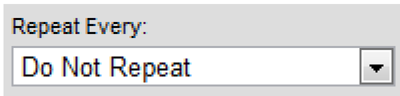
Summary Sort	**Default Sort**
Summary Value	Ascending
Summary Text	Ascending
Call Count	Descending
Minutes	Descending
Costs	Descending

SCHDEULED REPORT TIP

To schedule a report to appear in your e-mail inbox each day for the previous day's calls do the following:

- On the Report Menu, select E-Mail as the Report Output target. Enter your e-mail address. Separate e-mail addresses with a semi-colon. Select the Adobe PDF format as the output format.
- Select the report type you desire. (Be aware that summary reports delivered to e-mail as PDF, Word, Excel, RTF, will **not** have drill-down capabilities to detail. For drilldown, select Crystal Report Archive. Recipient will require Crystal Reports Viewer to be installed on viewing workstation.
- Select the desired OuterSort and InnerSort parameters.

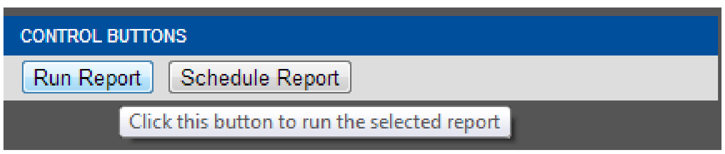
- Set the Start and End Date Range of the report to be the current date. If you would like a report on daily activity then <u>be sure to select only today's calls</u>.
- Click the 

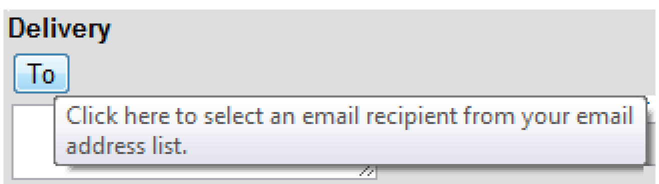
button to schedule this report. Assign a scheduled date of tomorrow at 6:00 am or whatever time you prefer. Be sure to assign an interval of 1 day to 

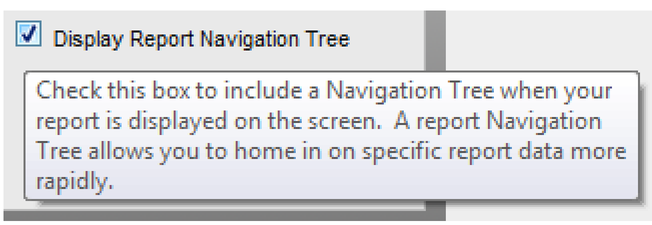
continue e-mailing the report each day.

A NOTE ON HELP

In addition to the help documents available online, be sure to use the bubble help to answer questions about any screen element of the CommView Web user interface. Just allow your mouse to hover over any object on the screen and you will soon see the bubble help associated with that object. This bubble help is used everywhere in CommView Web. Try it! Some examples are below:

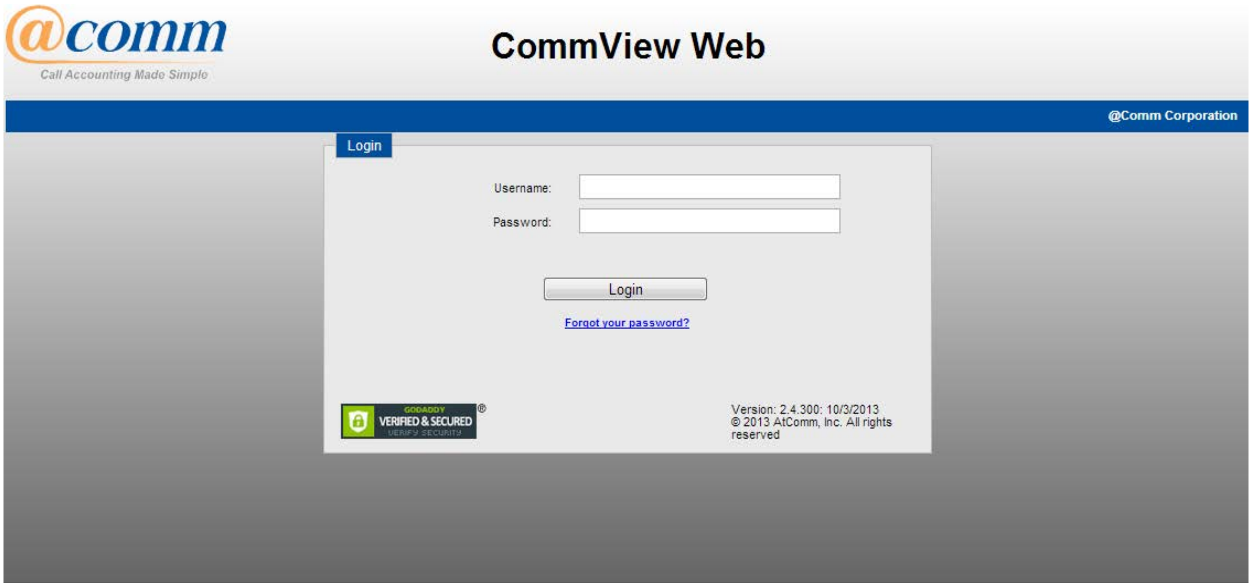




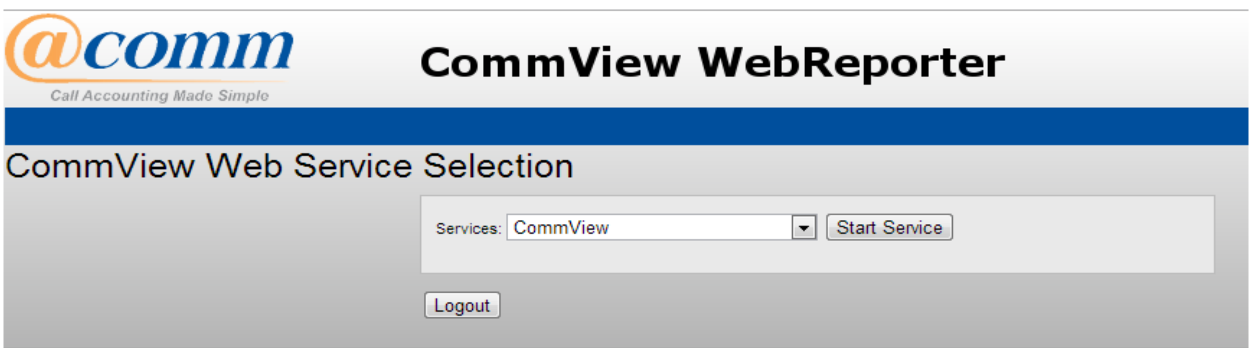


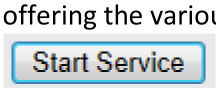
Part II – Login

By now you should have been provided with a URL (web address) and user name and password that allows you to access the service to produce reports.



Note: If you don't yet have a valid user name, check with your IT/Telecom administrator. If you are the IT/Telecom Administrator, please contact @Comm Technical Support at 603-628-3000.

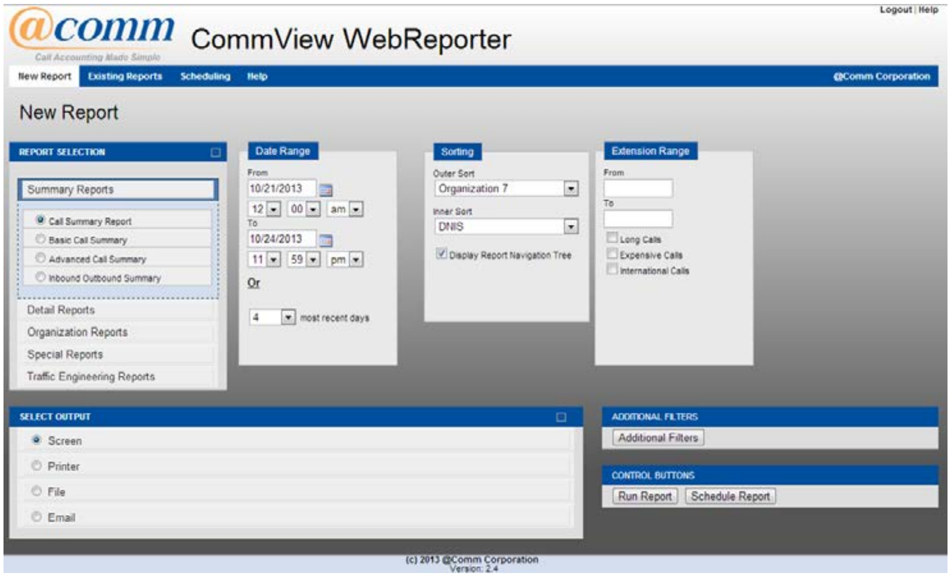


Once you have logged into the CommView Web Service, you will be presented with an option list offering the various services you are entitled to as part of your subscription and security level. Click 

to proceed to the CommView Web main report menu.

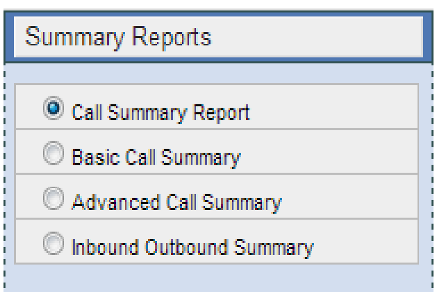
Part III – Reports To Screen

Below you will see the main Reports Menu for the CommView Web Service. Nearly all of your interaction with the service occurs from this single page. As an advanced user, you are presented with a number of Report Types (libraries) to select from. The report type will present data in different ways depending on your needs as a user.

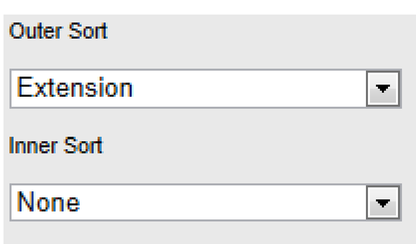


Here is a general breakdown of Report Library types:

Summary Reports



This is the main category displaying summarized data with drill-down capability. The default summary choice is the most expedient report (Call Summary Report). This report displays two levels of summary information on a single page. The summary information is determined based on the **OuterSort** and **InnerSort** parameters you assign. You may drilldown on either level of summary for further detail information.

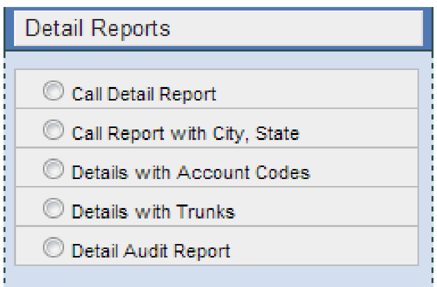


The default **OuterSort** is the extension or station number a call was made from or to. You can select a different OuterSort from the drop-down list. There are many choices to pick from. Feel free to experiment with this!

The default **InnerSort** is None. This means a value is already selected as the secondary sort criteria, based on the OuterSort identified. Typically, you do not need to select an InnerSort unless you have a specific secondary sort parameter in mind. Again, the list is extensive so feel free to try the options.

Note: WebReporter will remember the last OuterSort and InnerSort criteria you selected between report selections. This makes it easy for you to run multiple reports using the same selection criteria when you return to the same report request each time you login.

Detail Reports



This group of reports immediately displays the call detail, sorted and sub-totaled by the OuterSort and InnerSort criteria specified. Typically, the default detail report (Call Detail Report) presents the data in a format appropriate for most users. Other detail reports contain data that includes trunk information or account code information. The audit report format does not contain sub-total information and is therefore the most concise format if desired.

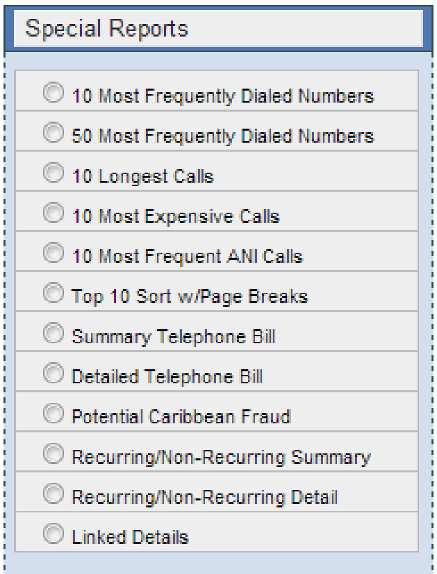
Note: Use the Detail Audit Report format for easy export of data to other popular formats such as Microsoft Excel.

Org Reports

The Organization group of reports presents data in a format that is specific to hierarchical organizational summarization (rolldown). Use these reports if you use an organizational hierarchy in your enterprise and need to see data accumulated by each level. The Unassigned Extension report identifies telephones that have not been assigned any organizational information by your administrator.

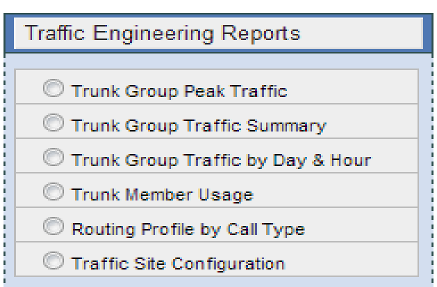
Note: The administrator at your location is responsible for providing @Comm with timely updates to the organization information associated with each extension. This includes each user's name as well as department/cost center information.

Special Reports



This group of reports contains many special types of call data presentation such as Most Frequently Dialed Number as well as Long or Costly calls. It is a good idea to try each of these reports with a small sample of data (1 or 2 days) to become familiar with them.

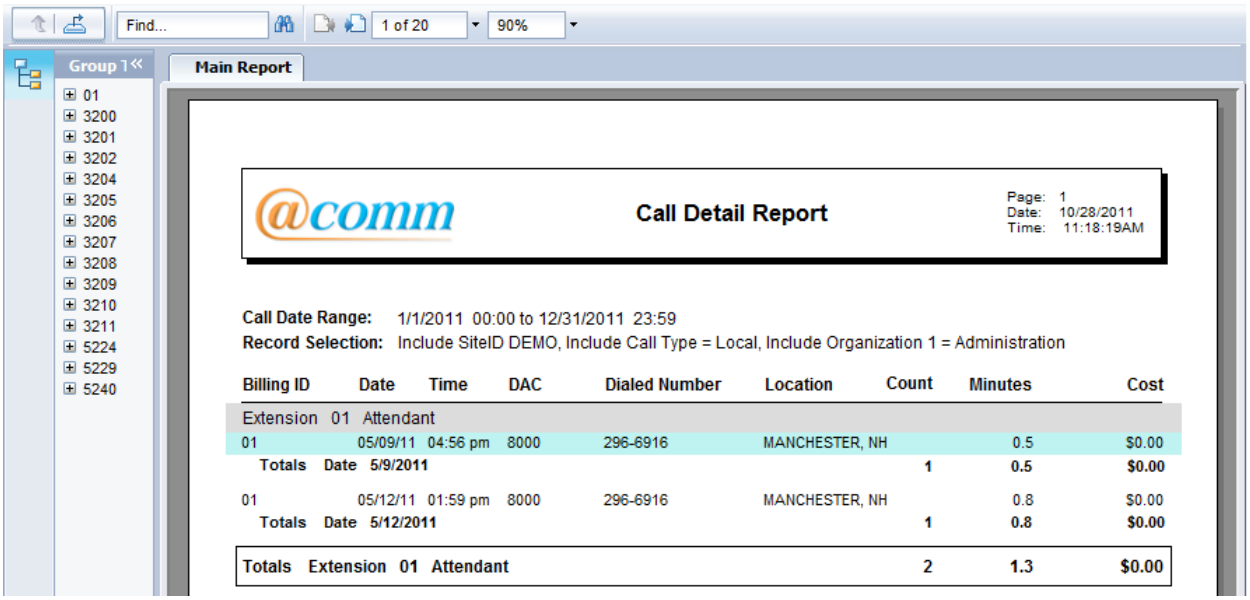
Traffic Reports



The traffic reports available in CommView Web Service can give your IT/Telecom group some very detailed and easy-to-read guidelines for optimizing the telephone network with the primary goals being those of improved service and reduced costs. This data is immediately available and requires no careful planning or study in advance!

Note: Traffic reports are available as a special option and may not be visible to all Advanced Users. In addition, traffic reports do not offer the additional filter option since they are specifically focused on trunk performance.

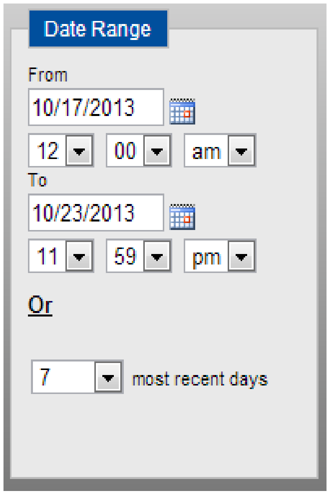
NOTE ON ALL REPORTS: Reports you run may have a security filter imposed on them by your administrator. If so, the selection criteria will be stated in each report header (on page 1) that you see. Below is an example:



The user has the **Record Selection** that restricts all reports he/she runs to be limited to SiteID = DEMO. In addition, the report requested had filter restrictions by the user to report on only local calls made from phones in the Administration department.

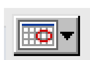
Part IV – Selecting Calls (Filters)

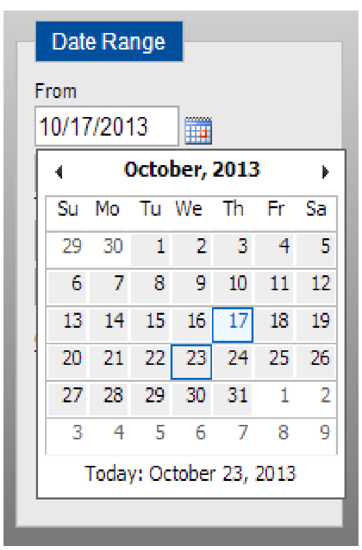
Select Calls by a Date Range (or most recent dates) the most common filter, or call selection criteria, used is date. CommView Web makes it easy to select a date or range of dates for any report.



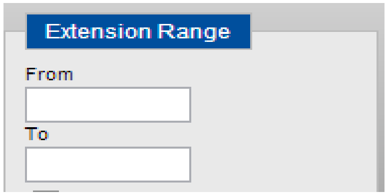
By default, calls from the most recent 7 days are selected to be included in a report. If you'd like to change this to include either additional or fewer days you can do so by:

Select The Most Recent Days Desired – This drop-down list makes it convenient to pick most recent data (1 day to 31 days)

Select The Specific Days – Either type in the dates you to select the date range or use the calendar icon  to select the date range (beginning date and ending date).



Select a Specific Extension – CommView Web makes it easy for you to isolate calls from or to a specific extension, or range of extensions.

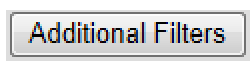


To select a specific extension, just enter the extension value once. To request a range of extensions, enter the beginning and ending values.

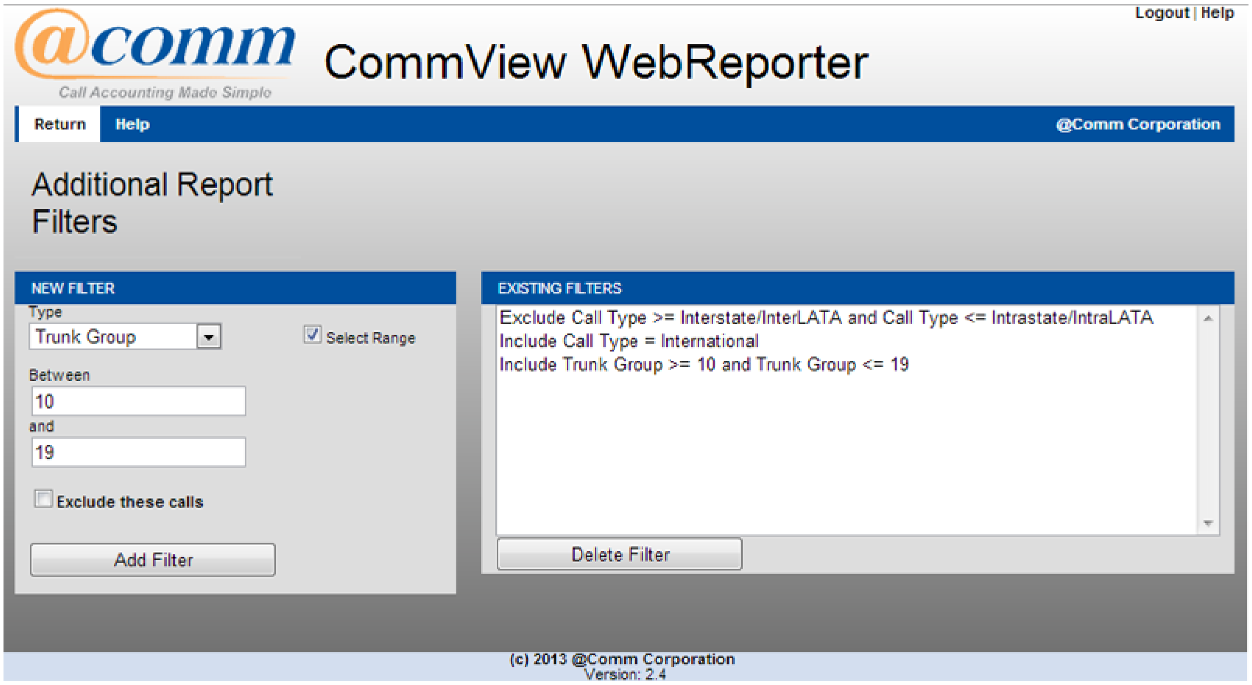
Select Exceptional Calls – CommView Web can quickly extract calls from the database that are exceptionally long, costly or international.

Check the appropriate categories for your needs. Be aware that checking **Long** and **Expensive** calls results in either condition being satisfied. Checking **International Calls** excludes all non-international calls from the resulting report.

Select Calls by other Criteria (Filters)

Click on the **Additional Filters** button: 

You will be presented with a screen to assign as many filters as you require.



The example above is selecting only long distance and international calls over a particular trunk group range. Try experimenting with these filters to isolate call information in reports. This makes reports much easier and faster to read!

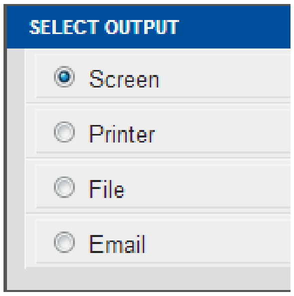
Note: To delete a filter, select the filter by marking it with your mouse, then click the Delete Filter button.

Part V – Reports to Other Output Media (File or E-Mail)

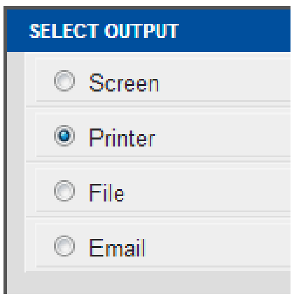
By default, reports are output to your screen. However, you may desire to save some report information for later use as either a file or as an e-mail sent to yourself and/or others.

Reports are sent to your browser window by default (Screen). Click the Run Report to present the report on your browser screen.

The Report Output section of the Report Menu looks like this:

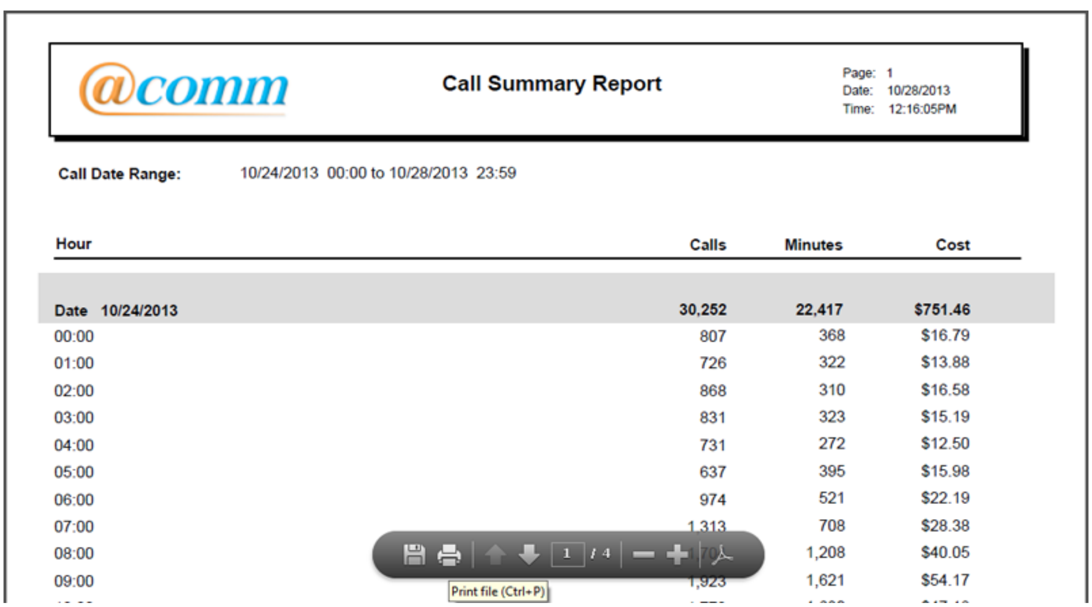


Reports to Printer



In order to allow you to efficiently print some or all of a report, WebReporter temporarily outputs the report to an Adobe PDF format, which is then presented in your Adobe Reader Choose the printer option above and click Run Report

You will be presented with a message indicating that a printer friendly version of the report is being created. You will then see the report presented as a popup in the Adobe Acrobat Reader as shown below:



Call Summary Report

Page: 1
Date: 10/28/2013
Time: 12:16:05PM

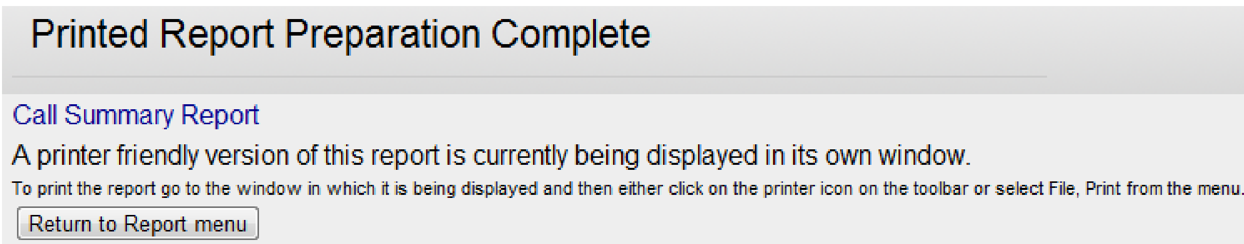
Call Date Range: 10/24/2013 00:00 to 10/28/2013 23:59

Hour	Calls	Minutes	Cost
Date 10/24/2013	**30,252**	**22,417**	**$751.46**
00:00	807	368	$16.79
01:00	726	322	$13.88
02:00	868	310	$16.58
03:00	831	323	$15.19
04:00	731	272	$12.50
05:00	637	395	$15.98
06:00	974	521	$22.19
07:00	1,313	708	$28.38
08:00	[illegible]	1,208	$40.05
09:00	1,923	1,621	$54.17

To print the report, click the icon in the Adobe Acrobat Reader toolbar. You will then be able to easily format and print some or all of the pages desired.

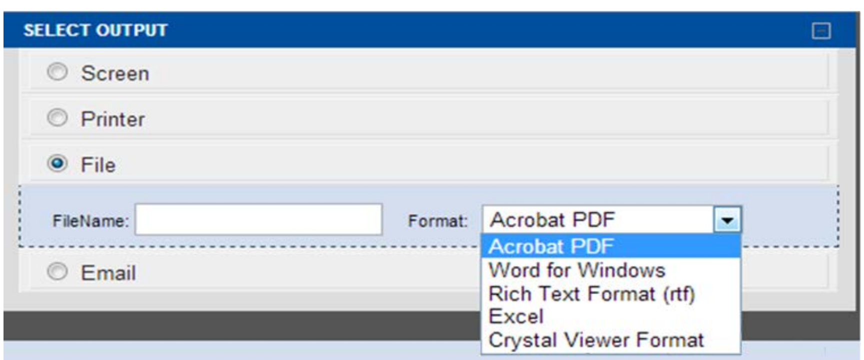
Note: You may also save the report. Close the Acrobat Reader window when you are finished.

The browser window you came from will now show this information:



Click Return to Report menu when you are ready for other reports.

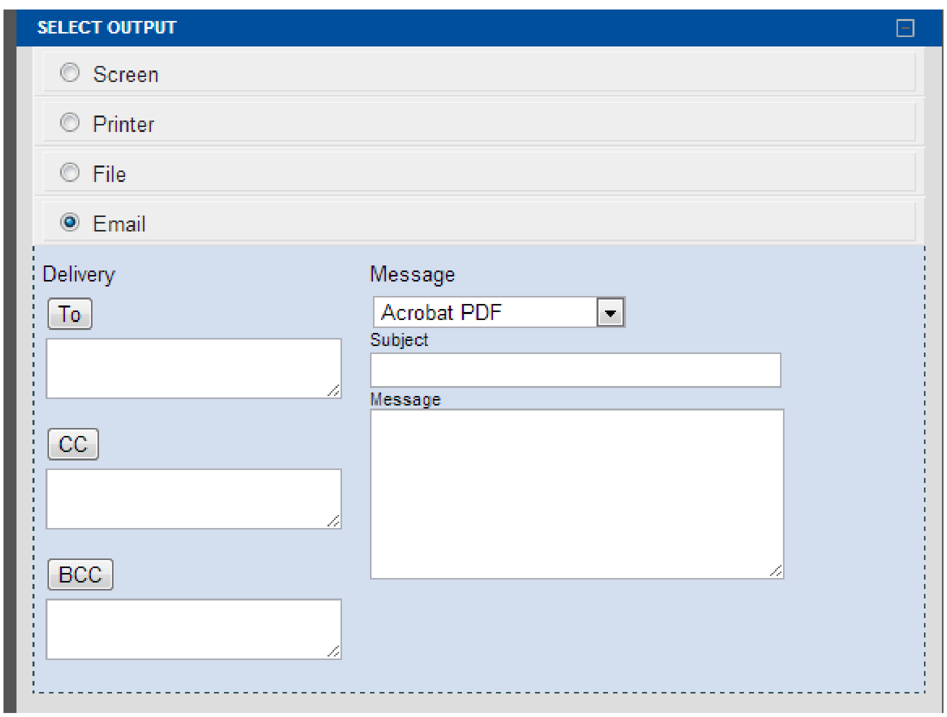
Reports to File - Choose this option if you'd like to save report content for later browsing. (Remember you can always request the same report later if you don't save it as a file.)



Name the report file with some meaningful name. You cannot use the same name in different reports. Reports are saved to the CommView Web server for easy retrieval at another time from any PC you choose to use to login to CommView Web from. This allows you to view saved reports from anywhere in the world! The report format has several options:

- **Acrobat (PDF)** – This default format is especially good for printing reports. You will need the Acrobat Viewer 6.0 or greater to browse reports saved in this format. If you don't have this viewer, you can download and install it from the website www.Adobe.com for free.
- **Crystal Archive Format (RPT)** – This format allows you to preserve the drilldown capabilities in summary reports. The data is represented in a browser window identical to your original report. Choose this format especially when you want to save summary reports, otherwise the drill-down will not be preserved. For viewing a file in the Crystal Archive Format, you will need the Crystal Report Viewer installed on the workstation that you are choosing to view the file. If you do not have this free viewer, you can download and install it from your CommView Web login page.
- **Word For Windows (DOC)** – You may save reports in the Microsoft Word format if desired. This may be useful for sharing this data with others in your enterprise. Some additional formatting may be required. If you are just going to print data, the PDF format is recommended over Word format.
- **Excel (XLS)** – The popular Microsoft worksheet format may be useful for identifying call detail information or exporting this data to another system for some other use. The Call Detail Audit report format is especially useful for exporting rows of data only in this format for use in other applications.
- **Rich Text Format (RTF)** – This standard document format may be elected for use over Word for Windows. RTF documents can be read by Microsoft Word.

Reports to Email

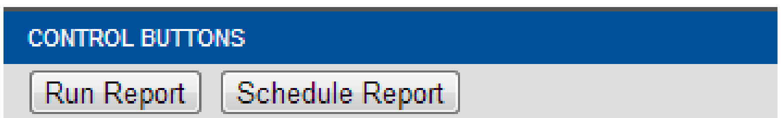


Select this option to deliver CommView Web reports to any number of e-mail addresses. You can copy (CC) or blind copy (BCC) additional addresses. Include a meaningful Subject. Optionally you may include a message that will be delivered with the attached report information.

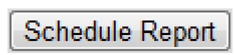
For optimum readability and security, it is recommended that you use the Acrobat PDF format for sending e-mail reports. Remember, drilldown is not provided in this format. If your organization or enterprise wishes to make full use of drilldown reports as shared documents, you may install Crystal Reports Viewer for each user requiring this reader.

Note: The format options of the e-mailed reports are similar to the file reports described above (Acrobat PDF, Word, Excel, RTF).

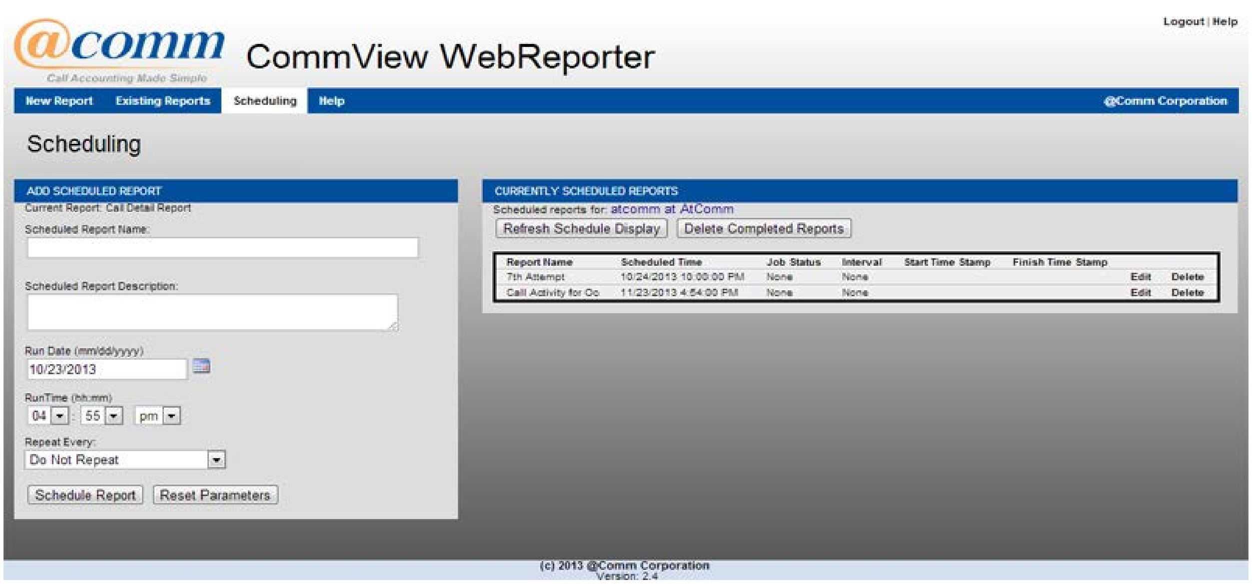
Part VI – Scheduling Reports



Click **Schedule Report** button to schedule the current report definition for a single or repeated execution.

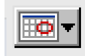
Once you have defined a report for either File or Email output, click the 

button. You'll see the scheduler screen below.



To schedule a report, complete the following information:

- **Scheduled Report Name** – Fill in this data field with a meaningful name. It will be used as the report title in the exported report as well as the referenced name in the scheduler task list.

- **Scheduled Report Description** – Enter a report description if desired. This can be useful for clarifying report types.
- **Run Date (mm/dd/yyyy)** – Enter a valid date for initiating the report. This must be the current date and time or later. You can click on the calendar icon if you like to pick the date 
- **Run Time (hh:mm)** – Enter a valid time for initiating the report.
- **Repeat Every** – Select the period for repeating the scheduled report. This is very useful if you want to receive e-mail reports say, every morning or every evening. You can schedule reports to repeat on a daily, weekly or monthly basis. Leave this selection to None to run the report only once.

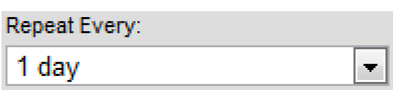
Schedule Report After filling in the information above, click the Schedule Report button to add the report to the scheduled report task list.

Reset Parameters Use the Reset button to reset all data values on this screen to their default value. You can easily begin scheduling over again after clicking reset.

New Report Click New Report link in the menu bar after you have finished scheduling the report.

Tip: The easiest way to schedule a report to appear in your e-mail inbox each day for the previous day's calls is to follow these steps:

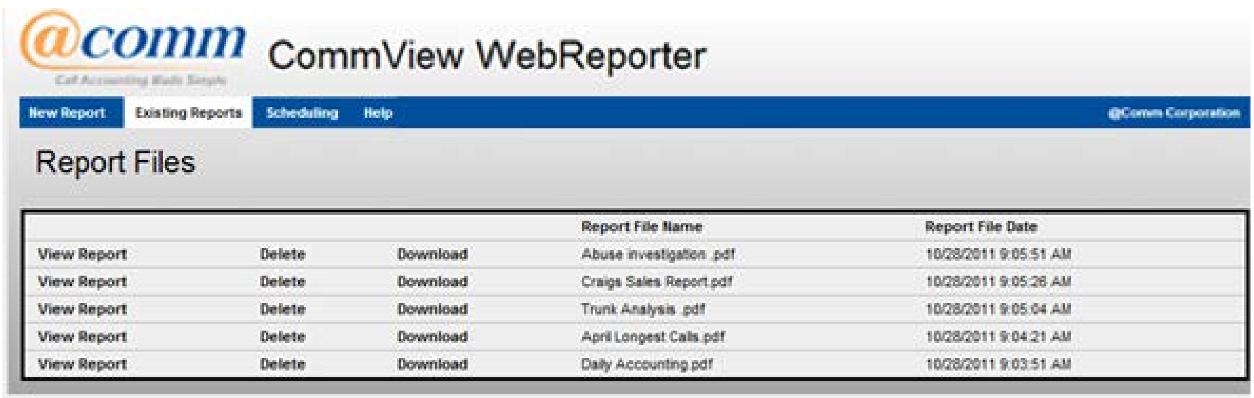
- On the Report Menu, select E-Mail as the Report Output target. Enter your e-mail address. For multiple recipients, separate e-mail addresses with a semi-colon. Select the Adobe PDF format as the output format. (recommended so that recipient may view report using Acrobat Viewer)
- Select the report type you desire. (Be aware that summary reports delivered to e-mail as PDF, Word, Excel, RTF, will not have drill-down capabilities to detail. If you require detail information, choose a Crystal report type.)
- Select the desired OuterSort and InnerSort parameters.
- Set the Start and End Date Range of the report to be the current period. If you would like a report on daily activity then be sure to select only today's calls.
- Click the Schedule Report button to schedule this report. Assign a scheduled date of tomorrow at 6:00 am or whatever time you prefer. Be sure to assign an interval of 1 day to continue e-mailing the report each day.



Part VII – How to View Reports Saved To File

Click Existing Reports in the top level menu to review all reports saved to file.

You'll see a catalog of all the reports you have saved to file. Below is an example catalog:



			Report File Name	Report File Date
View Report	Delete	Download	Abuse investigation .pdf	10/28/2011 9:05:51 AM
View Report	Delete	Download	Craigs Sales Report.pdf	10/28/2011 9:05:26 AM
View Report	Delete	Download	Trunk Analysis .pdf	10/28/2011 9:05:04 AM
View Report	Delete	Download	April Longest Calls.pdf	10/28/2011 9:04:21 AM
View Report	Delete	Download	Daily Accounting.pdf	10/28/2011 9:03:51 AM

You may sort the list of reports by either clicking on the **Report File Name** column header, or on the **Report File Date** header. Click the same column header again to toggle between ascending and descending views of the report list.

You may click the **View Report** option to present the data on your screen. The proper viewer will be used to present the data depending on the format that was chosen when the report was saved. Here are the relationships between report names and their proper viewer:

.xls	Microsoft Excel
.pdf	Acrobat Reader
.rpt	Crystal Report Archive
.doc	Microsoft Word
.rft	Microsoft Word

Note: Only files saved in the Crystal Archive Format (.rpt) will retain drill-down capabilities. It is suggested that you purge (delete) any reports that contain aged data you no longer need to retrieve. This will help simplify the organization of your saved reports.

Click **Delete** to permanently remove a saved report from your catalog.

You may also click **Delete** or **Download** either to delete a specific report from the server or to download a local copy for your own use later.

Part VIII – How to View Scheduled Reports

Click on **Scheduling** on the top level menu to view all scheduled and completed reports.

You will then see all of the reports that are currently scheduled and completed. Below is an example of 2 scheduled reports (Pending) and 1 completed report (Complete).

You can delete a scheduled or completed report from the task list by clicking the **Delete** option at the end of the report row.

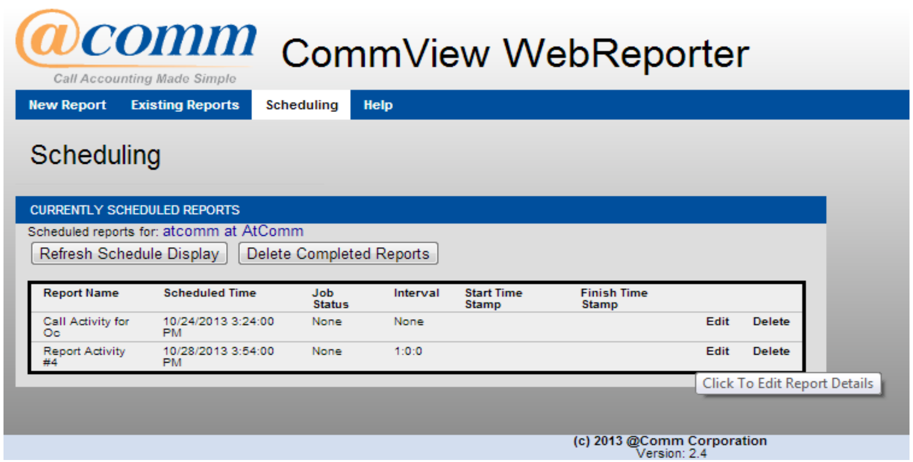
Note: The report schedule may need to be refreshed if a report has run while you are looking at the screen above. This can be required to see updates to the job status on reports that have been while the screen is displayed. Click Refresh Schedule Display the button to update the schedule screen.

It is suggested that you periodically delete reports that have been completed from your schedule list. Completed tasks only serve the purpose of confirming that a scheduled task has been run. Click the Delete Completed Reports button to clear the tasks that are *Completed* from the schedule list. This action does not affect any data you may have saved or e-mailed.

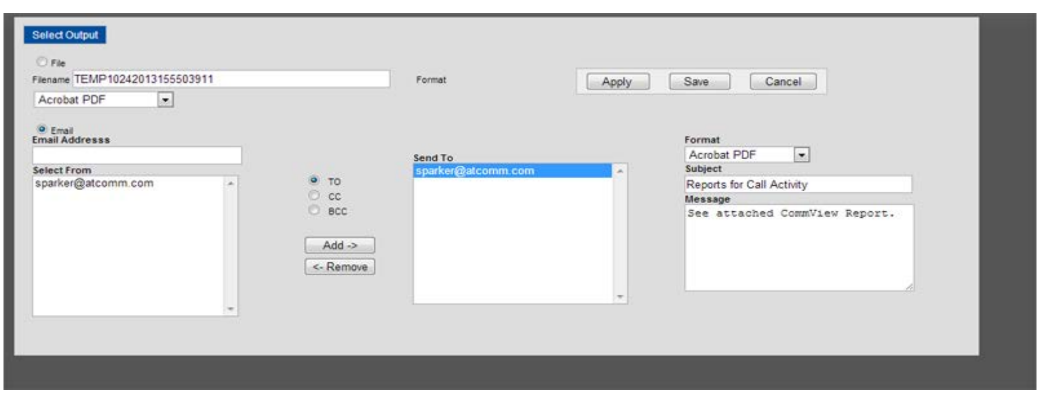
Part IX – How to Edit Scheduled Reports

- **Changing Recipient Information**

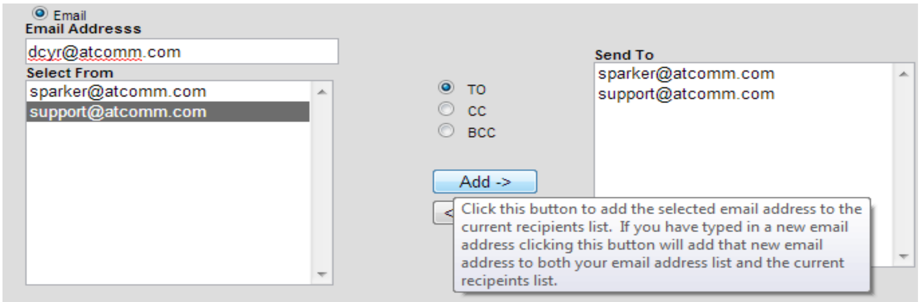
Once you have your report scheduled, you can go back into the existing scheduled reports and change the email recipients. If you are in the scheduling tab you will see the Edit option to the left of the delete option.



When you click the **edit** option you will see the following screen. This gives the user the ability to add/edit or delete existing recipients.

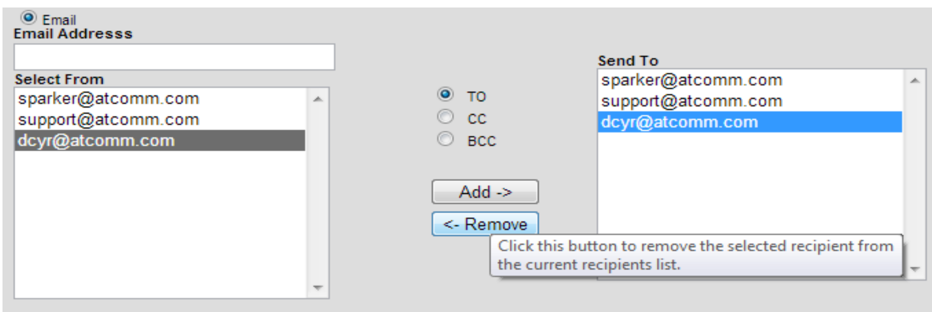


- To add recipients, simply type the recipient email in the email address field select the mail send type (TO, CC or BCC) and select Add -> from the controls to the right.

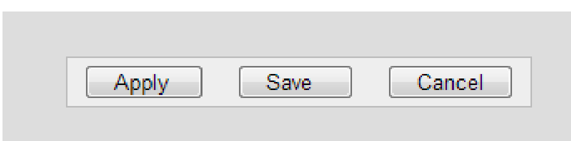


- Your new recipient is now added and will be shown in the Send To box.

- To remove recipients, simply highlight the Send To email address or addresses and click <- Remove.

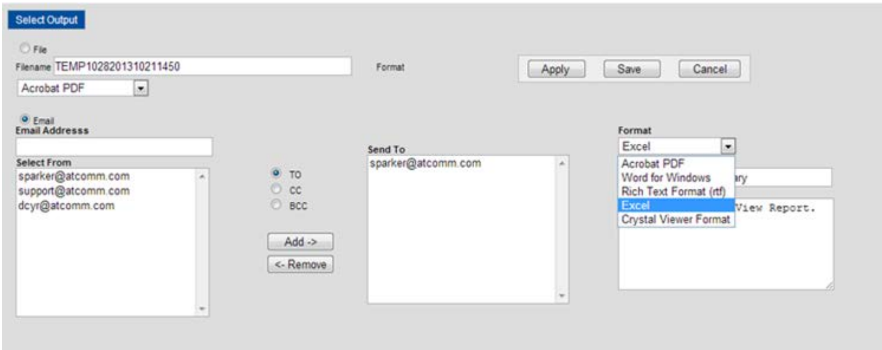


Once you have made your changes, select **apply** then **save** to save the changes.

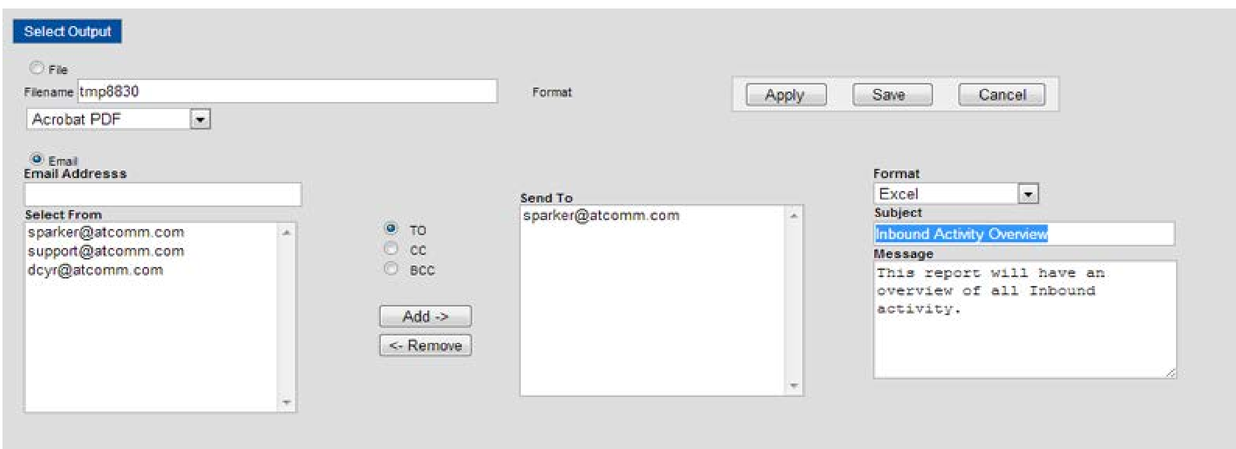


Upon saving, the screen will default back to the scheduling tab. This will allow you to make additional adjustments to other existing scheduled reports if needed.

- **Changing File Format, Subject and Message Detail**



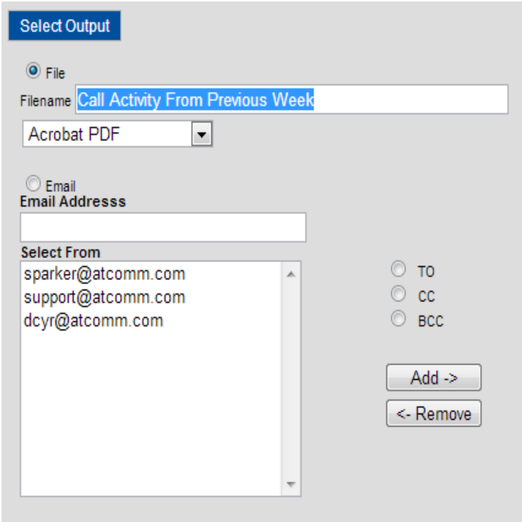
Once in edit mode, the user also has the ability to change format types if needed. The same goes for **Subject** and **Message** fields as seen below.



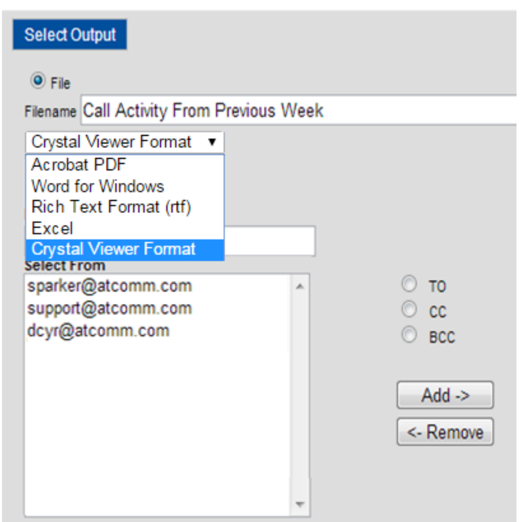
- **Changing Selected Output**

To change output type to **File** instead of **Email**, simply choose the File option instead of the Email option. The same goes for any user that wants to choose the email option vs. the file option.

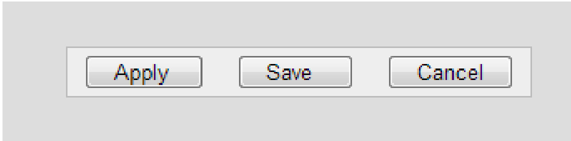
The user has the option to keep the temp name provided by default or can rename Filename if desired as seen below.



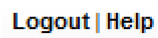
Once a file name has been designated the user can also change file type by selecting a preferred format type as seen below.



Once an option has been selected the user can simply click **apply** and then **save** to save the changes. These changes will now reflect the scheduled report selected.



Part X – Logging Out



Click the **Logout link** at the top right of the screen to end your session.

It is advised that you always logout from your session as a security precaution. It is also the best way to efficiently manage the number of concurrent seats your company is licensed to use on the online hosted service.

If you don’t logout of your session you will eventually be timed-out by the web server. This will force you to login again, regardless of what page your browser was left on. A message on the login screen will indicate your last session timed-out.