Vodafone Billing Analytics - User Guide

Vodafone UK LTD

Table of Contents

1. **Introduction**

Billing Analytics module helps the user in analyzing their bills. The enterprise user can view the bill, analyze the bill and easily manage out of bundle and reoccurring data and generate reports in both text and graphical formats to gain insights and to better understand the usage details across accounts and across historical invoices.

The Billing Analytics module contains in-built features to depict the trend analysis and display usage patterns in a group of accounts.

The Billing Analytics module generates several reports in both graphical and tabular formats to view usage details.

2. Logging to the Application

To login into the application:

✓ In a web browser, enter the **e-care/ iServe** application URL

The **e-care login** screen appears:

✓ Enter the **Username**, the **eCare** login **–** managed by Vodafone

✓ Enter the **Password** in the respective text box

The Account Info can be either

♦ From e-care site

♦ From iServe site

✓ Click **Go to next step**

The **Account summary** screen appears:
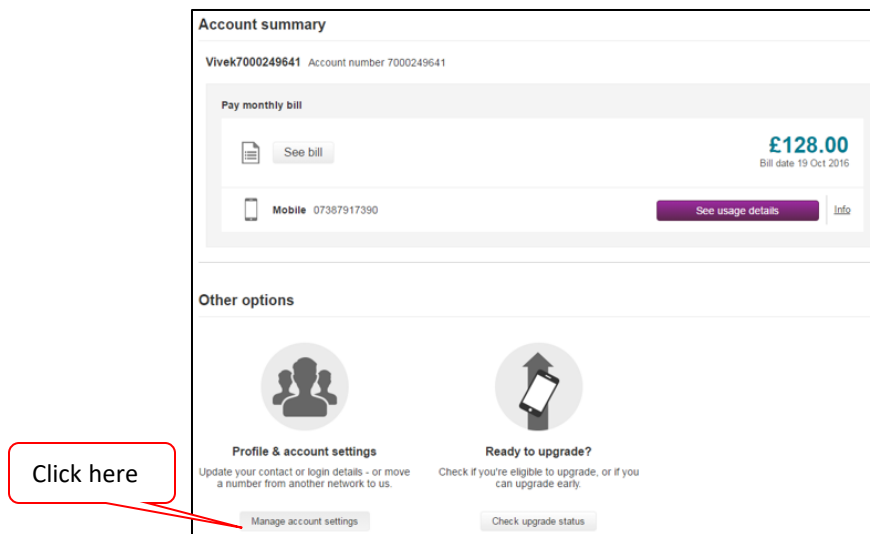
Click here

Figure.2:   Account summary

✓   Click on **Manage account settings**

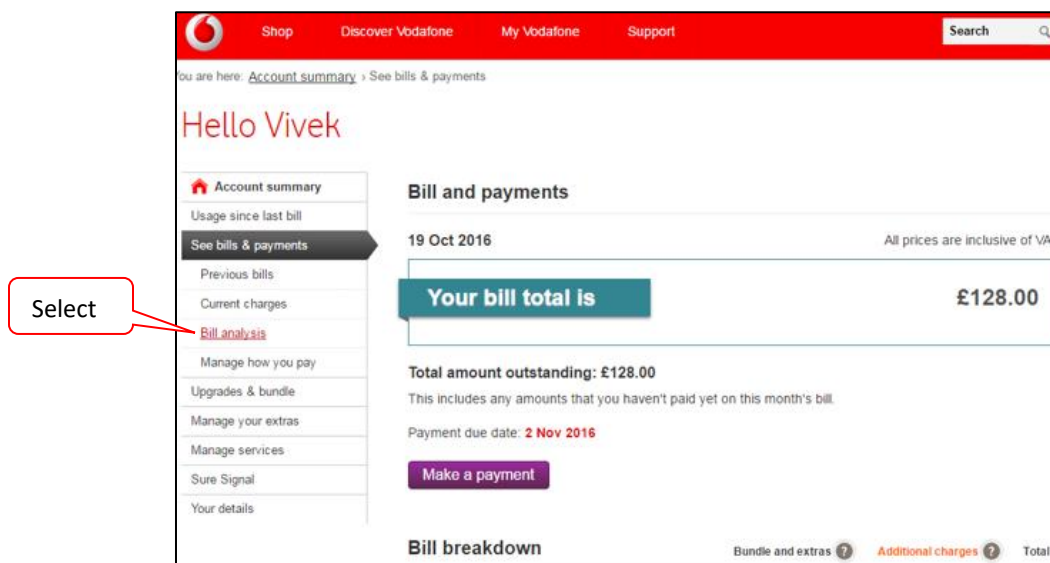   **The Bills and payments** screen appears:

Select

Figure.3:   Bills and payments

✓   Click on **See bills & Payments | Bill analysis**

    Upon landing on **Billing Analytics** screen, the interface contains the following modules:

♦   Dashboard

♦   Reports

♦   Manager

♦   Administration

3. Working with the Dashboard

Upon successful **Login** to the Vodafone application, you are navigated to the Billing Analytics interface. The Dashboard[1] is the default landing page of the application and allows you to view the account billing details for a selected view point [2] and time interval, the dashboard provides a graphical representation of out of bundle [3] and reoccurring[4] charge details. From the list of accounts, you can view the top spender [5] and top deviations [6] occurred.

The dashboard provides the following details for selected account or view point:

- You can view the Last Invoice Summary
- For selected period, in graphical representation, you can view the Invoice trends [7] graph
- You can view the account history details
- In graphical representation, you can view the summary of out of bundle and reoccurring details
- Details of Top Spenders and Top Deviations occurred

---

[1] Default landing page of the application

[2] Works as a report filter to view the data for specific set of user created accounts

[3] Non-usage billing charges

[4] Usage billing charges

[5] Highest total charges incurred by an account

[6] Total charges incurred vary every month

[7] Compare and analyze the history of billing charges
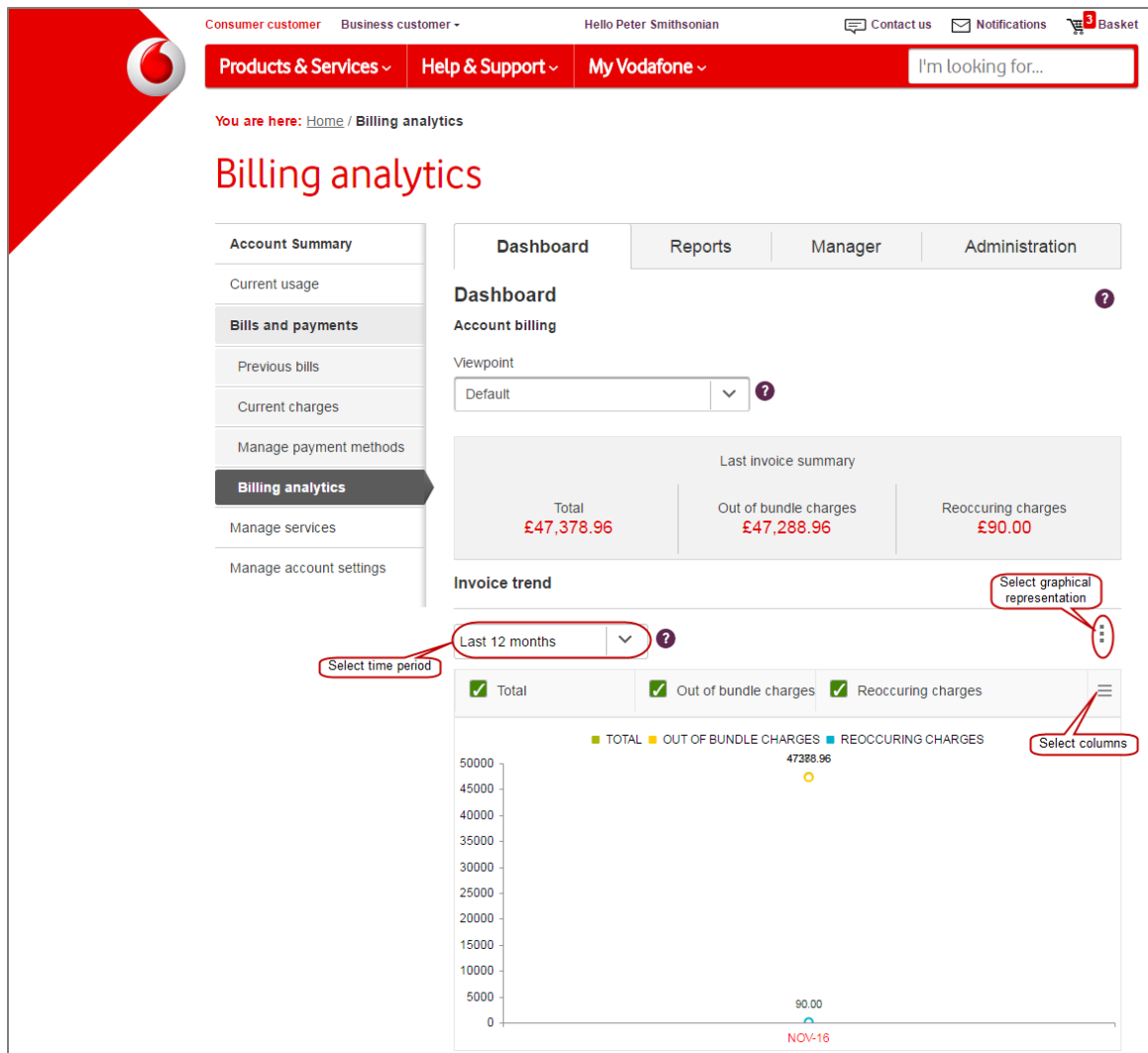
Figure.4:   Dashboard - Account Billing

☛   In the Dashboard, click on 🔮 icon to view the field information.

✓   From Viewpoint drop-down list, select the account

The account details are displayed in **Last Invoice Summary** (*displays the last generated statement details*)

Last Invoice Summary displays the following details:

♦   Total charges

♦   Out of bundle charges

♦   Reoccurring charges

☛   Please note the **Last invoice summary** details are non-editable**.**

◆ **Invoice trend**

☛ Please note the **Invoice trend** graph helps you to compare and analyze the billing charges based on the **Out of bundle**, **Reoccurring**, **Data volume**, and **Number of calls**.
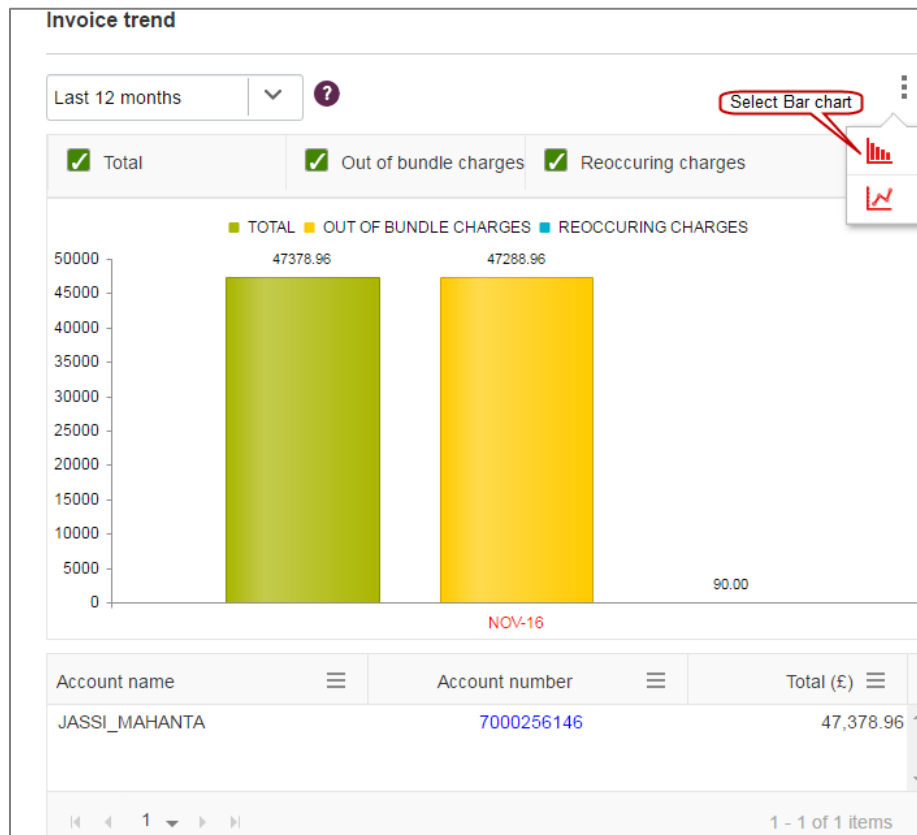
Figure.5: Invoice trend

✓ Click ⋮ icon, to select graphical representation

✓ For selected period, you can view the trends by default in **Line Chart** or if required select the **Bar chart** representation

✓ To view the trends in Invoice generated, from the drop-down list, select the required month(s).

☛ Please note you can select only **1 to 12 months**, else displays a warning message.

You can view the invoice trend graph, by selecting following time intervals:

◆ This calendar month

◆ Last month

◆ Last 3 months

- Last 6 months

- Last 12 months

- In **Pick a date range** option, select the time interval and click **Submit**

- In **Pick number of months** option, select the number of months and click **Submit**

☞ Please note you can select only **1 to 12 months**.

✓ For selected period, generates the **Invoice trend** graph

✓ Click ≡ icon, to select different parameters to display the graph

Following parameters are available to generate the graph:

- Out of bundle charges

- Reoccurring charges

- Data volume

- Number of calls

- Total charges

✓ In a grid, you can view the account statement which contains **Account name**, **Account number**, and **Total charges**

☞ Please note

☞ 1).The details available in the grid are associated to login, if you login with **single account**, then you can view the details pertaining to single account.

☞ 2) At the time of login, if you login with **multiple accounts** (*use the pipe symbol (||) to separate accounts*), then all the account details are listed down.

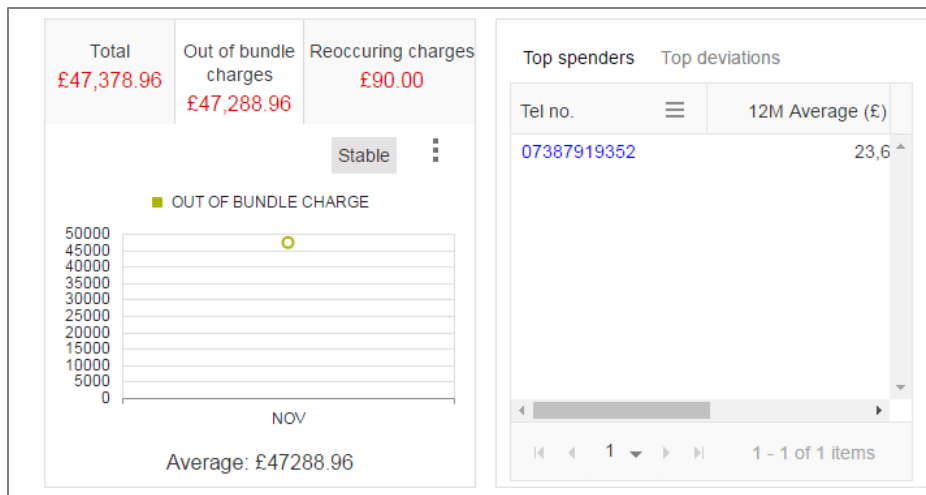The **Dashboard** displays the following details:

Figure.6:   Dashboard – Account billing

✓ In the dashboard, you can view the **total charges, Out of bundle charges**, and **reoccurring charges** incurred for selected account

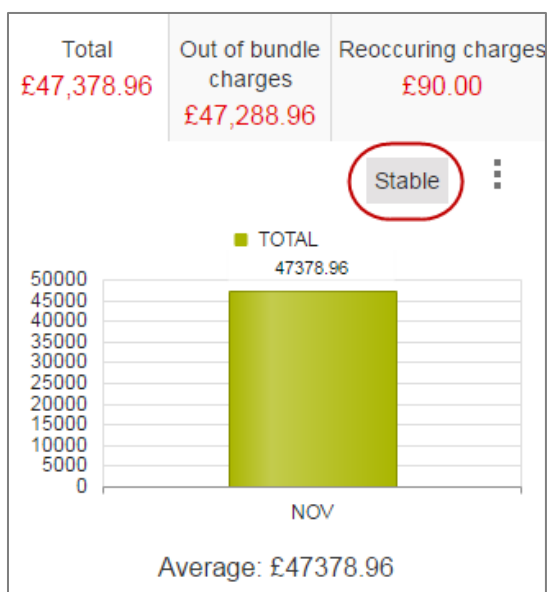The details are displayed in graphical representation as shown below:

Figure.7:   Total charges

✓ The graph displays the total charges during the selected period

☛ Please note if the graph has no fluctuations, displays as **stable** else displays **unstable**.
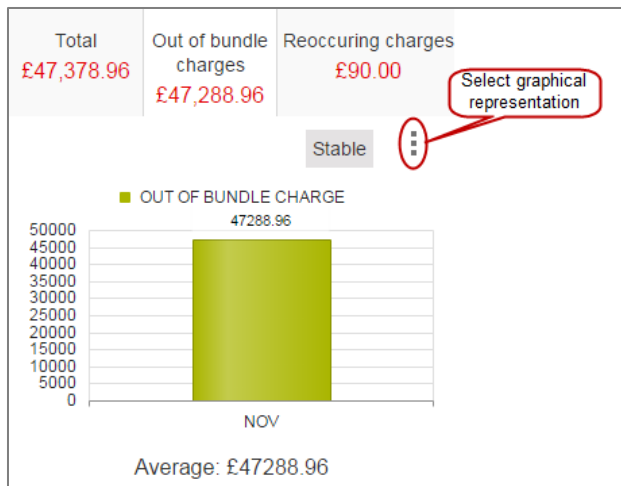
Figure.8:   Out of bundle charges

The graph displays the out of bundle charges for selected period

✔ Click icon, to view the details in bar chart representation

✔ Click icon, to view the details in pie chart representation

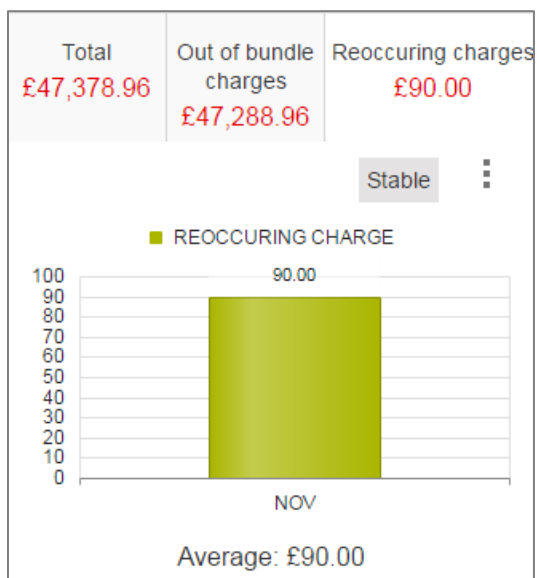✔ Click icon, to view the details in line chart representation

Figure.9:   Reoccurring charges

✔ The chart displays the reoccurring charges for selected period

   ♦ **Top spenders**

The report displays the account details of top spenders (*highest total charges*)

Figure.10:   Top spenders

Following top spenders account details are displayed

♦   Telephone number

♦   12 months average charges

♦   Current month charges

♦   Action

✓   By sorting, selecting and filtering the data, you can view the details of top spenders

♦   Sort Ascending - you can sort the list in ascending order (A to Z)

♦   Sort Descending - you can sort the list in descending order (Z to A)

♦   Columns - you can make a selection from available fields and view the details of top spenders

♦   Filter - you can set range value and view the details of top spenders

♦   **Top deviations**

If the total charges vary every month, those account details are displayed in top deviations report.

Figure.11:   Top deviations

Displays the following top deviations account details:

♦   Telephone number

♦   Current month charges

♦   Previous month charges

♦   Difference : Difference between the current and previous month charges

♦   Action

✓   By sorting, selecting and filtering the data, you can view the top deviations occurred report

    ♦   Sort Ascending - you can sort the list in ascending order (A to Z)

    ♦   Sort Descending - you can sort the list in descending order (Z to A)

    ♦   Columns - you can make a selection from available fields and view the top deviations occurred

    ♦   Filter - you can set range value and view the top deviations occurred

✓   Either in **Top spenders** or **Top deviations** grid, click on **Telephone number**, now you are navigated to **Telephone number** screen:
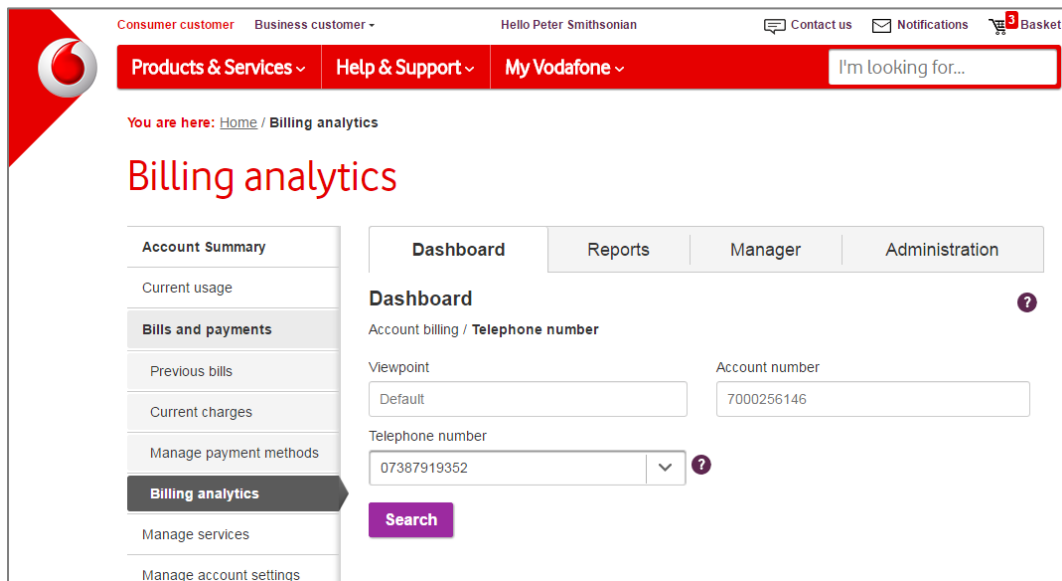

Figure.12:   Dashboard – Telephone number

The dashboard provides the following details:

    ♦   For selected telephone number, in graphical representation, you can view the spent charges details

    ♦   Summary of Out of bundle and reoccurring details

    ♦   Search the existing telephone number usage details

    ♦   Graphical representation of account usage details

    ♦   Viewing the usage details report

✓   The **Viewpoint** and **Account Number** details are auto-populated and non-editable

✓   From the **Telephone number** drop-down list, select the required number

☛   Please note the telephone numbers pertaining to that particular account are listed down.

✓   Click **Search**

In graphical representation, displays the summary of out of bundle and reoccurring charges for selected telephone number.

✓   From the drop-down list, select the **Type of usage**

◆   Overall spend

◆   Reoccurring charges

◆   Out of bundle

◆   **Overall spend report**

You can filter the data and generate the graph, based on following columns:

◆   Total

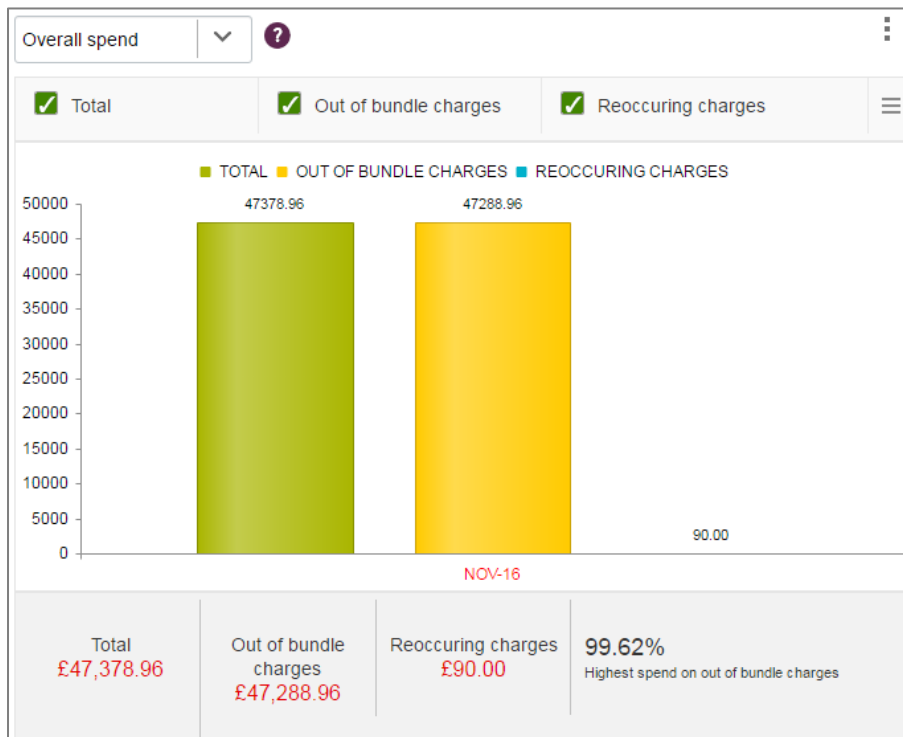◆   Out of bundle charges

◆   Reoccurring charges

Figure.13:   Overall spend charges

☛ Please note for selected **usage type**, you can view the trends by default in **Line Chart** representation or if required select the **Bar Chart** representation.

♦ **Reoccurring charges report**

You can filter the data and generate the graph, based on following columns:
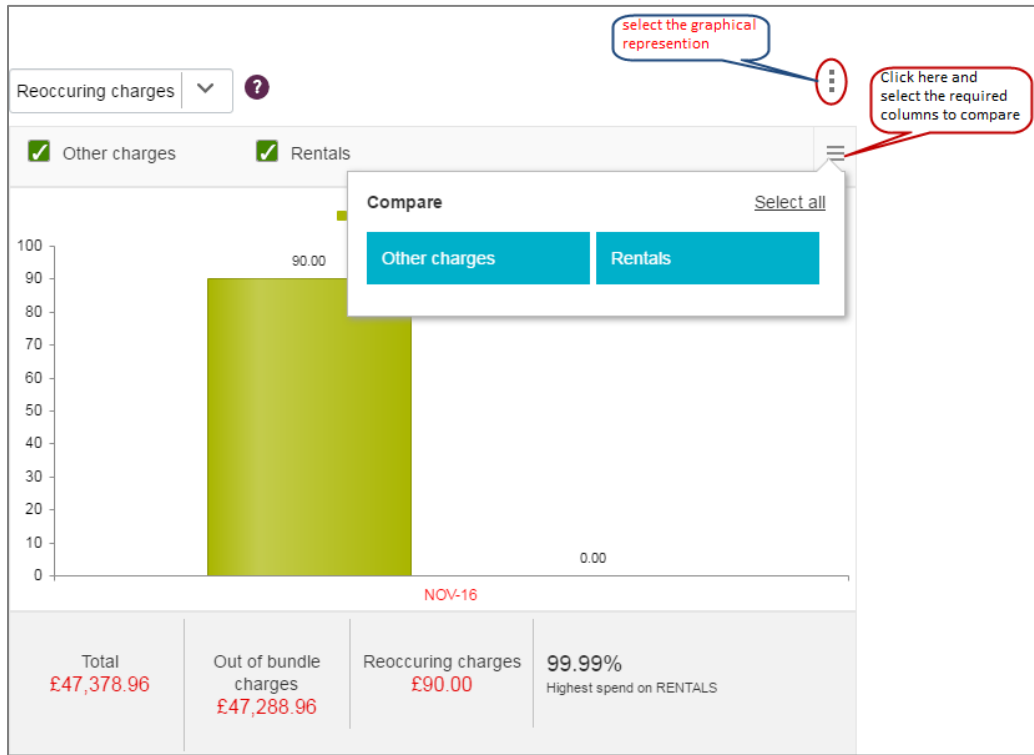
♦ Rentals

♦ Other charges

Figure.14:   Reoccurring charges

♦ **Out of bundle charges report**

✓ Click ≡ icon, to select different parameters to display the graph

You can filter the data and generate the graph, based on following columns:

♦ National Voice

♦ Roaming Voice

♦ International Voice

♦ Special Number (Beginning 08-09)

♦ Premium Voice

- ◆ National SMS

- ◆ Roaming SMS

- ◆ International SMS

- ◆ Premium SMS

- ◆ National Data

- ◆ Roaming Data

- ◆ MMS

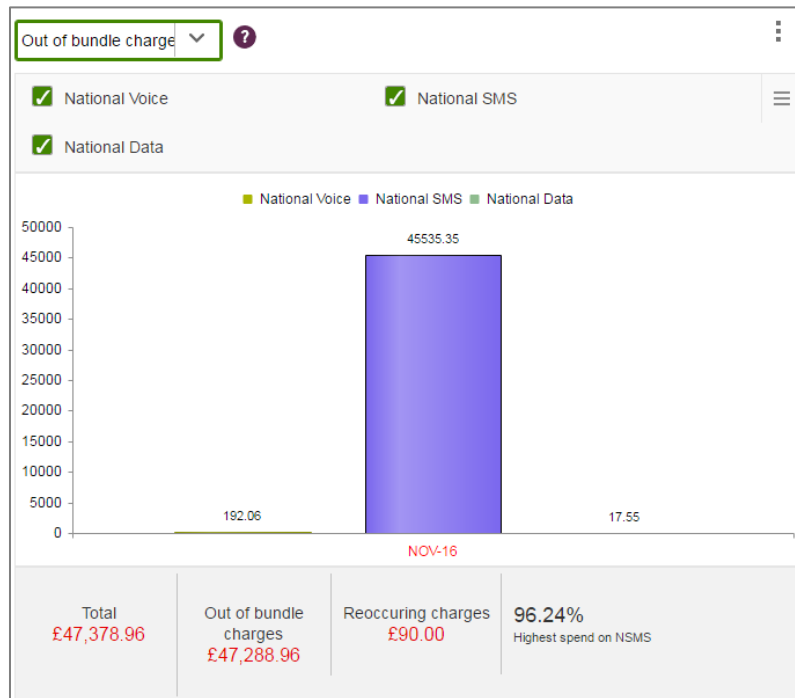- ◆ Purchases and Charity donations

- ◆ Company to company

Figure.15:   Out of bundle charges

✓ For selected telephone number, the graph is generated

✓ Click ⋮ icon, to select the graphical representation

✓ Click ≡ icon, to select different parameters to display the graph

Below the graph, in a grid, you can view **Total charges, Out of bundle Charges**, **Reoccurring Charges**, and percentage of **Highest spend on usage charges.**

☞ Please note the usage details are non-editable.

✓ The dashboard displays a call usage analysis report pertaining to selected telephone number

Called number	Call date	Call time	Charge subcategory	Duration	Volume	Text	Total charge (£)
441211232003	14-OCT-2016	01:05:00 PM	NTEL	02:46:39	0	0	91.66
441211232006	14-OCT-2016	04:30:00 AM	MMS	00:00:00	0	0	4.80
917437890121	14-OCT-2016	04:30:00 AM	MMS	00:00:00	0	0	4.80
917437890124	14-OCT-2016	04:30:00 AM	MMS	00:00:00	0	0	4.80
447468999701	14-OCT-2016	12:58:20 PM	NTEL	01:13:15	0	0	40.29
441211232006	14-OCT-2016	04:30:00 AM	NSMS	00:00:00	0	0	5,064.15
917437890124	14-OCT-2016	04:30:00 AM	NSMS	00:00:00	0	0	4,375.35
wap.vodafone.co.uk	14-OCT-2016	04:30:00 AM	NDATA	00:00:00	82944	0	17.55
441211232000	14-OCT-2016	04:30:00 AM	MMS	00:00:00	0	0	4.80
441211232000	14-OCT-2016	01:03:20 PM	NTEL	06:45:00	0	0	0.00

|◄ ◄ 1 ▼ ► ►| 1 - 10 of 29 items

Figure.16:   Report

The report displays the following details:

◆ Called number

◆ Call date

◆ Call time

◆ Charge subcategory

◆ Duration

◆ Volume

◆ Text

◆ Total charge

◆ **Filtering the report data**

✓ On the report header, beside a column name, click ☰ icon, to select different parameters to filter the report

By sorting, selecting and filtering the data, you can view the report:

- **By selecting Sort Ascending**

You can sort the list in ascending order as shown below:

Figure.17:   Ascending order

- **By selecting Sort Descending**

You can sort the list in descending order as shown below:

Figure.18:   Descending order

- **By selecting the Columns**

You can select from available columns and view in the report:

Figure.19: Select columns

◆ **By selecting the Filters**

You can set range value and view the report as shown below:

Figure.20: Applying filter

To apply following filters are available:

♦ Is equal to

♦ Is not equal to

♦ Starts with

♦ Contains

♦ Does not contain

♦ Ends with

✓ From the drop-down list, select the filter

✓ In the text-box provided, enter the field value

✓ Apply the condition **And / Or** between two columns

✓ From the drop-down list, select the filter

✓ In the text-box provided, enter the field value

✓ Click **Filter**

You can view the report as shown below:

Called number		Call date		Call time		Charge subcategory
917437890121	≡	14-OCT-2016	≡	04:30:00 AM	≡	MMS
917437890121		14-OCT-2016		04:30:00 AM		NSMS
917437890121		14-OCT-2016		01:08:20 PM		ITEL

Figure.21:   Report

4. Working with Administration module

The administration module allows you to create viewpoint, add an account, add telephone number, create new group, create new contact, add new cost code[8], add new cost centre, add account number, and add email-id.

This module allows you to work on the following:

- ♦ Viewpoint
- ♦ Address Book[9]
- ♦ Cost Centre[10]
- ♦ Call Tagging panel[11]

4.1. Configuring the Viewpoints

Viewpoint is a custom hierarchy to a specific user. Each user can create their hierarchies by grouping the account numbers and telephone numbers. Once the viewpoints are created, they are available as report filter to view the data for specific set of account numbers(s) or telephone numbers(s).

Through this interface you can:

- ♦ Create New viewpoint
- ♦ Add account to viewpoint
- ♦ Add telephone numbers to viewpoint
- ♦ Edit viewpoint
- ♦ Delete viewpoint
- ♦ Move an account from viewpoint to another
- ♦ Delete the account

---

[8] Cost centres are in turn divided into smaller cost codes for easy and effective functioning

[9] Maintains the personal and business information of the customer

[10] Functional business units of an organization

[11] Tags a name to called number

♦ Search existing accounts

♦ Upload viewpoint data

To work with Viewpoints,

✓ Navigate to **Administration | Viewpoint**

The **Viewpoints** screen appears:
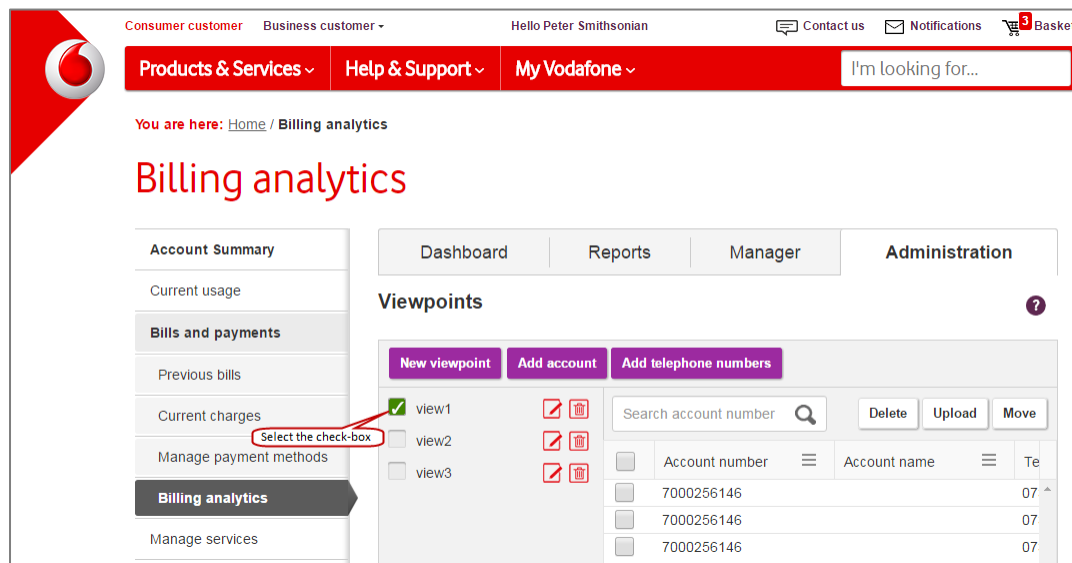
Figure.22:   Viewpoints

☞ Please note, the screen allows you to **drag and drop** the selected account.

Viewpoints are the major criteria for generating any kind of report. Following fields are displayed on the screen:

♦ Account number

♦ Account name

♦ Telephone number

♦ Actions: you can delete the selected contact

☞ Please select an account before performing any action.

4.1.1.   Search the existing account

The Search option enables you to search the required account number for whom you wish to configure the viewpoints.

✓ In the S**earch** text-box, enter the account number to be searched and click 🔍 **icon**

The search result displays the list of account numbers.

4.1.2. Sorting the data

✓ By sorting, selecting and filtering the data, you can view the existing account numbers

♦ Sort Ascending - you can sort the list in ascending order (A to Z)

♦ Sort Descending - you can sort the list in descending order (Z to A)

♦ Columns - you can make a selection from available fields and view the existing account numbers

♦ Filter - you can set range value and view the existing account numbers

4.1.3. Creating New viewpoint

A single view point may contain several accounts (*grouped according to your requirement*) thereby enabling easy and quick generation of reports. Viewpoints are the major criteria for generating any kind of report.

To create a new viewpoint,

✓ Click **New viewpoint**

The **New viewpoint** dialog appears:
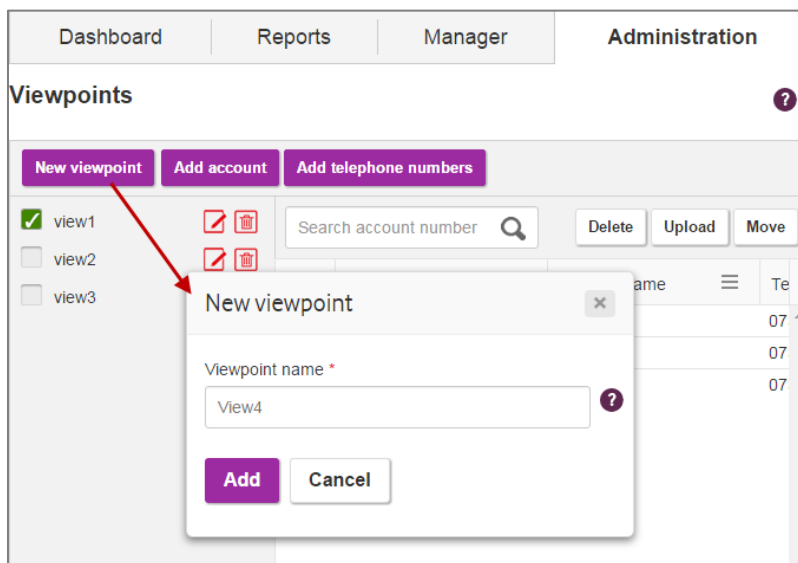
Figure.23:   New viewpoint

✓ In the **Viewpoint name** text-box , enter the name of the view point and click **Add**

Creates a new viewpoint and success message appears as shown below:
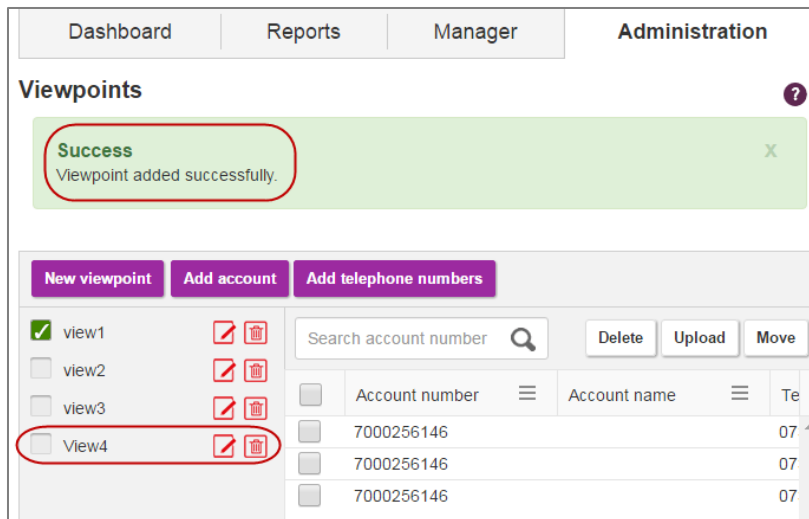
Figure.24:   Success message

Created new viewpoints are inserted to the viewpoint drill-down in the dashboard.

4.1.4.   Editing the viewpoint name

✓ To edit the view point, click the **edit** ☑ icon

The **Edit viewpoint name** dialog appears:
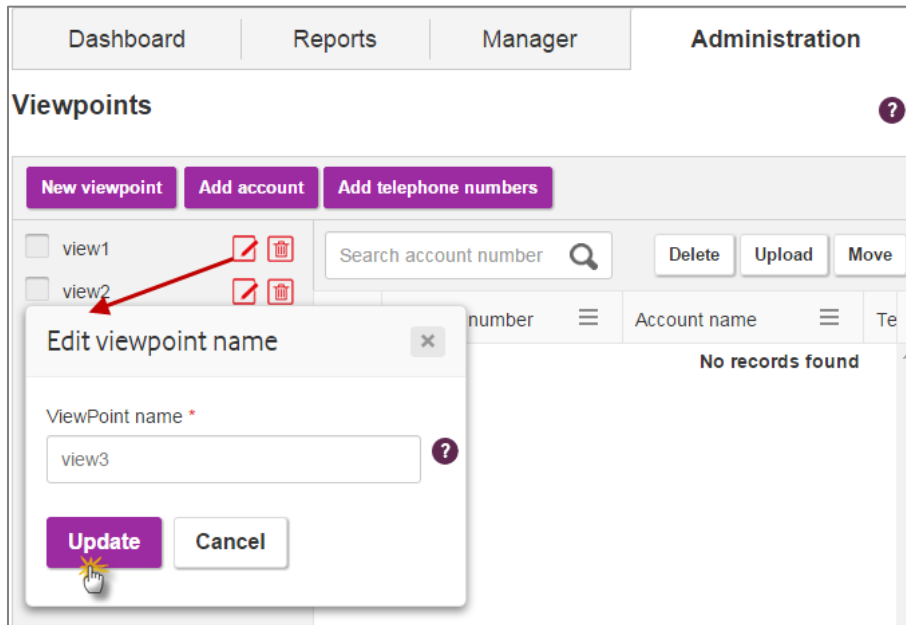
Figure.25:   Edit viewpoint

✓ Enter the required changes and click **Update**

☞ Please note, the field marked with "*" are mandatory

4.1.5.   Delete the existing viewpoint

✔ To delete the viewpoint, click the **delete** 🗑 icon

The application prompts for the confirmation from the user, as shown below:
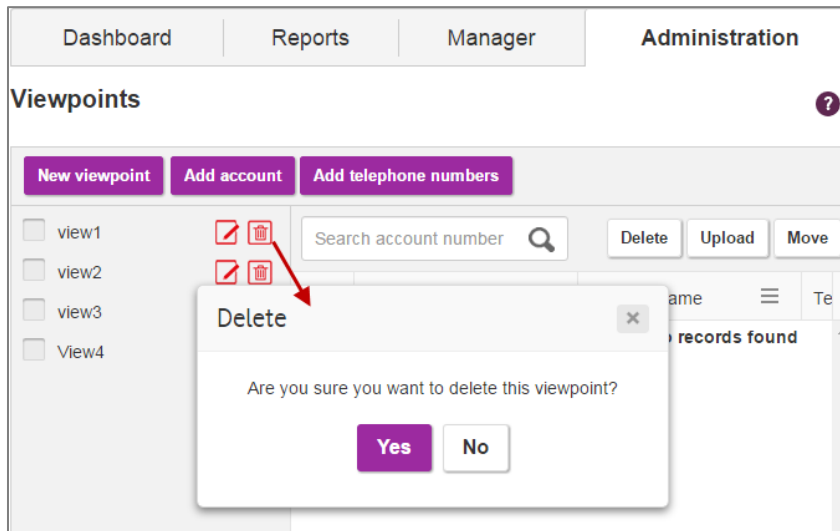
Figure.26:   Delete viewpoint

✔ Click **Yes** to delete or click **No** to retain the viewpoint

4.1.6.   Add account

✔ To add an account, click **Add account**

Add account dialog appears:
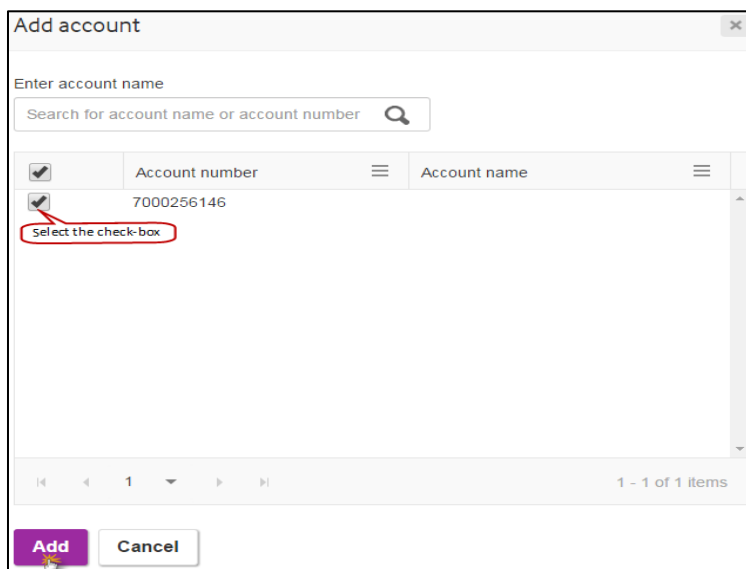
Figure.27:   Add account

✔ In the **Enter account name** text-box, enter the account name to be searched and click 🔍 **icon**

The search result displays the list of accounts

✔ Select the check boxes of the account to whom you wish to add

✔ Click **Add**

The success message appears.

4.1.7. Delete the existing account

To delete an account,

✔ From the list of accounts, select an account and click **Delete**
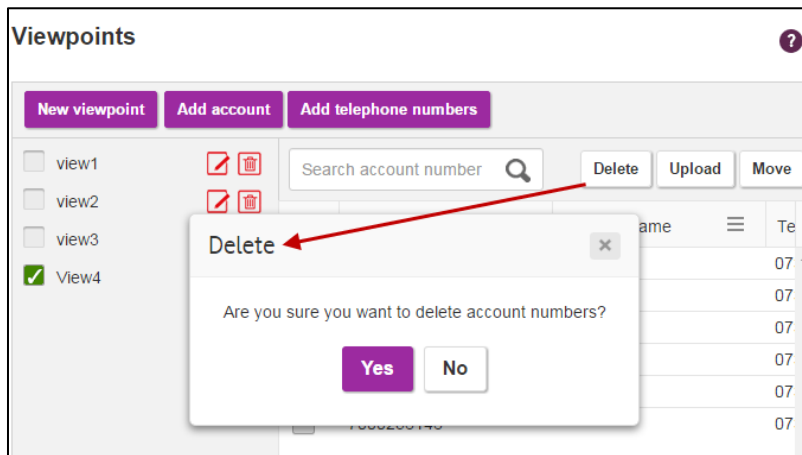
Figure.28:   Delete account number(s)

✔ The application prompts for the confirmation from the user, click **Yes** to delete or click **No** to retain the account number.

4.1.8. Moving the account

You can move the account from one viewpoint to another.

✔ In the left-pane, select the **Viewpoint**

✔ A list of accounts pertaining to the viewpoint are displayed on right-side grid, now select an account and click **Move**

The **Choose destination to move** dialog appears:
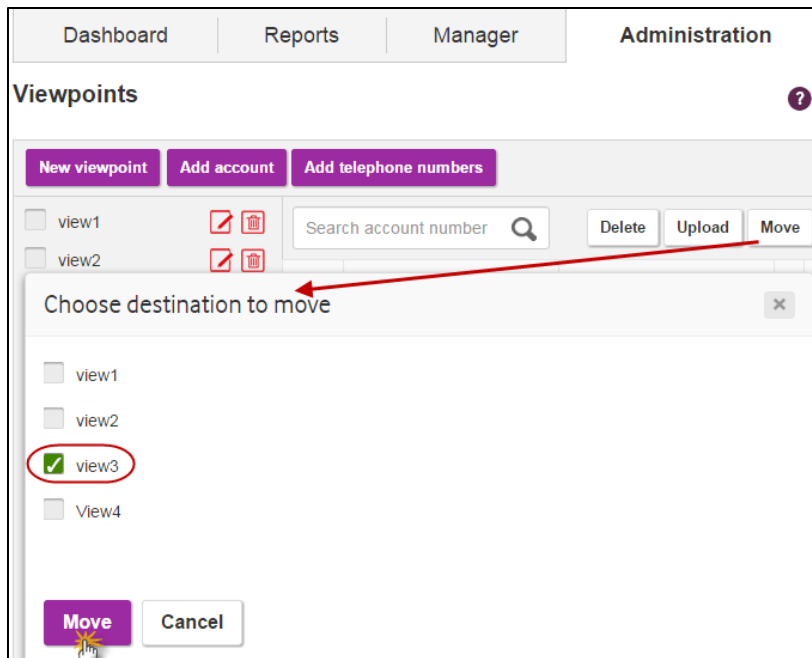
Figure.29:   Move the account

✓   From the list of viewpoints, select the viewpoint check-box and click **Move**

The account moved from one viewpoint to another.

4.1.9.   Uploading the viewpoint data

✓   To upload the account details, click **Upload**

The **Upload** dialog box appears:
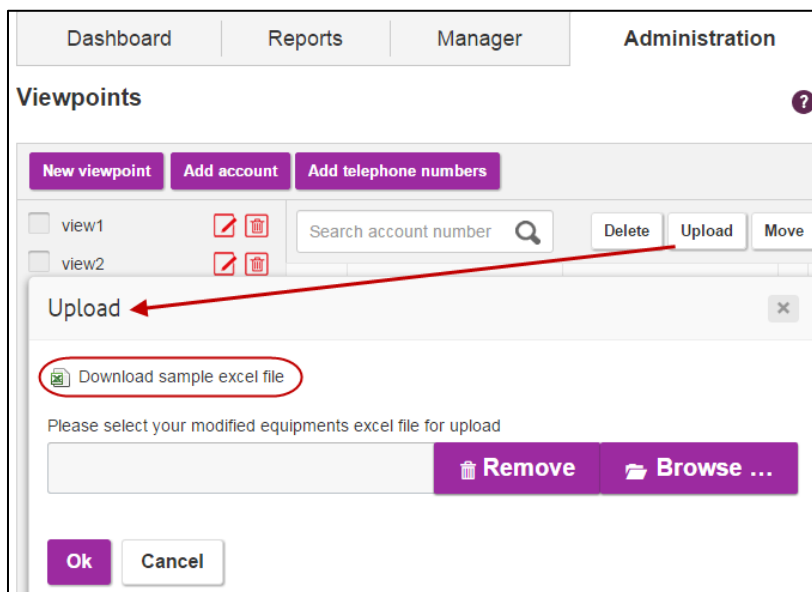
Figure.30:   Upload

✔ You can download the sample file by clicking **Download sample excel file** link
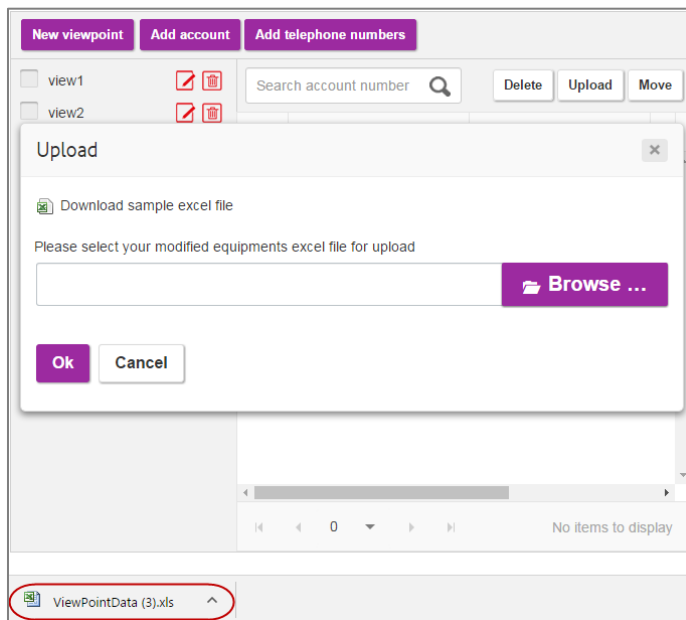
Figure.31:   Sample excel file

The sample excel file is downloaded to local drive and contains the following fields:

☞ Please note the default file format is **xls.**

◆ Viewpoint name

◆ Account number

◆ Telephone number

✔ Now upon filling the details save the excel file and click **Browse**
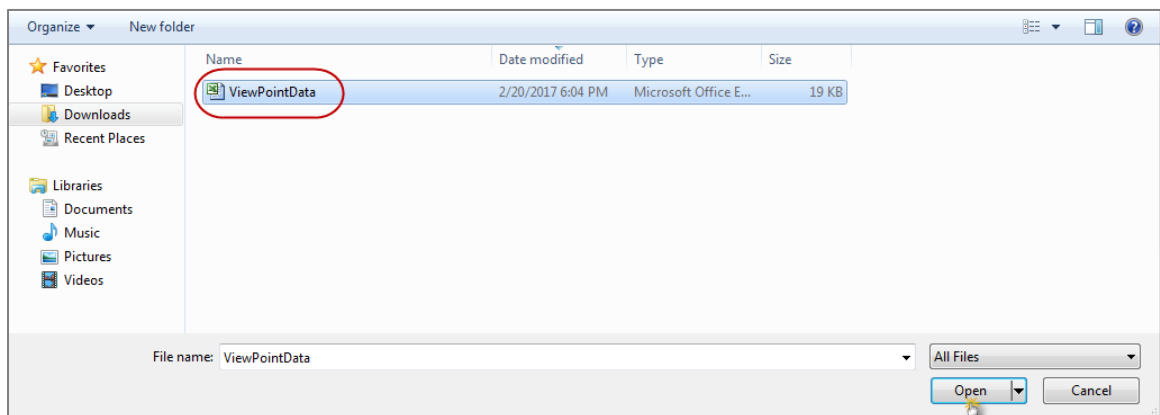
✔ Locate and select the excel file from local drive, and click **Open**
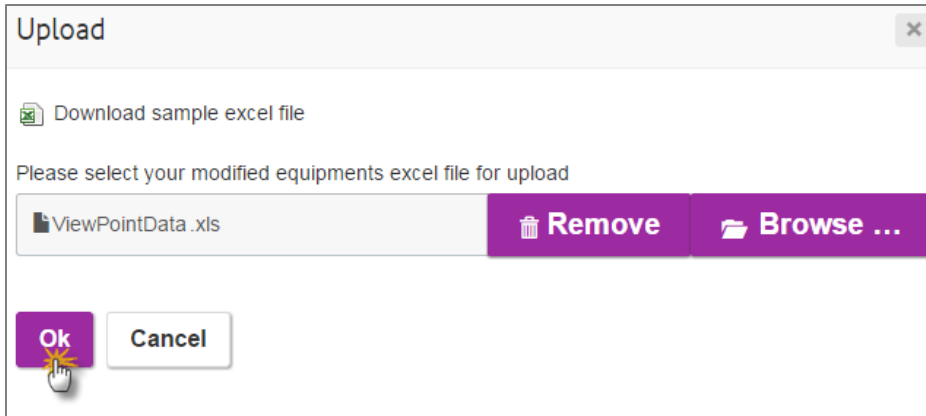
✓ Click **OK**

♦ **In success scenario**

If the upload is successful, the success message appears and records are inserted, next the acknowledgment is downloaded to local drive and status is available.

✓ The success message contains the following details:

♦ Total number of uploads

♦ Success count

♦ Failure count

✓ The acknowledgment is downloaded to local drive and contains the following details:

☛ Please note the default file format is **xlsx**.

♦ Viewpoint name

♦ Account number

♦ Telephone number

♦ Status: success

♦ Reason

♦ **In failure scenario**

If the upload fails, the success message appears and acknowledgment is downloaded to local drive.
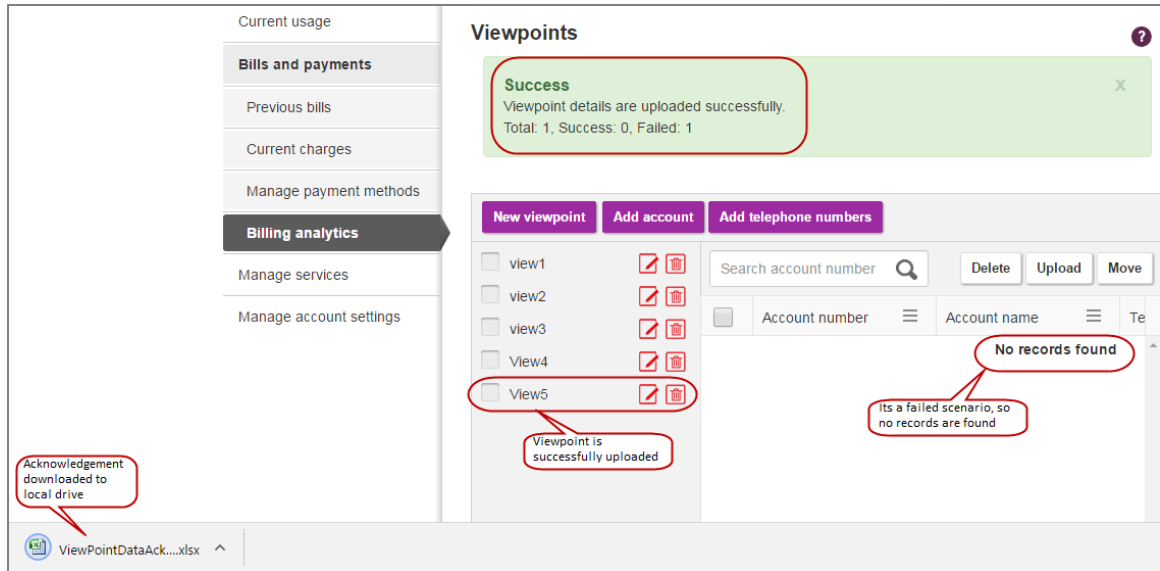
Figure.32:   Failure scenario

✓ The success message contains the following details:

♦ Total number of uploads

♦ Success count

♦ Failure count

✓ In failed scenario, records are not uploaded to viewpoint

✓ The acknowledgment is downloaded to local drive and contains the following details:

♦ Viewpoint name

♦ Account number

♦ Telephone number

♦ Status: failed

♦ Reason: The failure reason is displayed as shown below:

4.1.10.   Add telephone numbers

✓ To add a telephone number to existing account, click **Add Telephone numbers**

Add telephone numbers dialog appears:

Figure.33:   Add telephone numbers

✓ In the **Enter telephone numbers** text-box, enter the telephone number to be searched and click 🔍 **icon**

The search result displays the list of telephone numbers

✓ Select the check boxes of the telephone numbers to whom you wish to add to existing account and click **Add**

Added the telephone number and success message appears as shown below:

4.2. Working with Address book

The module allows you to maintain the customer details. You can add the customer names, email address, grouping the contacts, and maintaining personal information. You can also send the stored details and schedule the emails.

Through this interface you can:

- ♦ Create New group

- ♦ Edit the group name

- ♦ Delete the group

- ♦ Create New contact

- ♦ Search the existing contacts

- ♦ Delete the contact

- ♦ Edit the contact

- ♦ Move the contact from one group to another

- ♦ Upload the address book data

To work with Address book,

✓ Navigate to **Administration | Address book**

The **Address book** screen appears:
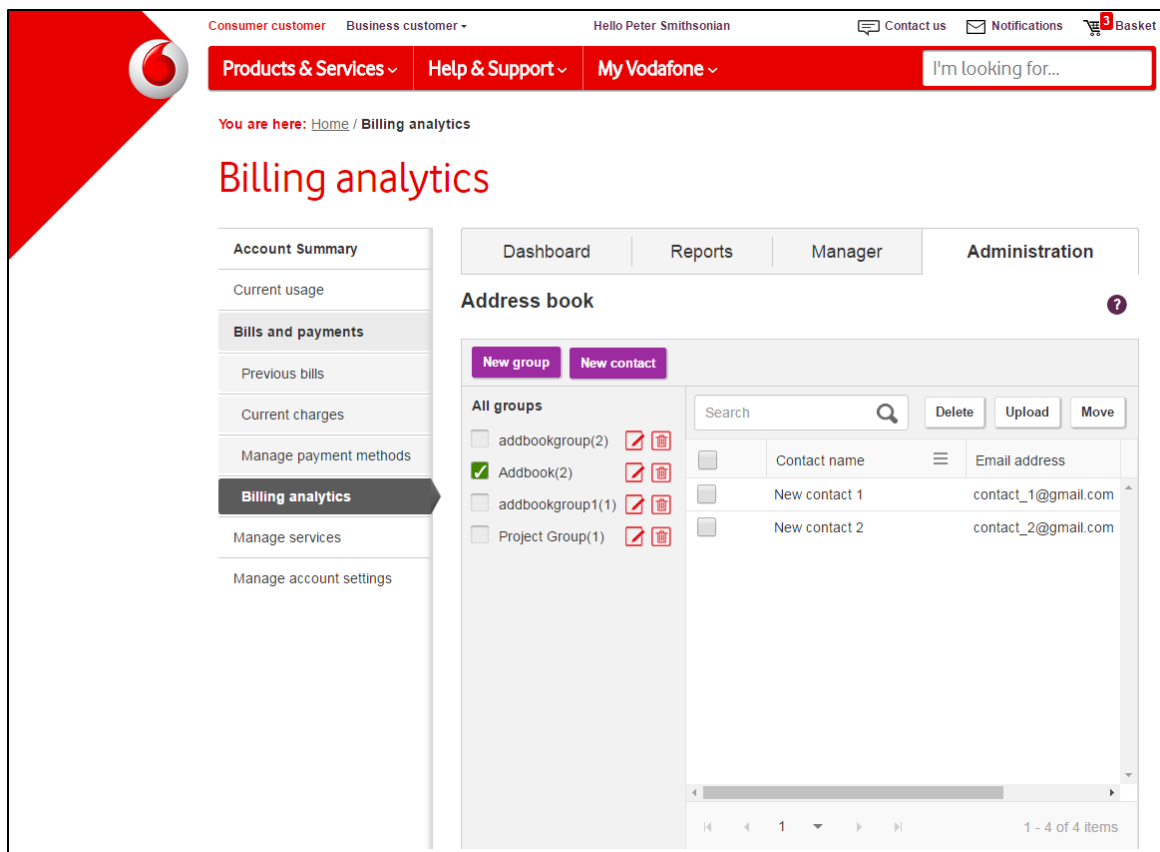
Figure.34:   Address book

☞   Please note, the screen allows you to **drag and drop** the selected contact.

✓   Following fields are displayed on the screen:

♦   Contact name

♦   Email Address

♦   Actions: you can perform edit and delete

☞   Please **select a contact** before performing any action.

4.2.1.   Creating New group

To create a new group,

✓   Click **New group**

The **Add group** dialog appears:
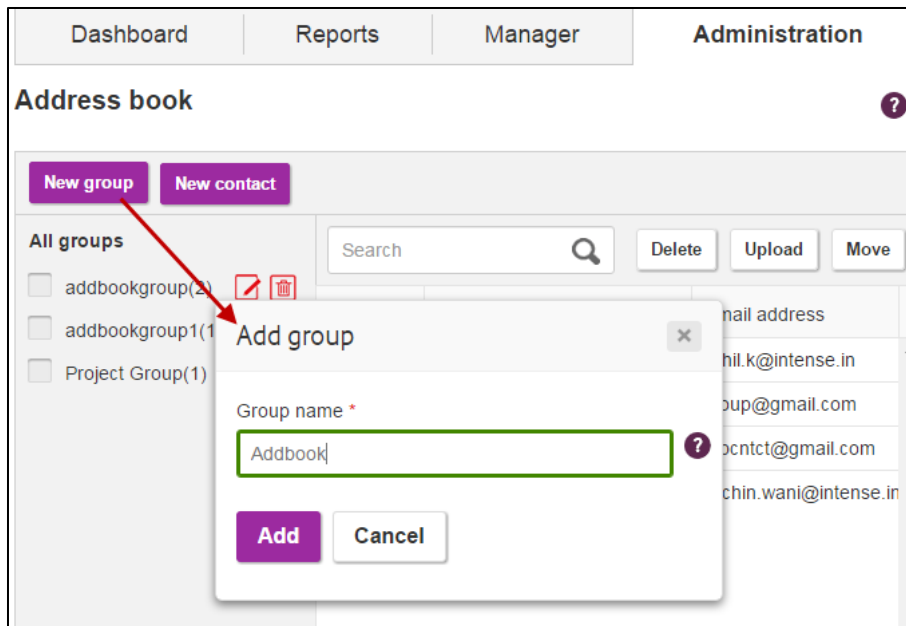
Figure.35:   New group

✓   In the **Group name** text-box , enter the name of the group and click **Add**

Creates a new group and success message appears as shown below:
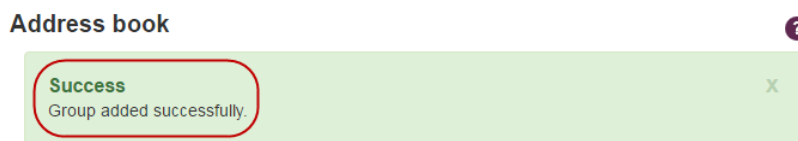
Figure.36:   Success message

4.2.2.   Editing the group name

✓   To edit the group, click the **edit** ✏ icon

The **Edit group name** dialog appears:
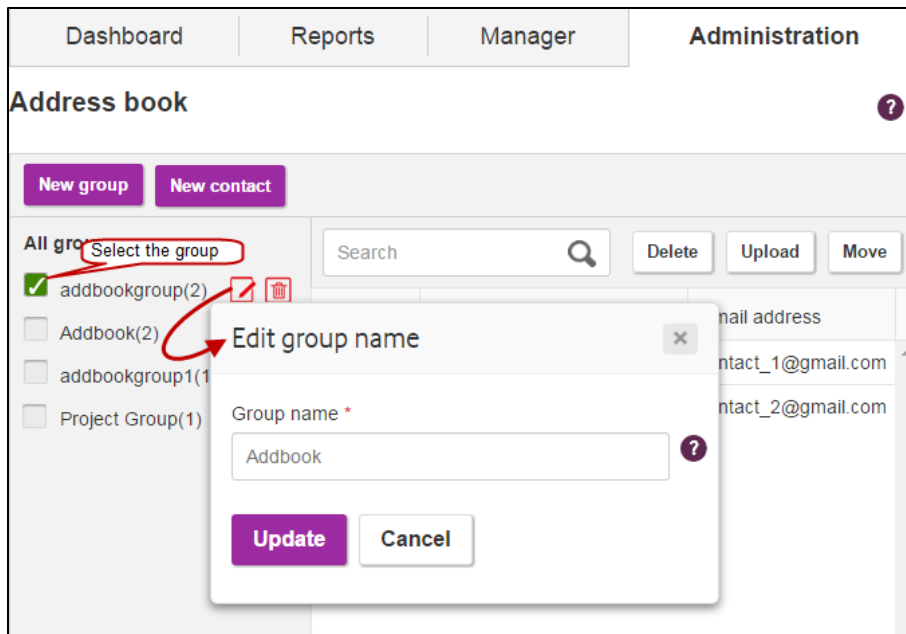
Figure.37:   Edit group name

✓ Enter the required changes and click **Update**

☛ Please note, the field marked with "*" are mandatory

4.2.3.   Delete the existing group

✓ To delete the group, click the **delete** 🗑 icon

The application prompts for the confirmation from the user, as shown below:
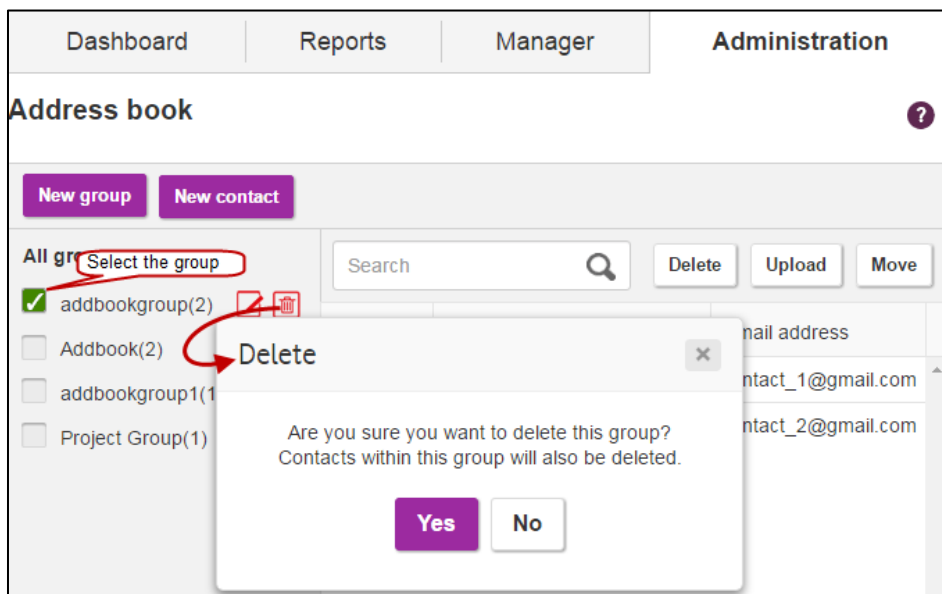
Figure.38:   Delete

✓ Click **Yes** to delete or click **No** to retain the group

4.2.4. Creating New contact

✓ To create new contact, click **New contact**

New contact dialog appears:
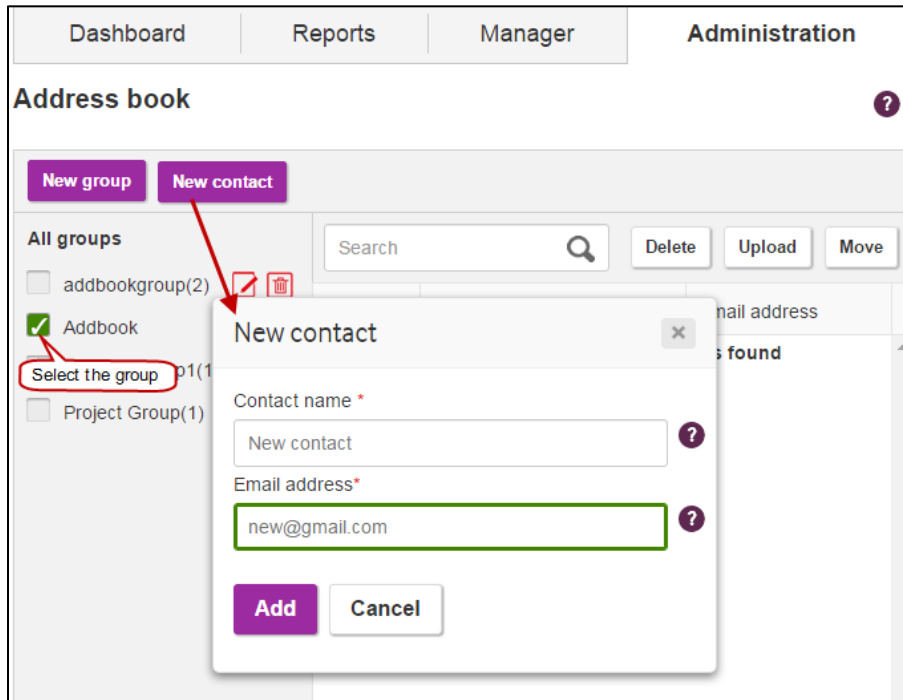
Figure.39: New contact

✓ In the **Contact name** text-box, enter the name of the contact

✓ In the **Email address** text-box, enter the mailing id to send the email

✓ Click **Add**

Created a new contact and success message appears as shown below:
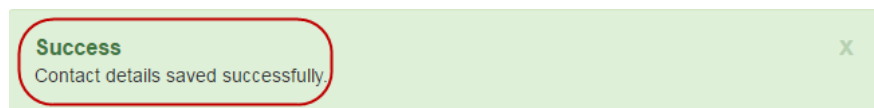
4.2.5. Search the existing contact

The Search option enables you to search the required contact for whom you wish to assign to a group.

✓ In the S**earch** text-box, enter the name of the contact to be searched and click 🔍 **icon**

The search result displays the list of contacts.

4.2.6.   Sorting the data

✓ By sorting, selecting and filtering the data, you can view the contacts

♦ Sort Ascending - you can sort the list in ascending order (A to Z)

♦ Sort Descending - you can sort the list in descending order (Z to A)

♦ Columns - you can make a selection from available fields and view the contacts

♦ Filter - you can set range value and view the contacts

4.2.7.   Uploading the contact

✓ From the list of contacts, select the check-box and click **Upload**

The **Upload** dialog-box appears:
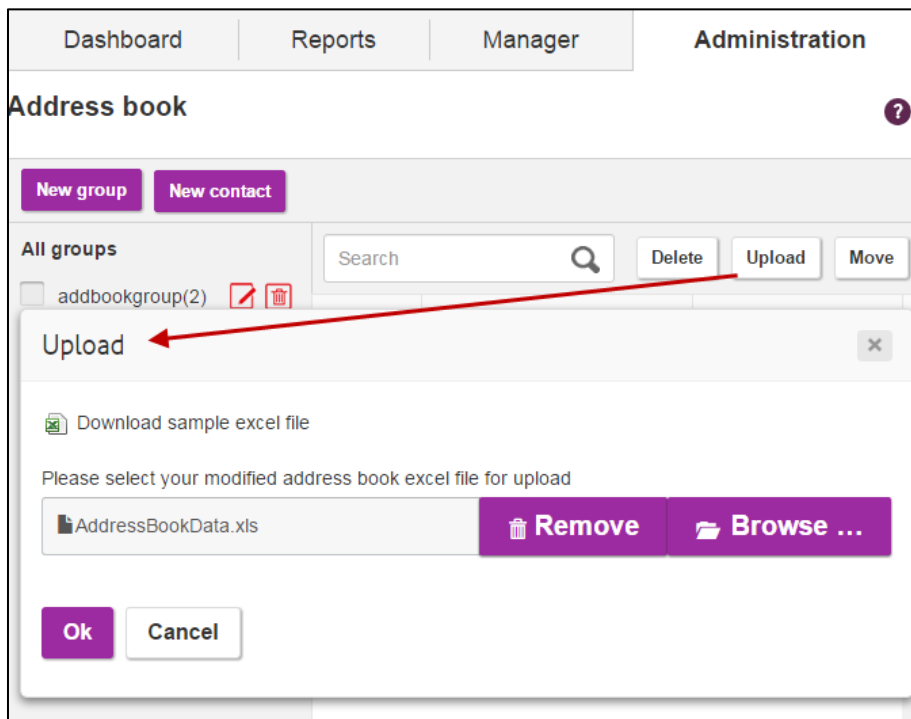
Figure.40:   Upload

✓ You can download the sample file by clicking **Download sample excel file** link

The sample excel file is downloaded to local drive and contains the following fields:

♦ Contact name

♦ Group name

♦ Email

☞ Please note the default file format is **xls.**

✓ Now upon filling the details save the excel file and click **Browse**

✓ Locate and select the excel file from local drive, and click **Open**

✓ Click **OK**

The contact details are uploaded successfully**.**

♦ **In success scenario**

If the upload is successful, the success message appears and records are inserted, next the acknowledgment is downloaded to local drive.
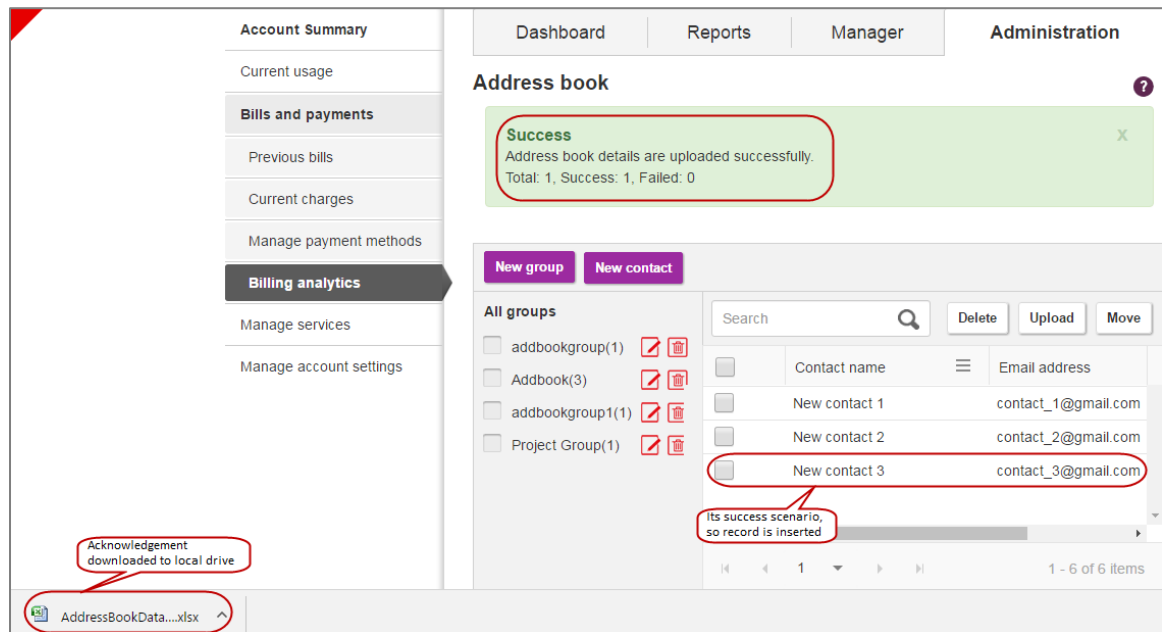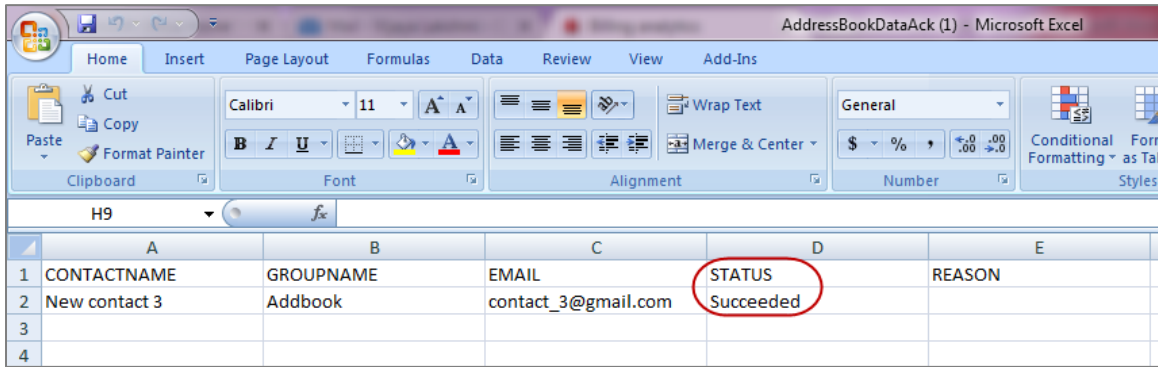
Figure.41:   Address book success scenario

✓ The success message contains the following details:

♦ Total number of uploads

♦ Success count

♦ Failure count

✓ The acknowledgment is downloaded to local drive and contains the following details:

☞ Please note the default file format is **xlsx**.

♦ Contact name

♦ Group name

- ◆ Email

- ◆ Status: Succeeded

- ◆ Reason

Figure.42:   Success scenario

- ◆ **In failure scenario**

If the upload fails, the success message appears and acknowledgment is downloaded to local drive.

- ✔ The success message contains the following details:

  - ◆ Total number of uploads

  - ◆ Success count

  - ◆ Failure count

- ✔ In failed scenario, records are not uploaded to address book

- ✔ The acknowledgment is downloaded to local drive and contains the following details:

  - ◆ Viewpoint name

  - ◆ Account number

  - ◆ Telephone number

  - ◆ Status: failed

  - ◆ Reason

4.2.8.   Moving the contact

You can move the contact from one group to another group.
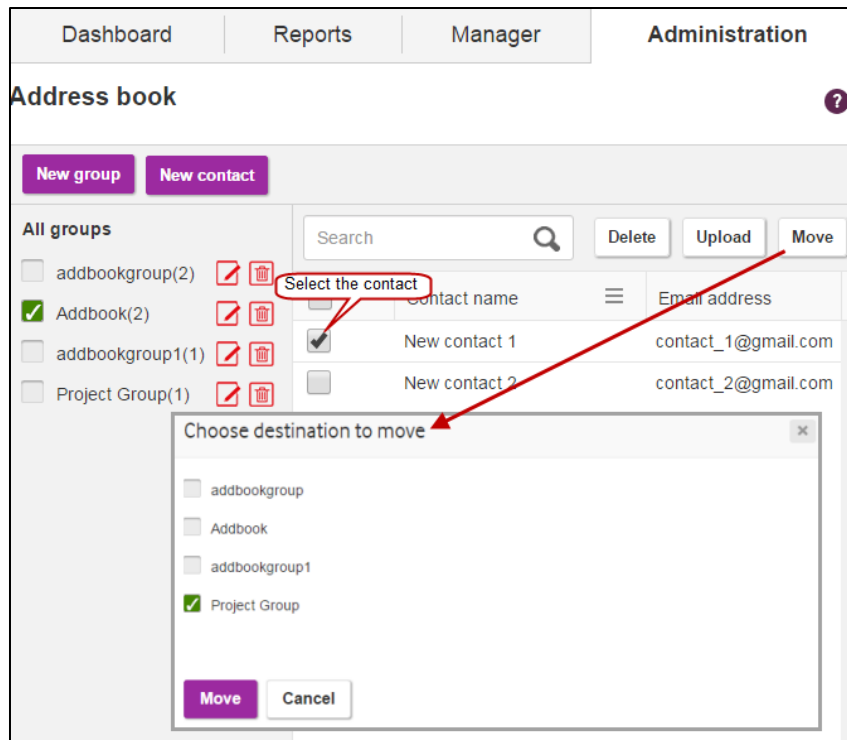
Figure.43:   Move

✓ From the list of contacts, select the check-box and click **Move**

   Choose destination to move dialog appears:

✓ From the list of groups, select the check-box and click **Move**

   The contact moved from one group to another

4.2.9.   Delete the existing contact

   ♦ **Delete the existing contact**

   To delete a single contact,

✓ From the list of contacts, under the actions field, click the **delete** 🗑 icon

   The application prompts for the confirmation from the user, as shown below:
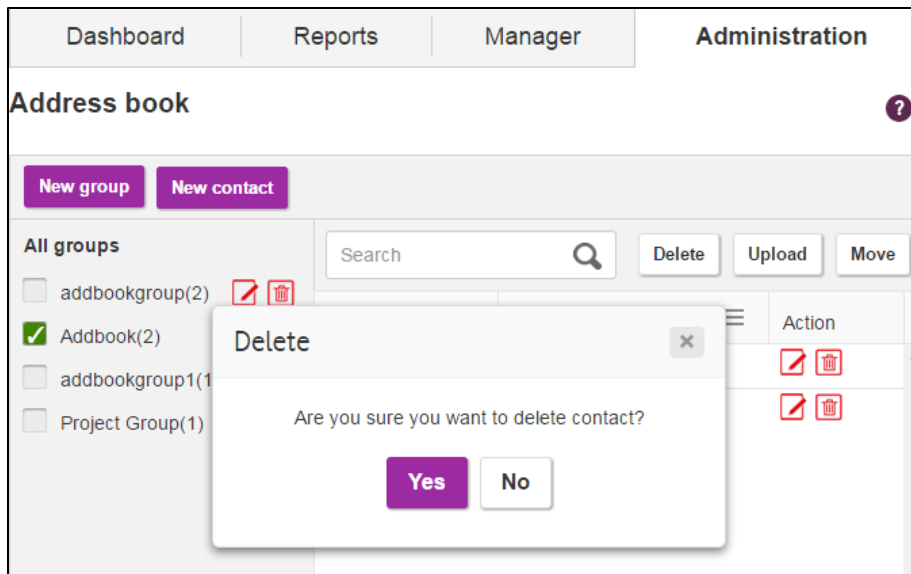
Figure.44:   Delete contact

✔   Click **Yes** to delete or click **No** to retain the contact

   ♦   **Delete multiple contacts**

✔   From the list of contacts, select the check-boxes and click on **Delete** button

   The application prompts for the confirmation from the user, as shown below:
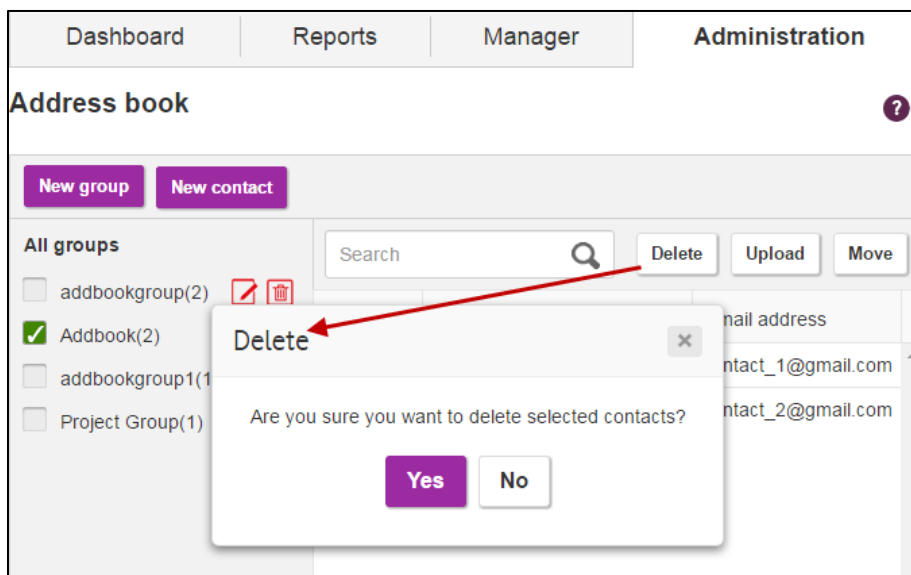
Figure.45:   Delete the contact(s)

✔   Click **Yes** to delete or click **No** to retain the selected contacts.

4.2.10.   Editing the contact

✓ From the list of contacts, beside the contact, select the check-box and click **edit** [icon]icon

Edit contact dialog appears:
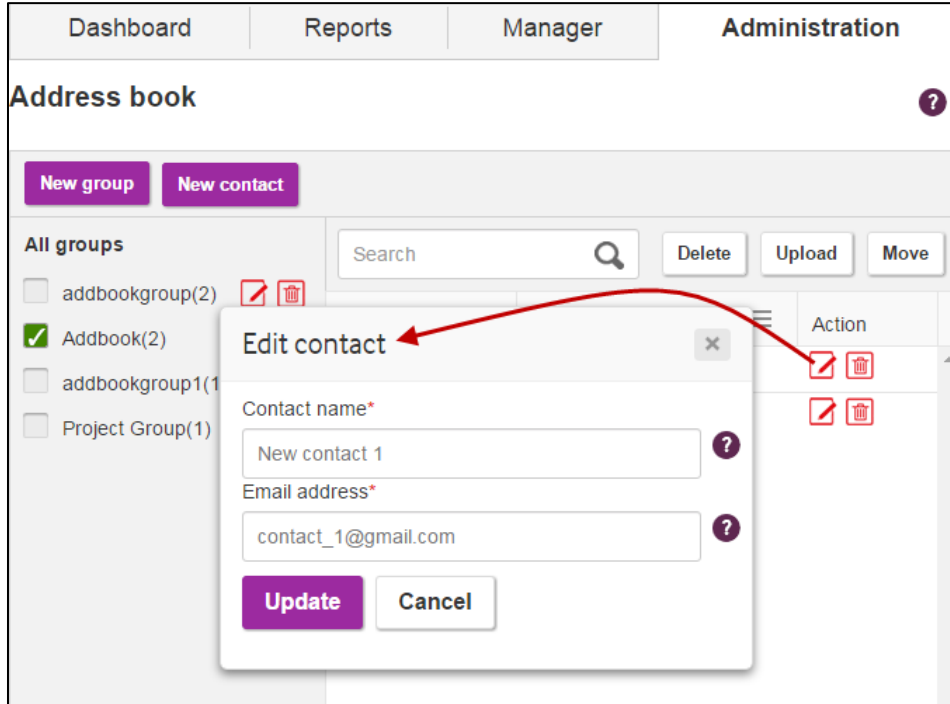
Figure.46:   Edit contact

✓ Enter the required changes and click **Update**

☞ Please note, the field marked with "*" are mandatory

4.3.   Working with Cost centres

This interface helps in effective administration of cost centres. Cost Centres are functional business units of an organization. An organization is divided into various cost centres for administrative convenience. Each cost centre is group of cost codes, where an account number and specific telephone number are assigned to each cost centre.

Through this interface you can:

♦ Create New cost centre

♦ Add cost codes to cost centre

♦ Add account number to cost centre

- Add telephone numbers to cost centre

- Edit cost centre and cost code

- Move cost codes from one cost centre to another

- Delete cost centre and cost code

- Upload cost centres

To work with Cost centre,

✓ Navigate to **Administration | Cost centre**

The **Cost centres** screen appears:
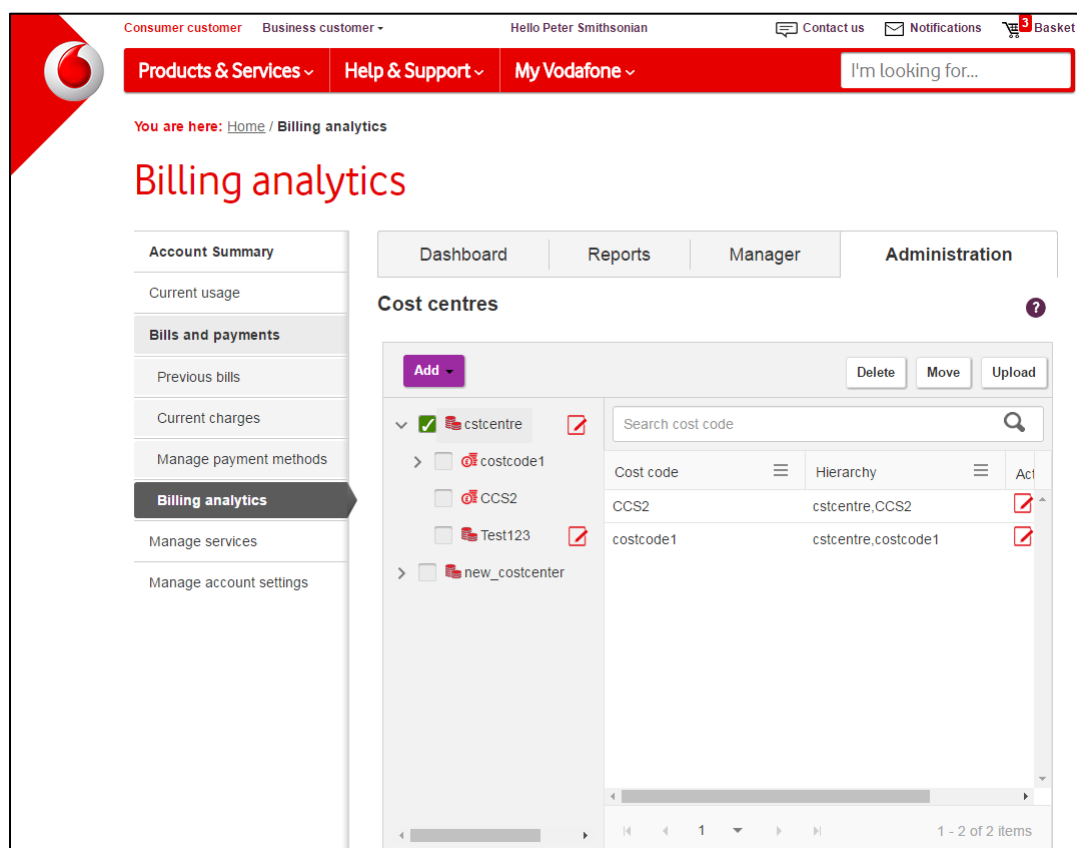
Figure.47: Cost centres

✓ Following fields are displayed on the screen:

- Cost code: you can view the assigned cost code

- Hierarchy: you can view step wise organization hierarchy

- Actions : you can edit and delete the assigned cost codes

☞ Please **select a cost code** before performing any action.

4.3.1. Add New cost centre

✓ To add a cost centre, click **Add**
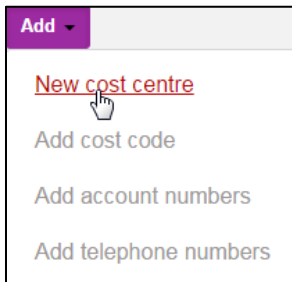
✓ A drill down is available, select **New cost centre**

    Add cost centre dialog appears:
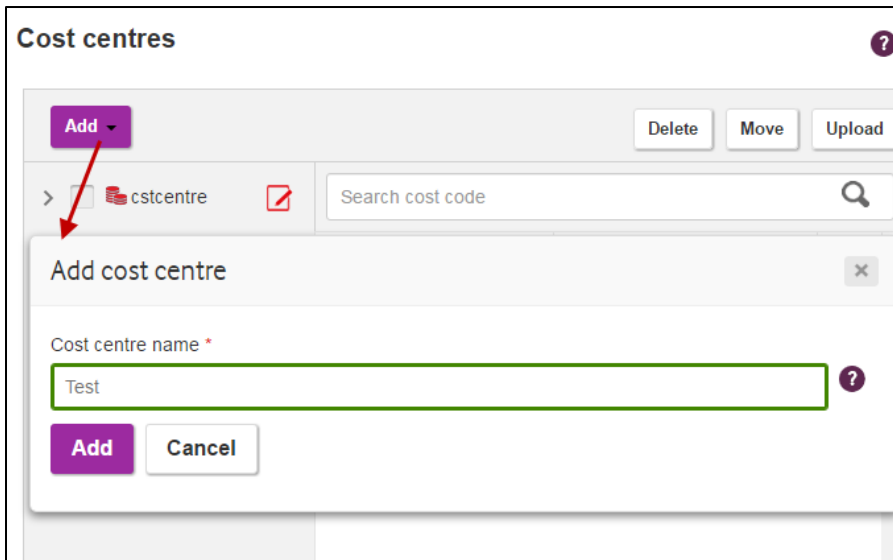
Figure.48: Add cost centre

✓ In the **Cost centre name** text-box, enter the name of the cost centre

✓ Click **Add**

    Created a new cost centre and success message appears on the screen**.**

4.3.2. Delete the existing cost centre

    To delete a cost centre,

✓ From the list of nodes, select a cost centre and click **Delete**
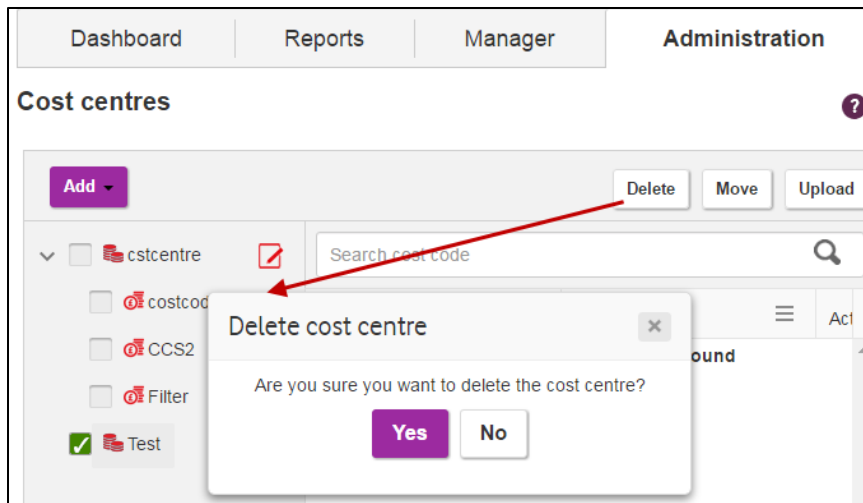
Figure.49:   Delete cost centre

✓ The application prompts for the confirmation from the user, click **Yes** to delete or click **No** to retain the cost centre.

4.3.3.   Editing the cost centre name

✓ To edit the cost centre, click the **edit** 🖉 icon

The **Edit cost centre** dialog appears:
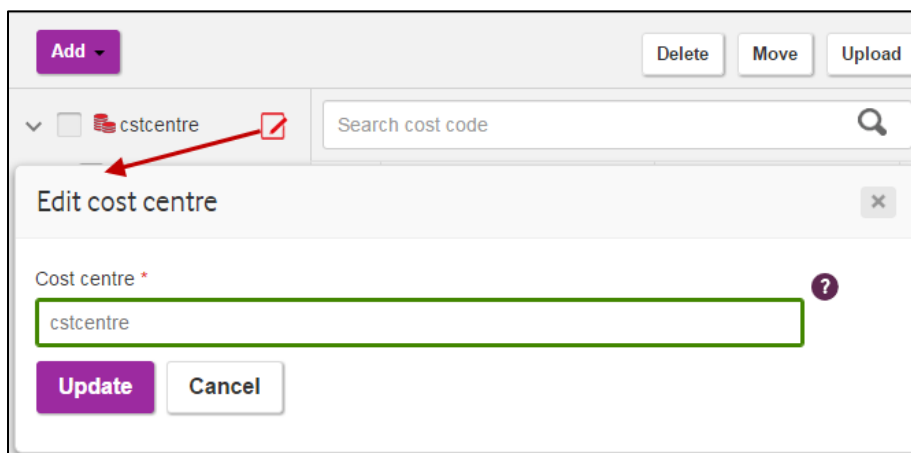
Figure.50:   Edit cost centre

✓ Enter the required changes and click **Update**

☛ Please note, the field marked with "*" are mandatory

4.3.4.   Add cost code

Cost centres are in turn divided into smaller cost codes for easy and effective functioning. Through this interface you can add new cost code, edit, delete, and search the existing cost codes.

✔ To add a cost code, click **Add**
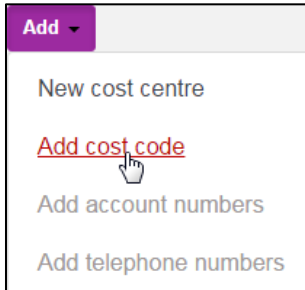
✔ A drill down is available, select **Add cost code**

Add cost code dialog appears:
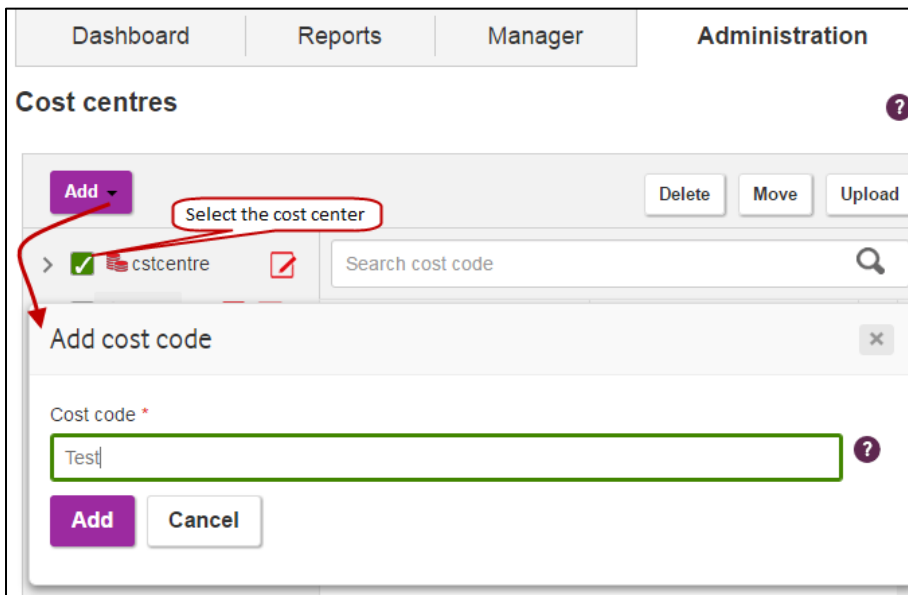
<p align="center">*Figure.51:   Add cost code*</p>

☛ Please note, selecting a **cost centre** is mandatory, before creating a **cost code**.

✔ In the **Cost code** text-box, enter the name of the cost code

✔ Click **Add**

Created a new cost code and success message appears on the screen.

4.3.5.   Search the existing cost code

The Search option enables you to search the cost codes for whom you wish to assign to cost centre.

✓ In the S**earch** text-box, enter the cost code to be searched and click 🔍 **icon**

The search result displays the list of cost codes.

4.3.6.   Sorting the data

✓ By sorting, selecting and filtering the data, you can view the cost codes.

♦ Sort Ascending - you can sort the list in ascending order (A to Z)

♦ Sort Descending - you can sort the list in descending order (Z to A)

♦ Columns - you can make a selection from available fields and view the cost codes.

♦ Filter - you can set range value and view the cost code.

4.3.7.   Editing the cost code name

✓ To edit the existing cost code, click the **edit** 🖉 icon

The **Edit cost code** dialog appears:

Figure.52:   Edit cost code

✓ Enter the required changes and click **Update**

☛ Please note, the field marked with "*" are mandatory

4.3.8.   Delete the existing cost code

✓ To delete the cost code, click the **delete** 🗑 icon

The application prompts for the confirmation from the user, as shown below:
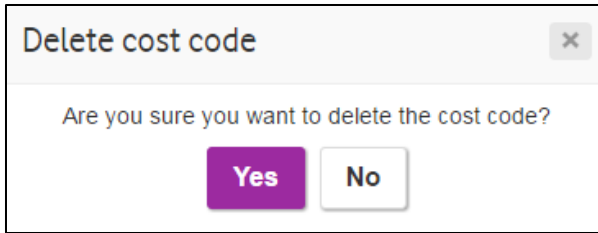
Figure.53:   Delete cost code

✓   Click **Yes** to delete or click **No** to retain the cost code

The cost code is deleted.

4.3.9.   Uploading to cost centre

✓   To upload the cost centre, click **Upload**

The **Bulk upload cost centre** dialog box appears as shown below:
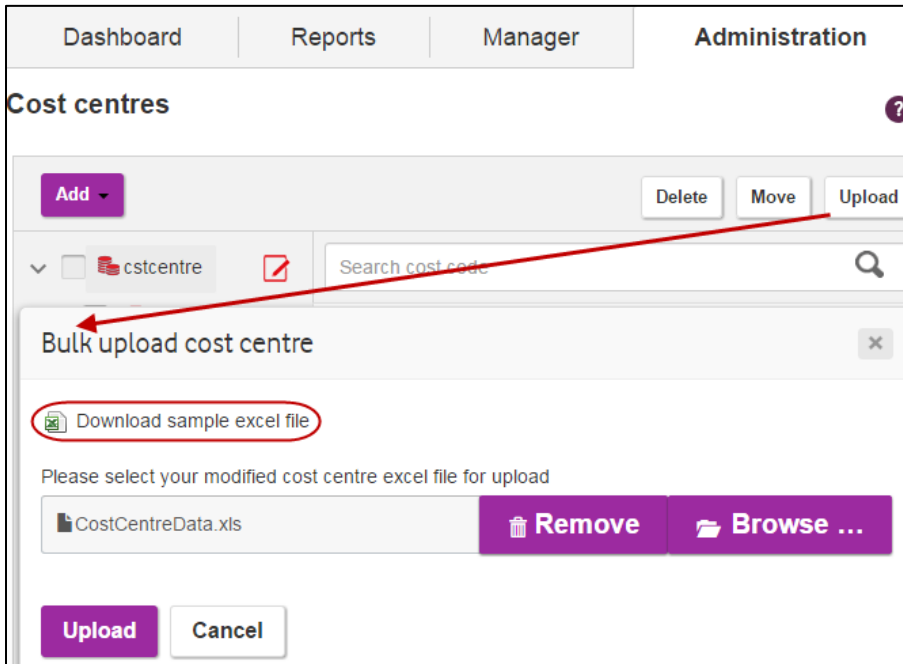
Figure.54:   Upload

✓   You can download the sample file by clicking **Download sample excel file** link

The sample excel file is downloaded to local drive and contains the following fields:

♦   Cost Centre/Cost Code/Telephone Number

♦   Parent

♦   Type

☞ Please note the default file format is **xls.**

✓ Now upon filling the details save the excel file and click **Browse**

✓ Locate and select the excel file from local drive, and click **Open**

✓ Click **OK**

The cost centre/cost code/telephone number details are uploaded successfully**.**

♦ **In success scenario**

If the upload is successful, the success message appears and records are inserted, next the acknowledgment is downloaded to local drive.
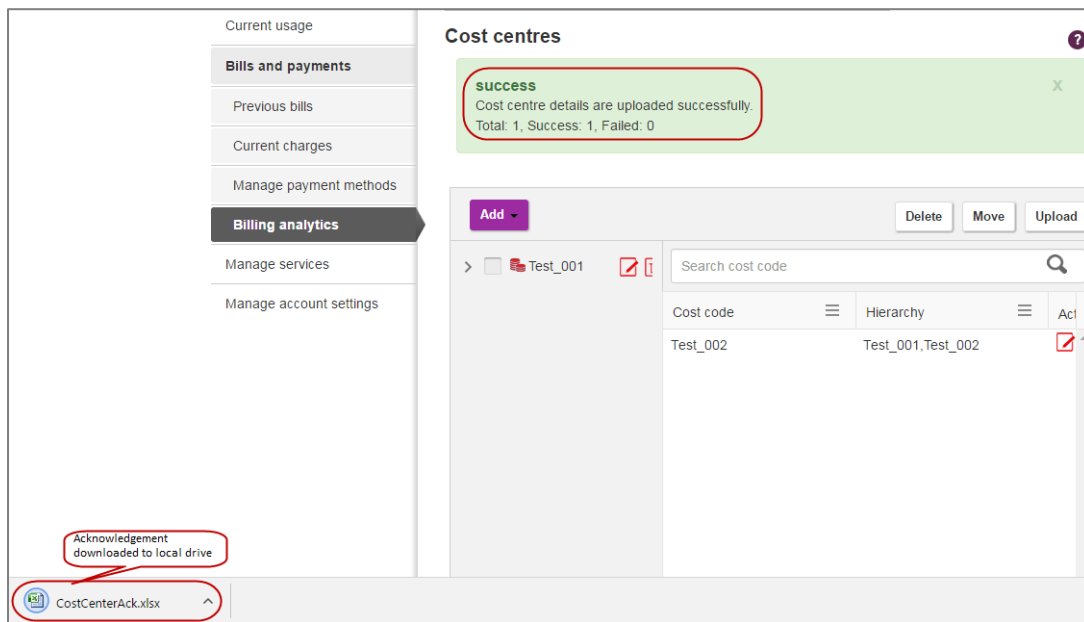
Figure.55:   Success scenario

✓ The success message contains the following details:

   ♦ Total number of uploads

   ♦ Success count

   ♦ Failure count

✓ The acknowledgment is downloaded to local drive and contains the following details:

☞ Please note the default file format is **xlsx**.

   ♦ Cost Centre/Cost Code/Telephone Number

   ♦ Parent

◆ Type: Three types are available they are:

    a. Cost centre is type 0

    b. Cost code is type 1

    c. Telephone number is type 2

◆ Status: Succeeded

◆ Reason

Figure.56:   Acknowledgement

◆ **In failure scenario**

If the upload fails, the success message appears and acknowledgment is downloaded to local drive.
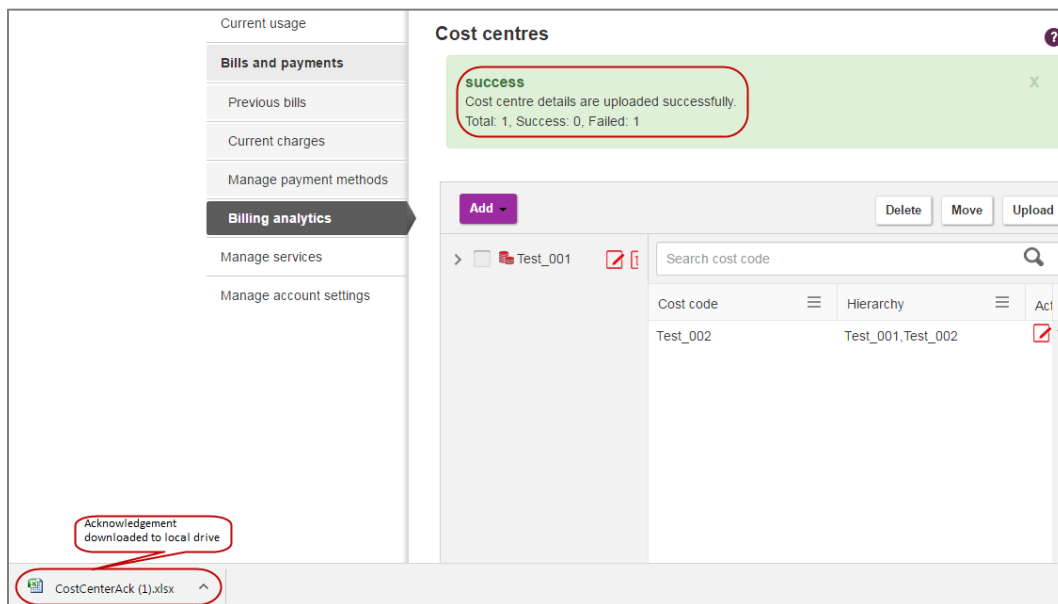
Figure.57:   Cost centre failure scenario

✔ The success message contains the following details:

♦ Total number of uploads

♦ Success count

♦ Failure count

✔ In failed scenario, records are not uploaded to cost centre/cost code/telephone number

✔ The acknowledgment is downloaded to local drive and contains the following details:

♦ Cost Centre/Cost Code/Telephone Number

♦ Parent

♦ Type

♦ Status: failed

♦ Reason: The failure reason is specified

4.3.10. Moving the cost code

Cost centres are in turn divided into smaller cost codes for easy and effective functioning. Through this interface you can move cost codes from one cost centre to another.

✔ From the list of cost codes, select a cost code and click **Move**

The **Choose destination to move** dialog appears:
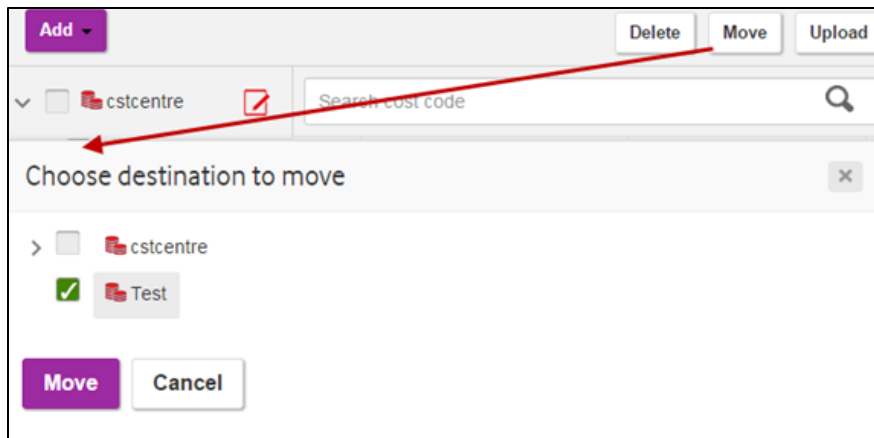
Figure.58:   Move

✓ From the list of cost centres, select the check-box and click **Move**

The cost code moved from one cost centre to another.

4.3.11.   Add account numbers

☞ Please note, selecting a **cost code** is mandatory, before assigning an **account number**.

✓ To add a account number, click **Add**
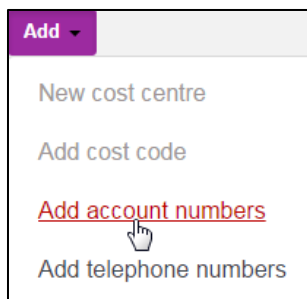
✓ A drill down is available, select **Add account numbers**

Add account numbers dialog appears:

Figure.59: Add account numbers

✓ In the A**ccount number** text-box, enter the account number to be searched and click 🔍 **icon**

The search result displays the list of accounts

✓ Select the check boxes of the user to whom you wish to add to existing account

✓ Click **Add**

The account number is set to existing cost code.

4.3.12. Add telephone numbers

The telephone numbers are cost code specific.

> ☛ Please note, selecting a **cost code** is mandatory, before assigning a **telephone number**.

✓ To add a telephone number, click **Add**

✓ A drill down is available, to add a telephone number to existing cost code, select **Add telephone number**

Add telephone numbers dialog appears:

Figure.60:   Add telephone numbers

✓ In the T**elephone numbers** text-box, enter the telephone number to be searched and click 🔍 **icon**

The search result displays the list of telephone numbers

✓ Select the check box of the telephone number to whom you wish to add to existing cost code and click **Add**

The telephone number is set to existing cost code.

4.4. Working with Call tagging panel

Call tagging allows you to know the business and personal information of the tagged customers. It maintains a record of names, telephone numbers, personal contact details, and professional contact details. It has the facility to provide the tagged service usage details. The call tagging information is updated in call tagging report pertaining to reports module.

Through this interface you can:

- ◆   Create New group in call tagging

- ◆   Edit the group

- ◆   Delete the group

- ◆   Create New contact in call tagging

- ◆   Delete the contact

- ◆   Edit the contact

- ◆   View the data by usage and contact

- ◆   Search by telephone numbers

- ◆   Move the contact from one group to another

- ◆   Upload the calling data

- ◆   Sort by roaming

☛ Please note the call tagging feature allows you to group the called numbers based on personal and business requirement. It also helps you to know the billing cost pertaining to specific telephone number.

To work with Call tagging,

✓   Navigate to **Administration | Call tagging panel**

The **Call tagging** screen appears:
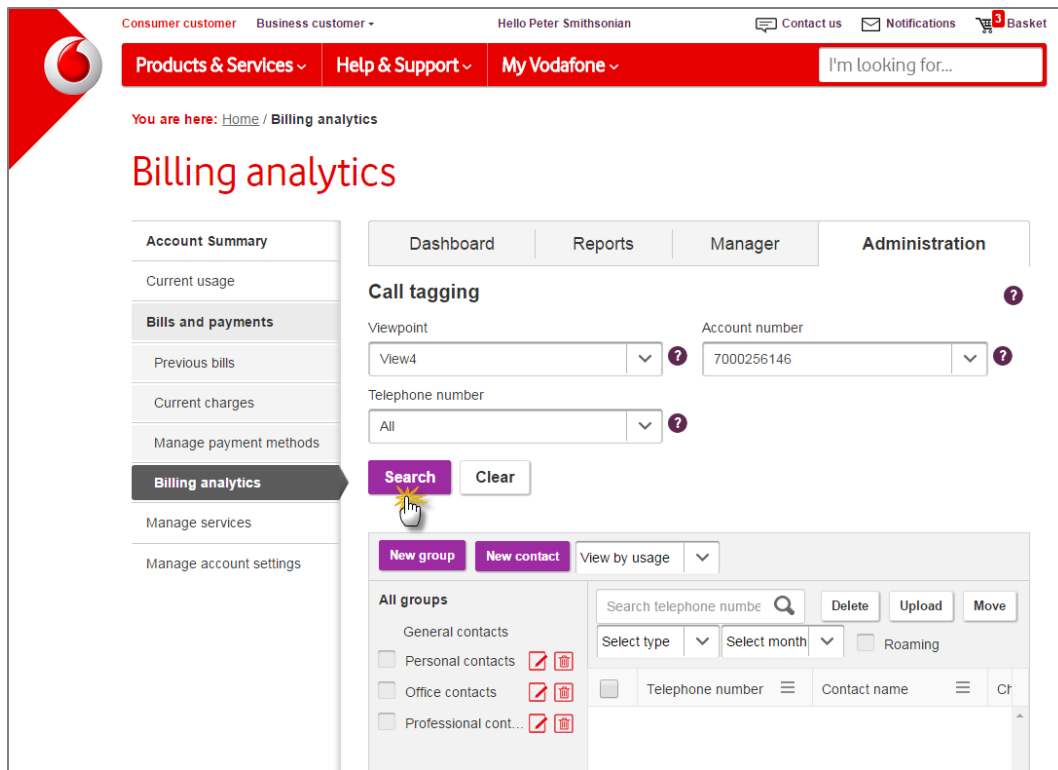
Figure.61:   Call tagging

☞ Please note, the screen allows you to **drag and drop** the selected contact.

✓ From the drop-down lists, select the **Viewpoint, Account number**, and **Telephone number's**

✓ Click **Search**

Displays the list of contacts

✓ To clear the search criterion, click **Clear**

The screen displays the following fields:

♦ Contact name

♦ Telephone number

♦ Group

♦ Actions: you can edit and delete the contacts

☞ Please **select a contact** before performing any action.

4.4.1.   Creating New group through call tagging

To create a new group,

✓   Click **New group**

   The **Add group** dialog appears:
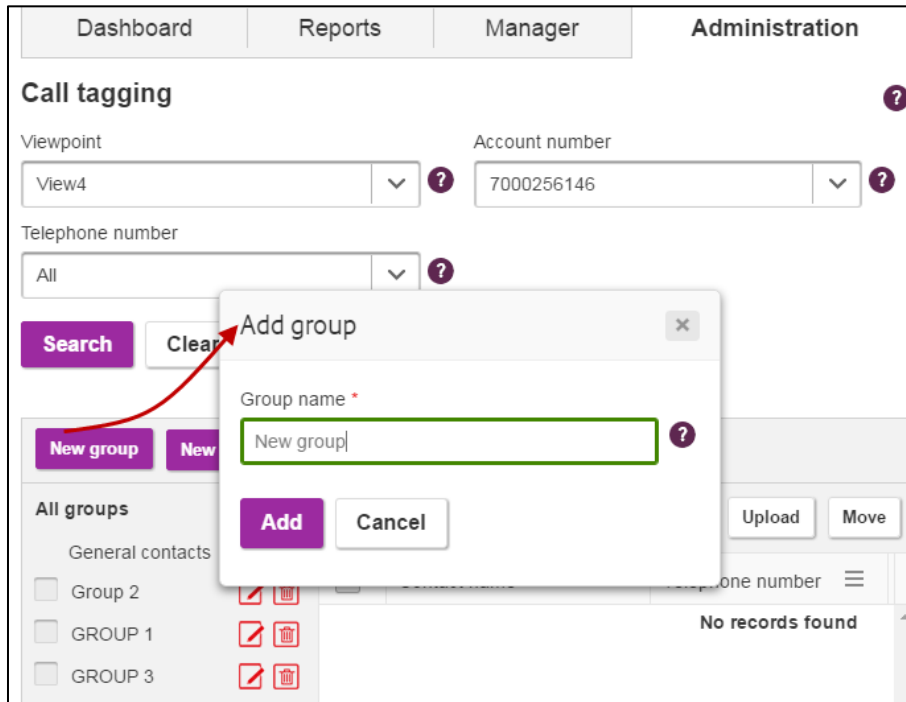
Figure.62:   Add group

✓   In the **Group name** text-box , enter the name of the group and click **Add**

   Creates a new group and success message appears.

4.4.2.   Editing the group name

✓   To edit the group, click the **edit** icon

   The **Edit group name** dialog appears:
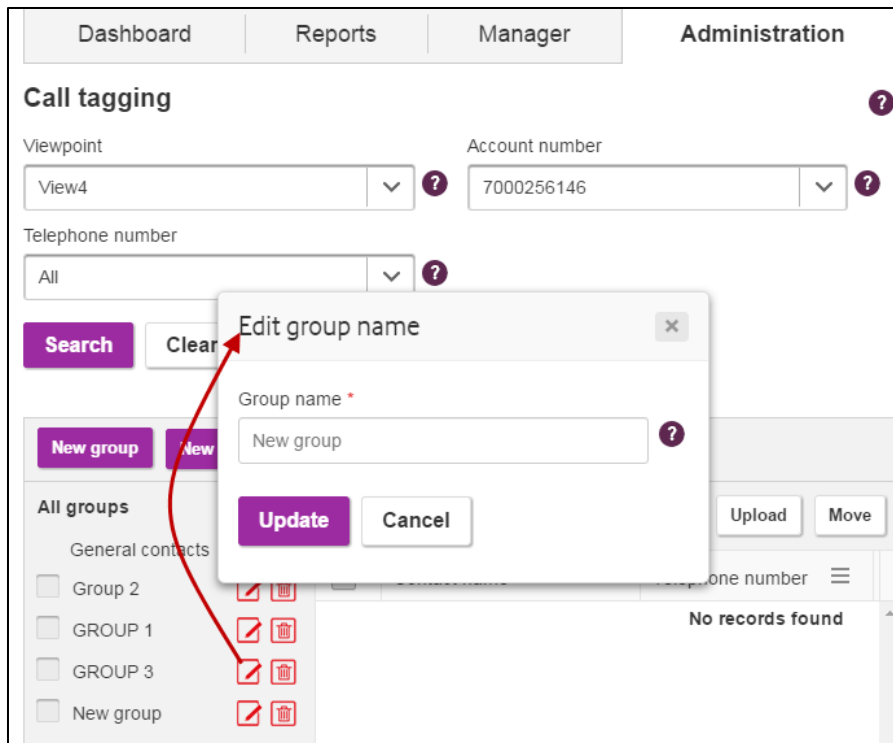
Figure.63:   Edit group

✓ Enter the required changes and click **Update**

☞ Please note, the field marked with "*" are mandatory

4.4.3.   Delete the existing group

✓ To delete the group, click the **delete** 🗑 icon

The application prompts for the confirmation from the user, as shown below:
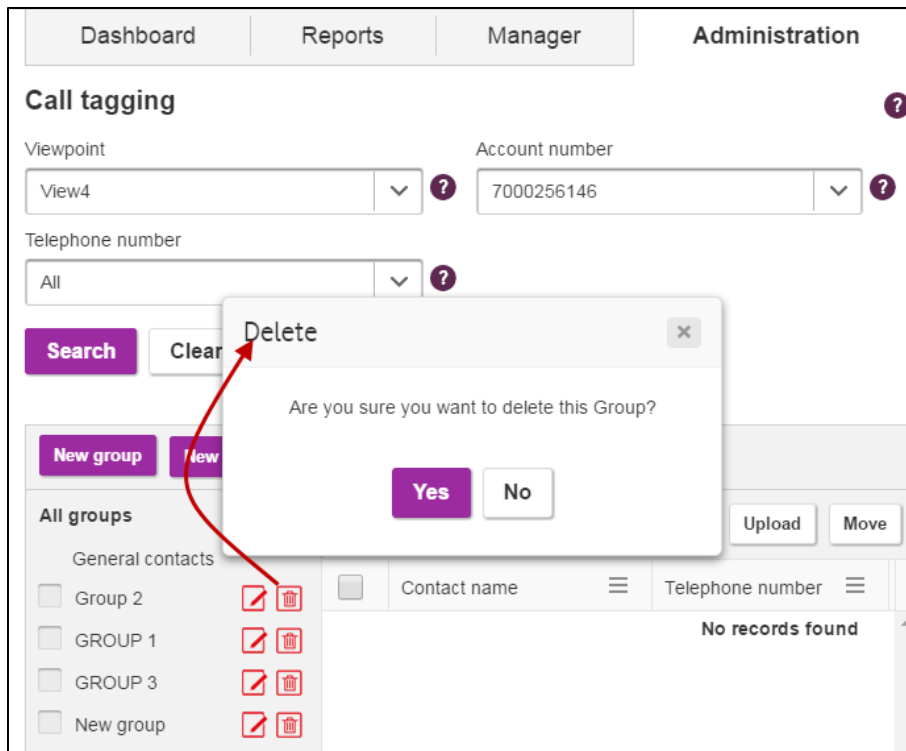
Figure.64:   Delete group

✓   Click **Yes** to delete or click **No** to retain the group

4.4.4.   Creating New contact through call tagging

To create new contact for call tagging,

✓   On Call tagging screen, click **New contact**

   The **New contact** dialog appears:

Figure.65:   New contact

✓   From the **Group** drop-down list, select the call tagging group

✓   In the **Contact name** text-box, assign a name to existing telephone number

☞   Please note, in **call tagging**, you can tag a name to **called number**

✓   From the **Telephone number** drop-down list, select a number

☞   The telephone numbers pertaining to selected group are only listed down

✓   Click **Add**

The screen allows you to view the contact(s) by selecting following filters:

♦   **Viewing the details by contact:**

Figure.66:   View by contact

♦   **Viewing the details by usage**

Figure.67:   View by usage

♦   **Search by telephone number**

Figure.68:   Search by telephone number

♦   **Filtering the list of contacts by calls**

Figure.69:   Sort by Calls

☛   Please note when you filter the data by calling list, the charge category is "**VOICE**"

♦   **Filtering the list of contacts by SMS**

Figure.70:   Sort by SMS

☛   Please note when you filter the data by SMS list, the charge category is "**TEXT**"

♦   **Sort by time period**
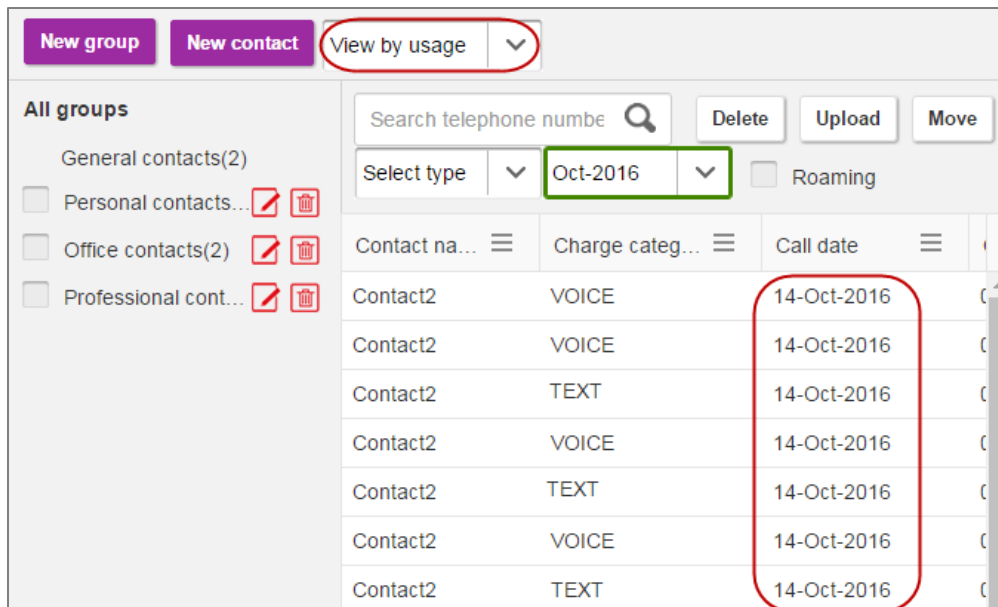
Figure.71:   Filter by time period

♦ **Sort by roaming:** You can view the list of numbers using the roaming facility
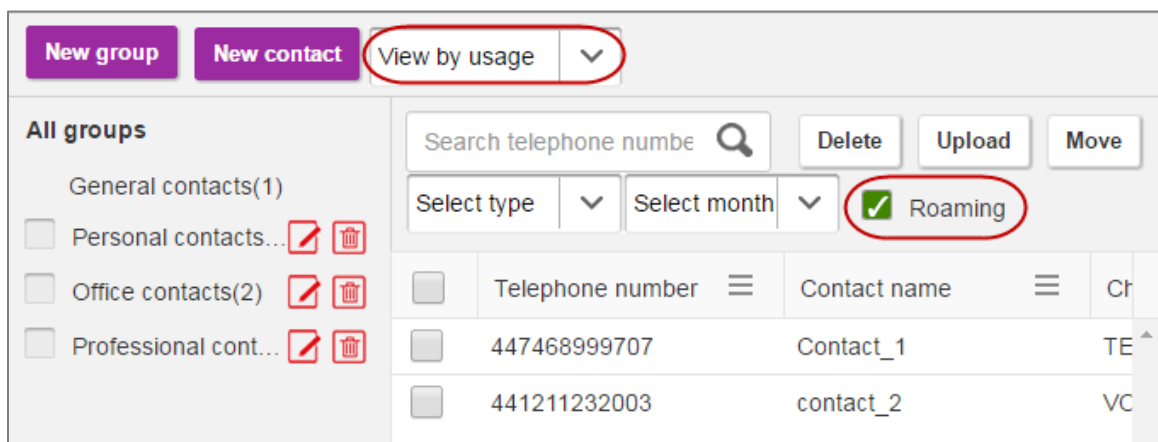
Figure.72:   Roaming list

4.4.5.   Sorting the data

✓   By sorting, selecting and filtering the data, you can view the contact's list

♦ Sort Ascending - you can sort the list in ascending order (A to Z)

♦ Sort Descending - you can sort the list in descending order (Z to A)

♦ Columns - you can make a selection from available fields and view the contact's list

♦ Filter - you can set range value and view the contact's list

4.4.6.   Search the existing telephone number

The Search option enables you to search by specific telephone number for whom you wish to view the contact details, and perform delete, upload and move actions.

✓ In the S**earch** text-box, enter the telephone number to search and click 🔍 **icon**

The search results are displayed.

4.4.7.   Uploading the tagged contact(s)

To upload a contact,
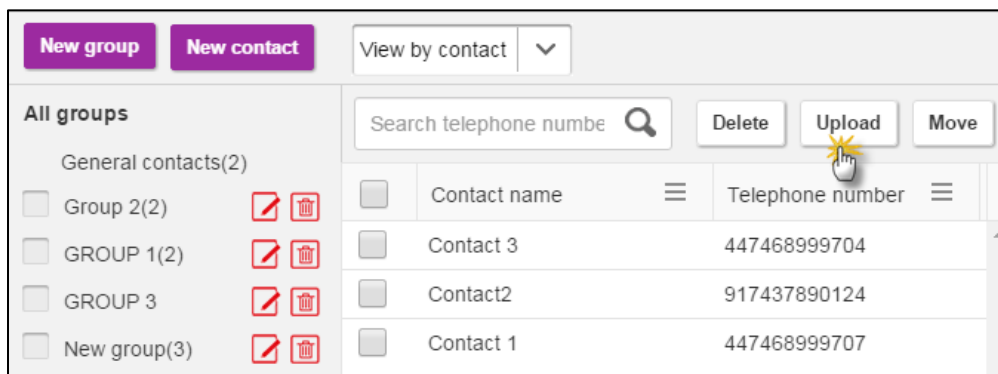
Figure.73:   Upload

✓ Click **Upload**

The **Upload** dialog box appears:
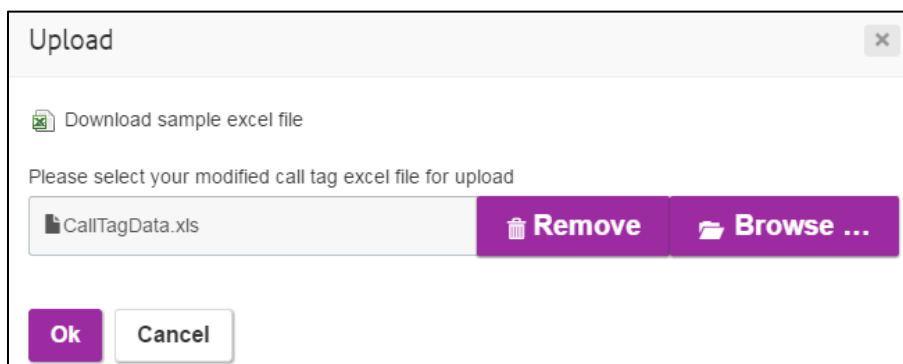
Figure.74:   Upload

✓ You can download the sample file by clicking **Download sample excel file** link

The sample excel file is downloaded to local drive and contains the following fields:

♦ Telephone Number

♦ Contact name

♦   Group name

☛ Please note the default file format is **xls.**

✓   Now upon filling the details, **save** the excel file and click **Browse**

✓   Locate and select the excel file from local drive, and click **Open**

✓   Click **OK**

The call tagging details are uploaded successfully**.**

♦   **In success scenario**

If the upload is successful, the success message appears and records are inserted, next the acknowledgment is downloaded to local drive.

✓   The success message contains the following details:

♦   Total number of uploads

♦   Success count

♦   Failure count

✓   The acknowledgment is downloaded to local drive and contains the following details:

☛ Please note the default file format is **xlsx**.

♦   Telephone Number

♦   Contact name

♦   Group name

♦   Status: Succeeded

♦   Reason

♦   **In failure scenario**

If the upload fails, the success message appears and acknowledgment is downloaded to local drive.
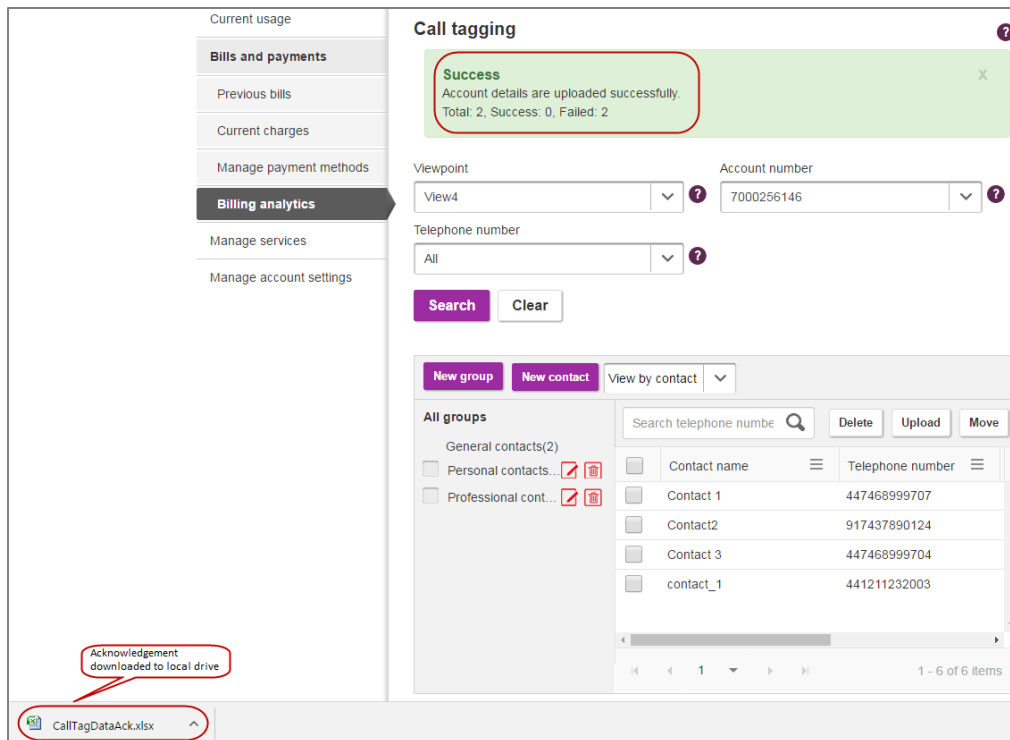
Figure.75:   Call tagging failure scenario

✓ The success message contains the following details:

   ♦ Total number of uploads

   ♦ Success count

   ♦ Failure count

✓ In failed scenario, records are not uploaded

✓ The acknowledgment is downloaded to local drive and contains the following details:

   ♦ Telephone Number

   ♦ Contact name

   ♦ Group name

   ♦ Status: failed

   ♦ Reason: The failure reason is specified

Figure.76:   Acknowledgement

4.4.8.   Delete the existing tagged contact

To delete a contact,

☛   Please note, to **delete** the contact details, the select criterion must be **View by contact**

✓   From the list of contacts available, beside the contact, select the check-box and click **Delete**
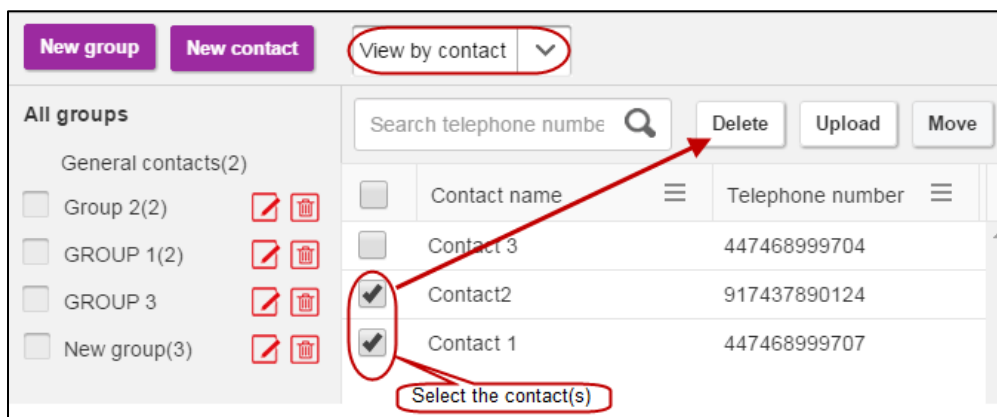
Figure.77:   Delete

The application prompts for the confirmation from the user, as shown below:
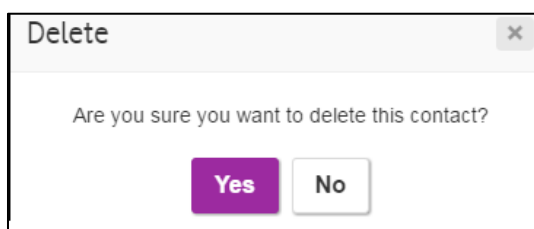
✓   Click **Yes** to delete or click **No** to retain the contact

Contact deleted successfully.

4.4.9.   Moving the tagged contact

You can move the contact from one group to another.

☛ Please note, to **move** the contact details, the select criterion must be **View by contact**

Figure.78:   Move

✓ From the list of contacts available, beside the contact, select the check-box and click **Move**

The **Choose destination to move** dialog appears:

Figure.79:   Choose destination to move

✓ From the list of groups, beside the group select the check-box and click **Move**

The contact moved from one group to another.

4.4.10. Editing the tagged contact details

☛ Please note, to **edit the contact** details, the select criterion must be **View by contact**.

✓ To edit the contact, click the **edit** 🖉 icon

The **Edit details** dialog appears:
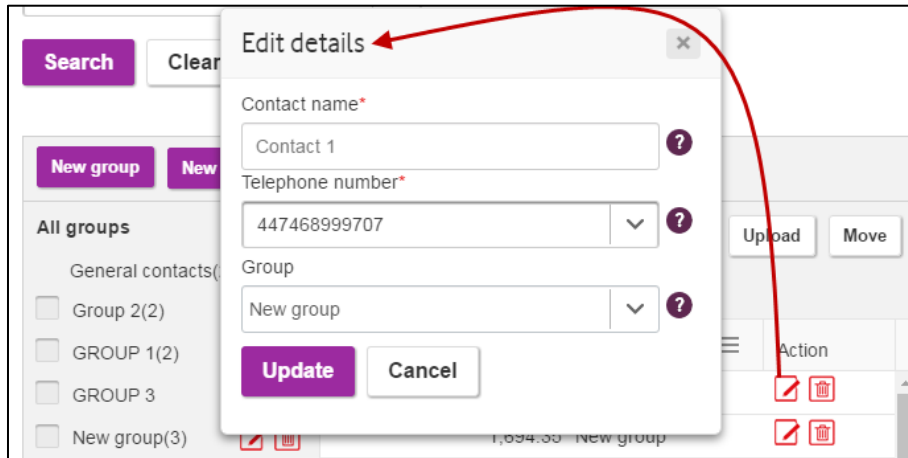
Figure.80:   Edit details

✓ Enter the required changes and click **Update**

☛ Please note, the field marked with "*" are mandatory

The updated details are also available in call tagging report

5. **Generating New reports**

The screen allows you to create a new report by using and mapping the existing database and data source.

To create new report,

✓ Click **Manager| New reports**

The **New Report** screen appears:

The screen allows you to work with two tabs:

- ♦ Fill in details
- ♦ Build your report

5.1.   Fill in details

The Fill in details feature allows you to customize and build your own reports to meet your information requirements quickly and easily.

✓ In the **Report Name** text-box, enter the name of the report

✓ If required in the text-box provided, enter the **description**

✓ Select the **Type of Report**

You can generate three different types of reports

♦ **Standard grid representation**

Grid representation of available data, you can apply filters to preview the data

♦ **Graphical representation**

The report is available in graphical format. You can generate four different types of graphical reports

♦ Bar chart: Bar charts illustrate comparisons among individual items

♦ Line chart: Line charts display continuous data over time and for showing trends in data

♦ Pie chart: Pie charts show the size of items in one data series (that is, data presented in one column or one row only) proportional to the sum of the items

♦ Donut: Doughnut chart is just a simple pie chart with a hole inside. You can define the hole radius to any size you require, both in percentage or pixels.

♦ **Pivot representation**

The Pivot shows the relation between items by dragging and dropping the columns

✓ From the **Select datasource** drop-down list, select the existing datasource

---

☛ **NOTE:** A data source is fixed set of query(s) which consist of specific data. You must contact **OPS team** to create customized datasource.

You can select from three types of datasources:

♦ Build datasource

♦ CSV datasource

♦ My Query datasource

✓ To re-enter the details, click **Reset**

✓ Else to continue further, click **Next**

Navigates to Build your report

5.2.   Building your report

The module allows you to create, apply new filters, and set conditions to generate new report.

✓   You can define the rule(s) for report generation:

- ◆   By selecting columns in standard grid

- ◆   By setting template filters

- ◆   By selecting report filters

- ◆   Edit the columns

- ◆   Sorting the order

✓   Following are the fields available:

- ◆   Standard dimensions

- ◆   Measures

- ◆   Time dimensions

- ◆   Preview

- ◆   Save

- ◆   Cancel

- ◆   Edit

✓   Click < symbol, to collapse the left-pane

5.2.1.   Selecting the columns in Standard grid

In standard grid, you can select the required column(s) in the report.
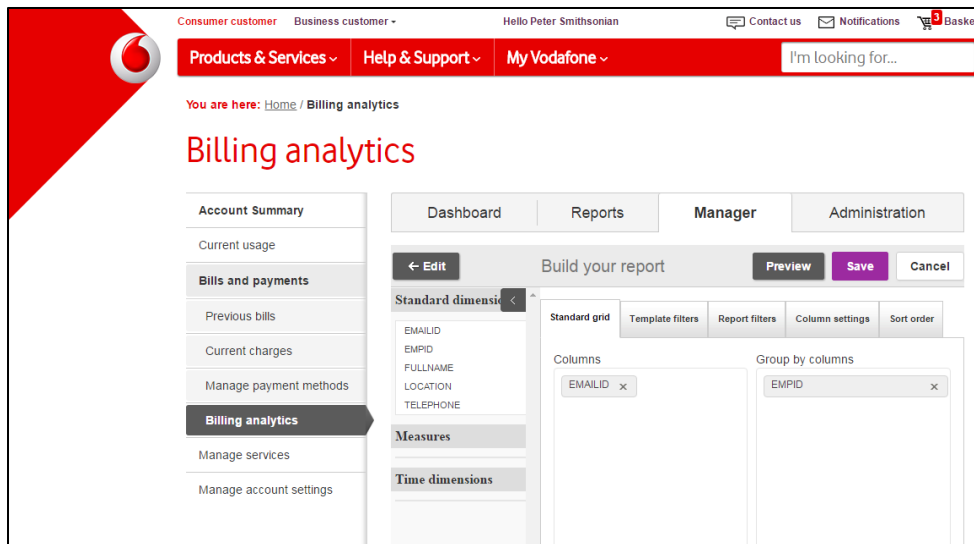
Figure.82:   Standard grid

✓   You can select the columns from **Standard dimensions, Measures, and Time dimensions**

✓   From left pane, drag and drop the required columns to right pane

   ♦   In **Columns**, place the required columns to view in the report

   ♦   In **Group by columns**, to filter the data, drag and drop the column

   When the group by condition is applied, the data is filtered based on set parameters and report is generated.

   For example:

   The customer information contains customer name, customer id (unique), called numbers, and time duration.

   Here, you can select time duration as group by column and when applied, the list of called numbers in that particular time duration are listed down.

5.2.2.   Setting Template filters

Template filters are preconfigured fixed filters which are hidden to user (*set in backend*) and are applied while populating the details.
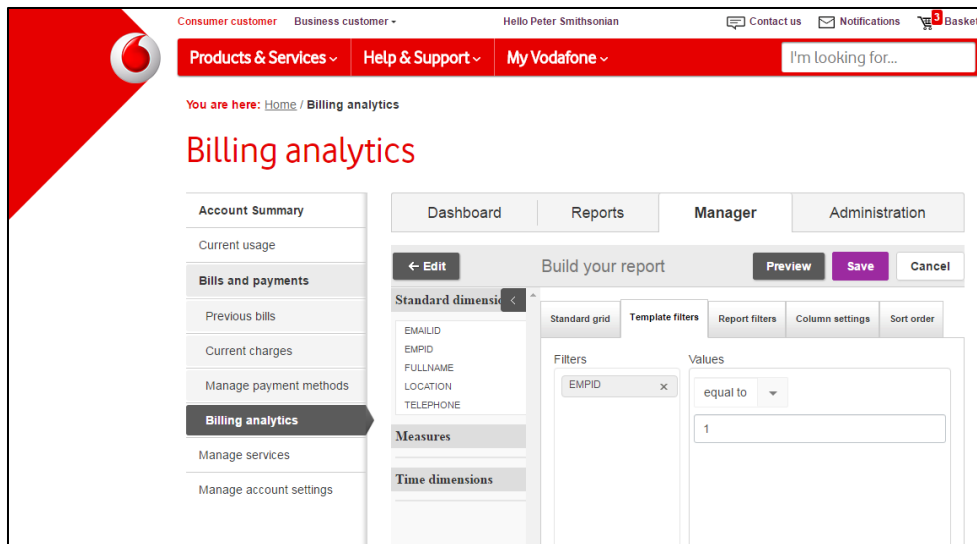
Figure.83:   Template filters

✓   You can select the columns from **Standard dimensions, Measures, and Time dimensions**

✓   From left pane, drag and drop the required columns to right pane

♦   In **Filters**, select the filter condition(column) by which the details must be filtered

♦   In **Values**, to selected filter you can set predefined values

The values can be either **equal to** or **not equal to.**

5.2.3.   Setting Report filters

In report filters, you can set the column and condition by which the data is filtered. The set report filter is available (in *frontend*) while generating the reports.
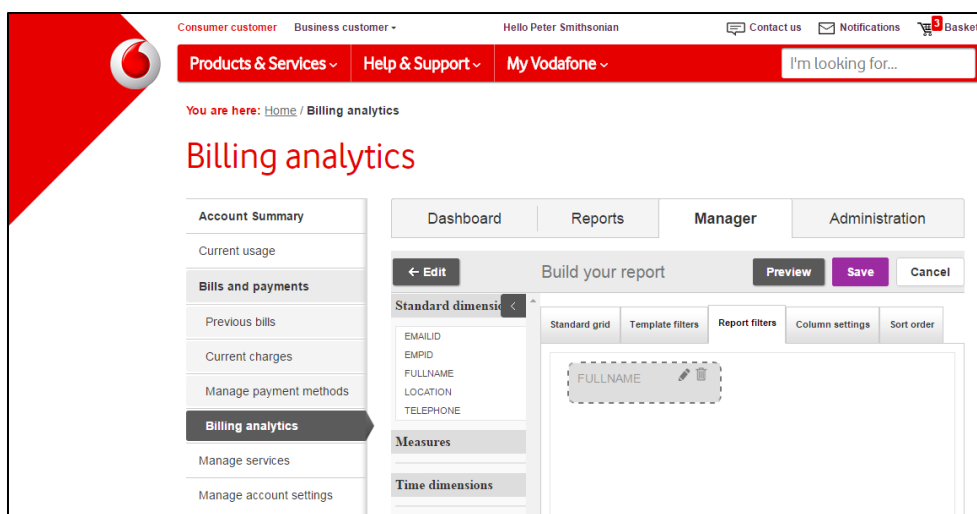
Figure.84:   Set Report filters

✓   You can select the columns from **Standard dimensions, Measures,** and **Time dimensions**

✓   From left pane, drag and drop the required column to right pane.

You can edit and delete the set report filters.

♦   To edit the existing report filter, click the respective **Edit** 🖉 icon

The **Edit Component** screen appears:
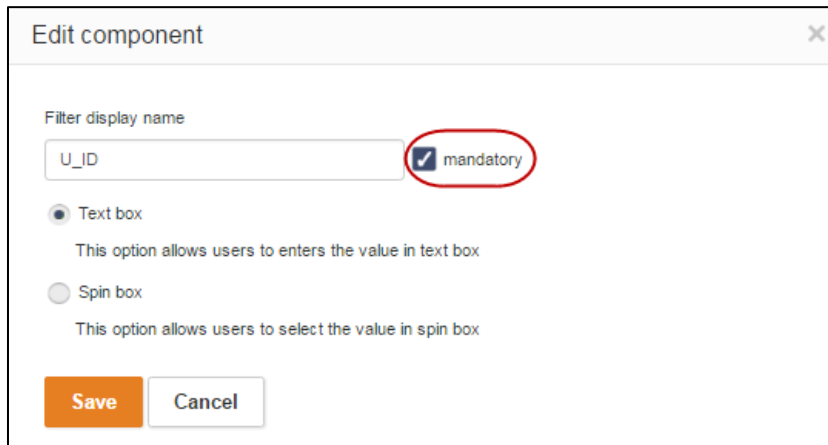
Figure.85:

✓   **Filter display name** is auto-populated

✓   If required, to set the field as mandatory, select the **mandatory** filed

---

☞   **NOTE:** The filter is set in the background and displayed in **Report filters** at the time of report generation.

✓   Select **text-box** or **Spin box**

The display settings are set, to enter the values

✓   Click **Save**

♦   To delete the existing report filter, click the respective **Delete** 🗑 icon

5.2.4.   Editing the Column settings

The column settings tab allows you to set alias name (*display name*) to selected columns and set the drill down filter.
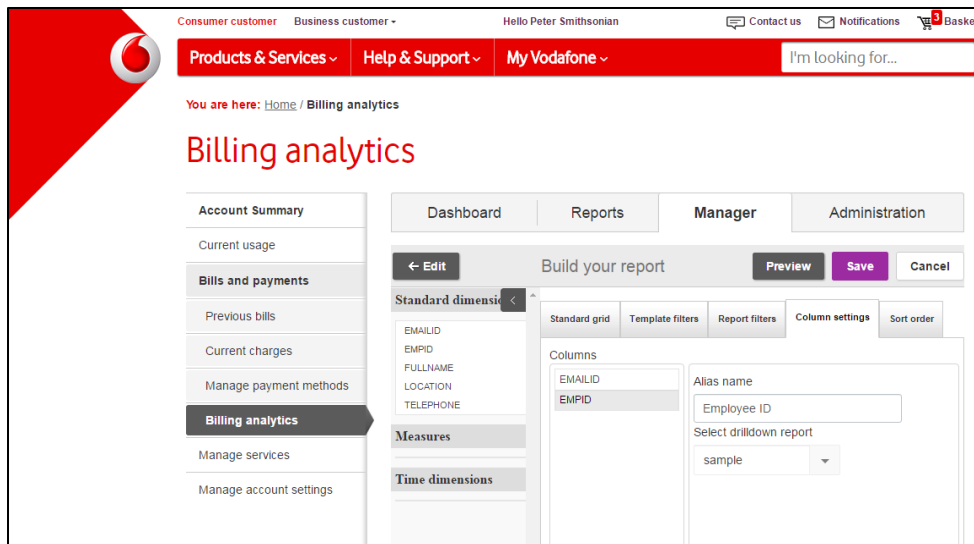
Figure.86:   Column settings

✓ You can select the columns from **Standard dimensions, Measures, and Time dimensions**

✓ From left pane, drag and drop the required column to right pane.

♦ In the **Columns** box, drag and drop the column

The selected column is **auto-populated** in the **Alias name**

♦ Now, **re-enter** the required display name

The name of the column is successfully changed.

♦ From the **Select drilldown report,** select an existing report

The drill down option allows you to filter the data based on selected report criterion.

☞ Please note a drill down report is highlighted in blue color.

5.2.5.   Sorting the order

The sort order tab allows you to sort the list of column either in ascending or descending order.
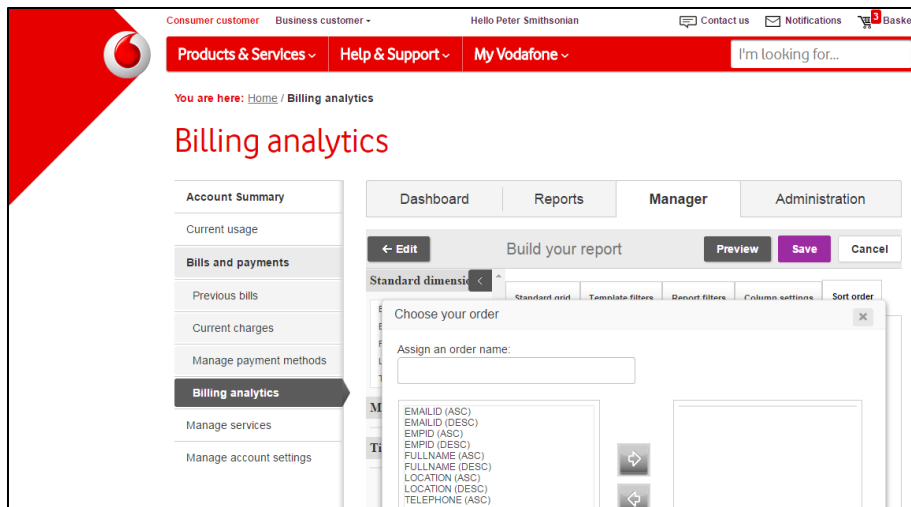
Figure.87:   Sort Order

☞   Please note, you can set either **Group by columns** or **Sort order**

✓   On the screen, in **Sort order** tab, click ⊕ icon

   Choose your order dialog appears as shown above:

✓   In the **Assign an order name** text-box, provide a name to sorting order

✓   From the list, select the required columns and click **->**

✓   The selected column are available in right pane, now sort the columns in ascending or descending order

✓   Click **Save**

   The columns are sorted in required order

✓   To go back and edit the report details, click on ← Edit on top left corner

✓   To view the preview of the report, click **Preview**

✓   Once preview is done, click **Save**

✓   Click **Cancel** to abort the transaction

6. Managing the Reports

You can generate a variety of reports using Billing Analytics. A synoptic view of few of the following basic reports are provided.
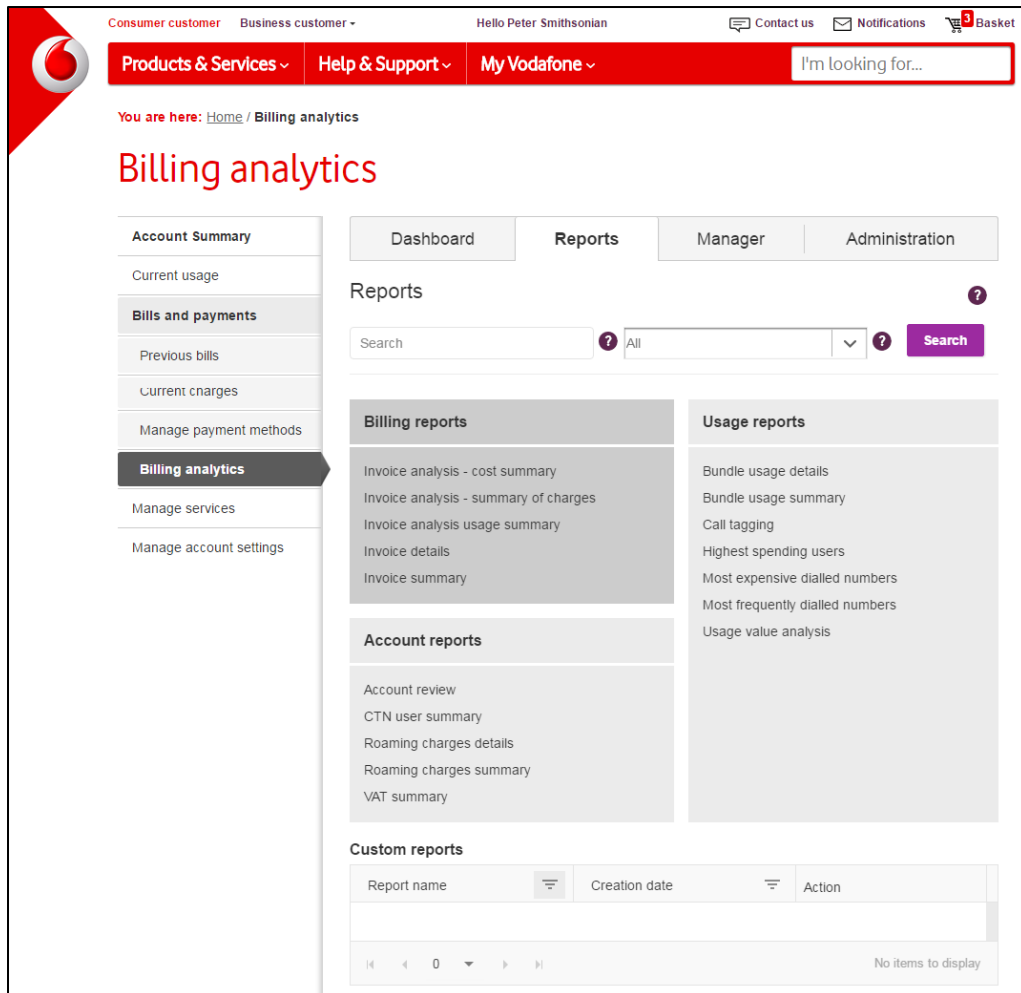
Figure.88: Reports

The reports module allows you to view the out of box reports and user specific custom reports

✓ Types of reports available:

♦ Billing Reports

♦ Usage Reports

♦ Account Reports

♦ Custom Reports

☛ Please note the generated report(s) does not affect the actual **billing format** in B**illing**

   system(s). These reports are purely based on created groups (viewpoints) which are

   grouped by existing account number(s) and telephone number(s).

♦ **Search the existing reports**

✓ In the S**earch** text-box, enter the name of the report to search

✓ From the drop-down list, select the required **report category** and click **Search**

   Displays the list of reports

6.1. Viewing the Billing reports

Following are different types of billing reports:

☛ Please note the columns displayed in the generated report(s) are report specific and they

   invariably vary with respect to the selected report type.

♦ **Invoice analysis – cost summary**

The report shows the cost summary for particular account and telephone numbers

pertaining to that account.
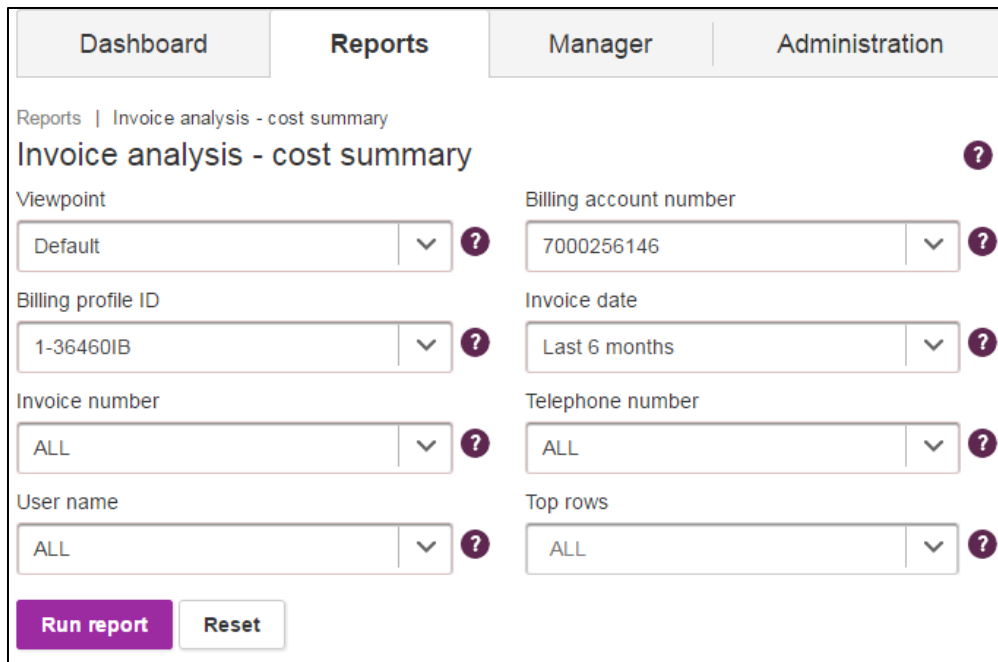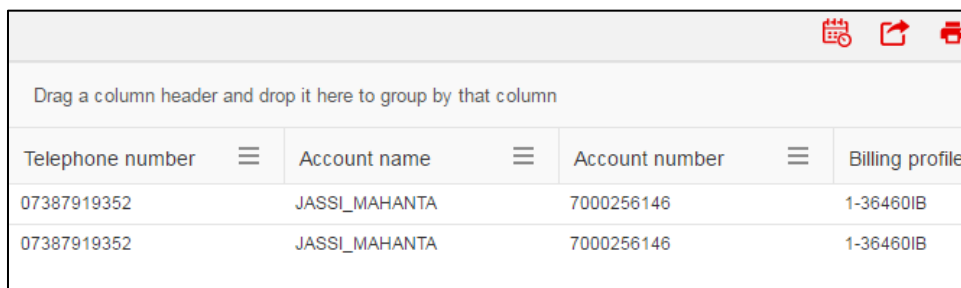
Figure.89:   Invoice analysis-cost summary
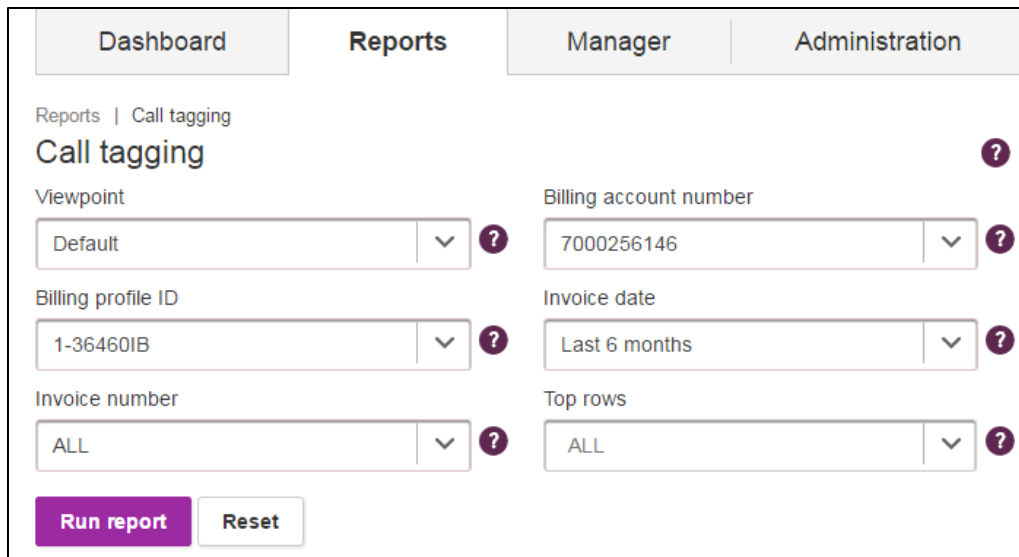
In the screen,

✓ Select the appropriate filtering options to generate the report and click **Run report**

✓ To reset the filtering criteria, click **Reset**

Generates the required report and displayed as shown below:

Figure.90:   Report

✓ Click here to refer the actions performed

♦ **Invoice analysis – summary of charges**

The report displays the summarized report of invoice charges for selected time period or duration.

Figure.91:   Invoice analysis-summary of charges

In the screen,

✓   Select the appropriate filtering options to generate the report and click **Run report**

✓   To reset the filtering criteria, click **Reset**

Generates the required report and displayed as shown below:

Figure.92:   Report

✓   Click here to refer the actions performed

♦   **Invoice analysis usage summary**

Depending on set time period or duration, displays the usage summary details.
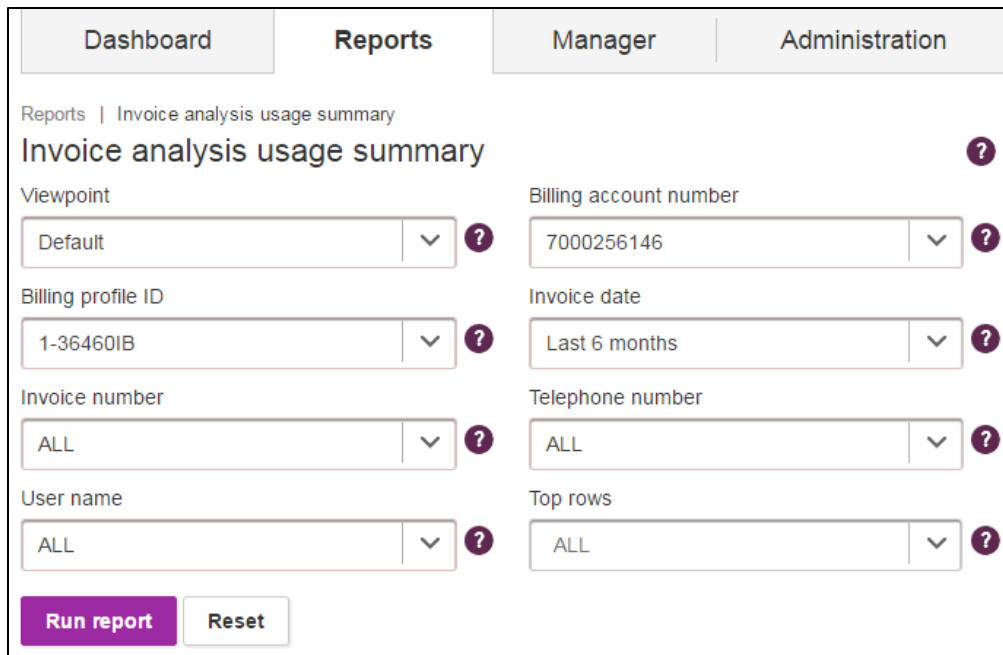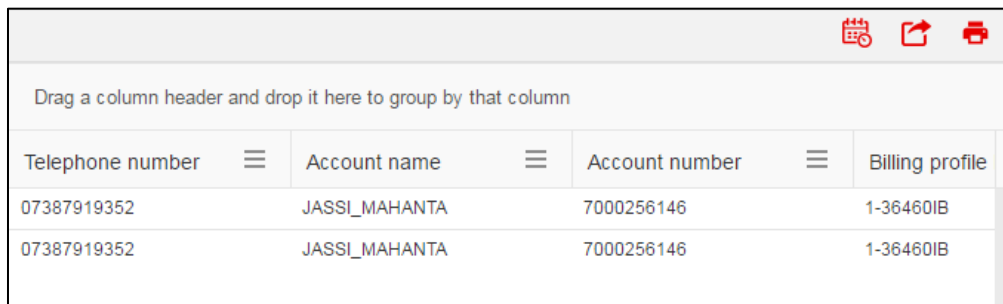
Figure.93:   Invoice analysis usage summary

In the screen,

✓ Select the appropriate filtering options to generate the report and click **Run report**

✓ To reset the filtering criteria, click **Reset**

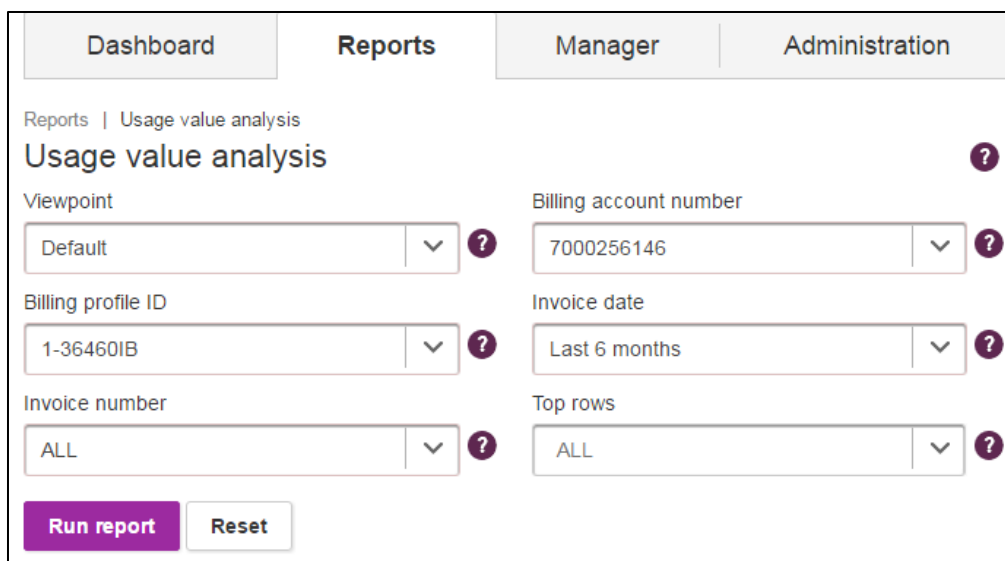Generates the required report and displayed as shown below:

Figure.94:   Report

☛ Please note the details displayed in the generated report are specific to availability of data and they invariably vary with respect to search criterion.

✓ Click here to refer the actions performed

♦   **Invoice details**

The report displays the details of transactional charges for call, data, messages, and other services.

Figure.95: Invoice details

In the screen,

✓   Select the appropriate filtering options to generate the report and click **Run report**

✓   To reset the filtering criteria, click **Reset**

Generates the required report and displayed as shown below:

Figure.96: Report

✓   Click here to refer the actions performed

♦   **Invoice summary**

The report displays the details pertaining to usage and reoccurring charges for particular
time duration
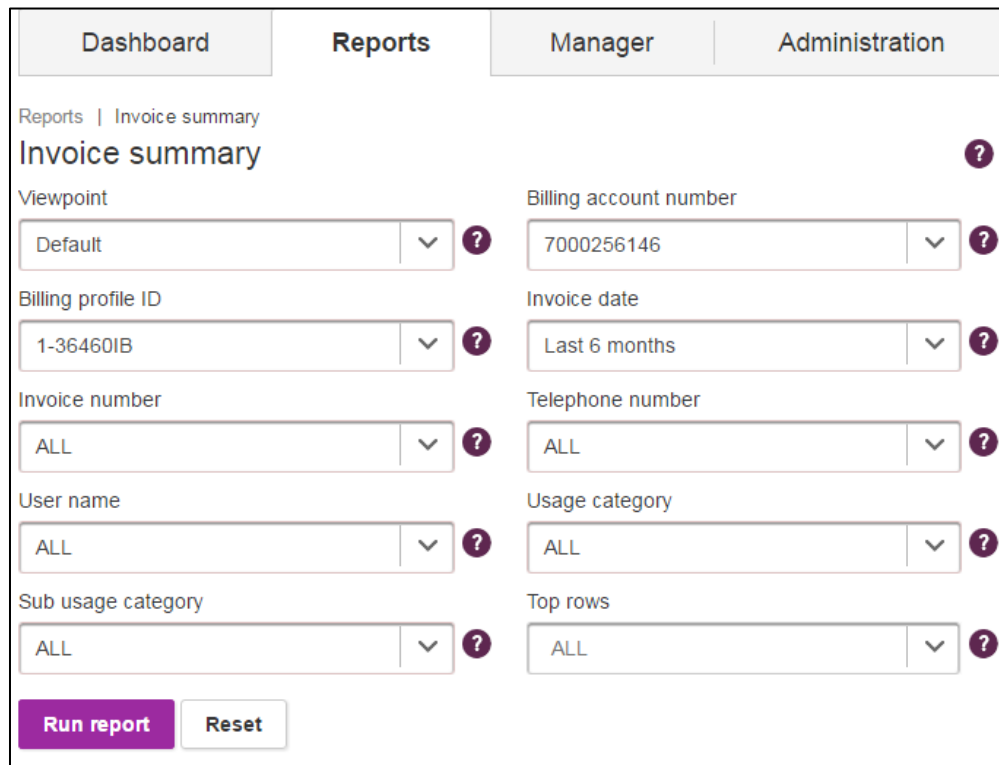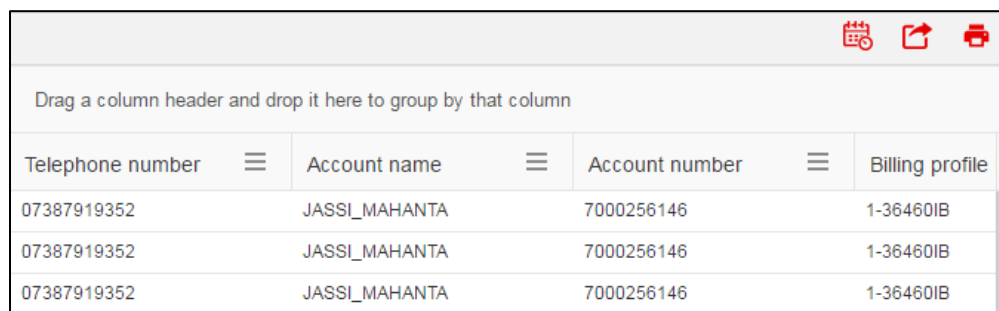
Figure.97:   Invoice summary

In the screen,

✓   Select the appropriate filtering options to generate the report and click **Run report**

✓   To reset the filtering criteria, click **Reset**

Generates the required report and displayed as shown below:

Figure.98:   Report

✓   Click here to refer the actions performed

6.2.   Viewing the Usage reports

Following are different types of usage reports:

♦   **Bundle usage details**

The report displays the detailed analysis of calls covering inside and outside of the customer bundle.
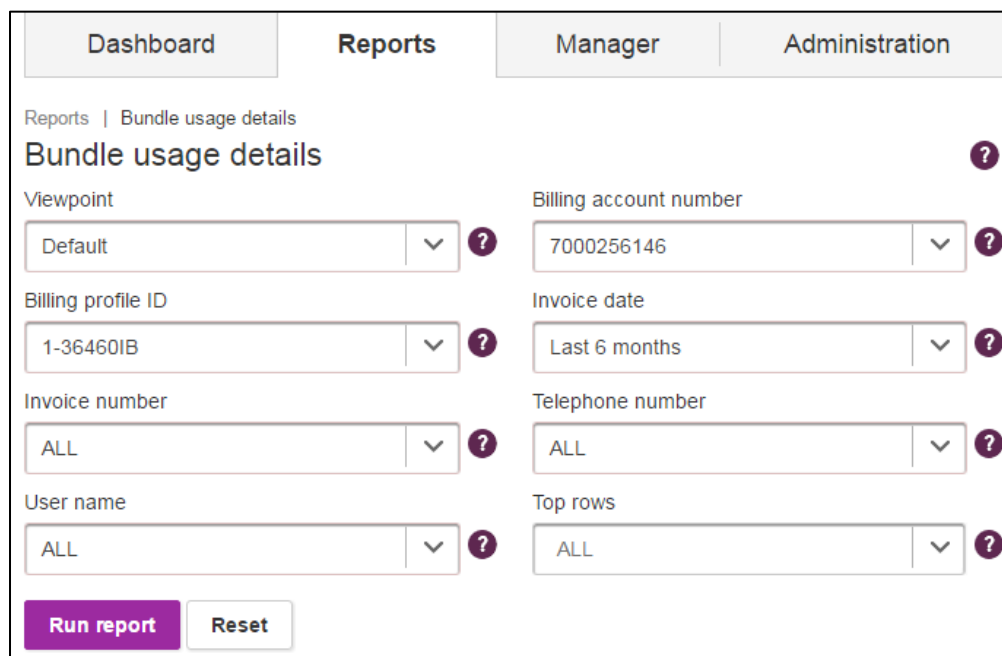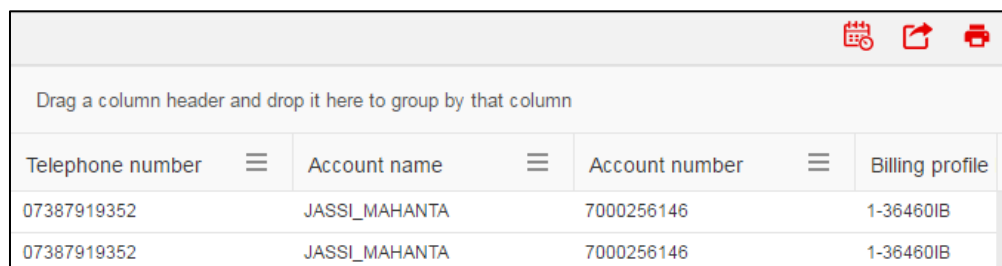
Figure.99:   Bundle usage details

In the screen,

✓   Select the appropriate filtering options to generate the report and click **Run report**

✓   To reset the filtering criteria, click **Reset**

Generates the required report and displayed as shown below:

Figure.100: Report

✓   Click here to refer the actions performed

♦ **Bundle usage summary**

The report displays the detailed summary of calls covering inside and outside of the customer bundle.

Figure.101: Bundle usage summary

In the screen,

✓ Select the appropriate filtering options to generate the report and click **Run report**

✓ To reset the filtering criteria, click **Reset**

Generates the required report and displayed as shown below:

Figure.102: Report

✓ Click here to refer the actions performed

♦ **Call tagging**

The report displays call tagging details.

Figure.103: Call tagging

In the screen,

✓   Select the appropriate filtering options to generate the report and click **Run report**

✓   To reset the filtering criteria, click **Reset**

Generates the required report and displayed as shown below:
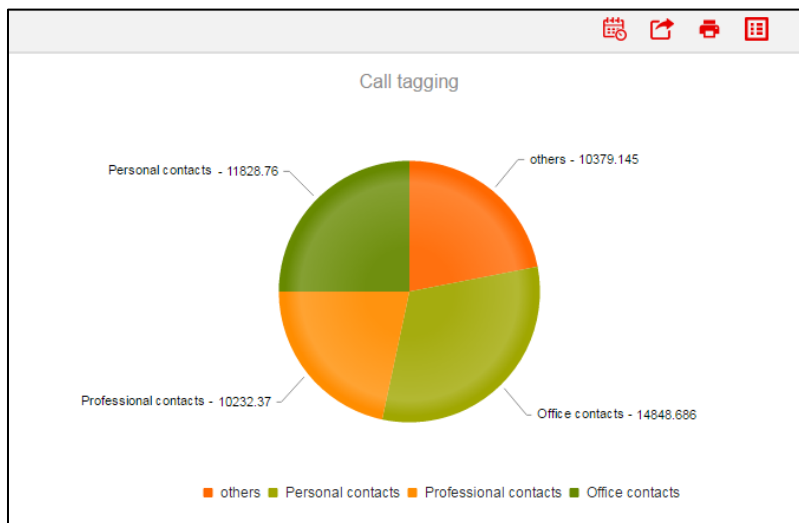
Figure.104: Report

The screen allows you to perform the following actions:

◆   Schedule the report[12]

◆   Print the report

◆   Export the report to following formats: **PDF, JPEG**, and **PNG**

◆   View the report in **Pie chart** or **Tabular** forms

◆   **Highest spending users**

Displays the detail pertaining to highest spending service users and a drill down is available to view each user details.

Figure.105: Highest spending users

In the screen,

✓   Select the appropriate filtering options to generate the report and click **Run report**

✓   To reset the filtering criteria, click **Reset**

Generates the required report and displayed as shown below:

---

12 Export data from one or more reports on a one-time or recurring basis.

Figure.106: Report

✔ Click here to refer the actions performed

♦ **Most expensive dialled numbers**

The report shows most expensive calls list.

Figure.107: Most expensive dialled numbers

In the screen,

✔ Select the appropriate filtering options to generate the report and click **Run report**

✔ To reset the filtering criteria, click **Reset**

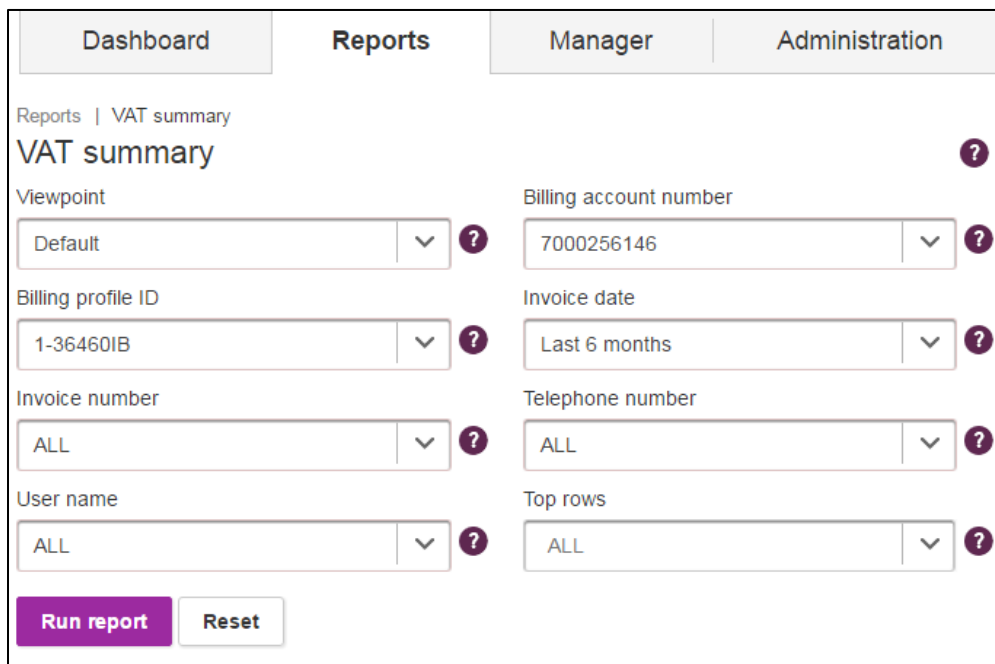Generates the required report and displayed as shown below:
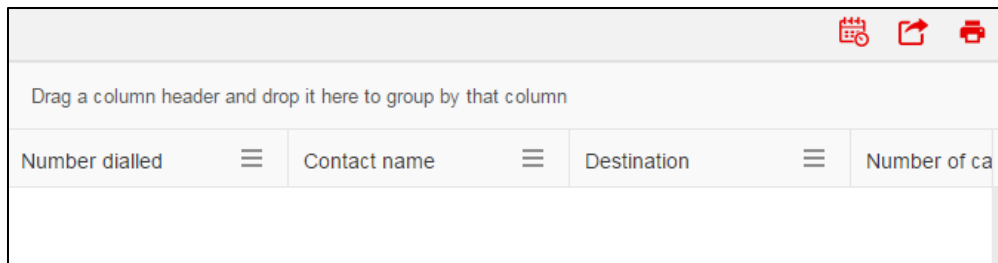
Figure.108: Report

✓ Click here to refer the actions performed

◆ **Most frequently dialled numbers**
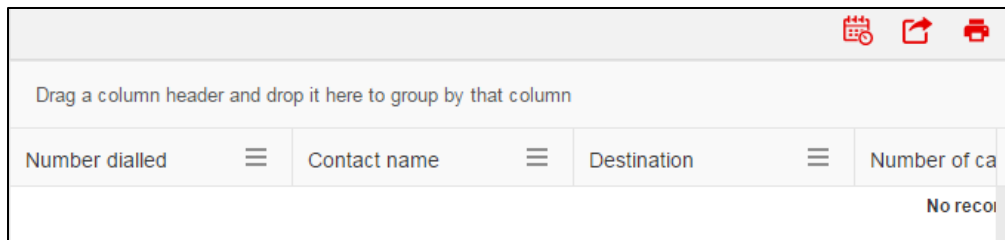
The report displays the analyzed details of frequently dialled numbers.

Figure.109: Most frequently dialled numbers

In the screen,

✓ Select the appropriate filtering options to generate the report and click **Run report**

✓ To reset the filtering criteria, click **Reset**

Generates the required report and displayed as shown below:

Figure.110: Report

✓ Click here to refer the actions performed

♦ **Usage value analysis**

The report displays the calls divided into different cost bands, with the ability to drill down on calls in each cost ranges.
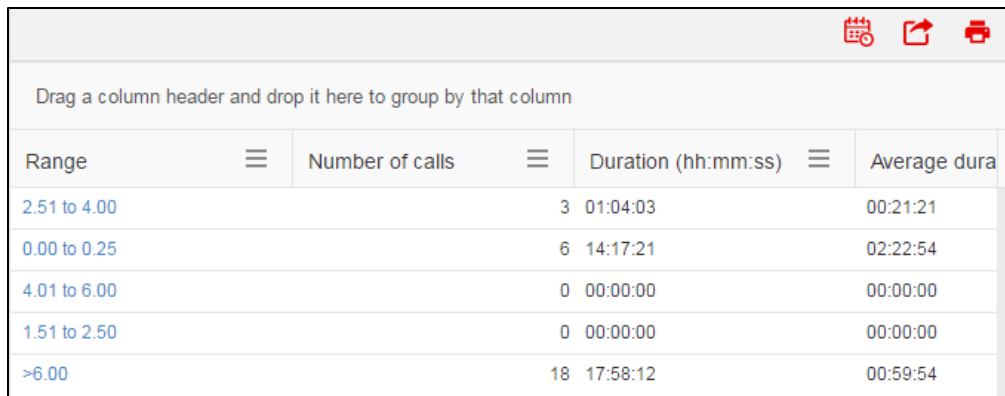
Figure.111: Usage value analysis

In the screen,

✓ Select the appropriate filtering options to generate the report and click **Run report**

✓ To reset the filtering criteria, click **Reset**

Generates the required report and displayed as shown below:

Range		Number of calls		Duration (hh:mm:ss)		Average dura
2.51 to 4.00		3		01:04:03		00:21:21
0.00 to 0.25		6		14:17:21		02:22:54
4.01 to 6.00		0		00:00:00		00:00:00
1.51 to 2.50		0		00:00:00		00:00:00
>6.00		18		17:58:12		00:59:54

Figure.112: Report

☞ Please note at the time of report creation, you can set drill down (click here to refer) and the set drill down is highlighted in blue color.
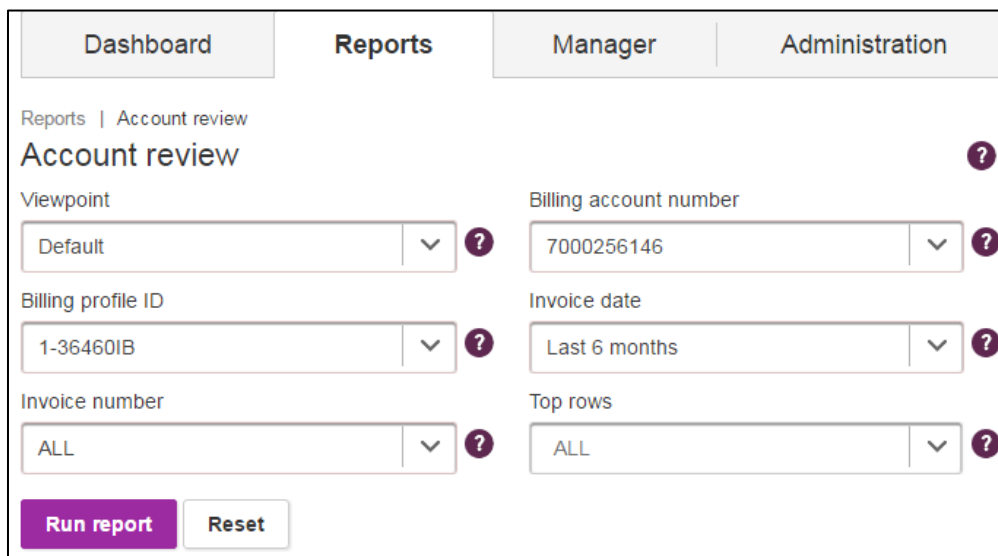
✓ **Click here to refer the actions performed**

6.3. Viewing the Accounting reports

Following are different types of accounting reports:

♦ **Account review**

The report displays the customer usage summary details with break-up of all usage and reoccurring charges.

Figure.113: Account review

In the screen,

✔ Select the appropriate filtering options to generate the report and click **Run report**

✔ To reset the filtering criteria, click **Reset**

Generates the required report and displayed as shown below:

Summary - Total, Average					
Subject	ACC_OTC (£)	ACC_RC (£)	ACC_ADJUSTM...	Text charges (£)	Call cha
Total	0.000	0.000	0.000	45535.350	
Average	0.000	0.000	0.000	22767.675	

Drag a column header and drop it here to group by that column

Telephone number		Account name		Account number		Billing profile
07387919352		JASSI_MAHANTA		7000256146		1-36460IB
07387919352		JASSI_MAHANTA		7000256146		1-36460IB

Figure.114: Report

✔ Click here to refer the actions performed

♦ **CTN user summary**

The report displays the summary of list of users using the telephone number.

Figure.115: CTN user summary

In the screen,

✔ Select the appropriate filtering options to generate the report and click **Run report**

✔ To reset the filtering criteria, click **Reset**

Generates the required report and displayed as shown below:

Figure.116: Report

✔ Click here to refer the actions performed

◆ **Roaming charges details**

For selected telephone number, the report displays the detailed roaming charges for call, messages, and data volume.

Figure.117: Roaming charges details

In the screen,

✔ Select the appropriate filtering options to generate the report and click **Run report**

✔ To reset the filtering criteria, click **Reset**

Generates the required report and displayed as shown below:

Figure.118: Report

✓ Click here to refer the actions performed

◆ **Roaming charges summary**

The report displays the summarized roaming charges for calls, messages, and data volume.

Figure.119: Roaming charges summary

In the screen,

✓ Select the appropriate filtering options to generate the report and click **Run report**

✓ To reset the filtering criteria, click **Reset**

Generates the required report and displayed as shown below:

Figure.120: Report

✓ Click here to refer the actions performed

♦ **VAT summary**

The report displays the usage charges, recurring, and non-recurring charges along with VAT code.

Figure.121: VAT summary

In the screen,

✓ Select the appropriate filtering options to generate the report and click **Run report**

✓ To reset the filtering criteria, click **Reset**

Generates the required report and displayed as shown below:

Figure.122: Report

✓   Click here to refer the actions performed
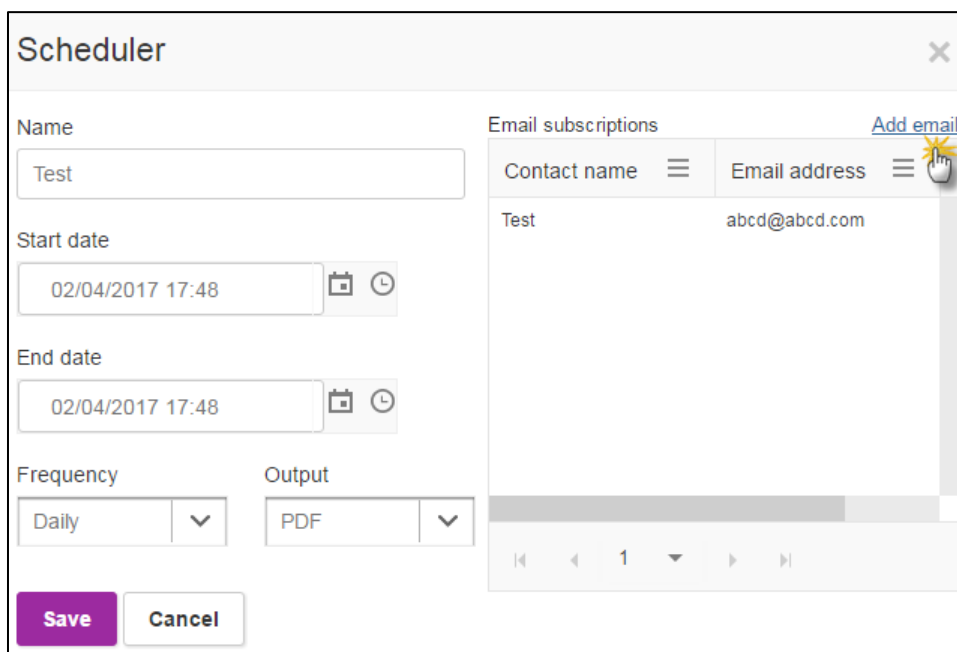
6.4.   Actions performed on reports

The reports module allows you to perform the following actions:

6.4.1.   Scheduling the report

✓   To work with Scheduling the Report, click the **Schedule Report** 📅 icon on the report screen

The **Scheduler** screen appears:

Figure.123: Scheduler

The reports are scheduled and priorities are set.

✓   On the left-pane, in the **Name** text-box, enter the name of the report to be scheduled

✓   From the **Start date** and **End date**, set the date and time intervals

✓   Click ⊡ icon to select the date

✓   Click ⊙ icon to set the time

☛ Please note depending on selected time intervals the frequencies are available.

✓   From the F**requency** drop-down list, set the time frequency to generate the reports(s).

You can generate reports daily, weekly, monthly, and yearly.

✓   **Daily**: If the option is daily, the scheduled report will be generated every day on selected bill cycle

For example:

♦   If start date is 21.02.2017 and end date is between 21.02.2017 to 27.02.2017, then reports can be scheduled only on daily basis

✓   **Weekly**: If the option is weekly, the scheduled report will be generated every week on the selected bill cycle

For example:

♦   If start date is 21.02.2017 and end date is after 27.02.2017(*duration is 7 days*), then reports are scheduled on daily and weekly basis.

✓   **Monthly**: If the option is monthly, the scheduled report will be generated every month on the selected bill cycle day

For example:

If start date is 21.02.2017 and end date is 23.03.2017 (*duration is 30 days*), then reports are scheduled on daily, weekly, and monthly basis.

✓   **Yearly**: If the option is yearly, the scheduled report will be generated every year on the selected bill cycle day

For example:

♦   If start date is 21.02.2017 and end date is 21.02.2018, then reports are scheduled on daily, weekly, monthly, and yearly basis.

☛ Please note the scheduled reports may not be delivered in few scenarios: 1).If the server is under maintenance.2). While sending the report, if the size of the email exceeds the maximum upload limit.

✓   From the **Output** drop-down list, select the format to send the generated report

---

You can generate the report in following formats:

◆   PDF

◆   CSV

◆   XLSX

✓   On the right-pane, from the Email subscriptions grid

✓   To send the above scheduled report, click **Add email**

The **Contact** screen appears:
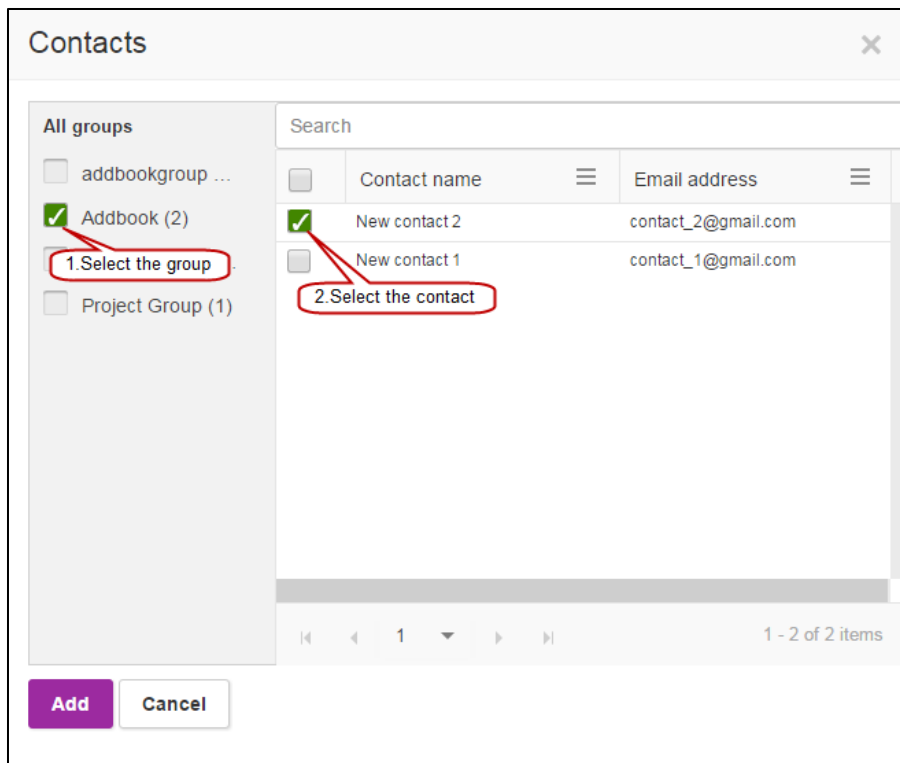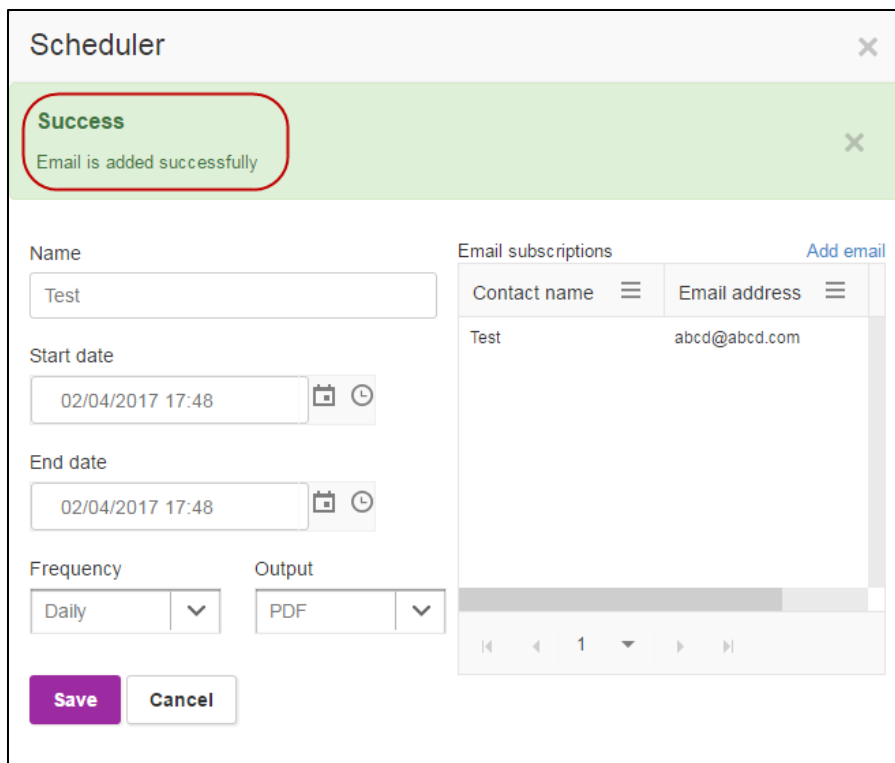
Figure.124: Contacts

By default, the screen displays all the available contacts

To select a particular group

✓   In the left-pane, beside the name of the group, select the check-box

On the right-pane, displays the list of contacts

✓   Select the check boxes of the users to whom you wish to send the above scheduled reports (*recipients*) and click **Add**

The email id is set to the scheduled report and success message appears:

Figure.125: Success message

✓ Once done, click **Save**

The report is scheduled and success message appears:
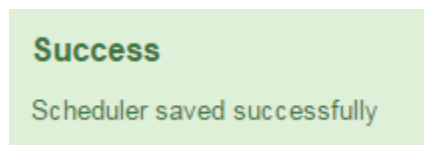
6.4.2.   Printing the report
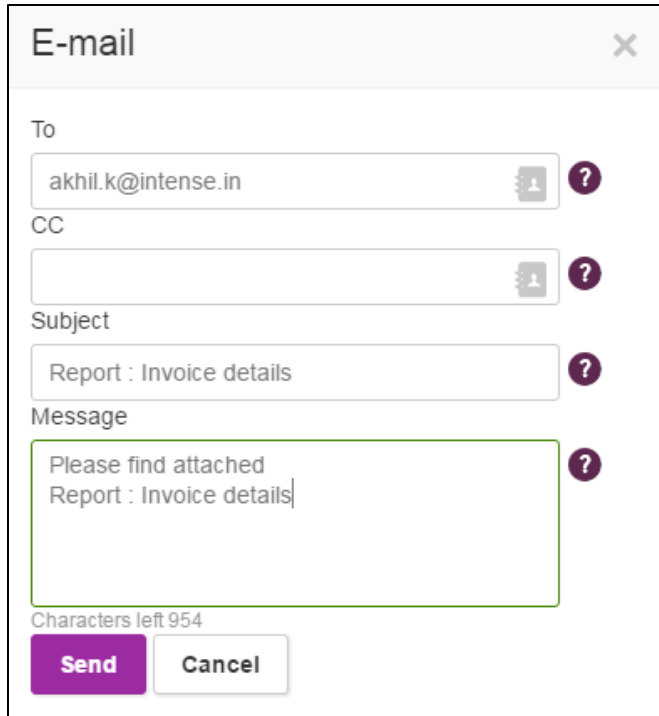
✓ To print the report, click print 🖶icon

6.4.3.   Exporting the report

The summary of the selected report are exported to following formats:

✓ To export the report to XLSX format, click export 🔗icon, select the **XLSX** link present

✓ To export the report to PDF format, click export 🔗icon, select the **PDF** link present

✓ To export the report to CSV format, click export 🔗icon, select the **CSV** link present

✓ To export the report through Email, click export 🔗icon, select the **Email** link present

The **E-mail** screen appears:

Figure.126: E-mail

✓ In **To** and **CC** fields, add the recipients address or select the contact from available contact list

✓ In the **Subject** text-box, specify the name of the report

✓ In the **Message** text-box, specify the report details

✓ Click **Send**

6.4.4.   Sorting the reports

✓ By sorting, selecting and filtering the data, you can view the reports

♦ Sort Ascending - you can sort the list in ascending order (A to Z)

♦ Sort Descending - you can sort the list in descending order (Z to A)

♦ Columns - you can make a selection from available fields and view the reports

♦ Filter - you can set range value and view the reports

6.5.   Managing Custom reports

The custom reports module allows you to view the user specific generated reports. The new reports generated in manager module are available to view in **Reports | Custom reports**.

Figure.127: Custom Reports

You can view the reports by selecting filters values, you can also edit, delete, and view the existing user generated reports.

6.5.1.   Viewing the Custom report

✓   To view the details of the already generated report, click **view** icon

Figure.128: View custom report

After viewing the user generated reports, you can also Export, Schedule and Print the custom reports.

6.5.2.   Editing the Custom report

✓   To edit the details of the existing Reports, click **edit** 🖊icon

✓   Perform the required changes and click **Update**

☛   Please note you cannot **edit** the scheduled custom reports.

6.5.3.   Delete the existing Custom report

✓   To delete the existing report, click **delete** 🗑 icon

✓   The application prompts for the confirmation from the user, click **Yes** to delete and click **No** to retain.

7. **Working with Manager Module**

The manager module allows you to create new reports and view the scheduled reports.

- ♦ Generate New Reports

- ♦ View Scheduled Reports

7.1. **Working with Schedule reports**

The interface allows you to view a list of scheduled reports that are set in the Reports module.

To work with scheduled reports,

✓ Navigate to **Manager| Scheduled reports**

The **Schedule reports** screen appears:

Figure.129: Scheduled Reports

The screen displays the list of scheduled reports, and allows you to view the count of reschedules done. It also allows you to view the status of the report and if required, you can also reschedule a selected report, download it to local drive, and delete the schedule report.

✓ Click **Refresh**

The reports are refreshed and updated report list is available on the screen.

✓ Following are the fields available to view:

- ♦ Schedule name

- ♦ Start date

- ♦ End date

- ♦ Count

- ♦ Action

- ♦ Status

    The scheduled report status can be either **In progress** or **completed.** The in progress
    reports are still active and running where as the completed reports are inactive.

✓ By sorting, selecting and filtering the data, you can view the scheduled reports

- ♦ Sort Ascending - you can sort the list in ascending order (A to Z)

- ♦ Sort Descending - you can sort the list in descending order (Z to A)

- ♦ Columns - you can make a selection from available fields and view the scheduled report

- ♦ Filter - you can set range value and view the scheduled report

✓ The scheduler module allows you to perform the following actions on the scheduled reports:

- ♦ To download the scheduled report, click **download** icon

- ♦ To edit the scheduled report, click **Edit** icon

☞ Please note you cannot edit the schedule session expired reports (i.e. *status is completed*).

- ♦ To delete the scheduled report, click **delete** icon