Quick Start Guide

ISC UCaaS Call Reports

June 2023
Version 1.5

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![Comcast Business | Masergy logo]

Running Reports

Masergy ISC UCaaS Call Reports is a call accounting application that integrates seamlessly with the Masergy UC services. The UCaaS Call Reports detects inbound and outbound calls, abandoned calls, and other call activities. The Masergy ISC UCaaS Call Reports works with any standard browser where you can schedule, customize, and download the reports in a .CSV file format.

First, you will need to be assigned the appropriate license in the Masergy Intelligent Service Control (ISC) portal with a UCaaS Admin role. This can be accomplished by either your ISC administrator or by Masergy support staff.

Masergy ISC UCaaS Call Reports provides access to the entire Enterprise's call detail records.
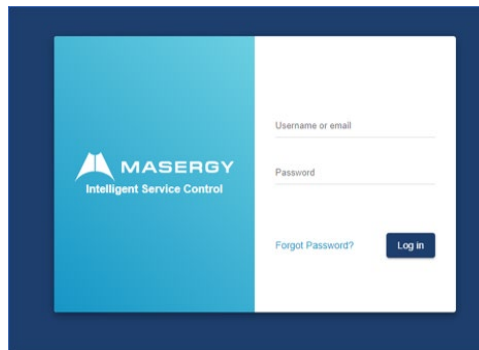
Logging in

The **UCaaS Admin** role credential will be needed to access the ISC UCaaS Call Reports in the ISC portal.
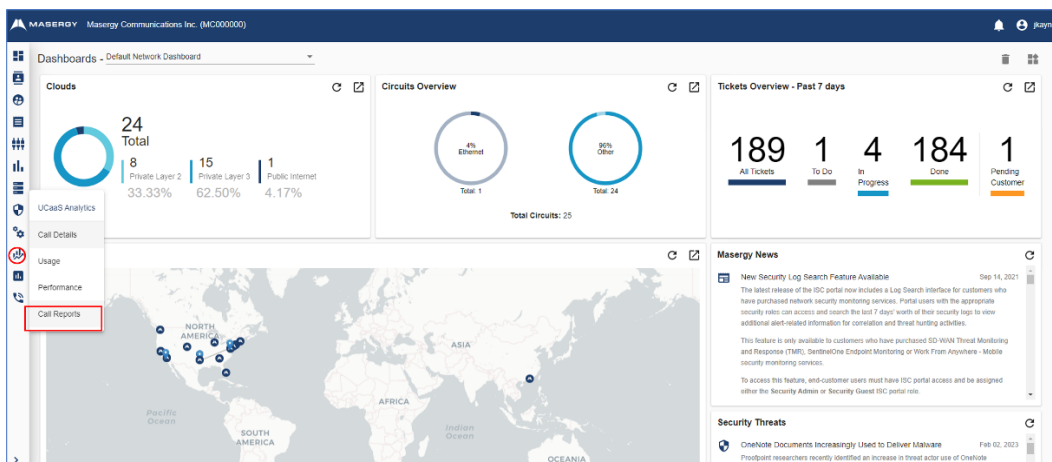
From the Comcast Business | Masergy website, select the **Login** and then select **Service Control**
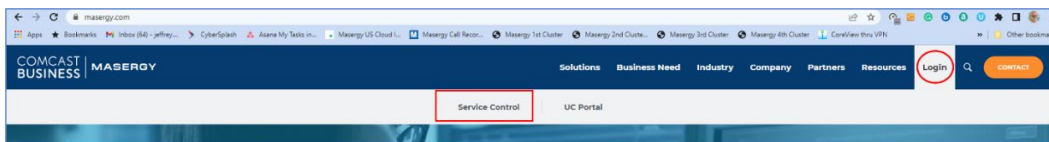
or go to https://isc.masergy.com. Enter your ISC Portal Credentials and password.

From the **ISC Dashboard** landing page, on the left-side menu select **UCaaS Analytics** to open the menu, select **Call Reports**.
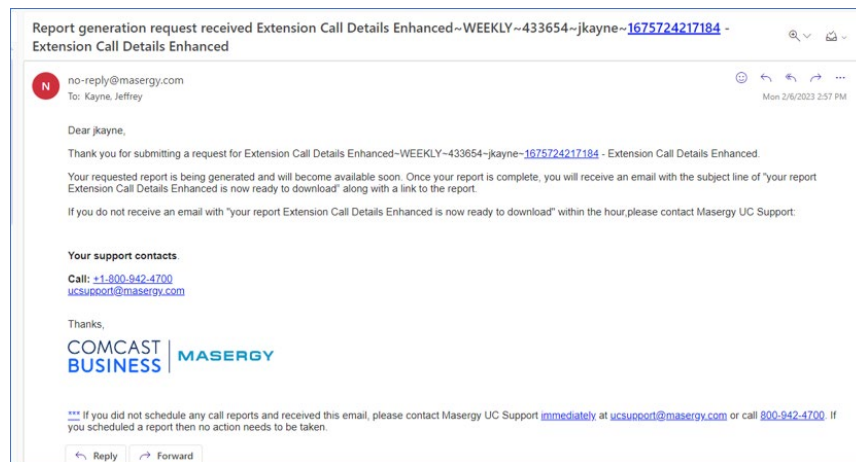
UCaaS Call Reports

The UCaaS Call Reports provide the details for call direction with internal, incoming, and outgoing calls. There are four prebuilt reports and the ability to create customized call report templates. The call report templates you customize can be saved and there is no limit on the number of call report templates that can be created.

The UCaaS Call Reports dashboard is where you will find the Schedule Report, Prebuilt Report, My Reports, Detailed Reports, and Summary Reports tabs.
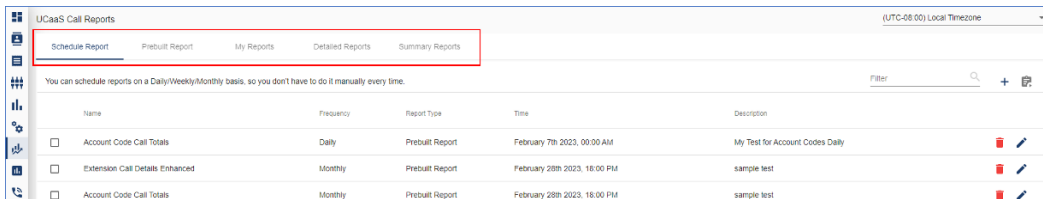
All the enterprise calling activity is stored for 18 months and the call history is purged on a First In First Out (FIFO) basis. Once the call report is scheduled, an email notification is sent to the UCaaS Admin confirming the call report is being processed.


When the call report becomes available, a second email notification is sent to the UCaaS Admin that includes a link to the requested call report.
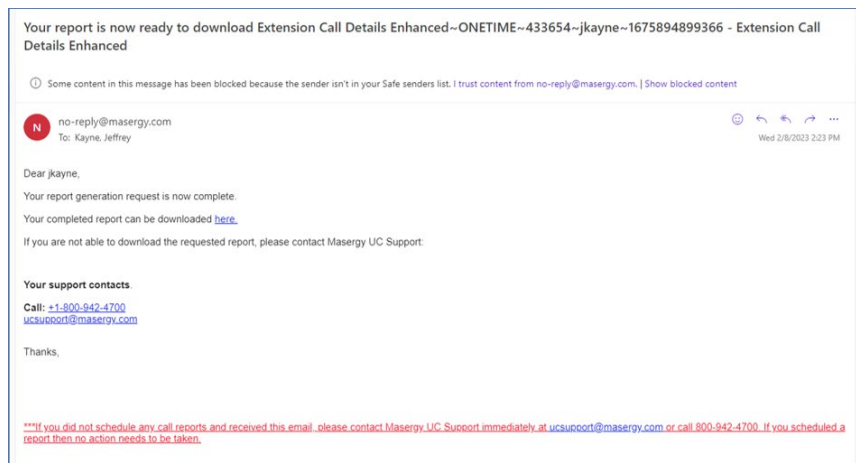
All generated reports are found in the My Reports tab. These call reports are kept for 90 days and purged on a FIFO basis.

Schedule Reports

Schedule Reports will display all the recurring reports and one-time reports that have been scheduled. Scheduled reports can be run on a daily, weekly, monthly, and one-time basis. Selecting the "**+**" sign opens the **Schedule New Report** menu. Before you begin to schedule any reports, please set your local time zone from the drop-down menu located in the upper right-hand corner.
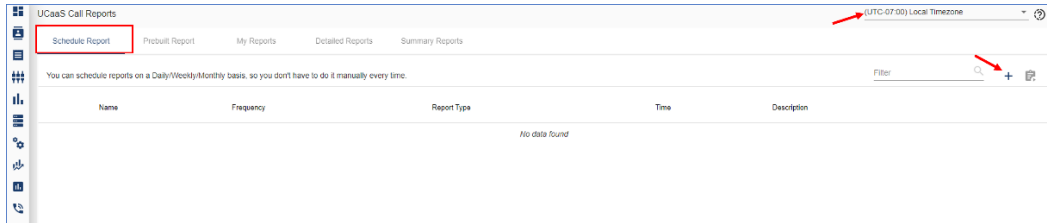
From the **Schedule New Report** menu, fill in a *Description*, select the *Schedule Interval*, *Select Day*, *Select Time*, and *Select Report Type*.
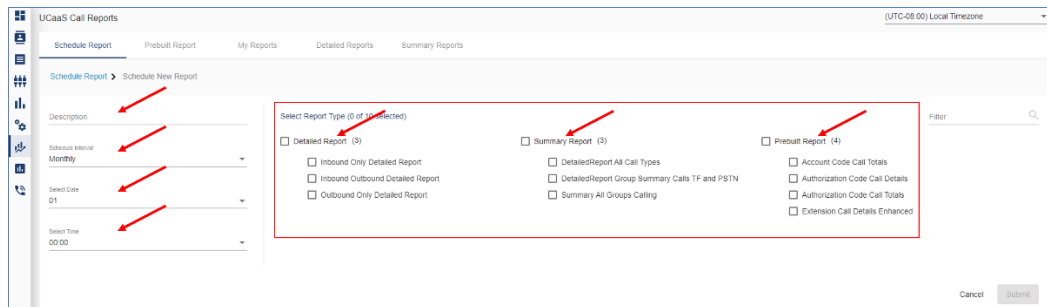
|	
Description	Choose a unique name to identify the scheduled call report.
Schedule Interval	Choose from Daily, Weekly, Monthly, and One Time.
Select Date/Day	Choose the start date/day by using the drop-down menu.
Select Time	Choose start time by using the drop-down menu.
Select Report Type(s)	Choose from the Detailed Report, Summary Report, and Prebuilt Report lists.

The example below shows scheduling three weekly recurring reports from the Detailed Reports and Prebuilt Report templates.
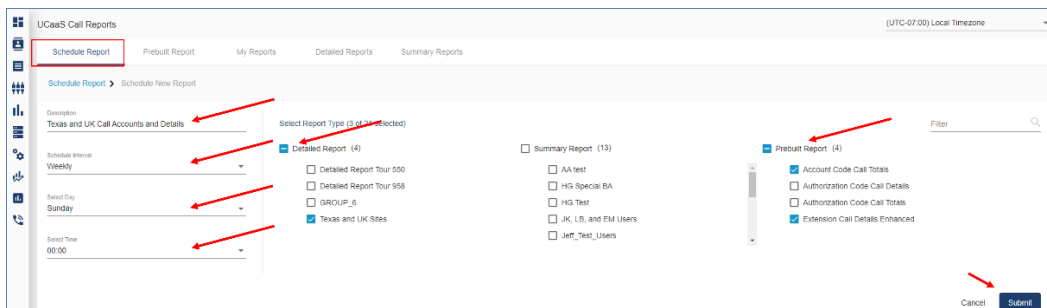

When you are finished creating the scheduled call report, select **Submit**.

The newly scheduled recurring report(s) will be displayed, and a green banner appears at the bottom showing the "*Report(s) was successfully scheduled.*"
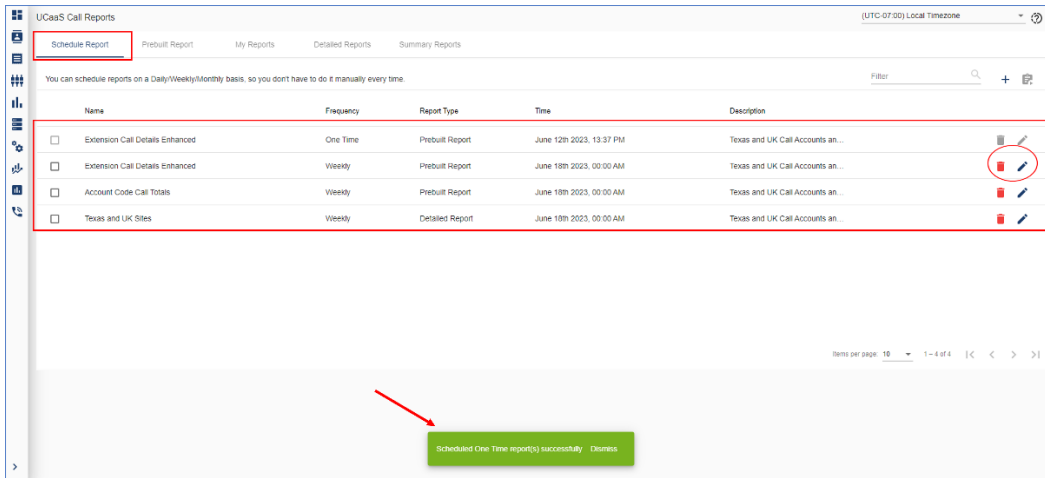

Note: All recurring scheduled reports can be modified (**pencil** icon) or removed (**trash can** icon).

For instance, you can use any existing scheduled report to run a one-time report. The example below shows selecting the *Extension Call Detail Enhanced* scheduled report and that will enable the **Clipboard** icon.
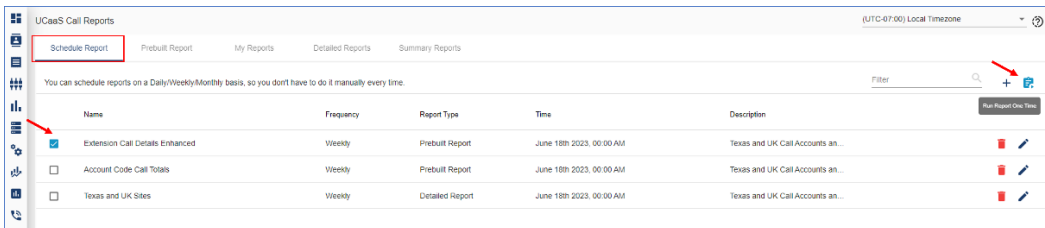

To generate this one-time report, select the **Clipboard** icon and the **One Time Report** menu will be displayed allowing you to select the time and call direction for this *Extension Call Detail Enhanced* report. Select **Run** to generate the report.
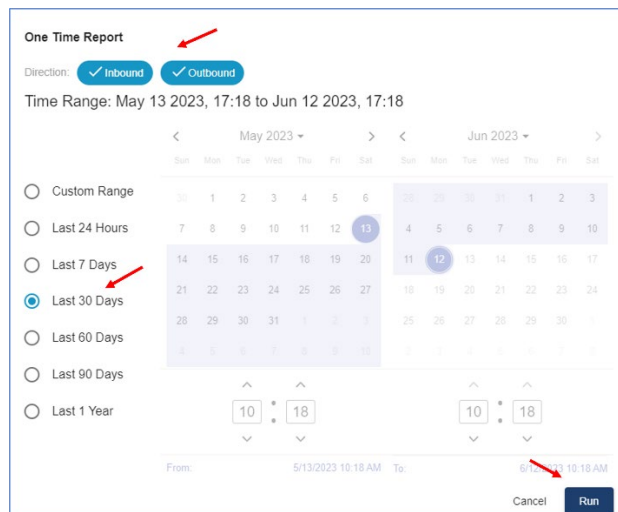
The Schedule Report lists all the scheduled and one-time reports that are pending to be generated. The **Frequency** indicates how often the report is run, and the **Time** indicates when the report would be generated. Once a scheduled report has been generated; the report will be found in the **My Reports** tab.

For instance, this one-time *Extension Call Detailed Enhanced* report is currently listed in the Scheduled Reports and once the report is generated would be found under the **My Reports** tab.
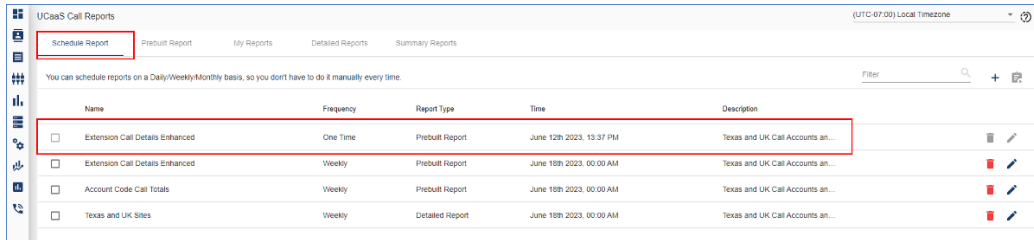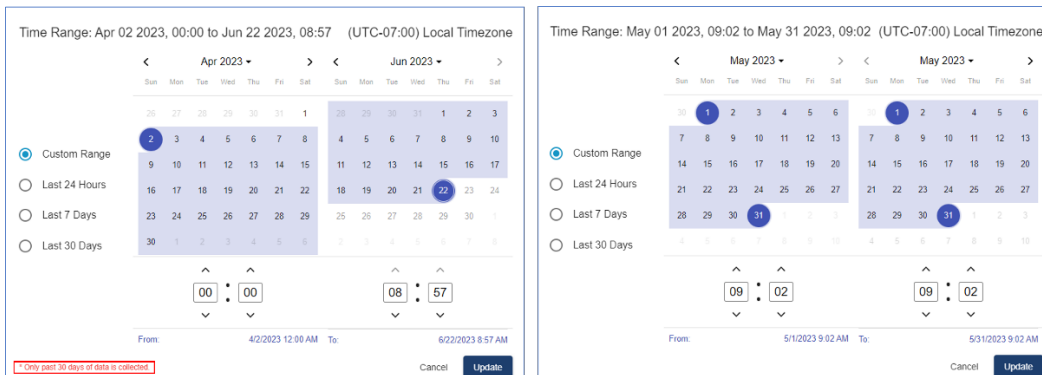

Report Time Ranges

The following time ranges are available when scheduling reports

Report Template Type	Time Range
Prebuilt Reports	Up to 18 months
Detailed Reports	Up to 18 months
Summary Reports	Up to 30/31 days (Monthly)

If multiple report templates are selected, and if the selection includes any summary report templates, then the time range will be limited to 30-days.

Note: It is recommended that summary reports be scheduled separately from the other report template types to prevent any time range limitation.

Prebuilt Report

Prebuilt Report provides four (4) prebuilt call report templates.

Account Code Call Totals — Reports the volume of calls grouped by the Account Code.

Authorization Code Call Details — Reports the volume of calls grouped by the Authorization Code.

**Authorization Code Call Totals** — This report shows you the call totals for each Authorization code.

Extension Call Details Enhanced — This report allows you to choose specific extensions and shows the date, time, duration, direction of the call, and if it was answered.

These prebuilt reports may be downloaded to provide an example of the report's output. These prebuilt call report templates can be used to create one-time and recurring reports. The icon allows you to schedule a pre-built report directly.
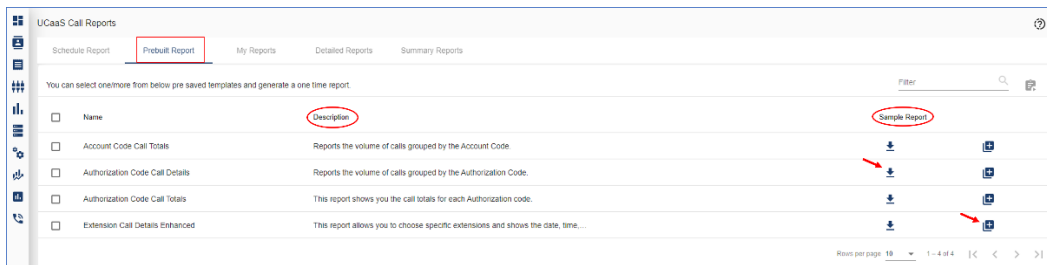
Extension Call Detail Enhanced sample report output. The data shown is fictional.
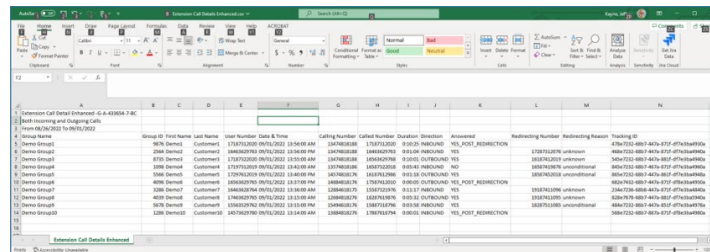
My Reports

My Reports is the repository for all generated reports. The **Filter** allows you to easily search through the list of generated reports. The call reports details can only be viewed after the report has been downloaded.
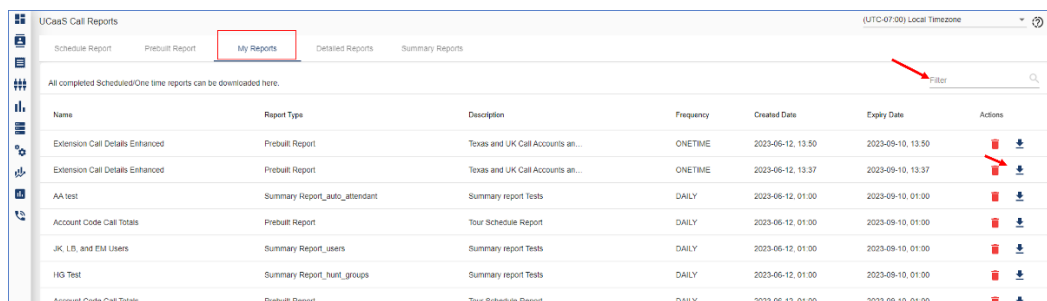
The call reports are generated in a comma separated value (CSV) file format that can be viewed in Microsoft (MS) Excel. However, MS Excel has a limitation of 1,048,576 rows and if any generated call report with a time limit greater than 90 days might exceed this row limit then the report results will become non-viewable in MS Excel.

- o Masergy recommends using a smaller time limit such as 3 months or less depending on the report type.
- o Other reporting tools such as Tableau, MS Power BI, and others, could be used to view report files that exceed the limitation of MS Excel.

Here is an example of an Account Code Totals report.

My Reports stores the generated reports for 90 days and after 90 days the oldest reports are purged on FIFO basis.

Detailed Reports

Detailed Reports provides for the selection of Group(s) with **Call Direction** for the creation of call report templates. By default, the inbound and outbound call directions are both selected.
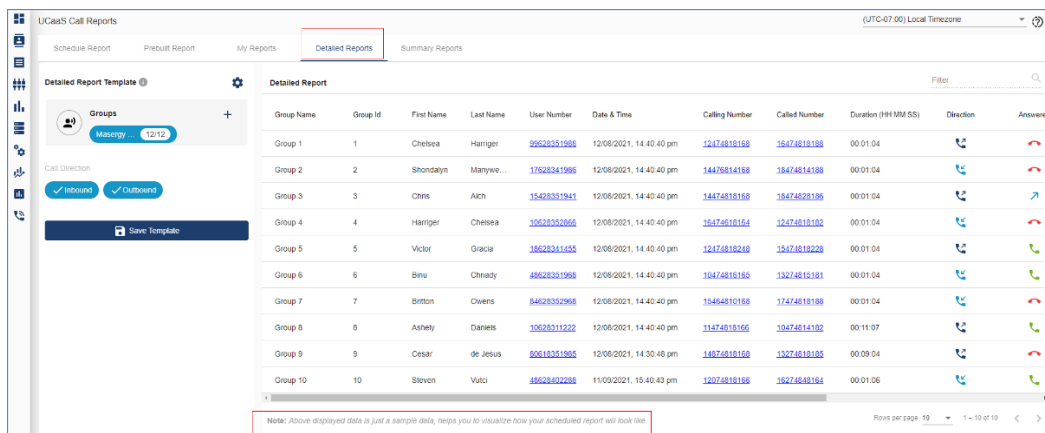
Please note, the above displayed data is just sample data that helps you to visualize how your detailed report will look like.
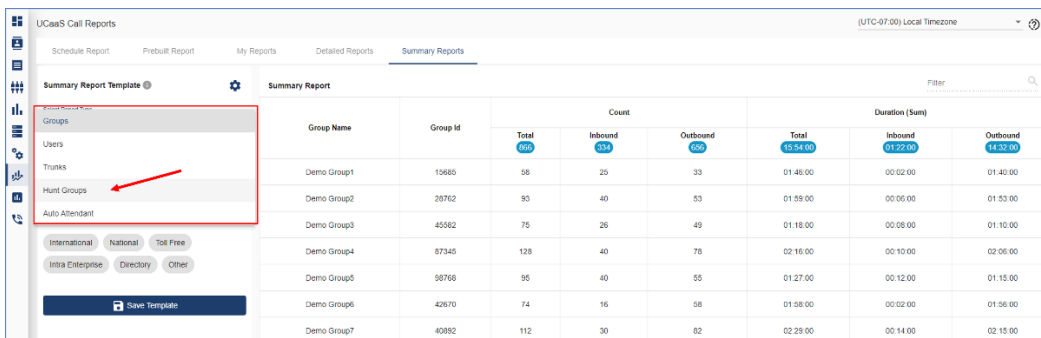
Summary Reports

Summary Reports will provide summary call reports for Groups, Users, Trunks, Hunt Groups, and Auto Attendants. Summary Reports templates are created in the same manner as Detailed Reports.
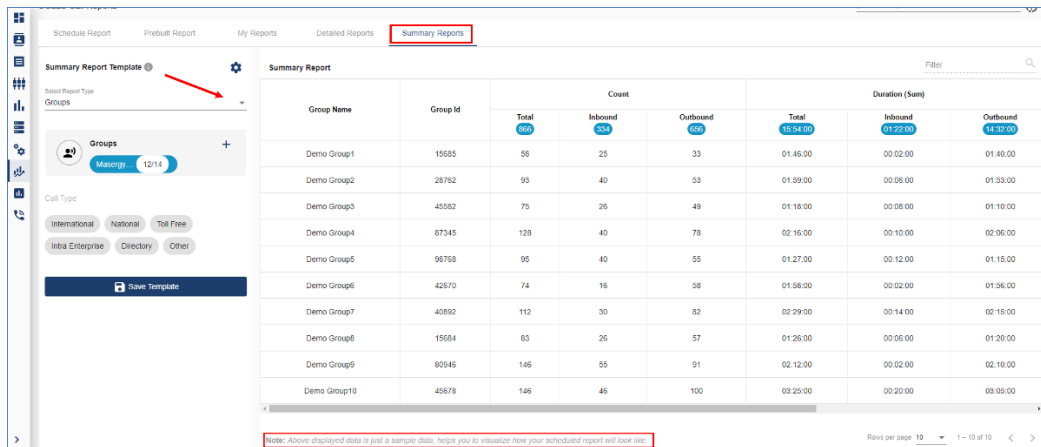
From the drop-down menu, select from the following choices: Groups, Users, Trunks, Hunt Groups, and Auto Attendants to create your Summary Report Templates.

Summary Report Type	Call Direction	Call Type
Groups	Inbound and Outbound	Available
Users	Inbound and Outbound	Available
Trunks	Inbound and Outbound	Available
Hunt Groups	Inbound Only	Not Available
Auto Attendants	Inbound Only	Not Available

The example below shows how to create a *Hunt Group Summary Report Template*.

Next, you will decide on what Groups to be filtered and then you select which Hunt Groups to include for this Hunt Group Summary Report template.

To schedule a new report from the Schedule Report tab, you will be able to choose from the Detailed Report, Summary Report, and Prebuilt Report templates.
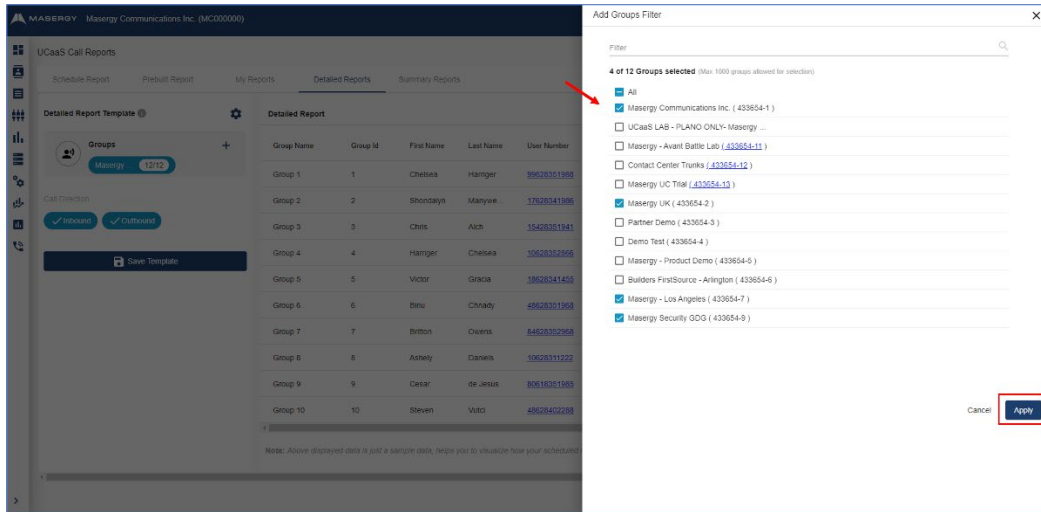

Managing Call Report Templates

Creating a Call Report Template

To create a call report template, select at least one Group and one call direction.
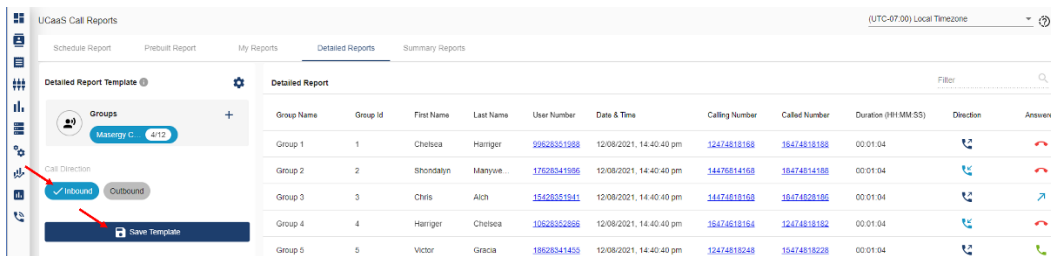
1. Select the "**+**" to filter which Group(s) to include for the call report template.

a. Choose which Group(s) to include and select **Apply**.

2. Next, select the **Call Direction** for the call report template. Choose from the call direction field. Select **Save Template** when finished. For this call report template example, the Call Direction Inbound was selected.

3. The **Save Template** will be displayed for labeling your call report template with a unique descriptive name. When finished select **Save**.
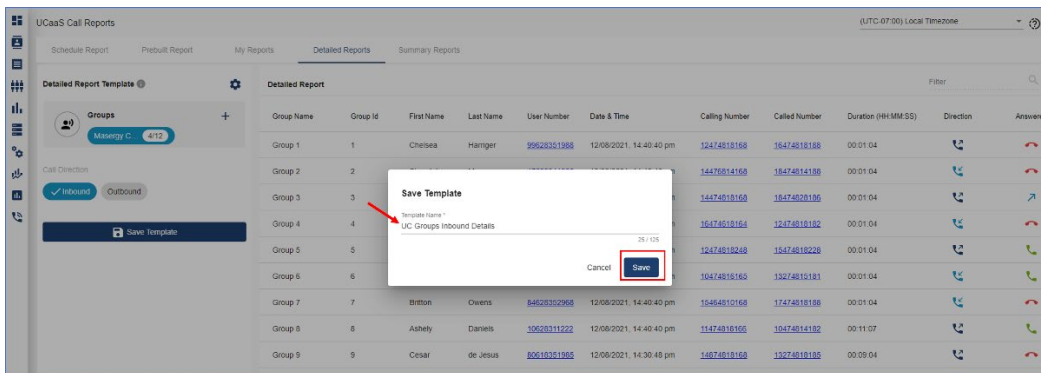
4. A green banner will appear at the bottom indicating the call report template was successfully created.
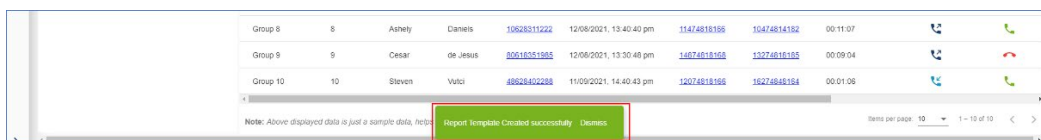
5. For creating additional call report templates, repeat the above steps.

Note: There is a report template limitation of 1,000 entries per requested report. The report templates for Groups, Users, Trunks, Hunt Groups, and Auto Attendants will be capped at 1,000 entries.

Modifying and Removing Call Report Template

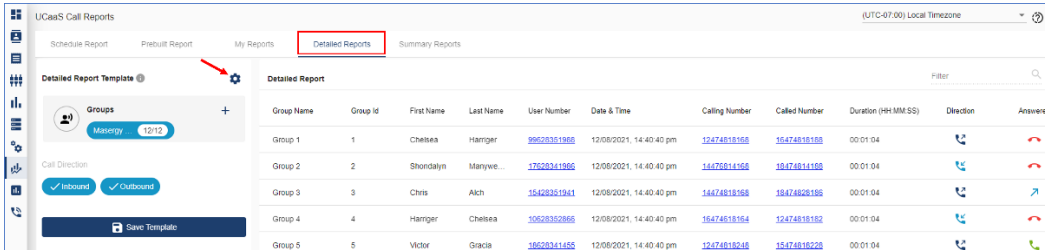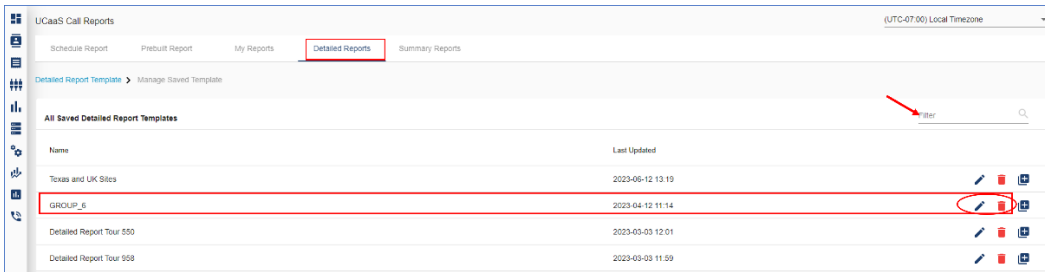To modify an existing call report template, please select the **Cog Wheel** icon.

Use the **Filter** to locate the call report template that needs modification or removal. To **Edit** an existing call report template, select the pencil icon. To **Remove** an existing call report template, select the trash can icon.

When editing any existing call report template, you can only modify the call direction and the Group(s), User(s), Trunk(s), Hunt Group(s), and Auto Attendant(s) that are being reported on. The name of the call report template cannot be changed. The sample below is modifying a detailed report template.
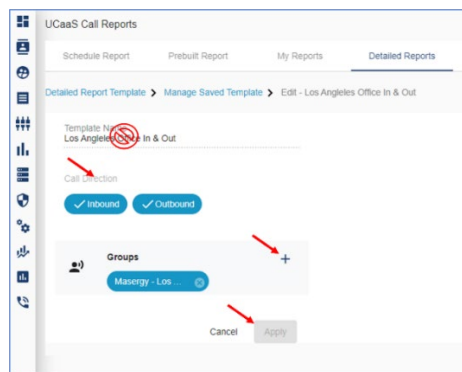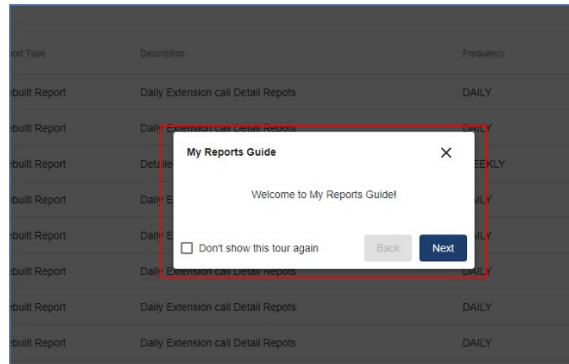

When finished select **Apply** to save your changes.

From the **Manage Saved Templates** view, the [icon] icon allows you to schedule a report directly.
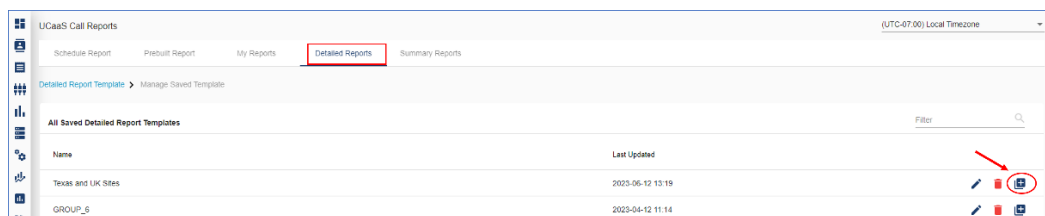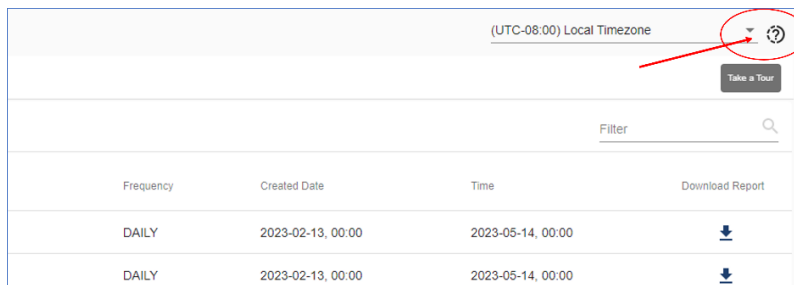
Call Reports – My Reports Guide Tour

Call Reports has a "Welcome to My Reports Guide" tour that is visible on all Call Reports tabs. The My Reports tour can be turned off by checking the "Don't show this tour again" checkbox.

The My Reports tour guide wizard can be turned on by selecting the "**?**" in the upper right-hand corner.

Considerations

- UCaaS Call Reports stores all call activity details for 18 months.
- Report time range for Prebuilt and Detailed Report templates is up to 18 months.
- Report time range for Summary Report templates is up to 30/31 days (Monthly).
  Note: If multiple report templates are selected, and if the selection includes any summary report templates, then the time range will be limited to 30-days. It is recommended that summary reports be scheduled separately from the other report template types to prevent any time range limitation.
- All generated reports are found under the My Reports tab, and these generated reports are stored for 90 days before they are purged on a FIFO basis.
- When creating your custom report templates, there is a report template limitation of 1,000 entries per requested report. Therefore, the report templates for customers with over 1,000 Groups, Users, Trunks, Hunt Groups, and Auto Attendants will be capped at 1,000 entries.
- UCaaS Call Reports generates all reports in a comma separated value (CSV) file format that can be viewed in Microsoft (MS) Excel. However, MS Excel has a limitation of 1,048,576 rows and if any generated call report with a time limit greater than 90 days might exceed this row limit then the report results will become non-viewable in MS Excel.
  - Masergy recommends using a smaller time limit such as 3 months or less depending on the report type.
  - Other reporting tools such as Tableau, MS Power BI, and others could be used to view report files that exceed the limitation of MS Excel.