

COMMS-ACCOUNTS MANAGEMENT REPORTS

User Manual

August 2012

Version 1.4

CONTENTS

1	INTRODUCTION	3
1.1	SYSTEM REQUIREMENTS	3
2	SECURITY CONCERNS	4
2.1	USER AUTHENTICATION	4
2.2	DATA VISIBILITY	4
3	USING MANAGEMENT REPORTS.....	5
3.1	HOW TO ACCESS MANAGEMENT REPORTS	5
3.2	HOW TO GENERATE MANAGEMENT REPORTS - GENERAL INFORMATION.....	6
3.3	NAVIGATING GENERATED MANAGEMENT REPORTS	7
3.4	EXPORTING REPORTS TO YOUR PC.....	8
3.5	GLOSSARY	8
4	UNDERSTANDING THE DIFFERENT REPORTS.....	9
4.1	A SUMMARY OF EACH REPORT	9
4.2	CALL CHARGES BY EXTENSION	10
4.3	MOBILE CALLS BY STAFF	11
4.4	CHARGE CODE BY CHARGE TYPE.....	12
4.5	CHARGE CODE BY SERVICE TYPE	13
4.6	DEPARTMENT SUMMARY BY SERVICE NUMBER	14
4.7	DEPARTMENT SUMMARY BY SERVICE TYPE	15
4.8	OVERALL DEPARTMENT SUMMARY	16

1 INTRODUCTION

Comms-Accounts Management Reports provides Budget Centre Managers access to the communications charges and usage details of the sections they manage.

Through web based reports, you can access billing and usage information relating to communications services allocated to your Section/School/Department. This includes Telephone Extensions, Mobile Services, Data Services, Internet Usage and other Inventory items managed by the Comms-Accounts database.

Management Reporting compliments the End User Reporting service, which provides communications charges and usage information to end users (Staff). Please see the Comms-Accounts End user Reporting user guide for more information.

Reports can be exported to multiple formats to suit the needs of the user. Eg, XML, PDF, Excel spread sheet, etc.

To access the CAAB Management Reports, go to
<http://comms-accounts.csu.edu.au/ManagementReports>

1.1 SYSTEM REQUIREMENTS

Comms-Accounts are accessed via a Web interface using Internet Explorer 8 or later, running under Windows. Comms-Accounts reports will not work correctly with other web browsers.

2 SECURITY CONCERNS

2.1 USER AUTHENTICATION

Authenticate to Comms-Accounts Management Reports using your normal CSU Username and Password.

The webpage will attempt to authenticate you automatically using the login credentials you used to log into your PC.

However you may be prompted for your Username and Password when accessing the webpage from a PC not on the CSU domain.

If you have any problems accessing your Charge code or business unit, please call the DIT service desk on 84357 and log a request to have this corrected.

2.2 DATA VISIBILITY

It is important to note that access to Management Reports does not automatically provide global permissions to data from all departments.

Users are typically granted permissions based on their organisational role, and as such cannot view data pertaining to members outside their visibility.

Eg Business Unit managers have full visibility over all data for members of the Business Unit. However, they would have no visibility over data for members outside the Business Unit.

Running a report for a Business Unit outside the scope of the users' role will typically yield an empty report.

Notes on Comms-Accounts Management Reports data:

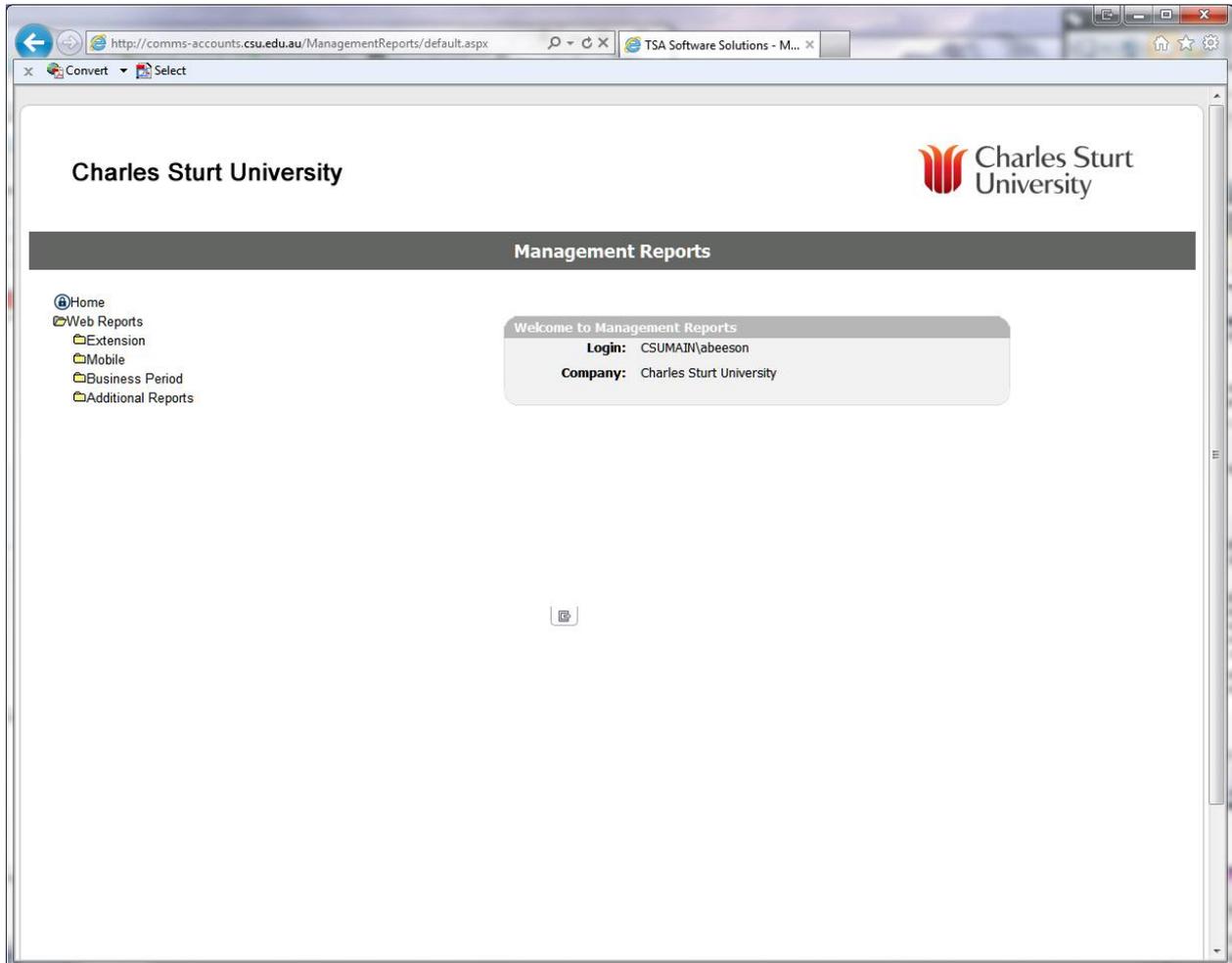
- Data changes in End User Reporting are not retrospective. If you request changes to the details of communications devices those changes will be made at the given date, and will apply to all future bills. Any applicable old charges will not change on previously issued bills.

3 USING MANAGEMENT REPORTS

3.1 HOW TO ACCESS MANAGEMENT REPORTS

To access Comms-Accounts:

- Open Internet Explorer, and navigate to <http://comms-accounts.csu.edu.au/ManagementReports>
- If prompted, enter your Username and Password
- You will be presented with the Management Reports main page below



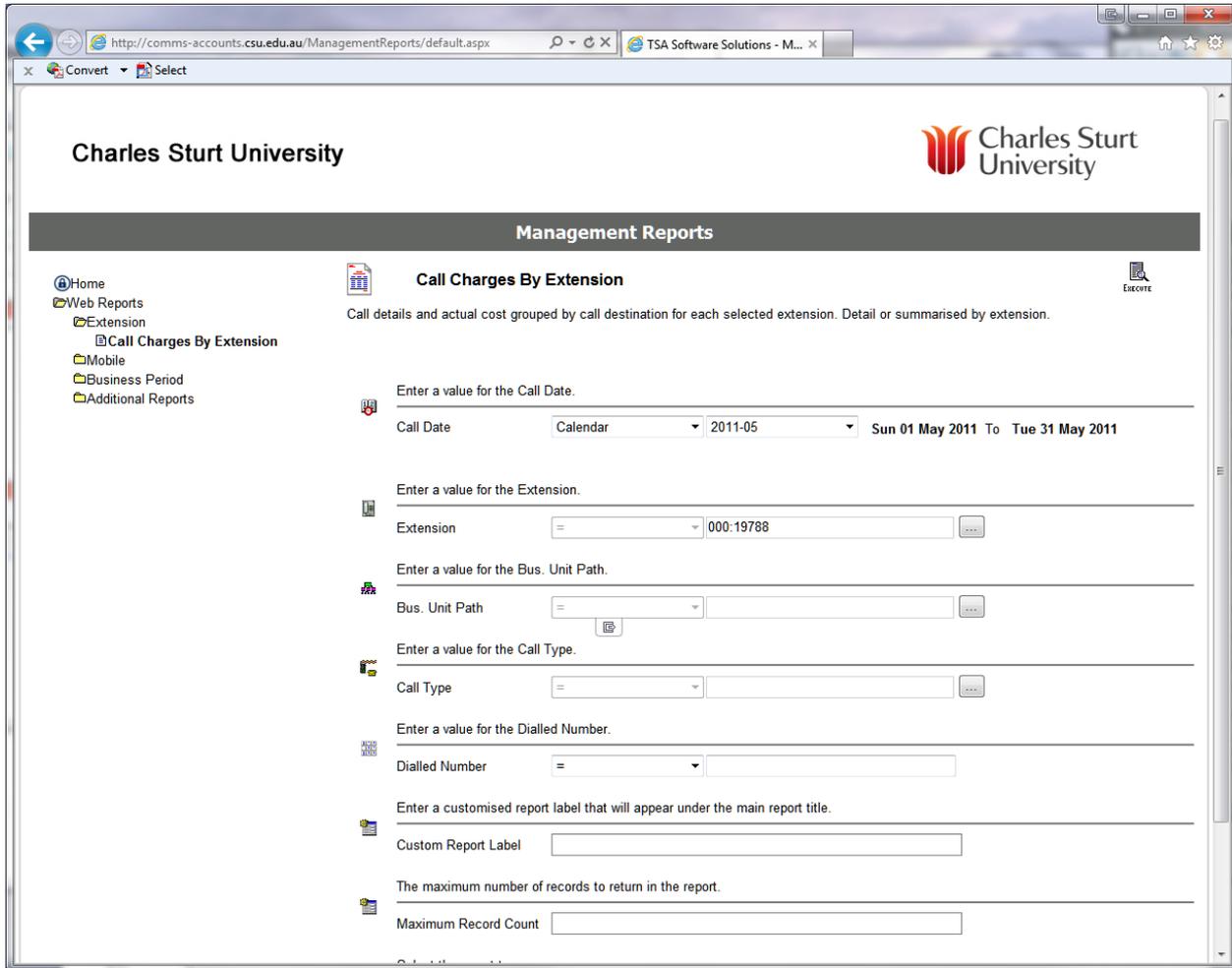
Management Reports Login

3.2 HOW TO GENERATE MANAGEMENT REPORTS - GENERAL INFORMATION

Comms-Accounts Management Reports are set out in the following way, as shown below.

The left of the screen shows a folder tree containing the available reports

The right side of the screen displays the report form for the currently selected report on the left.



Management Reports – Select Report Parameters

In general to run a report you will need to do the following

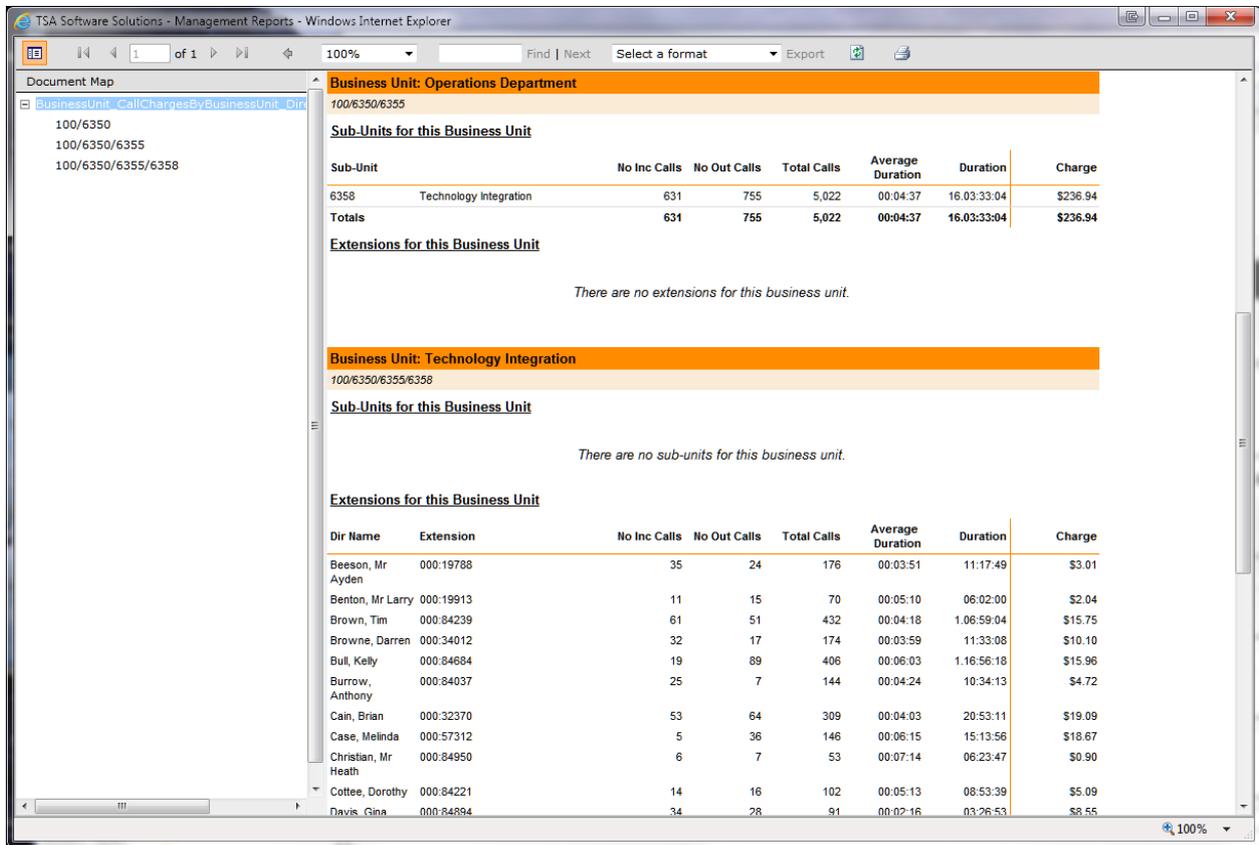
- Choose the report you wish to run from the report tree
- Fill in the required detail in the report form:
 - Selecting  will open a popup with all available options for each field
 - Set options as required and *Submit* to save and return to the main report form
- Enter a Custom Report Label (optional)
- Select a Report Type (if applicable)
- Click  to *Execute* the report

Reports will open in a separate window for each new report generated.

Some reports may take some time to generate so please be patient

3.3 NAVIGATING GENERATED MANAGEMENT REPORTS

Generated Management Reports can be navigated using the Control Bar (top) or Document Map (left panel).

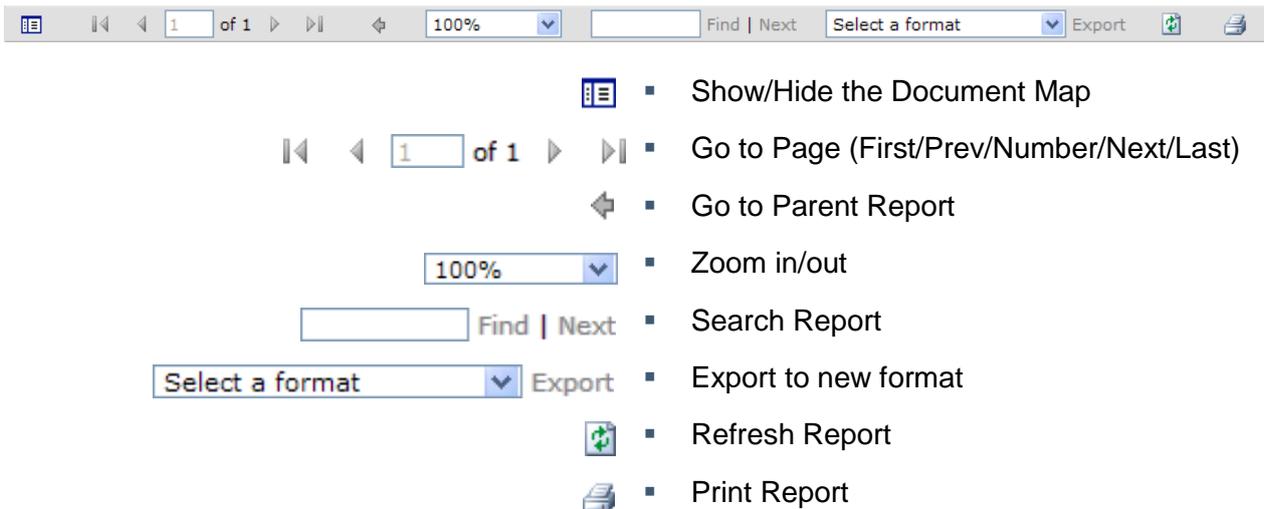


The screenshot shows a web browser window displaying a management report. The report is organized into sections for different business units. The first section is for 'Business Unit: Operations Department' (ID: 100/6350/6355). It includes a table of sub-units with columns for 'No Inc Calls', 'No Out Calls', 'Total Calls', 'Average Duration', 'Duration', and 'Charge'. The table shows data for 'Technology Integration' and a 'Totals' row. Below this is a section for 'Extensions for this Business Unit' which states 'There are no extensions for this business unit.' The second section is for 'Business Unit: Technology Integration' (ID: 100/6350/6355/6358). It also includes a table of sub-units, but states 'There are no sub-units for this business unit.' Below this is another section for 'Extensions for this Business Unit' which contains a table listing individual employees (Dir Name, Extension) and their call statistics.

Sub-Unit	No Inc Calls	No Out Calls	Total Calls	Average Duration	Duration	Charge
6358 Technology Integration	631	755	5,022	00:04:37	16.03:33:04	\$236.94
Totals	631	755	5,022	00:04:37	16.03:33:04	\$236.94

Dir Name	Extension	No Inc Calls	No Out Calls	Total Calls	Average Duration	Duration	Charge
Beeson, Mr Ayden	000:19788	35	24	176	00:03:51	11:17:49	\$3.01
Benton, Mr Larry	000:19913	11	15	70	00:05:10	06:02:00	\$2.04
Brown, Tim	000:84239	61	51	432	00:04:18	1.06:59:04	\$15.75
Browne, Darren	000:34012	32	17	174	00:03:59	11:33:08	\$10.10
Bull, Kelly	000:84684	19	89	406	00:06:03	1.16:56:18	\$15.96
Burrow, Anthony	000:84037	25	7	144	00:04:24	10:34:13	\$4.72
Cain, Brian	000:32370	53	64	309	00:04:03	20:53:11	\$19.09
Case, Melinda	000:57312	5	36	146	00:06:15	15:13:56	\$18.67
Christian, Mr Heath	000:84950	6	7	53	00:07:14	06:23:47	\$0.90
Cottee, Dorothy	000:84221	14	16	102	00:05:13	08:53:39	\$5.09
Davis, Gina	000:84894	34	28	91	00:02:16	03:26:53	\$8.55

The Control Bar allows you to:



The diagram shows the Control Bar with callouts for the following functions:

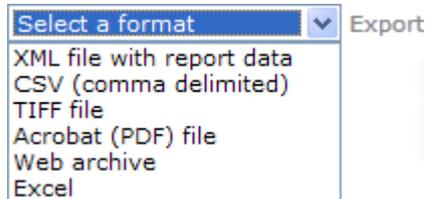
- Show/Hide the Document Map
- Go to Page (First/Prev/Number/Next/Last)
- Go to Parent Report
- Zoom in/out
- Search Report
- Export to new format
- Refresh Report
- Print Report

The Document Map (left panel) allows you to navigate the report by section titles.

3.4 EXPORTING REPORTS TO YOUR PC

Comms-Accounts Management Reports can be exported from the default format to other common formats for further analysis and investigation purposes.

- From the Control Bar select the *Export* dropdown



- Select the required format
- Click *Export*
- In a new window, you will be given the option to *Open* or *Save as a new file*

3.5 GLOSSARY

For a glossary of terms including various Telstra charge codes, please see the “Glossary of Terms” document

4 UNDERSTANDING THE DIFFERENT REPORTS

4.1 A SUMMARY OF EACH REPORT

Comms-Accounts Management Reports provide a variety of information, with each report suited to a different task.

Information ranges from a high level overview of a whole section all the way down to individual usage on a single item.

Understanding which report provides the required information will make your reporting job easier.

The reports provided by the system are as follows:

Report Group	Report name	Description and Purpose
Extension	<i>Call Charges By Extension (Recommended to get further detail on an extension)</i>	This report will allow you to view detailed usage based on an extension. A Budget Centre Manager would run this report to get further information about the usage of an individual internal phone extension.
Mobile	<i>Mobile Calls By Staff (Recommended to get further detail on a mobile)</i>	This report will allow you to view detailed usage based on a mobile phone. A Budget Centre Manager would run this report to get further information about the usage of an external mobile device. N.B. – Charges shown with this report are based on the Telstra billing calendar, and date ranges will vary slightly with the CSU Calendar month.
Business Period	<i>Charge Code By Charge Type (Recommended for Team Leaders / Manager / HoS level staff)</i>	This report provides an overview charges for a department grouped by Account Code (Charge Code). It is further grouped by the type of charge. A Budget Centre Manager would run this report to get further information about the types of calls being made (Local, national, mobile and rental charges).
	<i>Charge Code By Service Type (Recommended for Team Leaders / Manager / HoS level staff)</i>	This report provides an overview charges for a department grouped by Account Code (Charge Code) It is further grouped by the Service type (mobile, fixed line etc). A Budget Centre Manager would run this report to get a good overview of the costs incurred by their section (sorted by Mobiles, fixed line extension etc.)
	<i>Department Summary By Service Number (Recommended starting report for all budget managers)</i>	This report provides an overview of all devices under the specified Charge Code / Business Unit tree, sorted by phone number. A Budget Centre Manager would run this report as a starting point, giving them a good breakdown of each individual items rental charges and usage costs.
	<i>Department Summary By Service Type (Recommended for Dean / Director level staff)</i>	This report provides an overview of all devices under the specified Charge Code / Business Unit tree. A Budget Centre Manager would run this report to get a good overview of costs incurred in a whole section with multiple charge codes.
	<i>Overall Department Summary (Recommended for Deans / Executive Director level staff)</i>	This report provides an executive summary budget overview for a whole section. It's designed to be run by a budget manager with numerous charge codes, and provides a tree-style breakdown, grouped by organisational units, with subtotals given at each level.

4.2 CALL CHARGES BY EXTENSION

The Call Charges by Extension report will allow a budget manager to produce reports showing detailed call information for internal extensions.

This report is recommended when further information is required after running one of the summary reports (Department Summary or Charge Code reports)

To produce this report from the system, it is necessary to specify the following;

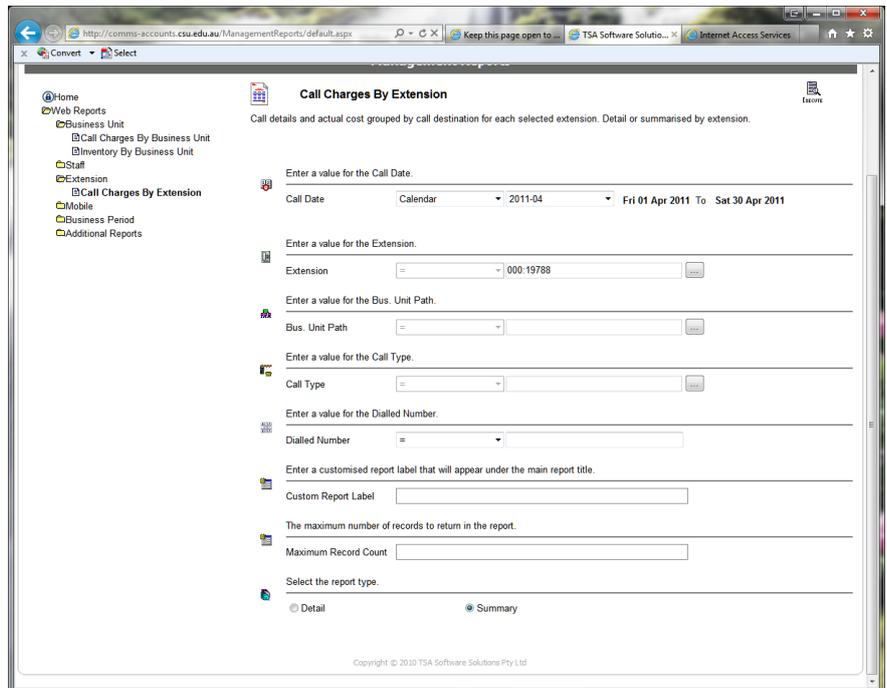
- The date you require the report to cover,
- The phone (extension) you want to report on (this can be multiple numbers),
- The call type (if you want to filter out / in certain calls, such as International calls)

To run the report:

1. Log into management Reports.
2. From the report tree on the left select Extension.
3. Select Call Charges by Extension.
 - This will display the Call Charges by Extension report form on the right of screen
4. Select the date range required.
5. Enter the extensions (using the selection button '...')
 - This will display the picker selector window
 - Leave the site box set as 'Please Select a site'
 - Use the extension box to search by extension or the directory box to search by the user
 - Then select the filter button
 - Use the tick box to select the Extension/User from your filtered list and select Submit
6. Select the Call Types you want included (using the selection button '...').

Leaving the field blank includes all calls.

- This will display the picker selector window
 - Use the tick boxes to select the Call Types you wish to include in the report and select submit
7. In the 'Select the report type' Section at the bottom of the form, select the 'Detail' option to give a detailed call record for the selected extensions
 8. Press Execute (up the top right of the form) to run the report.



The screenshot shows a web browser window displaying the 'Call Charges By Extension' report form. The browser address bar shows 'http://comms-accounts.csu.edu.au/ManagementReports/default.aspx'. The form title is 'Call Charges By Extension' and the subtitle is 'Call details and actual cost grouped by call destination for each selected extension. Detail or summarised by extension.' The form contains several sections with input fields and buttons:

- Enter a value for the Call Date:** Call Date (Calendar) 2011-04 Fri 01 Apr 2011 To Sat 30 Apr 2011
- Enter a value for the Extension:** Extension (000-19786)
- Enter a value for the Bus. Unit Path:** Bus. Unit Path
- Enter a value for the Call Type:** Call Type
- Enter a value for the Dialed Number:** Dialed Number
- Enter a customised report label that will appear under the main report title:** Custom Report Label
- The maximum number of records to return in the report:** Maximum Record Count
- Select the report type:** Summary (selected), Detail

At the bottom of the form, there is a copyright notice: 'Copyright © 2010 TSA Software Solutions Pty Ltd'.

4.3 MOBILE CALLS BY STAFF

The Mobile Calls by Staff report will allow a budget manager to produce reports showing detailed call information for external mobile extensions.

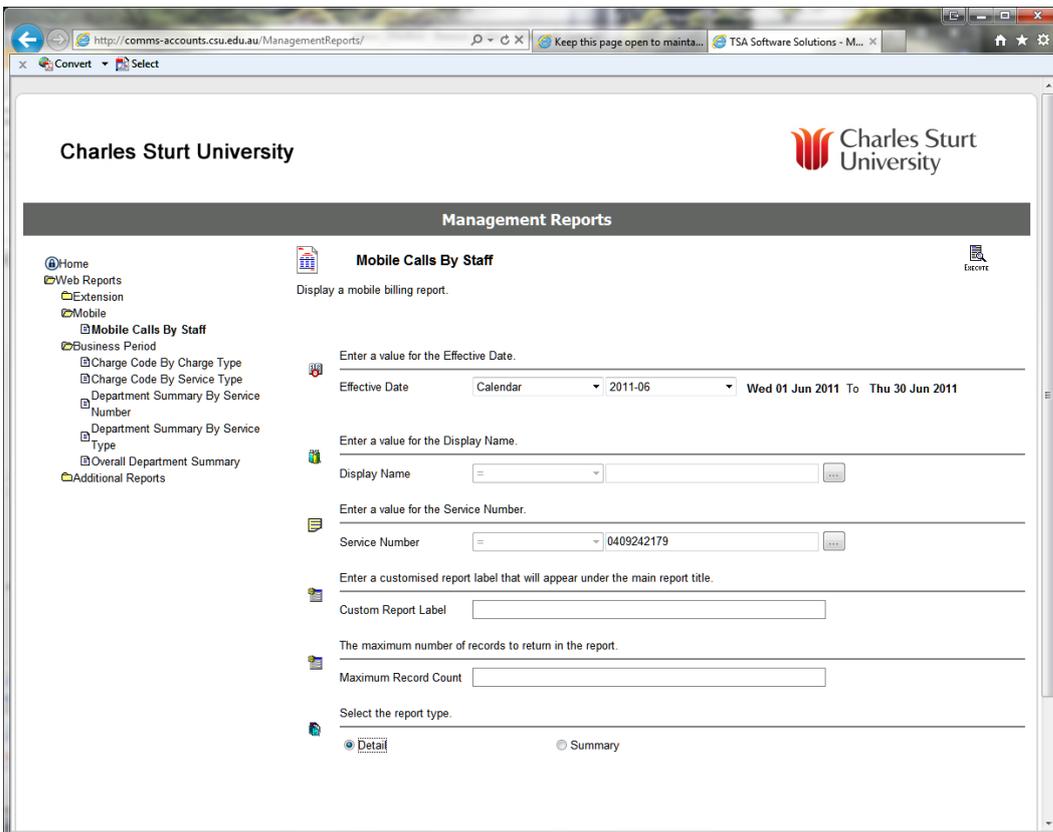
This report is recommended when further information is required after running one of the summary reports (Department Summary or Charge Code reports)

To produce this report from the system, it is necessary to specify the following;

- The date you require the report to cover.
- The mobile phone (service number) you want to report on (this can be multiple numbers).

To run the report:

1. Log into management Reports.
2. From the report tree on the left select Mobile.
3. Select Mobile Calls by Staff.
 - This will display the Mobile Calls by Staff report form on the right of screen
4. Select the date range required.
5. Enter the mobile “Service Numbers” (using the selection button ‘...’)
 - This will display the picker selector window
 - Use the Mobile box to search by number or the list to search by the users Name
 - Press the filter button if searching by number
 - Use the tick box to select the Mobile from your filtered list and select Submit
6. In the ‘Select the report type’ Section at the bottom of the form, select the ‘Detail’ option to give a detailed call record for the selected mobile phones
7. Press Execute (up the top right of the form) to run the report.



The screenshot shows a web browser window displaying the Charles Sturt University Management Reports interface. The page title is "Management Reports" and the sub-page title is "Mobile Calls By Staff". The left sidebar contains a navigation tree with the following items: Home, Web Reports, Extension, Mobile, Mobile Calls By Staff, Business Period, Charge Code By Charge Type, Charge Code By Service Type, Department Summary By Service Number, Department Summary By Service Type, Overall Department Summary, and Additional Reports. The main content area contains the following form fields:

- Effective Date:** A date range selector showing "Wed 01 Jun 2011 To Thu 30 Jun 2011".
- Display Name:** A text input field with a dropdown menu and a search button.
- Service Number:** A text input field with a dropdown menu and a search button, containing the value "0409242179".
- Custom Report Label:** A text input field.
- Maximum Record Count:** A text input field.
- Select the report type:** Radio buttons for "Detail" (selected) and "Summary".

An "Execute" button is located in the top right corner of the form area.

4.4 CHARGE CODE BY CHARGE TYPE

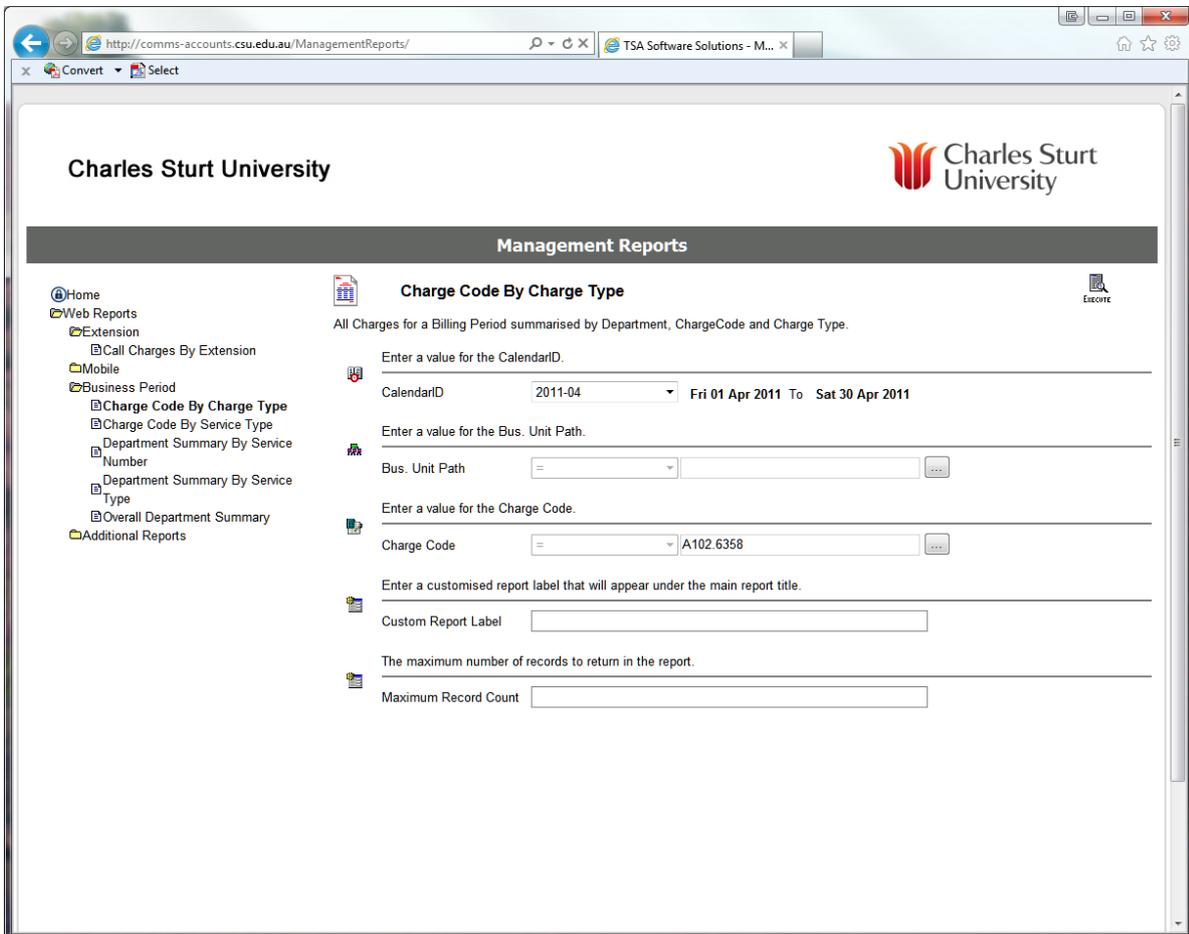
The Charge Code by Charge Type report will allow a budget manager to produce a report showing a summary of charges to a charge code, grouped by charge type (local call, rental, etc)

To produce this report from the system, it is necessary to specify the following;

- The date you require the report to cover, based on calendar month.
- The charge code you need to report on (i.e. A102.6358).

To run the report:

1. Log into management Reports.
2. From the report tree on the left select Business Period.
3. Select Charge Code by Charge Type.
 - This will display the Charge Code by Charge Type report form on the right of screen
4. Select the date range required.
5. Enter the charge code(s) (using the selection button '...')
 - This will display the picker selector window
 - Use the Charge Code box to search by charge code, or browse the list.
 - Press the filter button if searching by charge code.
 - Use the tick box to select the Charge code from your filtered list and select Submit
6. Press Execute (up the top right of the form) to run the report.



The screenshot shows a web browser window displaying the Charles Sturt University Management Reports interface. The page title is "Charles Sturt University" and the main heading is "Management Reports". The left sidebar contains a navigation tree with the following items: Home, Web Reports, Extension, Call Charges By Extension, Mobile, Business Period, Charge Code By Charge Type (selected), Charge Code By Service Type, Department Summary By Service Number, Department Summary By Service Type, Overall Department Summary, and Additional Reports. The main content area is titled "Charge Code By Charge Type" and contains the following form fields:

- CalendarID:** A dropdown menu set to "2011-04" and a date range "Fri 01 Apr 2011 To Sat 30 Apr 2011".
- Bus. Unit Path:** A dropdown menu set to "=" and a text input field.
- Charge Code:** A dropdown menu set to "=" and a text input field containing "A102.6358".
- Custom Report Label:** A text input field.
- Maximum Record Count:** A text input field.

The "Execute" button is located in the top right corner of the form area.

4.5 CHARGE CODE BY SERVICE TYPE

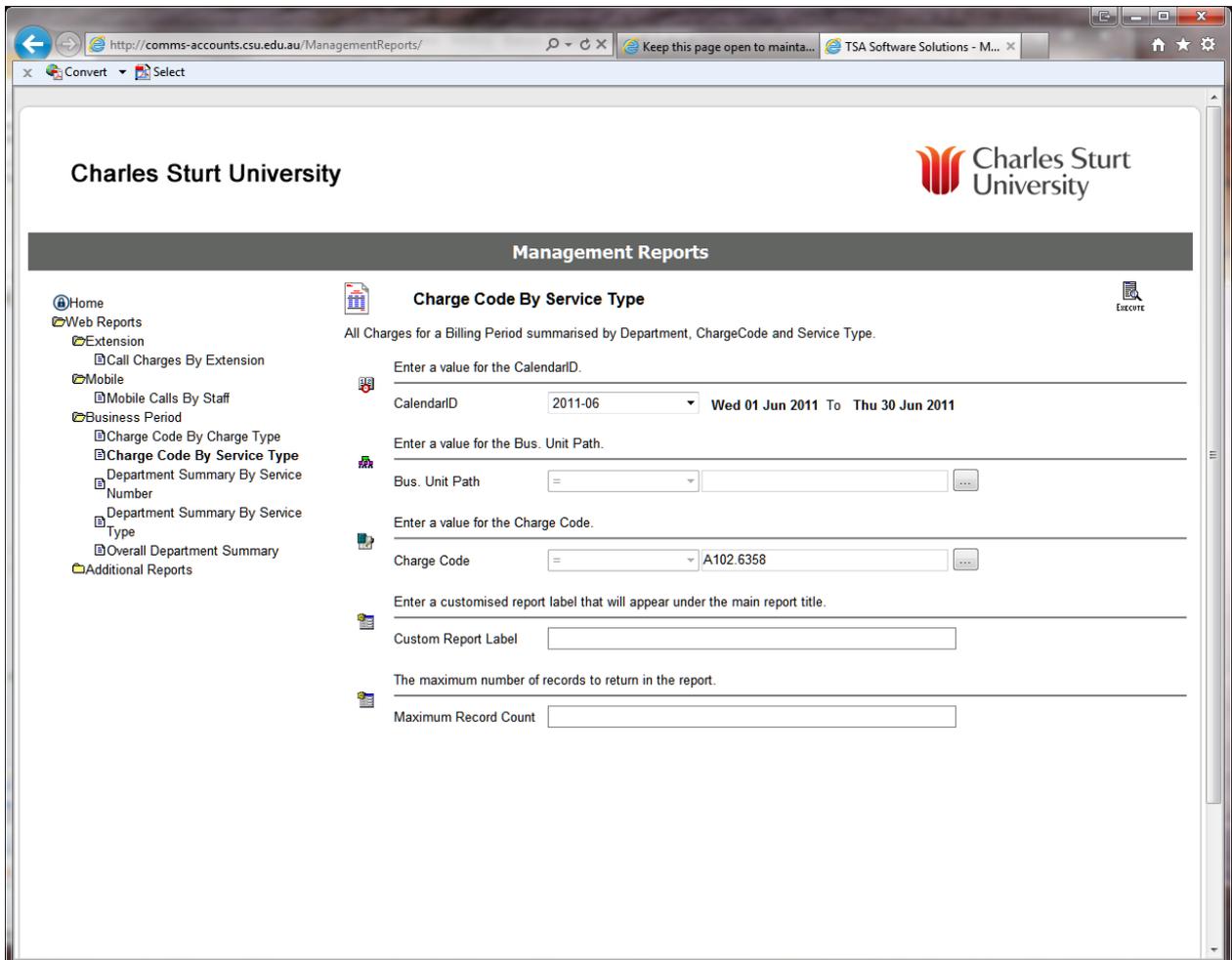
The Charge Code by Service Type report will allow a budget manager to produce a report showing a summary of charges to a charge code, grouped by service type (Extension, Mobiles, Data Devices etc)

To produce this report from the system, it is necessary to specify the following;

- The date you require the report to cover, based on calendar month.
- The charge code you need to report on (i.e. A102.6358).

To run the report:

1. Log into management Reports.
2. From the report tree on the left select Business Period.
3. Select Charge Code by Service Type.
 - This will display the Charge Code by Service Type report form on the right of screen
4. Select the date range required.
5. Enter the charge code(s) (using the selection button '...')
 - This will display the picker selector window
 - Use the Charge Code box to search by charge code, or browse the list.
 - Press the filter button if searching by charge code.
 - Use the tick box to select the Charge code from your filtered list and select Submit
6. Press Execute (up the top right of the form) to run the report.



The screenshot shows a web browser window displaying the Charles Sturt University Management Reports interface. The page title is "Management Reports" and the main heading is "Charge Code By Service Type". The interface includes a navigation menu on the left with options like Home, Web Reports, Extension, Mobile, Business Period, and Additional Reports. The main content area contains a form for generating the report, with fields for CalendarID (2011-06), Bus. Unit Path, Charge Code (A102.6358), Custom Report Label, and Maximum Record Count. An "Execute" button is visible in the top right corner of the form area.

4.6 DEPARTMENT SUMMARY BY SERVICE NUMBER

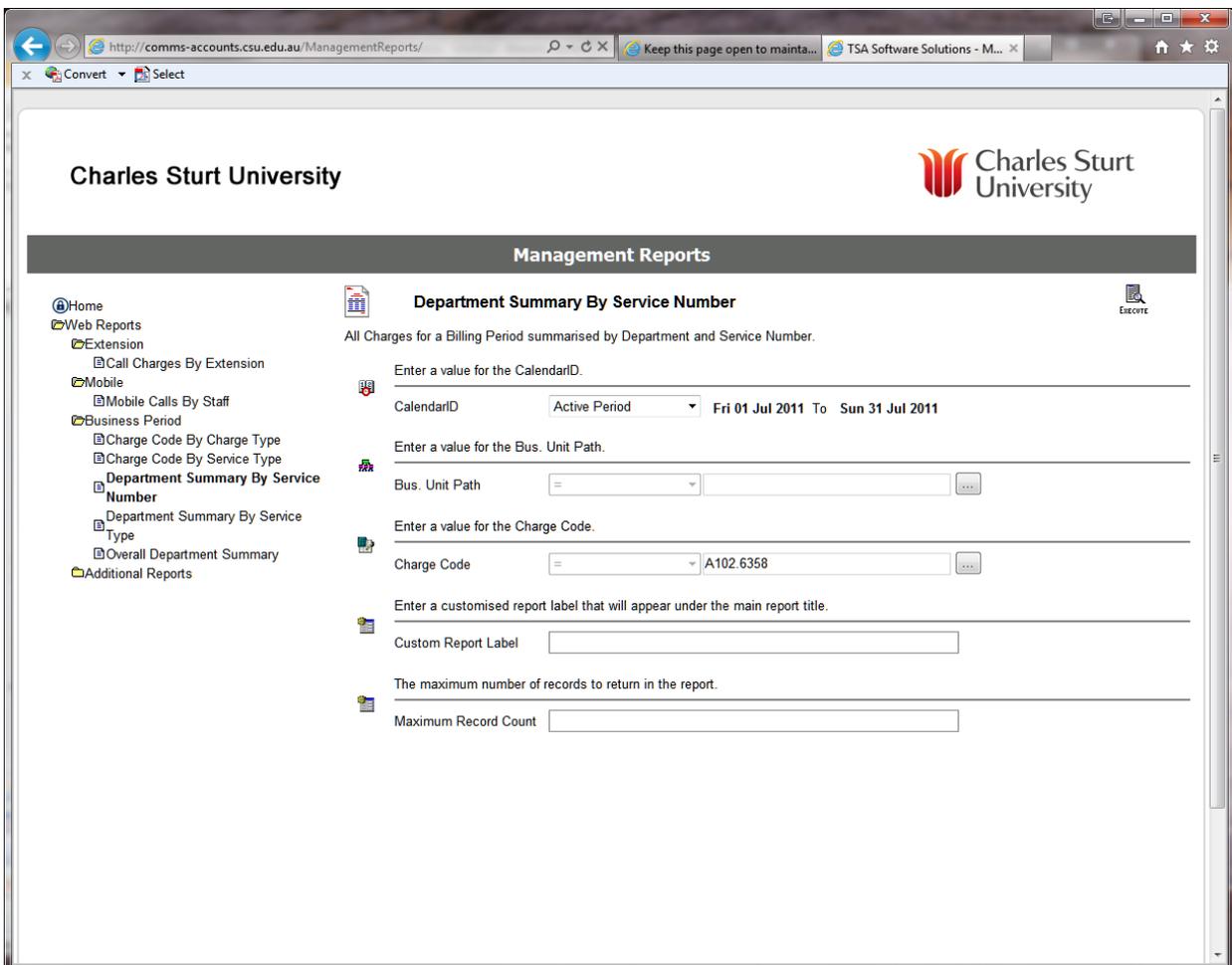
The Department Summary by Service Number report will allow a budget manager to produce a report showing a summary of charges to a charge code / Business Unit Tree, displayed against each item individually

To produce this report from the system, it is necessary to specify the following;

- The date you require the report to cover, based on calendar month.
- The charge code you need to report on (i.e. A102.6358).

To run the report:

1. Log into management Reports.
2. From the report tree on the left select Business Period.
3. Select Department Summary by Service Number.
 - This will display the Department Summary by Service Number report form on the right of screen
4. Select the date range required.
5. Enter the charge code(s) (using the selection button '...')
 - This will display the picker selector window
 - Use the Charge Code box to search by charge code, or browse the list.
 - Press the filter button if searching by charge code.
 - Use the tick box to select the Charge code from your filtered list and select Submit
6. Press Execute (up the top right of the form) to run the report.



The screenshot shows a web browser window displaying the Charles Sturt University Management Reports interface. The page title is "Charles Sturt University" and the main heading is "Management Reports". On the left, there is a navigation tree with categories like Home, Web Reports, Extension, Mobile, Business Period, and Additional Reports. The "Department Summary By Service Number" report is selected. The main content area shows the form for generating the report, which includes fields for "CalendarID" (set to "Active Period" with a date range of "Fri 01 Jul 2011 To Sun 31 Jul 2011"), "Bus. Unit Path", "Charge Code" (set to "A102.6358"), "Custom Report Label", and "Maximum Record Count".

4.7 DEPARTMENT SUMMARY BY SERVICE TYPE

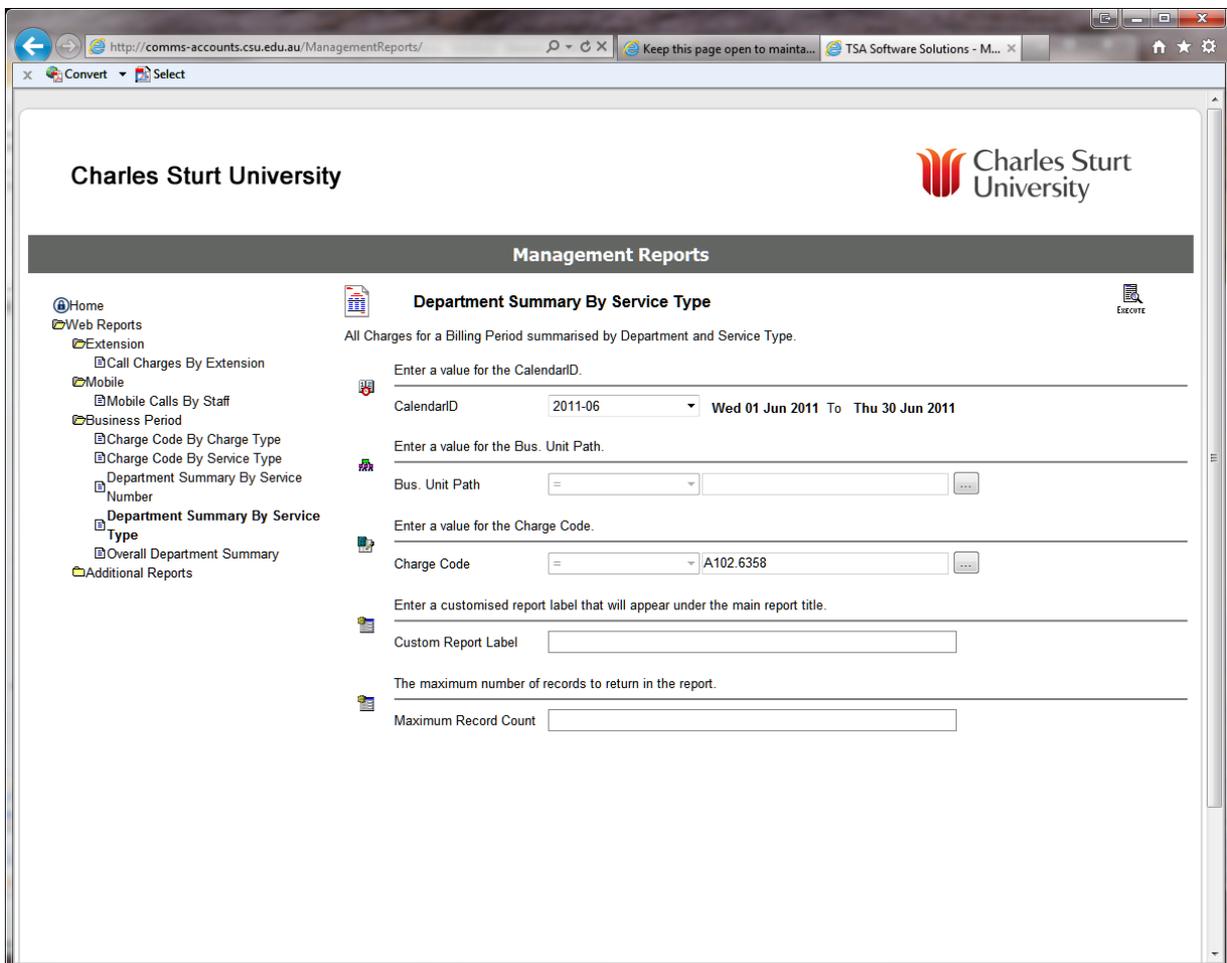
The Department Summary by Service Type report will allow a budget manager to produce a report showing a summary of charges to a charge code / Business Unit Tree, grouped by Service type (mobile, fixed extension, Data Devices, User logins etc)

To produce this report from the system, it is necessary to specify the following;

- The date you require the report to cover, based on calendar month.
- The charge code you need to report on (i.e. A102.6358).

To run the report:

1. Log into management Reports.
2. From the report tree on the left select Business Period.
3. Select Department Summary by Service Type.
 - This will display the Department Summary by Service Type report form on the right of screen
4. Select the date range required.
5. Enter the charge code(s) (using the selection button '...')
 - This will display the picker selector window
 - Use the Charge Code box to search by charge code, or browse the list.
 - Press the filter button if searching by charge code.
 - Use the tick box to select the Charge code from your filtered list and select Submit
6. Press Execute (up the top right of the form) to run the report.



The screenshot shows a web browser window displaying the Charles Sturt University Management Reports interface. The page title is "Charles Sturt University" and the main heading is "Management Reports". The left sidebar contains a navigation tree with the following items: Home, Web Reports, Extension (Call Charges By Extension), Mobile (Mobile Calls By Staff), Business Period (Charge Code By Charge Type, Charge Code By Service Type, Department Summary By Service Number, Department Summary By Service Type, Overall Department Summary), and Additional Reports. The main content area is titled "Department Summary By Service Type" and contains the following form fields:

- CalendarID:** A dropdown menu with "2011-06" selected, followed by the text "Wed 01 Jun 2011 To Thu 30 Jun 2011".
- Bus. Unit Path:** A dropdown menu with "=" selected, followed by a text input field and a "...".
- Charge Code:** A dropdown menu with "=" selected, followed by a text input field containing "A102.6358" and a "...".
- Custom Report Label:** A text input field.
- Maximum Record Count:** A text input field.

At the top right of the form area, there is an "EXECUTE" button. The browser's address bar shows the URL "http://comms-accounts.csu.edu.au/ManagementReports/" and the page title "Charles Sturt University".

4.8 OVERALL DEPARTMENT SUMMARY

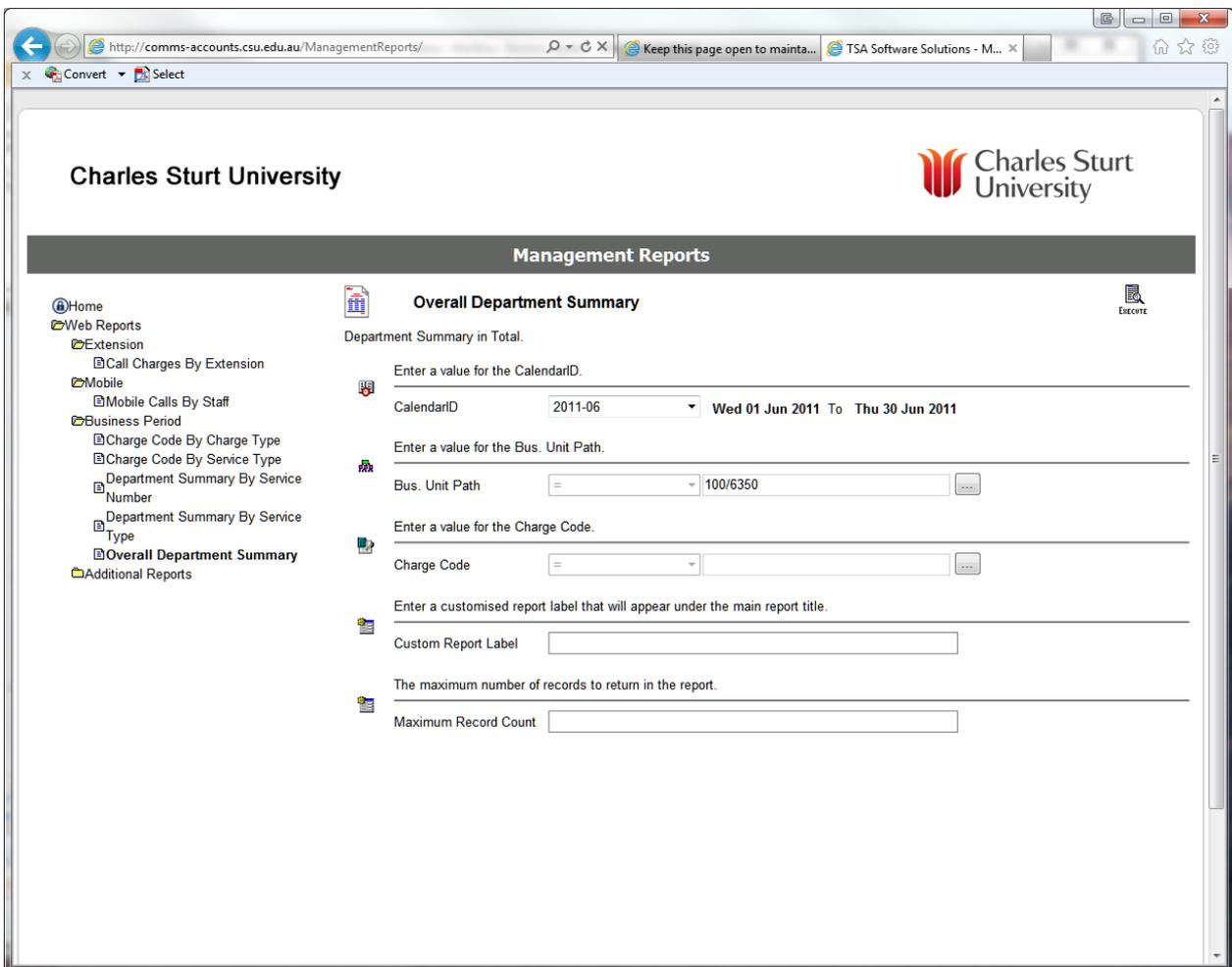
The Overall Department Summary report will allow a budget manager to produce a report showing a summary of charges to a group of Charge codes / Business Unit Tree.

To produce this report from the system, it is necessary to specify the following;

- The date you require the report to cover, based on calendar month.
- The charge code you need to report on (i.e. A102.6358). OR
- The Business Unit you need to report on (i.e. 100/6350)

To run the report:

1. Log into management Reports.
2. From the report tree on the left select Business Period.
3. Select Overall Department Summary.
 - This will display the Overall Department Summary report form on the right of screen
4. Select the date range required.
5. Enter the charge code(s) / Business Units (using the selection button '...')
 - This will display the picker selector window
 - Use the search box to search, or browse the list.
 - Press the filter button if searching.
 - Use the tick box to select the item you want from your filtered list and select Submit
6. Press Execute (up the top right of the form) to run the report.



The screenshot shows a web browser window displaying the Charles Sturt University Management Reports interface. The page title is "Overall Department Summary". On the left, there is a navigation tree with "Overall Department Summary" selected. The main content area contains the following form fields:

- Department Summary in Total.**
- Enter a value for the CalendarID.** CalendarID: 2011-06 Wed 01 Jun 2011 To Thu 30 Jun 2011
- Enter a value for the Bus. Unit Path.** Bus. Unit Path: = 100/6350
- Enter a value for the Charge Code.** Charge Code: =
- Enter a customised report label that will appear under the main report title.** Custom Report Label: [text input]
- The maximum number of records to return in the report.** Maximum Record Count: [text input]

An "Execute" button is located in the top right corner of the form area.