

Four Key Functions of a Telecom Reporting Tool

What Telecom Managers Need to Eliminate Distractions & Stay Focused on Major Projects

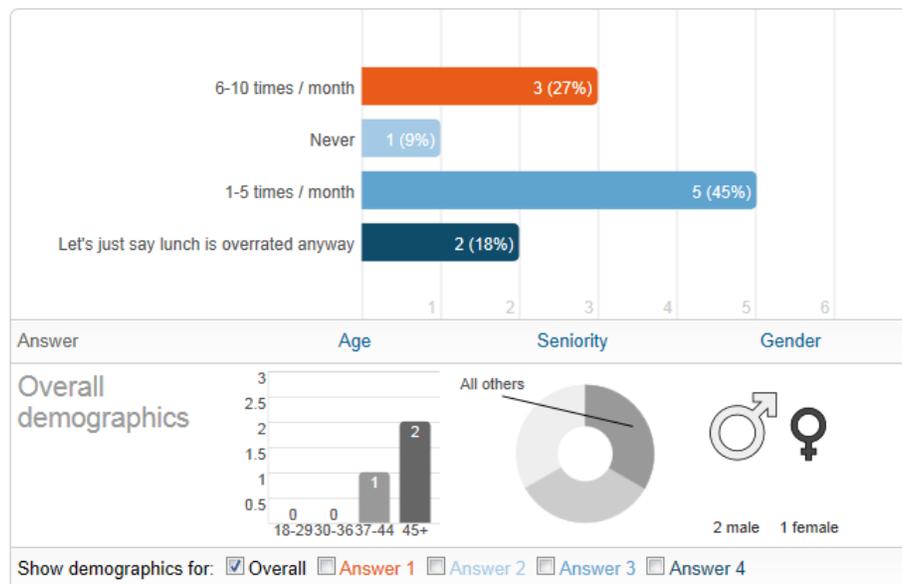
By Kari Bittner, Director of Telephony and Communications Products, Calero Software LLC



Voice over IP networks, wireless internet access, unified communications, video-conferencing, and other new communications technologies are changing the face of businesses across the world. Telecom managers need to focus on these types of big communications projects, but they are bombarded every day with a constant barrage of equally urgent telecom reporting questions.

Telecom Mgrs: How often do telecom usage & expense reporting tasks distract you from bigger communications projects?

By Kari Bittner Director of Telephony and Communications Products at Veremark Technologies • 11 votes • 0 comments • Ended 15 Dec 2012



To minimize these distractions, telecom managers need a reporting (aka “Call Accounting”) tool with four important functions:

- Imports data from multiple sources
- Combines data for meaningful use
- Provides flexible data interaction and sharing
- Looks beyond usage to expense management and invoice processing

1. Import Data from Multiple Sources



You have a lot going on in your environment...and every communications environment is unique. You have one or more PBXs...and they may be different releases, different brands, and at different locations. You may be responsible for wireless plans from one or more wireless providers. With the kinds of usage and expense inquiries you receive, you may need bits and pieces of data from many different places: from your PBXs, your wireless provider portals, Human Resources (HR), Accounting, your personnel directory, and on and on.

A standard telecom reporting tool should be able to bring in basic Call Detail Records (CDRs) from your PBXs. You'll use this "usage" data for answering all sorts of basic usage reporting questions. For most reporting needs, it's also helpful to track which extensions or wireless devices belong to which employees. For PBX extension to personnel data, the reporting tool needs to import data from another location within the PBX (like Avaya ASA or Cisco LDAP), an external directory (like Microsoft Active Directory), or from an HR database. To determine which mobile devices are being used by which employees, you may need to bring in data from yet another source...often the plan administrator's spreadsheet. On top of that, as your business grows, the need for reporting usage by cost center increases in importance. To do that, you need to know the organization reporting hierarchy – in other words, which personnel roll up under each cost center and how cost centers roll up to the next higher level(s) of your institution. That hierarchy is often maintained in yet another location.

A helpful telecom reporting tool will be able to handle data in varying formats and of the types you need to quickly answer your reporting questions. However, if your tool can't AUTOMATE the synchronization of all of this data with each original data source, then you're going to need a person (at least) just to manually keep everything up to date. Automating data imports to your telecom reporting tool from multiple original data sources will minimize operational distractions. Supporting data imports from numerous different types of platforms also helps you better manage your larger infrastructure migrations and upgrades. Rather than having to replace your tool as you migrate elements of your network, you save significant time when you can use the same reporting tool to continue to bring in data and answer questions for you, even as technologies and components are changing in your communications network.

The last thing you need is for your telecom usage reporting tool to become a bigger distraction than the on-going reporting requests you're trying to minimize!

2. Combine Data for Meaningful Use



Know WHAT you need to answer and HOW your telecom reporting tool can help you. If your reporting tool brings in data but then doesn't perform any extra functions to make that data more valuable, you'll just have yet another place that contains a whole bunch of data that doesn't actually help reduce your telecom reporting distractions....and may even increase the distractions as you try to make the tool answer something that it doesn't easily or accurately answer.

So what kinds of questions do you need to answer? Let's say you have CDRs from your PBX and you have organization reporting information from another source in HR. If you could easily link the CDRs to the right extensions, the extensions to the right personnel, and the personnel to the right cost centers, you'd have information that would be meaningful to Accounting for chargeback, and to Cost Center Managers who could better understand their own use of institutional resources. Now, if you could ALSO include wireless phones and roll up their usage and costs to the appropriate cost centers, you just made the data even more valuable, since it covers multiple forms of communications in a single place.

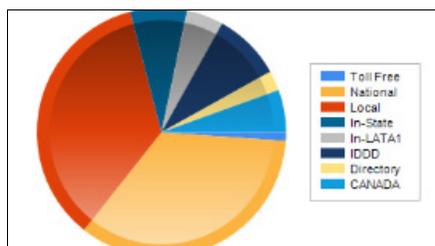
You know those boxes of wireless invoices you receive each month from each of your wireless providers? You're responsible for making sure that wireless plans are optimized, but honestly...you know how LONG it takes to try to figure out how many devices had international roaming plans and no international usage...over the past 3 months. Who has time for that? If you had a tool that could import your wireless usage and expenses data and summarize the devices that have certain plan anomalies that could be optimized, think about how valuable that summarized and recombined data would be.

If HR comes to you asking for call history about a harassment claim and the employee has both a PBX extension and a wireless phone, imagine how much time you could save if all of that data were in a single reporting tool. You could generate a single report searching for calls from a given telephone number to both the extension and the wireless phone for the past four months. THAT's valuable data!

Employees use those resources for both business and personal needs. Based on surveys of hundreds of customers, fewer than 10% know the volume or cost of personal use of their desk phones or provided wireless phones. While the vast majority of companies have informal or "trust" policies regarding personal use of phones, employees could help use resources more wisely...if they knew the cost of those calls. And for those organizations with formal reimbursement programs for personal calls, a self-service tool that allows employees to identify their personal calls vs. their business calls would significantly automate the process compared to using highlighters on paper printouts.

Knowing the types of telecom reporting distractions you encounter helps ensure that you look for the right data combination capabilities of your telecom reporting tool.

3. Provide Flexible Data Interaction and Sharing



Bringing the data INTO one location and combining it meaningfully are great....but the fundamental purpose of a "reporting" tool is getting the right data to the right people and 3rd party applications at the right time. People and applications interact with and consume data in different ways, depending on their needs.

Some information requests are truly a one-time need; others need to be repeated daily, monthly, or yearly; and still others may require notification only if certain events or thresholds are reached. Often one-time requests could be as simple as, "Can you tell me how many calls were placed today by extension 44586", or "How many times was 924-0214 called today", or "What's Maria Ramirez's company wireless phone number?" Quick search tools for fast, simple database queries in your reporting tool allow you, the administrator, to provide answers in less than 15 seconds.

However, there will be times when you need to interact more with the data. You might need to filter based on a variety of criteria, edit the data, refine which columns you need to view, or even export that data for post-processing in a tool such as Microsoft Excel®. In these cases, you need an interface to the data. A tabular format that allows you to dynamically filter your data to refine which rows are included, as well as to select the relevant attributes (columns), offers a great starting point. If you are editing the underlying data, then the ability to select a single record at a time, or where possible, multiple entries for bulk editing, gives you maximum flexibility.

Then there are the times when you need to share data more regularly with other users. Information used for monitoring and managing on-going operations such as usage, productivity, capacity or expenses, usually needs to be repeated at some specified frequency and shared with a variety of different users. Key attributes for this type of sharing include first, the ability to filter the search criteria and define the data columns so that the information can be tailored closely to the end-user's decision-making needs. Second, to reduce the administrator's ongoing involvement, it should be possible to pre-define the scheduled frequency to automatically generate this data. Finally, to reduce training time for end-users, they should be able to easily consume the information using their standard browser, email program, and report-reading applications. "Reports" are typically used for this type of information-sharing with specific recipients across the organization.

As businesses increase in size, the complexity of their telecom reporting needs may also grow. Cost Center Managers often benefit from the ability to monitor their costs and usage, but do not need to review data for other cost centers. Taking this one step further, the ability to automatically "burst" apart a report into sections that contain only the information for each specific cost center or personnel saves significant time for the reporting tool administrator, while providing significant value to each recipient – the knowledge to self-monitor their usage. Without an automated method for bursting reports, however, such reporting would involve significant set-up time for the tool administrator.

Some users (e.g., deans or department heads) simply need summarized data that they can view quickly and easily at a glance, to keep a quick pulse on key performance indicators or operational data. Dashboards are perfect for this type of sharing. Dashboard widgets (components) are pre-defined data summaries focused on one "topic" at a time. They can be arranged in one "screen" for quick consumption. For maximum self-sufficiency, dashboard widgets should also be interactive so that the user can easily obtain the details behind the summarized data when additional information is needed. Because the end-users of dashboards are located throughout the organization, the dashboards should be accessible via standard browser.

Finally, it is very common that data from your telecom reporting tool is needed in other applications (particularly accounting). Because the order of the data and the format needs of the receiving application can vary greatly, your reporting tool needs to allow significant flexibility on the filter criteria, the attributes included (and the order of those attributes in the export file), the amount and type of data summarization, and the output format (such as Excel or ASCII). Additionally, as with other types of data sharing, it's important to be able to schedule the output to save your ongoing time.

4. Look Beyond Usage...to Expense Management...and to Invoice Processing



A telecom call accounting tool helps answer common questions of “who”, “when”, “where” and provides a solid estimation of “at what cost”. Telecom is a top 10 business expense for companies. It’s inevitable that how employees use the communications infrastructure ultimately gets intertwined with how Accounting allocates this large expense across the cost centers. In fact, it is very common to ask whether a usage-based call accounting tool can be used for more expense-based accounting and invoice management activities. From a costing perspective, the call accounting tool alone will not exactly equal the phone bill invoiced cost. Why is that...and what options can your telecom reporting tool offer?

Call accounting software takes phone usage data from a company’s internal phone system (“PBX”), applies estimated costs, and makes that data available for usage reporting and equitable cost assignment throughout the organization or clients. The phone bill is the exact monthly cost of telephone services, as determined by the provider of those telephone services. The rating applied by a call accounting will not equal the totals on a monthly telephone bill for a number of key reasons. Fundamentally, the data used to rate calls in the software package is different from the data used by phone companies to generate a monthly invoice.

Knowing that the costs generated by call accounting software will differ from the phone bill costs, and understanding the options your telecom reporting tool offers to address those differences helps ensure that expectations of operational reporting and expense management are set appropriately.

A call accounting tool that enables the system administrator to apply that difference between the invoice and the call accounting-rated calls each month, so that the totals are much closer to that given month’s invoice, will save time and be sufficient for many organizations. For this type of utility or feature, be sure to check into the efficiency of the user interface and ability to quickly include the updated information into reports or other data feeds that are shared with Accounting.

Usage reporting (“call accounting”) is most often a software-based self-service business tool. An administrator sets up data collection and data sharing functions to meet the information needs of the stakeholders and uses the tool at whatever frequency meets the business needs. Call accounting is typically usage-focused with cost estimation as a means for equitably distributing the costs of telecom usage.

A software tool that allows the use of invoices as the key source of data for expense information is valuable when expense precision is more important, and when organizational needs stem more from the financial and accounting perspective. However, organizations that focus solely on the invoice data may be missing a tremendous opportunity. As businesses get larger, the actual processes of contracting with vendors, as well as receiving, reviewing, disputing, approving, and paying invoices become significantly more challenging, and can become filled with inefficiencies – it can even get to the point of being a competitive disadvantage. It’s at this point that tools and services assisting with PROCESS workflows and INVOICE management offer significant savings and efficiencies.

Telecom Expense Management (TEM) solutions offer a holistic approach to your expense management requirements. TEM solutions are normally comprised of software functions plus a wide variety of outsourced services to help you manage the expenses found on telecom-related invoices, as well as some or all of the processes of interacting with those invoices and their vendors. Because invoices come regularly, managing expenses is an on-going activity and requires a trusted partner with consistency in their own methods, processes and results.

When it comes to a telecom reporting tool, expenses and usage are highly intertwined. Finding a tool with the flexibility to grow from usage focus to an invoice and business process focus gives organizations a powerful method for monitoring, managing, and optimizing this mission-critical business resource (communications infrastructure) and its associated expenses. Finding efficiencies in telecom expense work flows and processes is smart business, and more likely a competitive advantage for cost-conscious businesses and organizations.

Case Study – Telecom Reporting at a Private University

Problem

The Director of IT Operations at a private Florida university was struggling with telecom reporting for both landline and mobile communications. Without a call accounting solution, it took him at least 4 hours every month to gather data from their Cisco Unified Communications Manager, Avaya Aura® Communications Manager, and Shortel phone systems to create chargeback reports. He had no budget to help department budget administrators self-monitor their telephony usage, and no time or resources to review their monthly 1,200-page mobile invoice from their wireless provider.

Solution

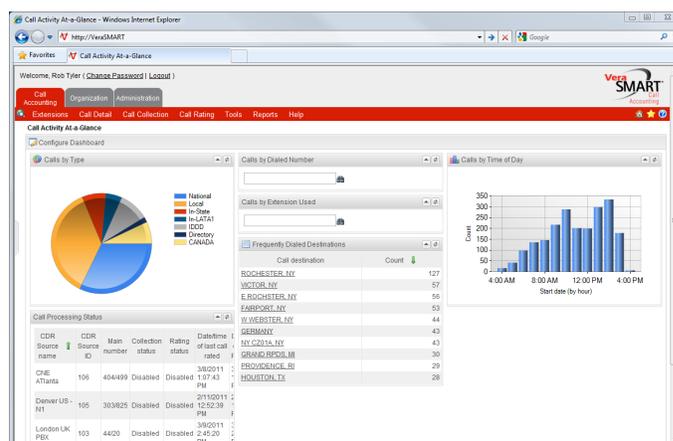
Now he is saving valuable time and money with VeraSMART® Wireline and Wireless Call Accounting software. VeraSMART helps him combine, simplify and share his wireline and wireless telecom usage and cost data.

- **Saving 4 hours a month with automated PBX chargeback and showback:**

“I used to spend at least 4 hours each month manually collecting the call records from all the switches and creating accounting chargeback reports. Now they automatically generate and distribute monthly to Accounting and to each budget manager.”

- **Saving over \$600 per month on mobile with automated mobile plan optimization:**

“Before VeraSMART, we just didn’t have the manpower to spend hours and hours reviewing a 1,200-page wireless bill. The beauty of VeraSMART is it shows a really clear picture of expenses in a simple dashboard and we can easily drill down to get more information.”



About Calero Software

Calero Software offers software and services for wireless and wireline call accounting for Avaya, Cisco, Microsoft Lync and other communications platforms. We are a Technology Partner in the Avaya DevConnect program and a Registered Developer in the Cisco Developer Network Program. Calero VeraSMART Call Accounting solutions eliminate telecom distractions every day for over 3,000 customers worldwide.

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To schedule an online demonstration or learn more about VeraSMART Call Accounting software, please call us at 585-383-6806 or email us at info@call-accounting-solutions.com. We look forward to hearing from you!