
CAAB USERGUIDE

(CALL ACCOUNTING AND BILLING)

User Guide for UQ staff

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This guide has been compiled to provide a quick reference for the most common functions that UQ finance staff are likely to access when using CAAB web portal.



GETTING STARTED

ITS recently upgraded the PABX call accounting solution and now provide a self-service portal that provides authorised UQ staff to access call accounting data for their business units. Billing data for Telstra mobile services, which are billed through UniFi/MBRS, are also visible through the unified reporting CAAB portal. The interface of the CAAB portal is simple and nearly all aspects of the interface can be clicked to explore the data in more detail.

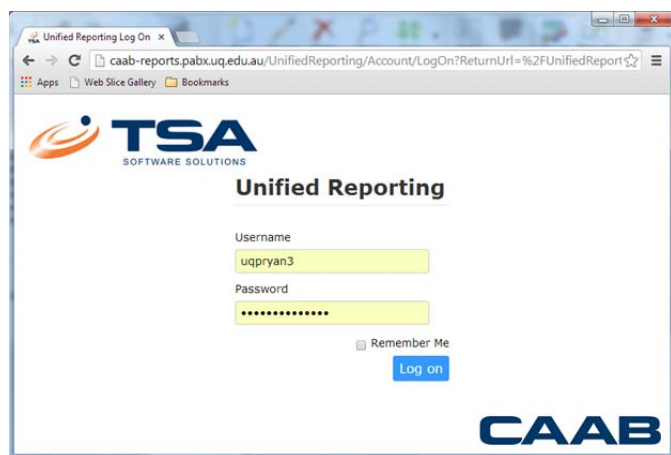
For any assistance with the CAAB site please contact Voice Ops x51000 voiceops@uq.edu.au.

The unified reporting consists of 2 tabs:

- **My Charges:** View details of inventory assigned directly based on the UQ username used to log-in. Users can explore their own usage and see how their communications behaviour has changed over time. The inventory includes PABX extensions, Authority Codes (PINS), Telstra MBRS mobiles.
- **Business Charges:** Finance staff granted access by Voice Operations (x52000) will have access to the Business Charges tab. View Staff and Business Units under your management, and see how their devices and usage affects the charges applied to the business unit.

WEB PORTAL (CAAB-REPORTS.PABX.UQ.EDU.AU)

CAAB provides a self-service portal to call accounting data for any authorised UQ staff.



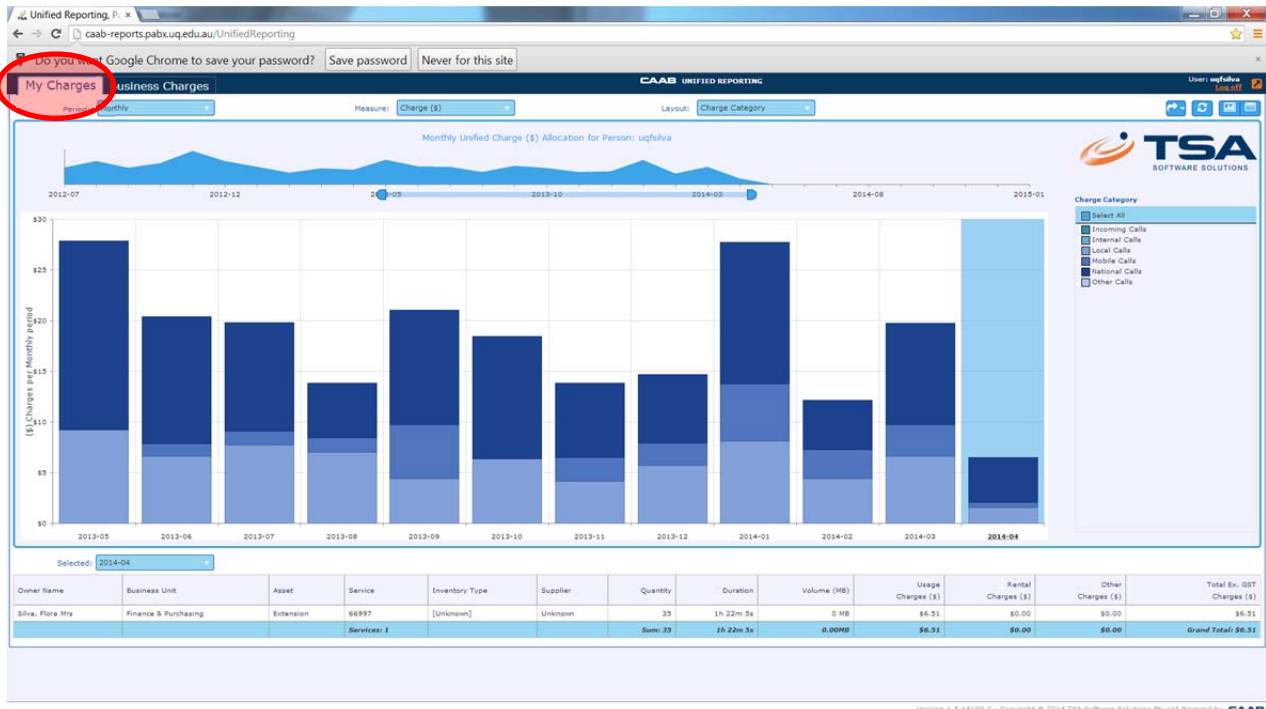
1. Open a browser to caab-reports.pabx.uq.edu.au (Chrome is the recommend browser)
2. Enter your UQ credentials (username and password).
3. Click “Log on” button






My Charges Tab

The default screen displays the “My Charges” tab and any services (PABX and Telstra mobiles) associated with your username are displayed in a unified report.

Users get a basic portal to explore their own devices only.

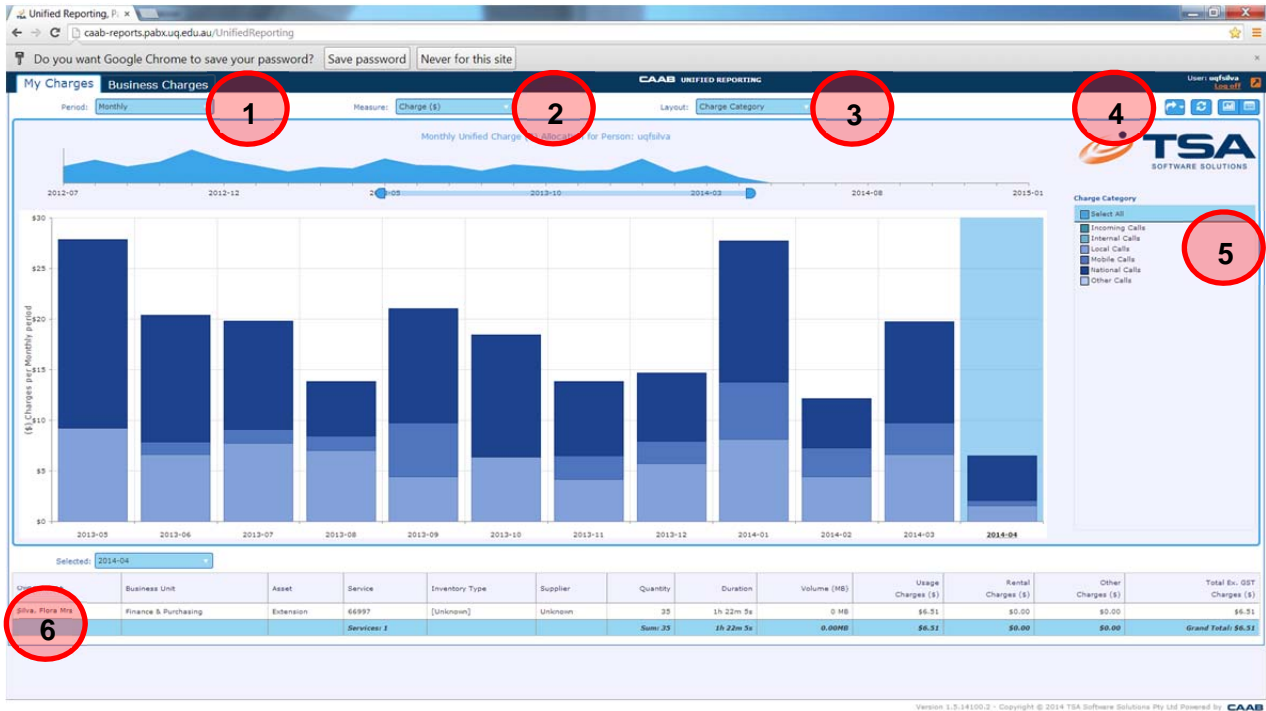


- Period dropdown: Select how to display the data in monthly, quarterly or yearly format.
- Measure: Select from the menu how the data is measured. Charge (\$), Calls (Quantity), Calls (Duration), Data Usage (MB).
- Layout: Select from the menu how the data will be displayed. Charge Category, Inventory Class, Sub-Unit (Children). Note: The layout options will determine the legend (See below)
- Icons:

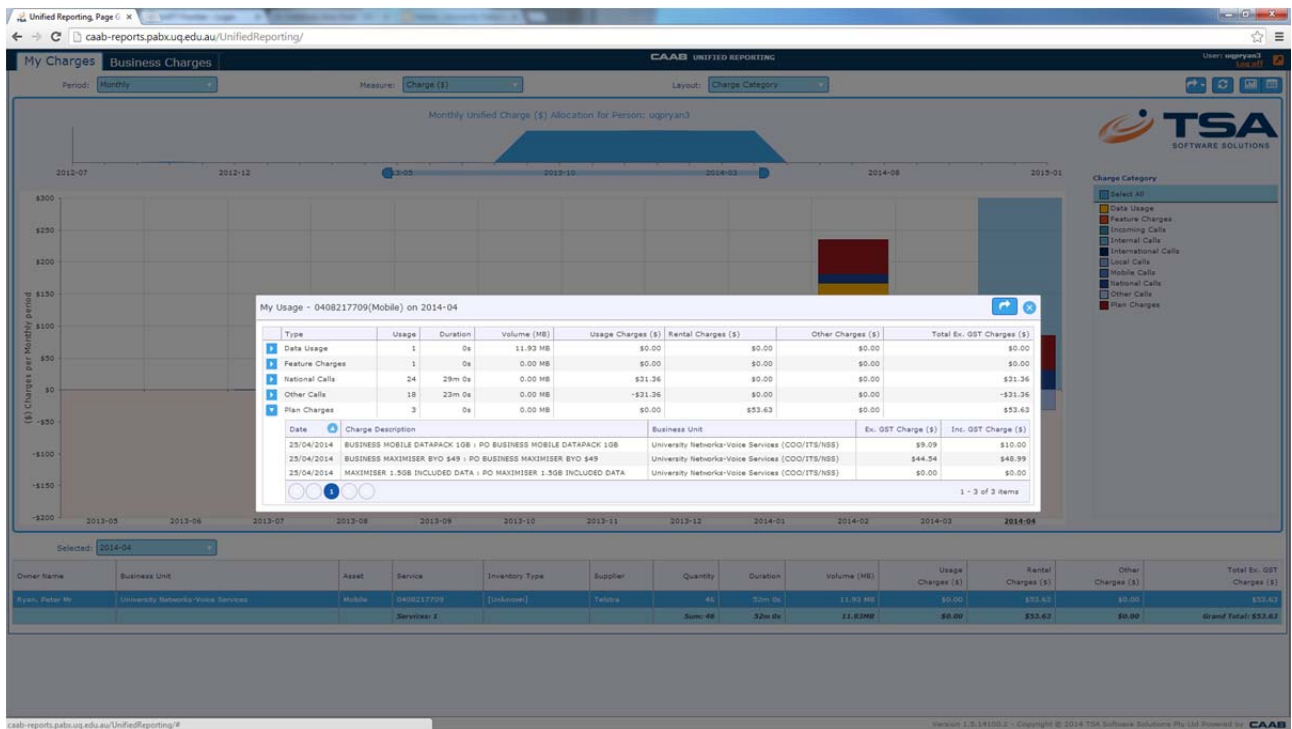
- Export Data: 
- Reset to default view: 
- Toggle Graph and Grid data 

- Legend: Based on the layout selected (Item 3), the legend options will change and individual categories can be selected to isolate specific data.
- Grid Area: The grid area will display data based on the options selected.









Users can drilldown to per call transaction to investigate data.



Icons:

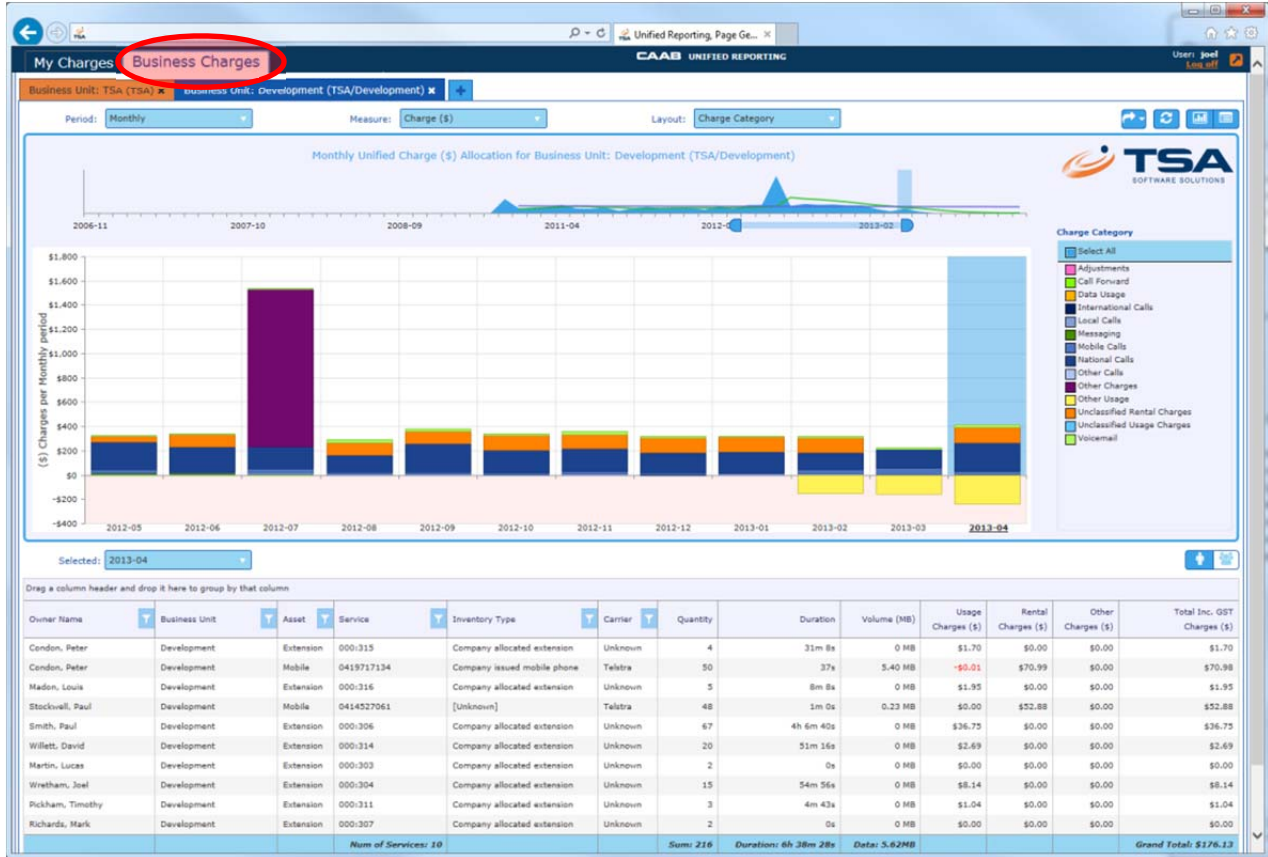
- Expand the category to display more details 
- Collapse the category to view the summary data 
- Sort the data in ascending order 
- Sort the column/data in descending order 



Business Charges Tab



The "Business Charges" tab allows authorised users to view the usage data for any services (PABX and Telstra mobiles) associated with business unit as defined by Voice Ops (x52000).

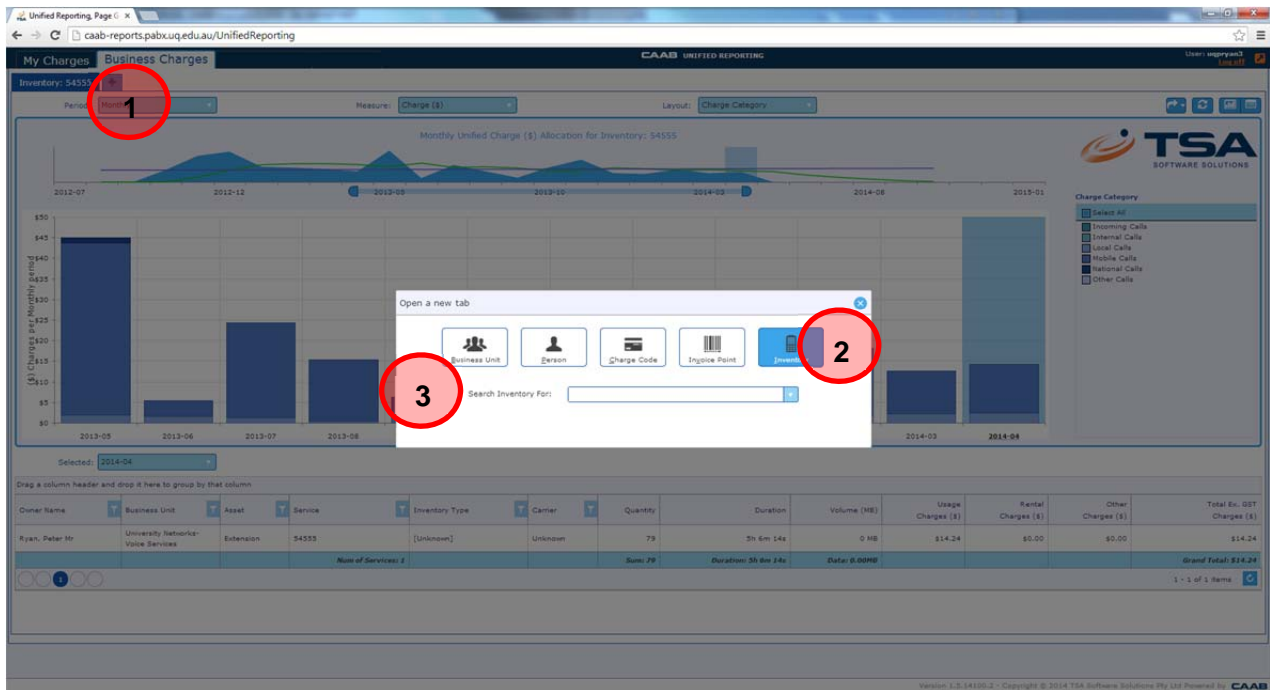
If you're authorised to view data for business units the "Business Charges" Tab will be accessible.



How do I view the data for a specific PABX extension or mobile service?

CAAB regards all PABX extensions, Telstra MBRS mobiles and Authority codes (PINs) as inventory.

1. On the “Business Charges” tab, click the  icon to open a new tab.
2. Click the inventory button. 
3. Enter search criteria and select from the drop down menu which will dynamically change as you refine the search criteria. Note: Only services that are allocated to your business unit will be visible.



How do I view mobiles only?

Whilst you can view the data for a specific mobile service (How do I view mobiles only? Page 7) you can restrict any graph to display only mobile services:

1. Select “Inventory Class” from the layout drop down menu.

Layout:



2. Select mobiles from the options and the graph and data displayed will be reflected.

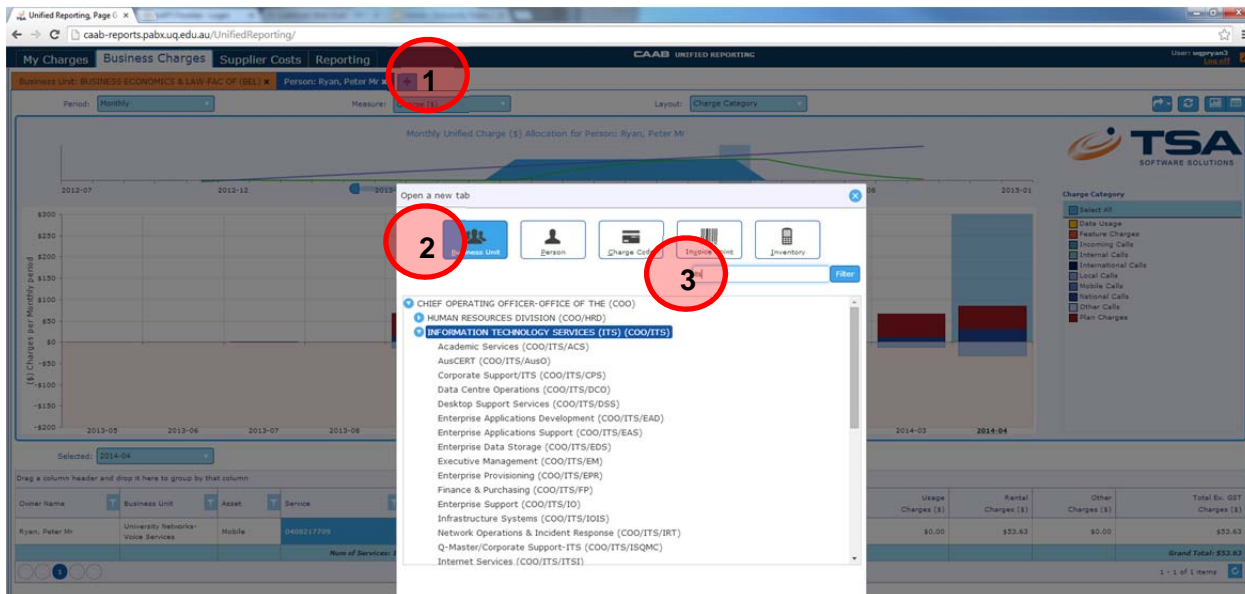


The screenshot shows the 'Inventory Class' selection menu. It has a title 'Inventory Class' and a 'Select All' checkbox. Below it are three options: 'Extension' (unselected), 'Mobile' (selected), and 'Authority Code' (unselected).





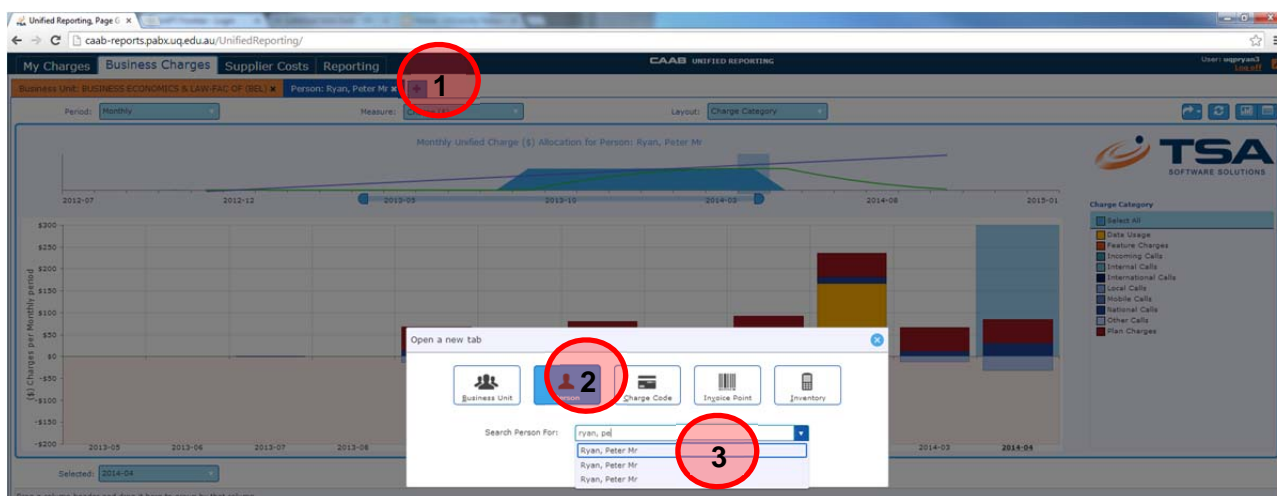
How do I view services for a specific business unit?

1. On the “Business Charges” tab, click the  icon to open a new tab.
2. Click the Business Unit button. 
3. Enter search criteria and select from the drop down menu which will dynamically change as you refine the search criteria. Note: Only business units you've been approved to access will be visible.



How do I view services for specific staff?

1. On the “Business Charges” tab, click the  icon to open a new tab.
2. Click the Person button. 
3. Enter search criteria and select from the drop down menu which will dynamically change as you refine the search criteria. Note: Only staff within your business unit will be visible. Staff are displayed (surname, firstname title)



General Questions

Who can see my landline phone and mobile call details?

You can see your own landline and mobile phone call details. Staff within your organisational unit that are responsible for paying your bill, budgeting communications expenses for the unit, and other relevant financial responsibilities will be able to see your data. This data is aimed at helping organisational units better manage their expenses.

There seems to be a discrepancy in the data shown via the CAAB unified reporting portal?

Please document what you believe is the discrepancy and contact ITS Voice Operations on x52000 or email voiceops@uq.edu.au.

Can I export the data?

Wherever you see the following icon you can export data. The format options will depend on the data displayed but include CSV and PDF.



What are Authority Codes?

Authority Codes were called PIN Codes in the previous call accounting system. Authority codes allow UQ staff to alleviate the restrictions on some extensions to allow calls that would normally be restricted e.g., make an international call from an extension that is in a public area that normally can only make local calls.

Troubleshooting

The CAAB unified reporting portal isn't working as expected?

Firstly, try using another web browser. CAAB works best on Google Chrome. If this does not work, please call Voice Operations on x51000 or email voiceops@uq.edu.au.

PABX extension or mobile services are not visible?

Firstly, try using another web browser. CAAB works best on Google Chrome. All services are assigned to a business unit by ITS Voice Operations so if any services are not visible on the CAAB website please contact Voice Ops on x51000 or email voiceops@uq.edu.au and advise the service numbers (Mobile or PABX extension).

Where can I get help?

Assistance with CAAB can be sought through the Voice Operations team in Information Technology Services (ITS). Please contact Voice Ops on x51000 or email voiceops@uq.edu.au

