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Data Extraction Mini Guide

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Contents

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1. Introduction

The purpose of this document is to provide details on how to extract the data that you have stored on your Blueface UC Portal account.

It is important that you access and save any relevant information that you may need before you cancel your account, as some data is automatically deleted once the account is closed.

The data that can be accessed on the account will depend on the user role assigned.

Regular Users	Can only see their own data
Group Monitors	Can see certain data related to users in their **Group**
Customer Administrators	Can see all data for all users on their account

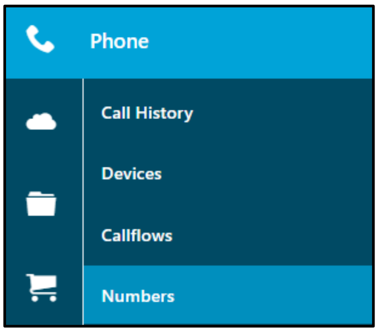
To access the UC Portal, please visit https://uc-portal.blueface.com/login

Your username is generally your **FirstName.LastName** but this may differ depending on the personal preferences of how it was set up.

If you do not have your username or if you run into any other issues, please reach out to the Support Team at support@blueface.com or call (IE) 01 524 2000 or (UK) 020 7100 4208. You should have your account number handy so that we can verify we are speaking to an authorised person.

2. Numbers

To review the list of numbers on your account and the current callflow in place for each number, navigate to **[Phone]** then **[Numbers]** on your left-side menu.



This page contains a list of all your internal extensions, fax, geographic, and non-geographic numbers. You can use the **Filter by Number Type** drop-down to filter the list by specific number types.

3. Users

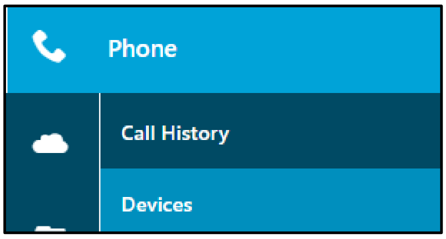
To access the list of users on your account, please navigate to **[People]** then **[Users]** from your left-side menu.

The main page from the Users menu provides the Username, which is what the user needs to enter to log into their account, their email address, location, highest role (access level) and the groups they belong to.

If you wish to gather additional details, such as their caller IDs, their devices, etc. you can select the **[Edit]** pencil icon at the end of each row for each user and this will provide additional information.

4. Devices

To access the list of physical and virtual devices that are on your account, navigate to **[Phone]** then **[Devices]** on your left-side menu.



Each individual square on this page will provide you information such as the name of the device, the type of device, the user assigned to the device (if relevant), and the line status. You can select the **[Edit]** pencil icon to gather additional details, such as whether the device has any **Device Functions** such as BLF (Busy Lamp Field) or speed dials assigned to it, and how the caller ID for each device is configured. We recommend viewing our **Device Functions Mini Guide** for more information on how this can be edited.

NOTE: Any DECT phones (cordless phones) will only be listed **under** the base station. For example, if you have three TPA 60 or two Snom M30 devices that work from a single base station, this will only appear on the UC Portal as either the Panasonic TGP 600 or the Snom M400 base stations:

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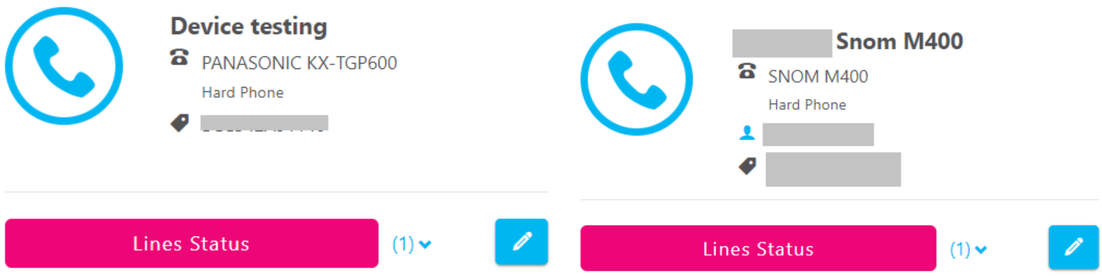
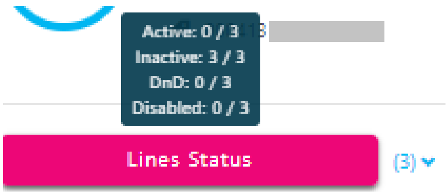


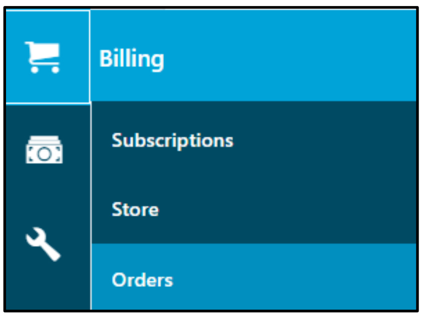
Each handset will need an individual line. To see how many lines are set up, you can hover over the **Line Status** indicator. The denominator is how many lines are on the device.



In the above image, there are 3 lines available. This means 3 individual handsets can be paired with the base station.

5. Invoices

Your invoices can be downloaded from the UC Portal. To access these, navigate to **[Billing]** then **[Orders]** on your left-hand menu.



If you select the hyperlink for each invoice that is located under the **Invoice** column, your invoice will download as a .PDF file automatically.

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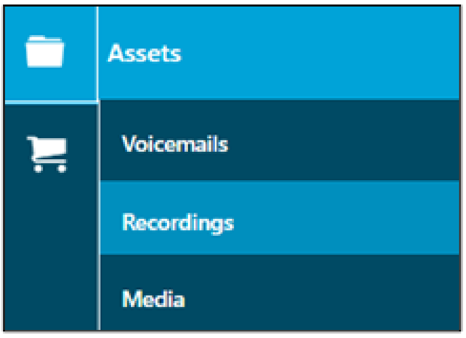
6. Call Recordings

If you would like to listen to or download your call recordings, navigate to **[Assets]** on the left-side menu and then select **[Recordings]**.



If there is a specific call that you are searching for, use the **Start Date** and **End Date** filters to narrow down the date of the call.

Customer administrators can use the **User** drop-down to search for call recordings for all users on the account, while Regular users can only filter through their own user's call recordings.

You can tick the **Advanced Search** option to reveal additional options to help narrow down your search. The below table provides additional information on these fields.

1. Group	Customer administrators can use this drop-down to search for call recordings by **Group.** This will return all call recordings from the different Groups that have been created on the account. Regular Users with the **Group Monitor** extended role will be able to use this drop-down to filter by any Group that they belong to.
2. From	If you are trying to filter by a specific inbound call, you can type the telephone number the call was received from in this field.

3. To	If you are trying to filter by a specific outbound call, you can type the telephone number that was dialled in this field.
4. By Recording Duration	You can use this drop-down to filter calls by the duration of the call. The options available are *Any, More than 30 seconds, More than 60 seconds, More than 5 minutes* and *More than 10 minutes*

Once you have found the call you are looking for, you can press the **[Play]** button to play the recording, press the **[Download]** button to download a copy of the recording or select the **[Delete Recording]** icon to delete the recording.

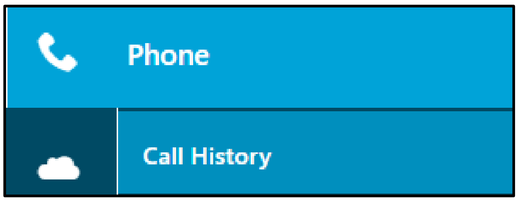
NOTE: Regular Users can view and download their call recordings but are unable to delete them.

6.1. Call Recording Storage Capacity

Call Recordings are retained for a maximum of 3 months (90 days), or up to 100 hours of recording time, whichever limit occurs first. When the maximum limit is reached, the oldest Call Recording will be replaced by the newest. If you need to store these long-term, it is recommended to download your recordings and store locally before either limit is reached.

7. Call History

The **Call History** feature of the UC Portal allows you to review calls made and received on your account. To access your call history, select the **[Phone]** icon on the left-side navigation menu, followed by **[Call History].**



The UC Portal allows you to download reports and track productivity. You can filter by *date range, call type, number from, number to*, as well as searching by *User, Group* and *Device*. Below is list of the different filters that can be applied.

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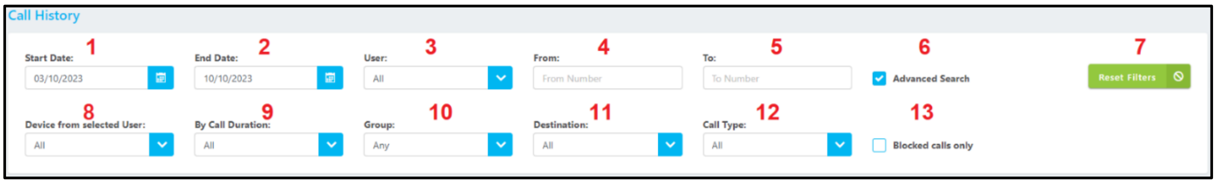

1. Start Date	Use this drop-down to set the **start date** for the period you plan to search.
2. End Date	Use this drop-down to set the **end date** for the period you plan to search.
3. User	Use this drop-down to review the call history for a particular user.
4. From	Use this free text box to review the call history for calls received from a particular number.
5. To	Use this free text box to review the calls made to a particular number.
6. Advanced Search	Tick the **Advanced Search** box to populate additional filters (detailed further below).
7. [Reset Filters]	Select **[Reset Filters]** to clear any filters applied to your call history search.

<u>Advanced Search Filters</u>

8. Device from select user	Use the drop-down to review the call history for a particular device. **NOTE**: If you have filtered by a User, the Device drop-down will only display devices that have been allocated to that user.
9. By Call Duration	Use the drop-down to filter search results by call duration. Options include more than 30 seconds, more than 60 seconds, more than 5 minutes, or more than 10 minutes.
10. Group	Use the drop-down to review the call history for a particular group.
11. Destination	Use the drop-down to review the call history of calls made to *Internal, National,* or *international* numbers.
12. Call Type	Use the drop-down to filter search results by *Voice, Fax,* or *SMS* interactions.
13. Blocked Calls Only	Use this checkbox to only display **Blocked Calls**.

7.1 Downloading Call History

Once you have filtered your call history by your chosen variables, the results should appear as per the below example:

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1. Call Type Icon	This icon indicates the type of interaction (*Voice, Fax,* or *SMS*).
2. Date	This column displays the date and time the call began.
3. Call Type Icon	This icon indicates the type of call. 
4. From	This column displays the number / name of the caller.
5. To	This column displays which number was dialled.
6. Owner	This column displays the user who answered the call. **NOTE:** If the call was made / answered from a device with no users assigned, this column will return no value for that call**.**
7. Destination	This column displays the contact type. For outbound calls, this will display the type of number you contacted (ex. Toll-Free, Mobile). If you have the number added as a contact, the contact's name will appear. For inbound calls, this will only show the contact's name if you have the number added in your contacts. No other number information will be displayed.
8. Duration	This column displays the duration of the call.
9. Cost	This column displays the cost (if any) of the call. If there is a charge associated, this will be highlighted in a darker shade to be easily identifiable.
10. On Hold Icon	To view the amount of time a call was On Hold, select the ▼ icon. If the call was not on hold, the icon will not appear.

To download the data you have searched for, locate the **[Export]** button on the bottom right-hand portion of the page and press it. This will download your queried data via a .CSV file. You can then further filter the data on your .CSV file.

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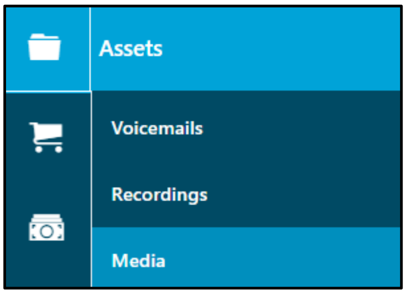
If you are trying to get an estimate of your call usage, you can see the number of minutes you are on calls in the **Duration** column. You can then filter the **Direction** column by **Outbound** calls and then change the **Destination** filters to see how much time you spend on calls to different destinations (national, mobile, international, etc). Please note that your call history only displays calls for up to one year.

8. Audio Recordings

Some customers have sent or uploaded their own audio recordings to be used for Voicemail Messages, On Hold Music, or for their Interactive Voice Response (IVR) menus.

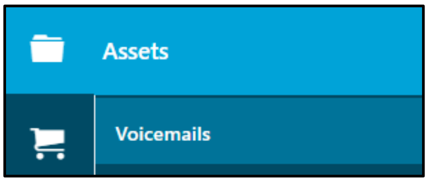
To access the recordings that are on your account, select **[Assets]** then **[Media]** from your left-side menu.



You have the option to **Preview** each message. If you want to keep the file, you can press the **Download** button or if you do not need the recording, you can **Delete** the file.

9. Voicemail Messages

Users can access voicemail messages by selecting **[Assets]** then **[Voicemails]** from the left-hand menu.



Once on the **Voicemails** page in the UC Portal, you are provided with different options to manage the messages on your voice mailboxes.

1.	Enter the inbound caller’s phone number in the **Caller** field to locate voicemails left by that number

Directors: **Gavan Smyth, John Denis Buckley, Edward Zimmerman, Robert Victor**

REG Number: 385721
VAT Number: IE6405721V

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2.	To search for voicemails left on voice mailboxes assigned to a specific user, select the relevant user from the **User** drop-down menu
3.	To search by a particular mailbox, use the Mailbox drop-down. If a User has multiple mailboxes, each one can be viewed individually using this drop-down
4.	To filter messages by status, use the **Status** drop-down. Messages can be filtered by *Unread, Read* and *All*
5.	To alter the settings of the mailbox, select the **[Mailbox Settings]** button
6.	To change the status of or delete a voicemail, you will need to tick the box visible in the **Actions** column. The **Actions** field becomes available once the box has been ticked. The actions available for selection include *Mark as Unread, Mark as Read,* and *Delete Selected.*
7.	The **Status** column displays the status of a voicemail. The statuses are either **Unread** or **Read.** Voicemails have a status of **Read** when: • It's playing / has been played • It's set manually to read Voicemails are **Unread** when: • Voicemail has not been played • It's set manually to unread
8.	To call back the person who left a voicemail, select the small **Click-to-Call** icon
9.	The **Caller** column displays the phone number of the caller who left the voicemail
10.	The **Date** column displays the date the voicemail was created
11.	The **Duration** column displays how long the voicemail is
12.	To delete a specific voicemail message, select the **[Delete Mailbox]** icon
13.	To download a specific voicemail message, select the **[Download Message]** icon

9.1. Voicemail Storage Capacity

A maximum of 500 voicemail messages are retained on your account. Once this limit is reached, no further voicemails will be retained.

Users can set a limit so that messages delete after a certain amount of time. To set a limit, log into your UC Portal account and select **[Phone]** then **[Mailbox]** from the left-hand menu.

On the Mailbox page, select the **[Edit]** pencil icon next to the mailbox you would like to update. Toggle the **Automatic message deletion** from **No** to **Yes**, then enter the number of days you would like messages to remain in your mailbox for. Once that number of days is reached, the message(s) will automatically delete.

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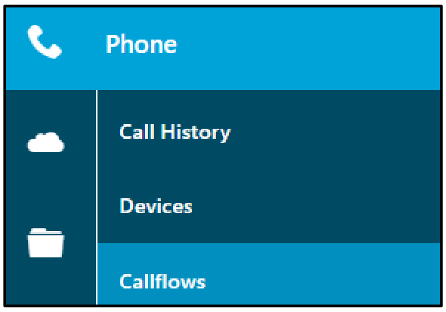
10. Callflows

Callflows are the mechanism by which we can assign certain devices to ring when certain numbers are dialled.

To access the callflows on your account, navigate to **[Phone]** then **[Callflows]** from the left-side menu.



This is a list of all the callflows on your account. The **Numbers** column will display one or more numbers if the callflow is currently in use.

To see the layout of the callflow, you need to select the **[Edit]** pencil icon at the end of the row for each callflow or simply click on the hyperlink name of each callflow.

In the Callflow Designer section, there is an icon on the right side that allows you to take a screenshot of the callflow. Pressing this button will save a .PNG file of the layout of your callflow.

To check specifics of different elements, such as what devices are assigned to a ring element or what voicemail box is assigned to a voicemail element, select the white box with three small dots on the right-side of each element in your callflow and then select **[Settings]**.

For more information on callflows, please see the **Callfows Mini Guide** and the **How to Create a Callflow Mini Guide**.

If you have any questions, please reach out to the Support Team at support@blueface.com or call (IE) 01 524 2000 or (UK) 020 7100 4208.