

# Call Management System

## Bulk Provisioning

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## Contact Details

If you have any queries regarding the content of this document please contact your Customer Services Advisor.

## Issue Details

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# Call Management System

## Bulk Provisioning Guide

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## Introduction

Call Management System is used to manage non-geographic numbers and services on the Intelligent Network (IN) and Interactive Voice Response (IVR) platforms

## Bulk Provisioning with Call Management System

Portal Bulk Provisioning allows the Call Management System users the ability to create, modify or disconnect inbound services in bulk using the portal interface. This has been designed to replace the existing email and FTP bulk provisioning services used on First Generation Systems for customers who manage their services via the portal. The user must upload a valid file containing translations which will create and connect (or disconnect) IN services and can be tracked using the Order Tracking facility.

This service can be used as a simple disaster recovery method by having preconfigured files with a maximum of up to 200 rows per file ready to upload should a disaster situation arise.

## Compatible Service Types

Standard Services are the only compatible service types currently. Call Management System users can upload details of standard services into their file, which will be created as new services and connected to the inbound numbers in the file. Each string of translations will contain order references, an inbound number to be connected or disconnected, a service name and the destination numbers. A valid string **MUST** contain a primary destination number however up to 10 subsequent diverts are optional.

## Command Types

Within the wizard, the user is given the option of 2 command types; Connect and Disconnect. If the Connect command is used, the user has the option to either connect to a new service or connect to an existing service (using service ID). Separate formats will be used for each of the command types as detailed in the following section.

## File Format

### Standard Service

Each line of the file for a standard service must contain the following parameters:

- Reseller Reference - A reference used in Order Tracking to identify the reseller
- Account Reference - A reference used in Order Tracking to identify the account
- NGN - Inbound Number to be connected or disconnected
- Service Name - The name of the service to be created and connected to
- Destination Number - The destination which the inbound dialled number will terminate
- Diverts - Any subsequent diverts to be included as part of the service created (optional)

### Connect to New

(Reseller Ref) | (Account Ref) | (NGN) | (Service Name) | (Destination) | (Divert1) | (Divert2)

### Connect to Existing Service

(Reseller Ref) | (Account Ref) | (NGN) | (Service ID)

### Disconnect

(Reseller Ref) | (Account Ref) | (NGN)

Note: Including a 'pipe' at the end of the string will result in the file failing verification checks and return an 'invalid file format' message.

## Validation

Upon uploading the file to the portal, a validation check will take place. This is to ensure the format of the file is correct and highlight to the user where any errors may be, prior to submitting the order.

All telephone numbers will be automatically corrected as per the following rules:

- Remove all whitespace
- Appending leading zero if not present

So if the user uploads a file with numbers without a leading zero, a zero will be added and the process will continue.

The user permissions will also be validated to check whether they have the right to modify the NGN's and that the destination numbers are valid and permitted (i.e national/international permissions granted).

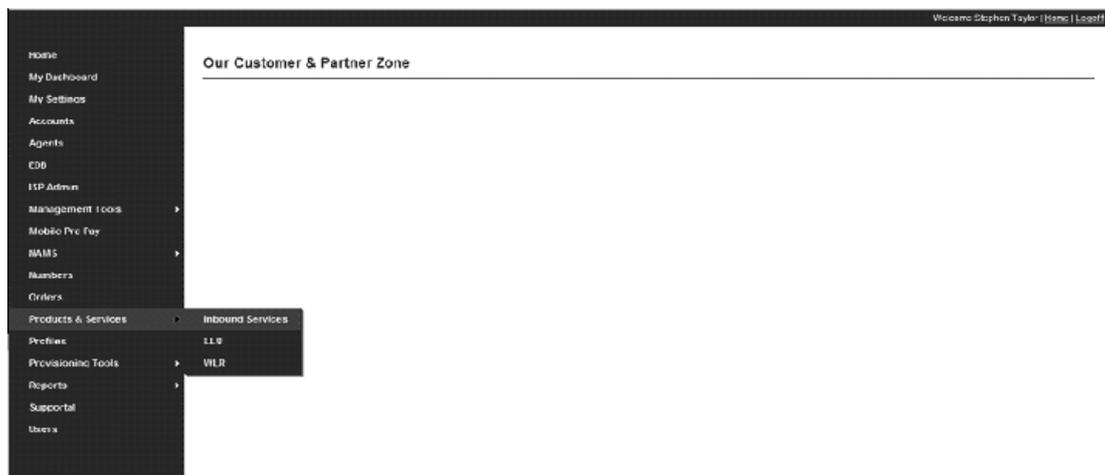
## Order Tracking

After all orders have been created, a summary will be shown detailing the number of orders and the order tracking command IDs. A link will be provided to order tracking to show all the appropriate commands.

Also the user will have the option to request an email containing the number of orders and the order tracking command IDs, plus the link to order tracking. This would enable the user to check the status of the appropriate orders at a later date easily.

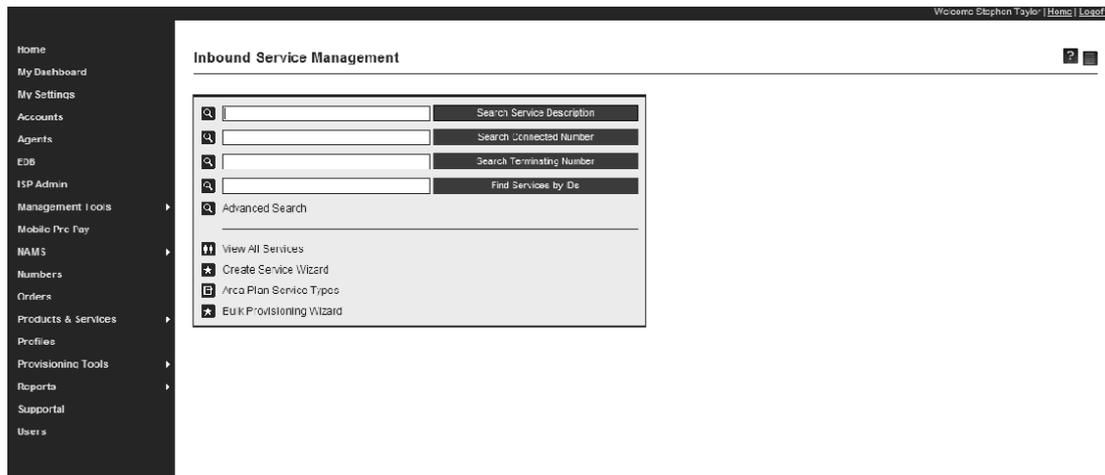
The orders are created under the account of the current agent. Therefore only users with access to the root account of that agent will be able to check the status of the order.

## Connect to a New Service



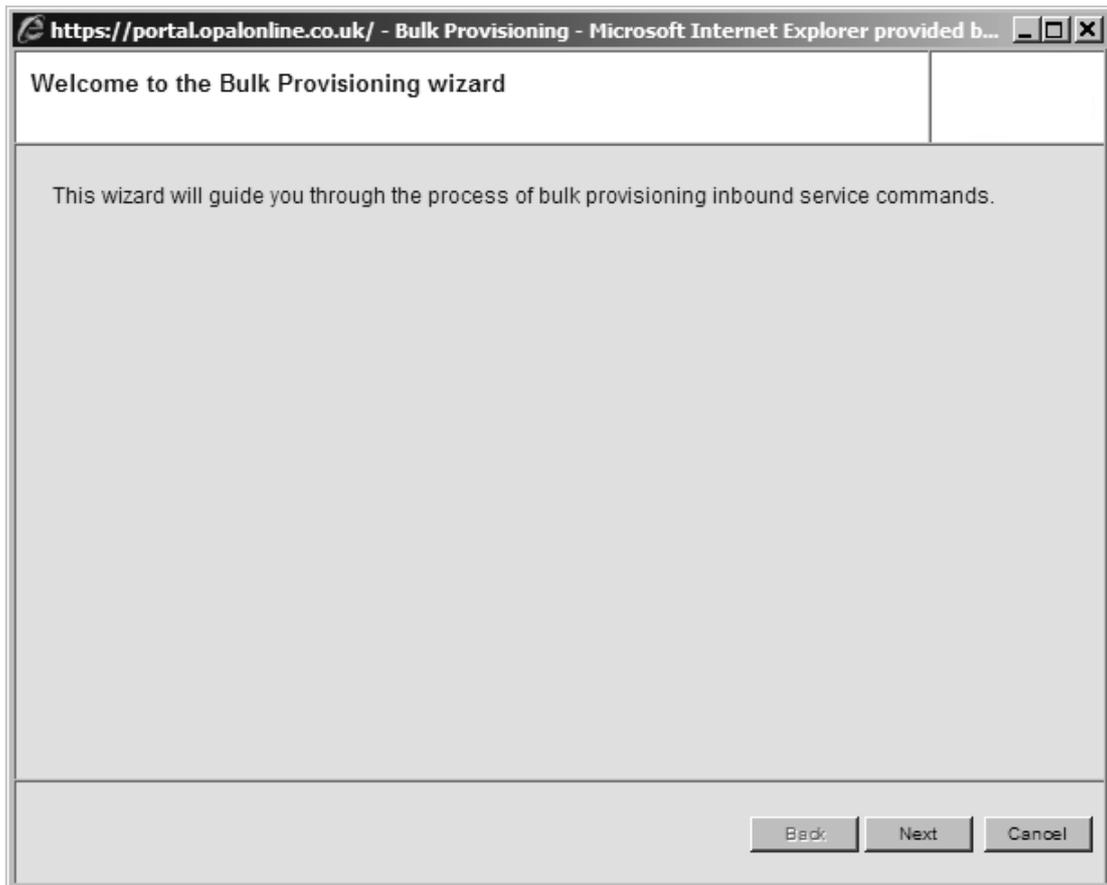
**Main Menu Screen**

From the menu select **Products & Services>Inbound Services** and the following screen will appear:



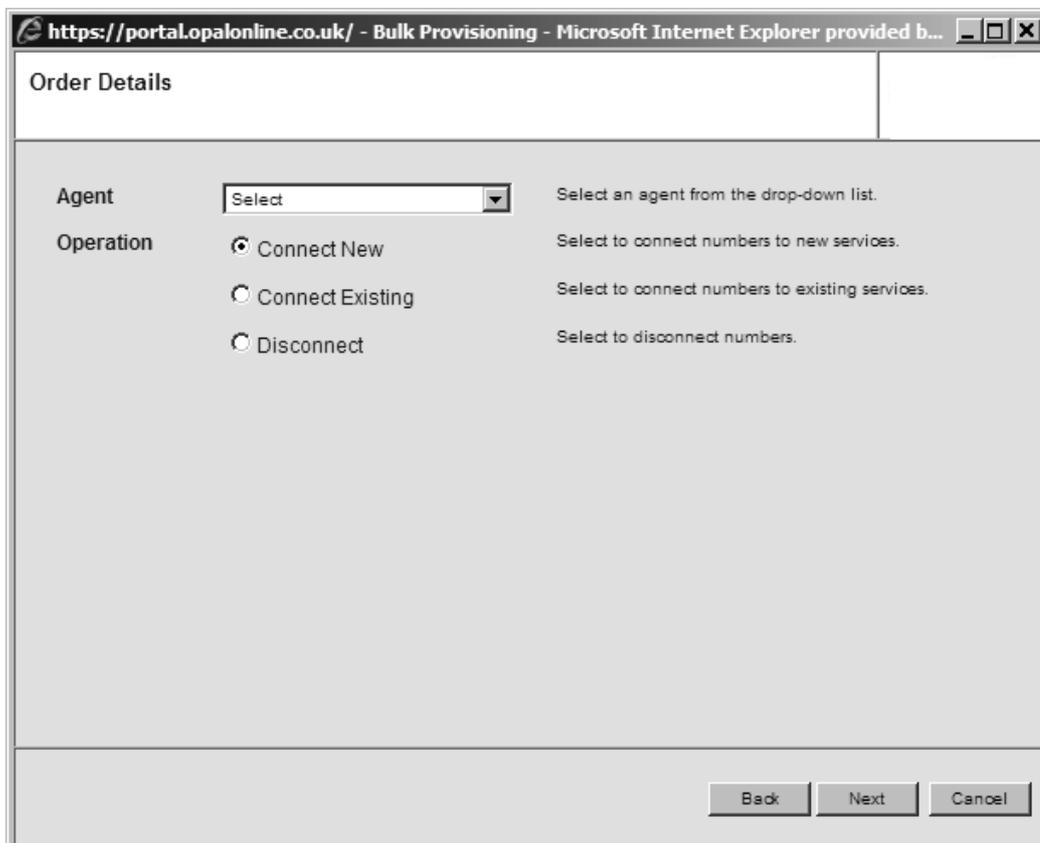
**Inbound Service Management Screen**

Select the **Bulk Provisioning** task (permissions allowing) and the Pop Up Wizard screen will appear:



**Bulk Provisioning Wizard Welcome Screen**

Your browser may ask you to enable pop-ups, as some default to block. From the pop-up wizard welcome screen, click **Next** and the Order Details screen will appear:



**Bulk Provisioning Wizard – Order Details Screen**

Select Agent (Reseller) from drop down list and ensure the 'Connect New' (default) button is highlighted before continuing to click **Next** and the Search Accounts screen will appear:

Search Accounts

Please choose the type of search:

Search accounts by name

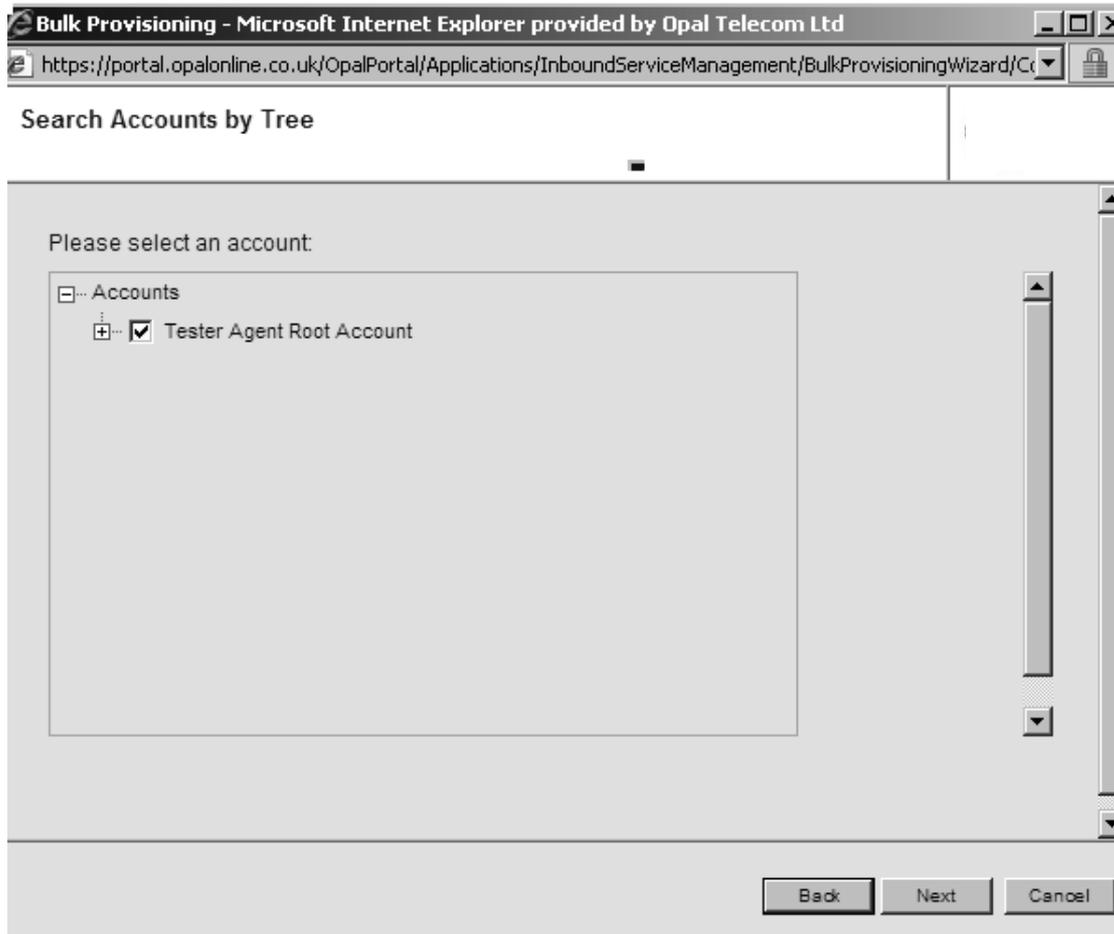
Search accounts by tree

Back Next Cancel

#### **Bulk Provisioning Wizard – Search Accounts Screen**

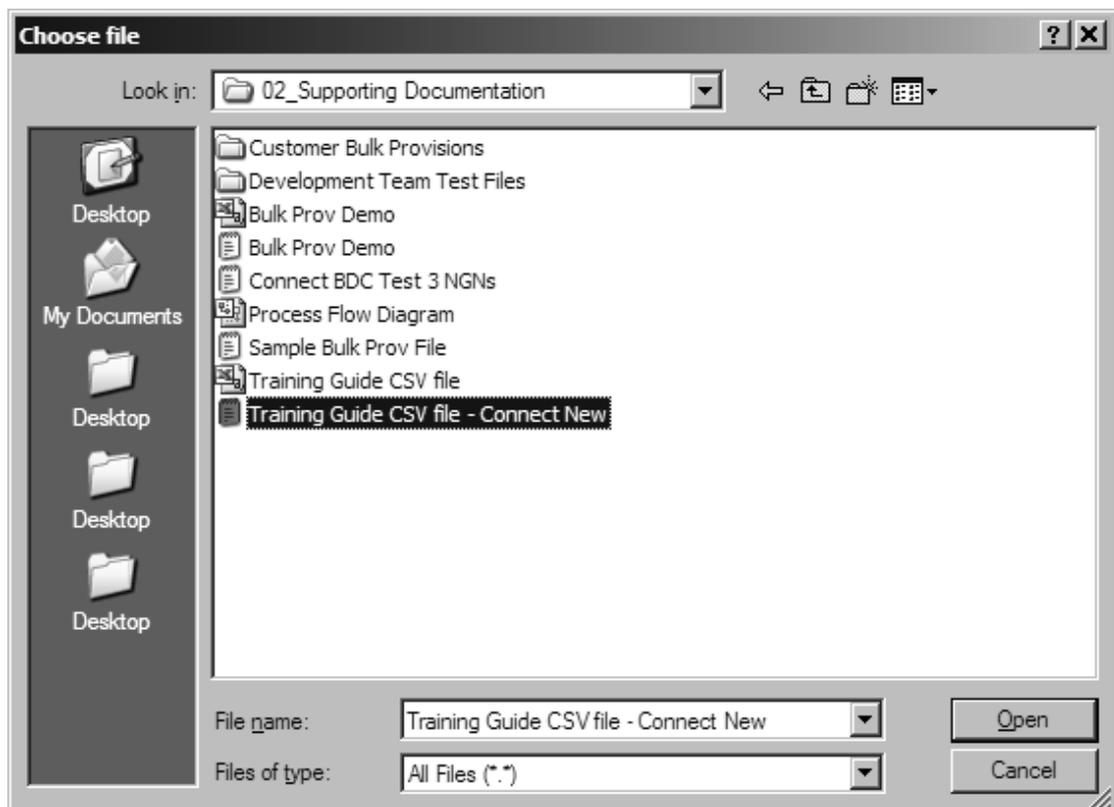
Choose a method to search for the account to house the newly created services. This can either be done by searching for the name of the account or selecting from a tree. Click **Next** to proceed and the Search Accounts by Name or Tree screen will appear, depending on the type of search chosen.

NOTE: If the user has selected to connect to an EXISTING SERVICE, then the account selection screen will not be presented.



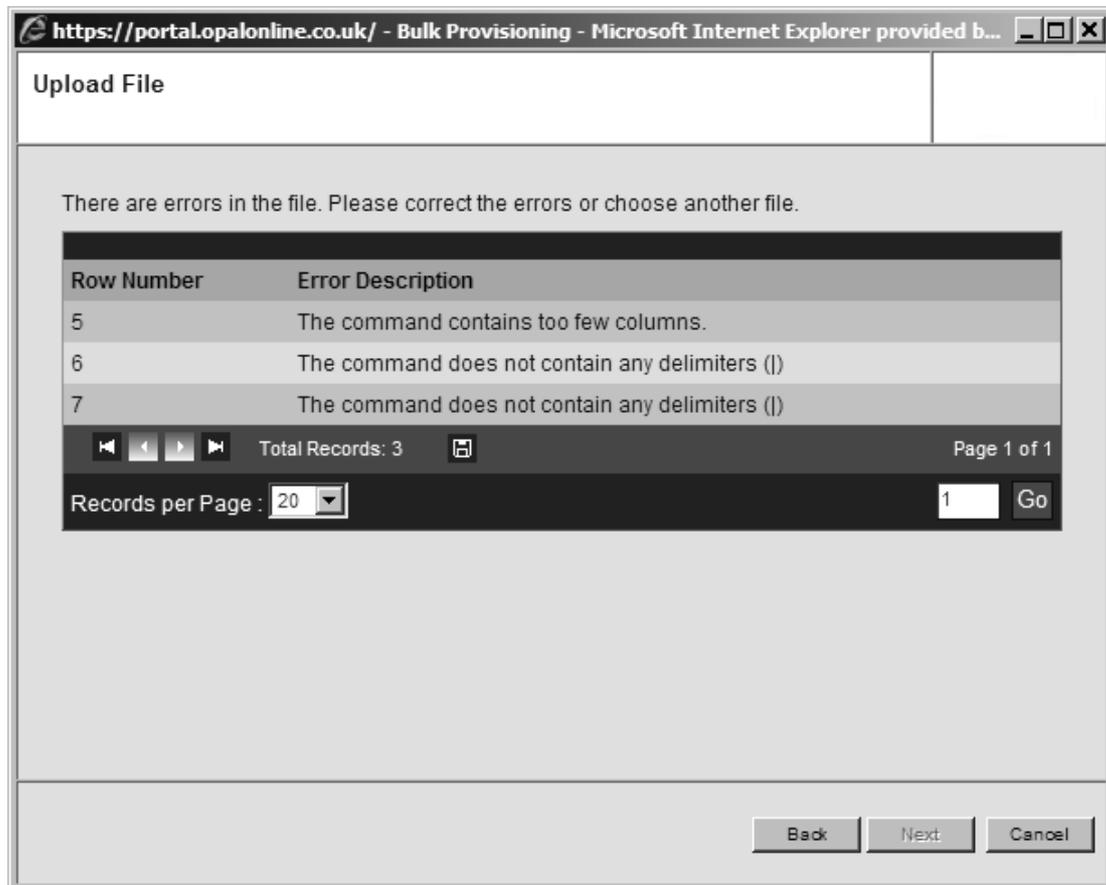
**Bulk Provisioning Wizard – Search Accounts by Tree Screen**

If the tree is the chosen method of account selection, choose the account from the tree by ticking the check box and click **Next**



Choose file to be uploaded

Click the **Browse** button and select the upload file from the file location and click the **Upload** button to begin the verification process, the Upload File screen will appear:



**Bulk Provisioning Wizard – Upload File Screen**

If there are errors in the file, these will be displayed as indicated above. The user must rectify these errors in the file using the error messages for guidance and reattempt to upload the corrected file and the File Summary screen will appear:

https://portal.opalonline.co.uk/ - Bulk Provisioning - Microsoft Internet Explorer provided b...

### File Summary

Reseller Ref	Reseller Account RefID	Number	Description	TLI
Reseller 1	Account A	08451949781	Service 3.1	01612229781
Reseller 1	Account A	08451949782	Service 3.2	01612229782
Reseller 1	Account A	08451949783	Service 3.3	01612229783
Reseller 1	Account A	08451949784	Service 3.4	01612229784
Reseller 1	Account A	08451949785	Service 3.5	01612229785
Reseller 1	Account B	08451949786	Service 3.6	01612229786
Reseller 1	Account B	08451949787	Service 3.7	01612229787
Reseller 1	Account B	08451949788	Service 3.8	01612229788
Reseller 1	Account B	08451949789	Service 3.9	01612229789
Reseller 1	Account B	08451949790	Service 3.10	01612229790

Total Records: 10

Page 1 of 1

Records per Page:

**Bulk Provisioning Wizard – File Summary Screen**

Once all the errors have been corrected and the file is uploaded, the user will be presented with a confirmation screen detailing the file details, click **Next** and the Confirm Order screen will appear:

Confirm Order

All the information for the order has been collected.

Your password is required to submit the order. Please enter it into the field below.

Password

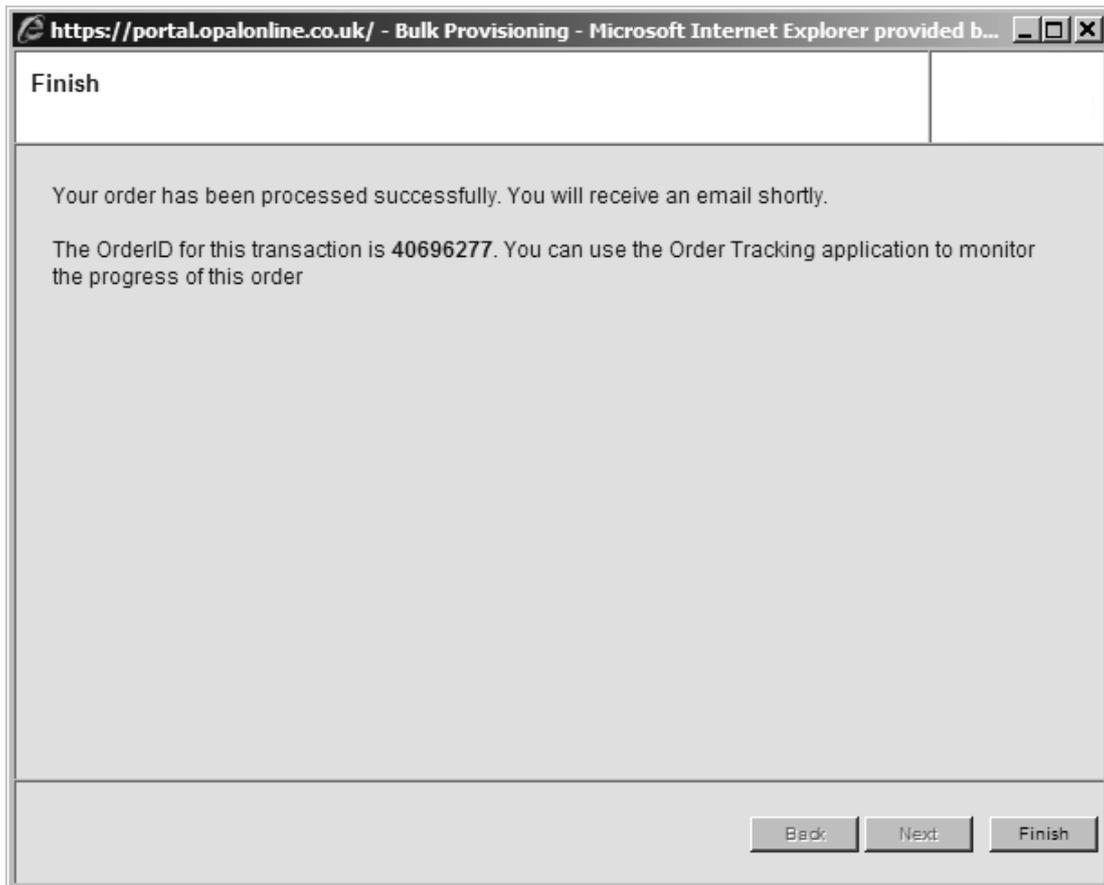
Click Next to submit the order.

Back Next Cancel

### Bulk Provisioning Wizard – Confirm Order Screen

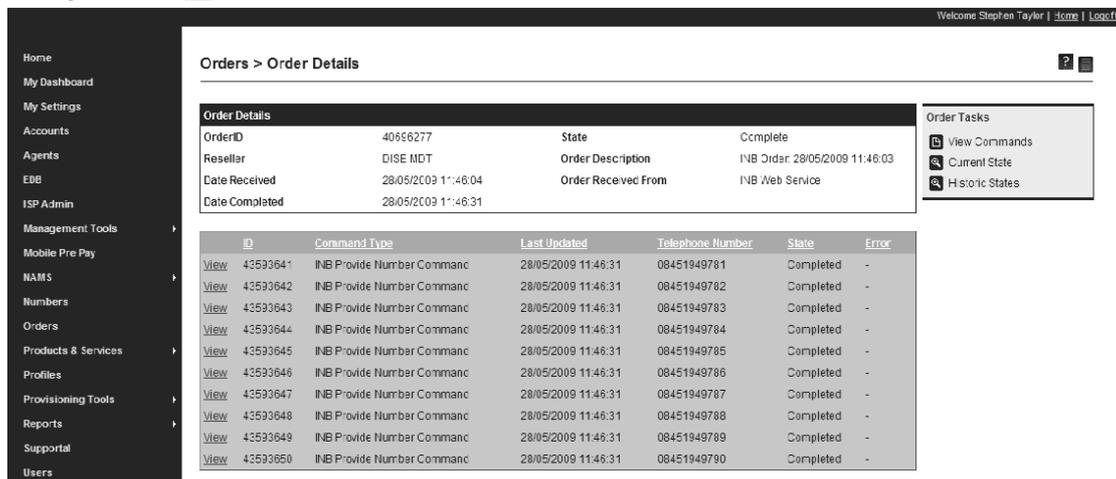
The User will be prompted to re-enter their portal password as an added security measure, once this has been entered, click **Next**.

Once the password has been verified, the order is complete and the user will be presented with the Finish screen below detailing an Order ID for the transaction. This order ID can be used at a later stage to track the progress of the order via the portals Order Tracking application.



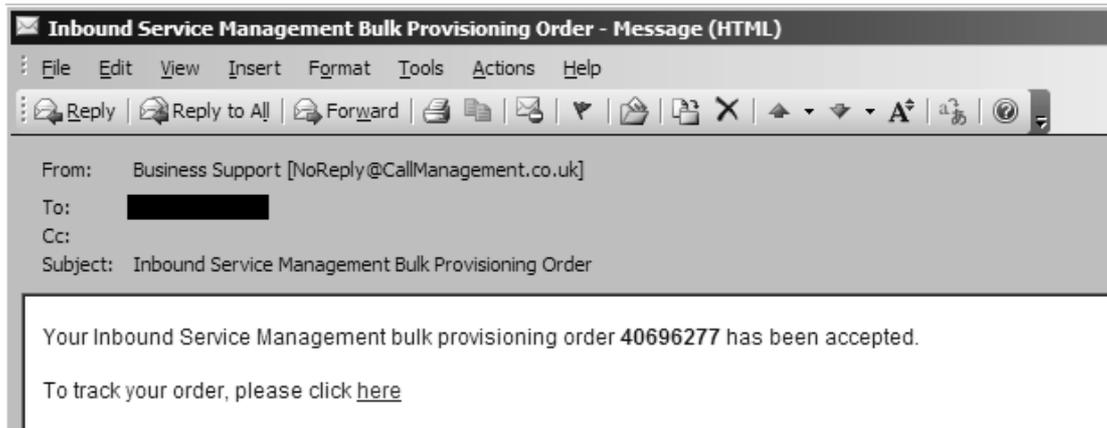
**Bulk Provisioning Wizard – Finish Screen**

Click **Finish**, the wizard will close. If the user has the correct permission levels they can navigate to Order Tracking to be able to track the progress of the order.



**Order Tracking Screen – Order Details**

The state of the order lines will be as follows: Accepted=>Validated=>Completed



### Confirmation Email

A confirmation email will be sent to the user containing the order tracking reference.

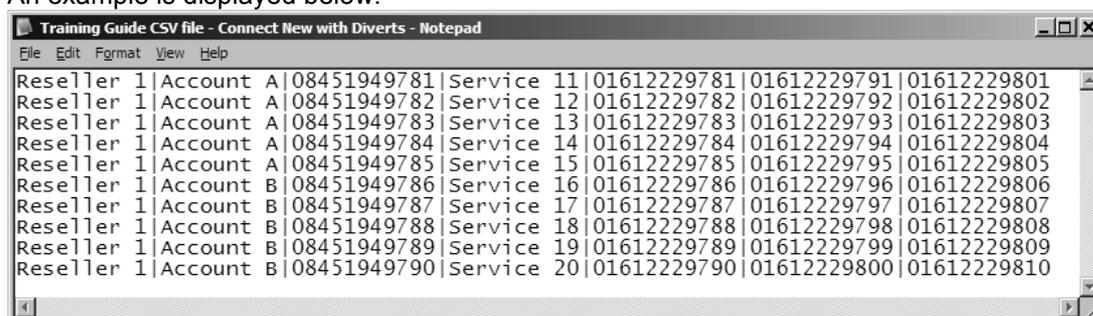
Note: If the numbers were previously connected to a Standard Service(s) (and no other numbers are connected to that service(s)) then the previous service will be deleted. This will not be the case if the numbers were previously connected to any other service type other than Standard Service.

## Connect to a New Service with Diverts

The process for connecting NGN's to new standard services with up to 10 diverts is the same as for connecting to New service without diverts as detailed above. The file format however needs to contain details of the additional diverts.

(Reseller Ref) | (Account Ref) | (NGN) | (Service Name) | (Destination) | (Divert1) | (Divert2)

An example is displayed below:



Reseller	1	Account	A	08451949781	Service	11	01612229781	01612229791	01612229801
Reseller	1	Account	A	08451949782	Service	12	01612229782	01612229792	01612229802
Reseller	1	Account	A	08451949783	Service	13	01612229783	01612229793	01612229803
Reseller	1	Account	A	08451949784	Service	14	01612229784	01612229794	01612229804
Reseller	1	Account	A	08451949785	Service	15	01612229785	01612229795	01612229805
Reseller	1	Account	B	08451949786	Service	16	01612229786	01612229796	01612229806
Reseller	1	Account	B	08451949787	Service	17	01612229787	01612229797	01612229807
Reseller	1	Account	B	08451949788	Service	18	01612229788	01612229798	01612229808
Reseller	1	Account	B	08451949789	Service	19	01612229789	01612229799	01612229809
Reseller	1	Account	B	08451949790	Service	20	01612229790	01612229800	01612229810

**Example of CSV Connection File with additional diverts**

Note: If the numbers were previously connected to a Standard Service(s) (and no other numbers are connected to that service(s)) then the previous service will be deleted. This will not be the case if the numbers were previously connected to any other service type other than Standard Service.

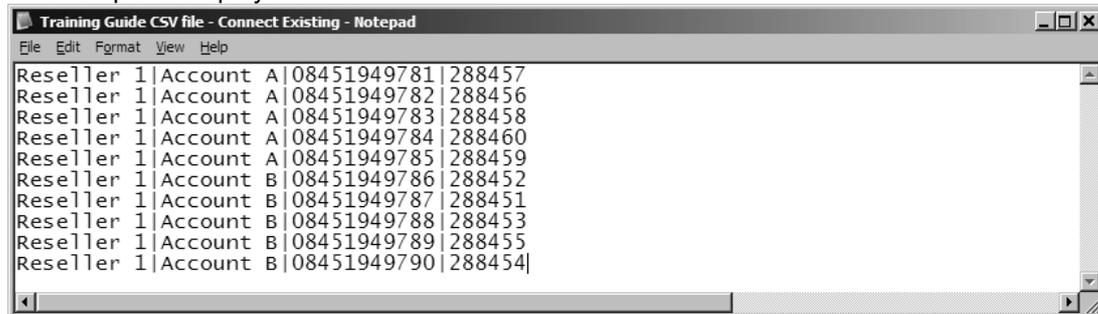
Note: If a divert is added, the previous destination will ring for a default of 15 seconds prior to diverting. The final destination number will ring for a default of 'maximum'. Up to 10 diverts can be added to each service.

## Connect to an Existing Service

The process for connecting NGN's to existing services is the same as for connecting to a new service as detailed previously, with the exception of selecting "Connect Existing" on the first wizard screen. The user will not be taken to the account selection screen. The file format however needs to contain details of the existing services.

(Reseller Ref) | (Account Ref) | (NGN) | (Service ID)

An example is displayed below:



```
Training Guide CSV file - Connect Existing - Notepad
File Edit Format View Help
Reseller 1|Account A|08451949781|288457
Reseller 1|Account A|08451949782|288456
Reseller 1|Account A|08451949783|288458
Reseller 1|Account A|08451949784|288460
Reseller 1|Account A|08451949785|288459
Reseller 1|Account B|08451949786|288452
Reseller 1|Account B|08451949787|288451
Reseller 1|Account B|08451949788|288453
Reseller 1|Account B|08451949789|288455
Reseller 1|Account B|08451949790|288454
```

**Example of CSV Connection File with details of existing service**

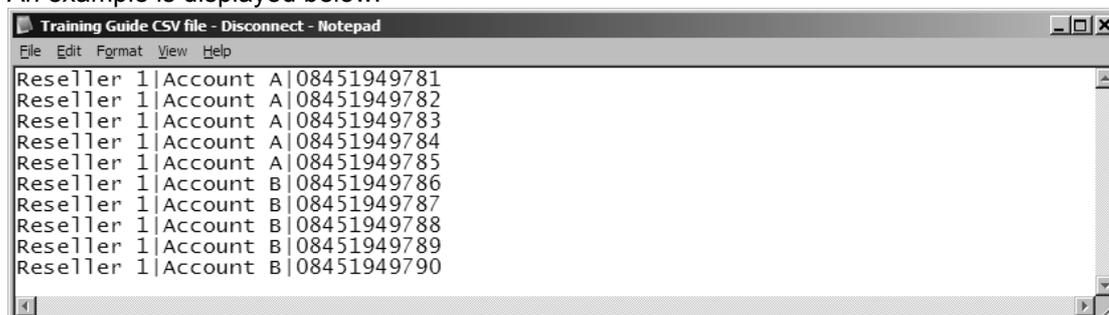
Note: Connecting to an existing service will leave all previous services intact.

## Disconnect from an Existing Service

The process for disconnecting NGN's from an existing service is the same as for connecting to a new service as detailed previously, with the exception of the account selection step. The file format however does not need to contain details of the existing services, only the Reseller reference, account reference and NGN.

(Reseller Ref) | (Account Ref) | (NGN)

An example is displayed below:



```
Reseller 1|Account A|08451949781
Reseller 1|Account A|08451949782
Reseller 1|Account A|08451949783
Reseller 1|Account A|08451949784
Reseller 1|Account A|08451949785
Reseller 1|Account B|08451949786
Reseller 1|Account B|08451949787
Reseller 1|Account B|08451949788
Reseller 1|Account B|08451949789
Reseller 1|Account B|08451949790
```

**Example of CSV Disconnection File**

Note: Disconnecting from an existing service will leave all previous services intact.