



EXCENDIA BILLING DATA EXPORT UTILITY

ADMINISTRATOR GUIDE

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1. Overview of the Data Export Utility

The Data Export Utility enables administrators to plan and execute the transfer of billing and CDR data generated by Excendia into CSV files that can be imported by third-party billing systems to bill customers or to keep a history of when a person has used a certain service.

The Data Export Utility offers the required flexibility to select the fields to export into the CSV files.

There are five types of billing data that can be exported from Excendia systems:

1) Users	Users are individuals or employees of a company who make use of the services. We export three type of users: companies, company employees and customers
2) Sessions	Sessions are logged each time a user accesses and uses a service. The sessions indicate the usage duration of services by users from the beginning of a session (call answered) until the end of the session (Call Hang-up).
3) Call Logs	The call logs provide information about calls made/received by users from/to other people. Calls are either local or long distance.
4) Packages	Packages are the bundles of services that Excendia offers to its customers.
5) User Packages	User Packages are the packages associated to each user.

Configuring the Data Export involves setting the day when the billing period ends. The Data Export will generate the set of CSV files on that day for that billing period of one month.

2. The XML Template

To generate the CSV files, you must first design a personalized XML template that tells the Data Export Utility which data to fetch and how the CSV files should look like.

The Data Export Utility creates the CSV files using the same order and number of fields specified in the XML template.

A default template provided is *FieldMappingExportTemplate.xml*. The file contains all the fields as well as all the attributes that could be applied. To better understand this document, it is highly suggested to open and view the XML file as you read the explanations below.

Overview of GeneralTemplate.xml

This section describes what the *FieldMappingExportTemplate.xml* file contains and what can and can't be changed.

The first statement, `<?xml version="1.0" encoding="utf-8" ?>` is the XML Declaration statement. Leave this unchanged.

Any element with a red star next to it means that the field is mandatory. The following elements appear at the beginning of the XML file:

<code><ExportTemplate></code> <code></ExportTemplate></code>	This tag identifies the name of the template. It may be anything, from your company name to the name of your software or system. Make sure that you have the closing tag at the end of the XML file matching the opening tag.
<code><Settings></code> <code></Settings></code>	<p>In the Settings block, you can set the field separator character and the character that embeds fields. The Settings block has to be the first block in the template. The possible elements to set are:</p> <ul style="list-style-type: none"><input type="checkbox"/> * <code><FieldSeparator value="value" /></code> where value is the character or series of characters that will be used to separate each field.<input type="checkbox"/> <code><StringCharacter value="value" /></code> where value is the character that will embed fields that are identified as text. This is useful for systems that require some fields to be embedded in double quotes. <p><u>Note:</u> For the double quote character, write: <code>value=""</code> in order for the XML document to parse correctly.</p> <p>Example: "John","Smith",200,10/20/2006 where first name and last name have the StringCharacter parameter.</p>

3. Exporting information into CSV files

This section describes the list of available fields that you can use to specify which data you need. This gives you the flexibility to specify which fields you want to export in the order that you want. You may create CSV files containing just three columns or every column available.

If you specify a field name that isn't recognized, the application will ignore it and continue generating the CSV file. The field names that were unrecognized will be substituted by an empty space.

Data Field Attributes

The following attributes are applicable to all data fields including those of Users, Sessions, CallLogs and Packages.

<u>Name</u>	<u>XML form</u>	<u>Description</u>
* type	<Password type="data" ... />	Type of field required. This attribute is for each data field.
text	<FirstName text="true" ... />	Specifies that the data field is a string. This attribute tells the Data Export Utility to embed the field with the StringCharacter specified in the <Settings> block.
identifier	<Zip identifier="\$ZipCode" ... />	The Identifier is the column name. Some systems require that a header be printed at the top of the page identifying each column. Ex: \$Firstname,\$Lastname,\$Address John,Smith,123 Street Jane,Smith,456 Boulevard

Data Block Attributes

The following attributes are applicable to Users, Sessions, CallLogs and Packages elements.

<u>Name</u>	<u>XML form</u>	<u>Description</u>
* filename	<Users filename="file.csv" ...>	Specifies the name of the CSV file
Title	<Sessions title="Clients:" ...>	This is the title printed on top of the CSV file.
Command	<CallLogs command="ADD: " ...>	Command specifies the name of an action that is printed in front of every data row. Example: ADD: "John","Smith",5142223333...

Example:

```
<Users filename="clients.csv" command="ADD-CLIENT:" title="Billed Clients: ">
...
</Users>
```

4. Exporting Users

Users are registered subscribers on the system. To export users, all the fields must be placed within the <Users></Users> tags.

<Users> block exportable data

<u>Name</u>	<u>Description</u>
UserID	The User ID number of the Excendia subscriber
MBR	Master Billing Record (MBR) is the unique Customer ID of the paying customer.

<u>Name</u>	<u>Description</u>
Corporate	This value is 1 if the customer is the paying customer. 0 signifies a non paying customer.
FirstName	First name
LastName	Last name

Example of the Users block:

```
<Users filename="export_Users.csv" title="*** Users">
  <UserID type="data" identifier="$UserID" />
  <MBR type="data" identifier="$PayingAccount" />
  <LastName type="data" text="true" identifier="$LastName" />
  <FirstName type="data" text="true" identifier="$FirstName" />
  <Corporate type="data" identifier="$Corporate" />
</Users>
```

Generates the following CSV file:

```
*** Users
$UserID;$PayingAccount;$LastName;$FirstName;$Corporate;
2000;Cpy50950;"Smith", "John", False
2001;2001;"May", "Bill", False
```

5. Exporting Sessions

Sessions mean user voice sessions (when users call their virtual assistant to read their e-mails, forward their calls or call contacts, etc.). To export sessions, all the fields must be placed within the <Sessions></Session> tags.

The list of all data fields for the Sessions block is:

<u>Name</u>	<u>Description</u>
UserID	The User ID number of the Excendia subscriber
CallingFrom	The telephone number of the caller. (call originating number)
CallStart	The date and time when the session started
Duration	Session duration, in seconds
TollFree	Is the call toll-free or not? 0 = Charges apply, 1 = Toll-Free
Code	The code of the service name when the session occurred.

Example:

```
<Sessions filename="export_UserSessions.csv" title="*** Sessions">
  <UserID type="data" identifier="$UserID" />
  <CallingFrom type="data" identifier="$CallingFrom" />
  <CallStart type="data" identifier="$CallStart" />
  <Duration type="data" identifier="$Duration" />
  <TollFree type="data" identifier="$TollFree" />
  <Code type="data" text="true" identifier="$SessionCode" />
</Sessions>
```

Generates the following CSV file:

```
*** Sessions
$UserID;$CallingFrom;$CallStart;$Duration;$TollFree;$SessionCode";
2005;5144859934;10/4/2007 12:03:32 PM;83;False;"ESN_USR_SESS";
2001;5084851103;10/10/2007 10:38:46 AM;106;False;"ESN_USR_SESS";
2007; 447806934091;10/6/2007 3:32:38 PM;28;False;"ESN_USR_SESS";
```

6. Exporting CallLogs

Call Logs include all calls made and received by users through the system. To export call logs, all the fields must be placed within the <CallLogs></CallLogs> tags.

The list of data fields for the CallLogs block is:

<u>Name</u>	<u>Description</u>
UserID	The User ID number of the Excendia subscriber
CallingNumber	The telephone number of the calling person (call originating number)
CalledNumber	The telephone number of the called person. (dialed number)
CallStart	The date and time when a session started
Duration	Call duration, in seconds
CallStatus	The code of the service name.
Outbound	Is the call an inbound or outbound: 0 = Inbound, 1 = Outbound
Code	The code of the service where the call was made or received

Example:

The following XML block

```
<CallLogs filename="export_CallLogs.csv" title="*** Call Logs">
  <UserID type="data" identifier="$UserID" />
  <CallingNumber type="data" identifier="$CallingNumber" />
  <CalledNumber type="data" identifier="$CalledNumber" />
  <CallStart type="data" identifier="$CallStart" />
  <Duration type="data" identifier="$Duration" />
```

```

<CallStatus type="data" identifier="$CallStatus" />
<Outbound type="data" identifier="$CustomerID" />
  <Code type="data" text="true" identifier="$LogCode" />
</CallLogs>

```

Generates the following CSV file:

*** Call Logs

```

$UserID;$CallingNumber;$CalledNumber;$CallStart;$Duration;$CallStatus;$CustomerID;"$Log
Code";
2001;5145811237;5145811237;10/4/2007 4:47:00 PM;15;2;True;"ESN_USR_SESS";
2005;5143344343;5144972036;10/9/2007 12:39:08 PM;17;2;False;"ESN_USR_SESS";
2007;5144488136;5149921583;10/5/2007 9:17:08 PM;0;0;False;"ESN_USR_SESS";

```

7. Exporting Packages

Packages mean System Packages. Each Package is the definition of a set of specific **services** offered at a specific **monthly rate**, including a specific amount of **free minutes**, and charged at a specific **per minute rate** once the included minutes are used. To export packages, all the fields must be placed within the <Packages></Packages> tags.

The list of all data fields for the Packages block is:

<u>Name</u>	<u>Description</u>
PackageID	The package's unique ID number
LabelEn	Name of the package in English
LabelFR	Name of the package in French
Description	Description
Price	The price is exported without any currency symbols
Qty	The minutes included in the package
UnitRate	The cost of any of additional minute.
IsActive	1 if the package is used in the system
Created	When was the package created
Updated	When the package last updated

Example:

```

<Packages filename="export_packages.csv" title="*** Packages">
  <PackageId type="data" identifier="$PackageId" />
  <LabelEn type="data" text="true" identifier="$LabelEn" />
  <LabelFr type="data" text="true" identifier="$LabelFr" />
  <Description type="data" text="true" identifier="$Description" />
  <Price type="data" identifier="$Price" />
  <Qty type="data" identifier="$Quantity" />
  <UnitRate type="data" identifier="$UnitRate" />
  <IsActive type="data" identifier="$IsActive" />
  <Created type="data" identifier="$Created" />

```



```
<Updated type="data" identifier="$Updated" />
</Packages>
```

Generates the following CSV file:

```
*** Packages
$PackageId;$LabelEn";"$LabelFr";"$Description";$Price;$Quantity;$UnitRate;$IsActive;$Created;$Updated;
1;"Smart VoIP Phone";"Téléphone VoIP";"Smart VoIP
Phone";19.9500;999999999;0;True;9/26/2008 11:53:33 AM;9/26/2008 11:53:33 AM;
2;"Business Mobile";"Affaires Mobile";"Business Mobile";29.9500;999999999;0;True;9/26/2008
11:56:13 AM;9/26/2008 11:56:13 AM;
3;"Road Warrior";"Grand Routier";"Road Warrior";49.9500;999999999;0;True;9/26/2008
11:57:57 AM;9/26/2008 11:57:57 AM;
```

8. Exporting User Packages

User Packages mean the list of packages to which a customer has subscribed. To export customer packages, all the fields must be placed within the <UserPackages></UserPackages> tags.

The list of all data fields for the User Packages block is:

<u>Name</u>	<u>Description</u>
UserID	The User ID number of the Excendia subscriber
PackageID	The package's unique ID number
IsActive	1 if the user's package active. 0 is an unsubscribed package
SubscriptionDate	The first day when the customer started using this package

Example:

```
<UserPackages filename="export_CustomerPackages.csv" title="*** Customer Packages">
  <UserID type="data" identifier="$UserID" />
  <PackageId type="data" identifier="$PackageID" />
  <IsActive type="data" identifier="$Activated" />
  SubscriptionDate type="data" identifier="$SubscriptionDate" />
</UserPackages>
```

Generates the following CSV file:

```
*** Customer Packages
$UserID;$PackageID;$IsActive;$SubscriptionDate;
2000;17;True;2008-01-01;
2000;19;True; 2008-04-17;
2000;20;True; 2008-03-20;
```

9. How BillingAccount is exported

The Data Export Utility export needs to export user and company accounts with their associated "BillingAccount" IDs. This BillingAccount will be used by the billing system to identify paying customers.

In the event that the Data Export finds a user or a company without any BillingAccount, it will generate a default one as follows:

<u>Type of Account</u>	<u>Default BillingAccount</u>
A user (public user or company member) who subscribed and pays for his/her account.	User ID (ex: 2050)
A company account	10000 + CompanyID (ex: 10050)
A company member. The paying account is the company account	10000 + CompanyID (ex: 10050)