

Porta  Switch[®]



New Features Guide

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Preface

PortaSwitch® Maintenance Release 28 is the next leap-forward release, consistent with the “fast releases, precisely on time” ideology introduced earlier in 2012 year.

Where to get the latest version of this guide

The hard copy of this guide is updated upon major releases only and does not always contain the latest material on enhancements introduced between major releases. The online copy of this guide is always up-to-date and integrates the latest changes to the product. You can access the latest copy of this guide at: www.portaone.com/support/documentation/.

Conventions

This publication uses the following conventions:

- Commands and keywords are given in **boldface**
- Terminal sessions, console screens, or system file names are displayed in fixed width font



The **exclamation mark** draws your attention to important information or actions.

NOTE: Notes contain helpful suggestions about or references to materials not contained in this manual.



Timesaver means that you can save time by performing the action described here.



Tips provide information that might help you solve a problem.

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Geographical redundancy

The ultimate goal is to allow a service provider to have the servers installed at multiple locations (different data centers or even different cities), so even in case of a failure at the main site (e.g. power outage or simply a connectivity problem between the remote and main sites), the remote sites will continue to provide service in a stand-alone mode. When connectivity is restored, the databases are automatically synchronized (e.g. if customer used the service for \$2 on the remote site while it was in the stand-alone mode, then his balance in the master database will be increased by \$2 and xDRs will be created).

As a result, a service provider can operate a complex network and continue to provide service even in the case of a catastrophic event affecting parts of the network – with no manual intervention required.

Configurator						
Servers Configurations Users Update						
Add Edit Ping Delete						
Ping	Name	IP	Instances	Build	Alt Build	Periodic Tasks Timezone
Site: Main						
●	configurator	10.30.30.20		mr28-0	mr26-1	UTC
●	oracle	10.30.30.22	hzora.portaone.com (10.30.30.22)	mr28-0	N/A	UTC
●	single	10.30.30.21	porta-billing-web-1 (193.27.45.43) (mr28_0) porta-billing-radius-1 (193.27.45.43) (mr28_0)	mr28-0	mr26-1	UTC
●	sip	10.30.30.23	porta-billing-radius-4 (193.27.45.44) (mr28_0) porta-sip-1 (193.27.45.44) (mr28_0) porta-sip-2 (193.27.45.46) (mr28_0) porta-presence-1 (193.27.45.44) (mr28_0) porta-call-recording-1 (193.27.45.46) (mr28_0) cassandra-3 (10.30.30.23)	mr28-0	mr26-1	UTC
●	um	10.30.30.24	porta-billing-radius-3 (193.27.45.45) (mr28_0) porta-um-1 (193.27.45.45) (mr28_0)	mr28-0	mr26-1	UTC
Site: 2						
●	DB backup	195.15.24.74	hzorabak.portaone.com (195.15.24.74) (mr28_0)	mr28-0	N/A	UTC
●	RADIUS backup	195.15.24.57	porta-billing-radius-2 (195.15.24.57) (mr28_0)	mr28-0	N/A	UTC

A fully finished geo-redundancy solution will be available at the end of 2012. In the meantime, MR28 is a stepping stone towards it – containing many important changes in underlying product architecture and code. The most visible change is the new “site” entity in the configuration server. This allows the assignment of physical servers to the “main” site or to one of the remote sites.

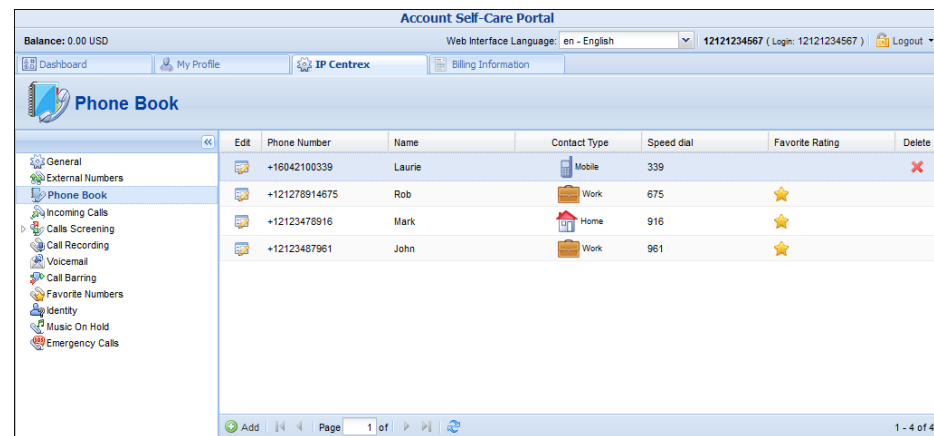
Self-care Portal: Access Levels (ACLs)

A new self-care portal provides easy-to-use control of all aspects of user accounts (billing information, usage data, IP Centrex service configuration, etc.) yet in some cases it may be beneficial for the service provider to reduce the amount of data accessible by the end-user. For

instance, a company that does not offer fully hosted IP PBX service and thus does not allow end-users to manage their extensions and hunt-groups would prefer that end-users do not see these options at all. The same flexible model of ACLs (going as granular as controlling access to every individual field) that are available for the rest of the web interface can now be applied to the customer self-care portal by the administrators.

Phone book

A redesigned phone book module provides several important improvements to the way this service can be offered to the end user, for both residential VoIP and hosted IP PBX scenarios.



- A phone book is now available for each account (phone line) – so that each user can register his own contacts
- The end-user may assign speed-dial to any entry in the phone book (global dials, available to all users of the same IP Centrex environment, are still available via Abbreviated Dials module)
- The “Phone book” and “Favorite numbers” modules have been integrated, so there is no need to enter and maintain “favorite” numbers separately. The administrator can flag any phone book entry as a “favorite” and calls to that number will be charged according to the special rate
- To simplify the self-management of favorite numbers and reduce the amount of work done by the helpdesk, the administrator can “lock” portions of the phone book information (e.g. the actual phone number) while the end-user can still change other attributes

Edit	Phone Number *	Name	Contact Type *	Abbreviated Dial Assigned	Lock	Favorite Rating	Delete
	+12123478916	Mark	Work	916	Number	Yes	X
	+16042100339	Laurie	Work	339	Full	No	X
	+121278914675	Rob	Work	675	None	Yes	X
	+12123478916	Mark	Home	916	Number	Yes	X
	+12123487961	John	Work	961	Number	Yes	X

Customizable Invoice Number Sequences

When a reseller operates as a virtual operator on the PortaSwitch® platform, invoices for his customers are generated on his behalf. In the case of multiple resellers operating on the same platform, it is now possible to assign individual invoice numbering sequences to each reseller so that the reseller’s invoice numbers are assigned in sequence (1, 2, 3, etc.). This simplifies the day-to-day operations of the reseller and satisfies the requirements of local tax authorities in certain countries.

Legal info Invoicing Report info

Company Name: PortaOne Demo

Address: PortaOne, Inc. Suite 408
2963 Glen Drive
Coquitlam BC V3B 2P7

Country: CANADA

Phone:

Fax:

Email: contact@portaone.com

Web: portaone.com

Invoice Number Sequence: Individual For Environment

- Individual For Environment
- Individual For Reseller
- Individual For Customer

The screenshot shows the 'Add Reseller' configuration page. At the top, there are navigation icons and buttons for 'Save', 'Save & Close', and 'Close'. The main form area is divided into several sections:

- Customer Information:** Customer ID (David Welsh), Customer Class (VoIP Resellers), Currency (USD - US Dollar), and Opening Balance (0).
- Address Info:** Default Tariff for Voice Calls (Welsh Wholesale), Routing Plan (All Available Routes), Discount Plan (None), Subscription Discount Rate (%), Representative (Not defined), Tax ID, Callshop Enabled (checkbox), and Override Tariffs Enabled (checkbox).
- Payment Info:** Billing Period (Monthly), Next Billing Date (2012-09-01), Shift Billing Date To (YYYY-MM-DD), Send Statistics (Full Statistics), Invoice Template (Customer class' default), and Send Invoices (Customer class' default).
- Custom Fields:** Invoice Number Sequence (Individual for Customer) and Invoice Number Sequence for Subcustomers (Default, Individual for Environment, Individual for Reseller, Individual for Customer).

External Invoice Templates

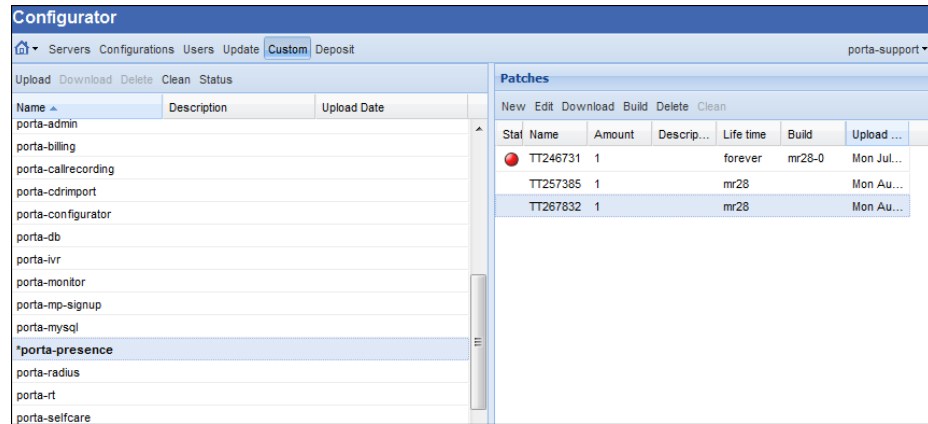
As an alternative to the WYSIWYG invoice layout designer (built into the system), we are testing another approach in which an invoice template can be designed as a TML/CSS file and then uploaded into the system. This simplifies the process if the invoice template is created by an external design agency (that does not have access to PortaBilling®) and allows advanced template customizations (e.g. arrangement of data to exactly match “legacy” invoices or insertion of dynamic content such as banners) by third-party developers.

Industry-leading PDF generation software PrinceXML is used to produce the actual PDF files. The license for PrinceXML will be provided as a part of an OEM agreement for all PortaOne customers who perform an update to MR28.

The Maintenance Release 28 contains a prototype module for this alternative PDF generation software and we invite our customers and their design agencies to jointly develop the functionality further.

Improved Support for Custom Modifications

A large group of PortaOne customers actively engage in in-house customization and improvements to extend the platform. The configuration framework provides a reliable place to store these modifications and apply them automatically during the next system update, thus guaranteeing that the modifications will not be forgotten or lost. To make it easier to maintain fairly complex modifications in this fashion, the “custom patch” module on the configuration server now supports multiple files.



Effortless auto-registration for prepaid calling IVR

To simplify the process of using the prepaid PINless calling service, the prepaid calling application can be configured so that upon the first successful login with a prepaid card PIN, the caller number (CLI/ANI) is immediately registered on the system and associated with that PIN. Then when other calls are made, the caller will automatically be recognized. This helps to provide better service for diverse multi-lingual communities (migrant workers is a good example of one), where end-users (who may not be fluent in any of the major languages in which the IVR operates) might become confused by additional CLI/ANI registration confirmation prompts.

