

KAKAPO

SYSTEMS

# VISION360

Licensing and Provisioning

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This document provides an overview of Vision360 licensing, including which license needs to be assigned to support different use cases. It also outlines the provisioning process, which is very similar to how other Unity licenses are managed in the Kakapo partner portal and provisioning API.

# 1 VISION LICENSING

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Vision360 provides analytical reporting on all users and group services within a Group or Enterprise. However Vision360 licensing is user-based, meaning there is no additional charge for group service reporting. Vision360 licenses are assigned the same way as any other Unity licenses, either through the Kakapo partner portal or Provisioning API. Furthermore all user license features such as sub-purchases and bulk assignment, migration and deletion are available.

There is also no charge for access to the Vision360 portal, and no limit to the number of portal admins that can be created. Similarly there is no additional charge for the generation of Vision360 reports from Unity Supervisor, or SSO from Unity Supervisor into the Vision360 portal. Please note that when generating reports from Unity Supervisor or performing SSO into the Vision360 portal, only those call center queues and agents that the user is currently supervising will be displayed. A portal admin account should be created in the Vision360 portal if visibility of all users and group services is required.

**Please note: Vision360 report generation and SSO login from Unity Supervisor are still in development**

There are two base Vision360 licenses available:

## 1.1 VISION360 AGENT

This license should be assigned to any users that are associated to one or more call centers in BroadWorks. If this license is assigned then Vision360 will capture and report on all activity by that user for all call types (call center, hunt group, personal etc), disposition code assignment, account/authorization code usage, ACD state and joined state changes etc.

## 1.2 VISION360 UC USER

This license applies to all other user types, including hunt group users and standard UC users. All non call center calls as well as FAC/account/authorization code usage will be captured for reporting. Please note this functionality is included in the Vision360 Agent license, meaning if a user is an agent in call centers and hunt groups then only the Vision360 Agent license needs to be assigned.

**Vision360 bundles have also been created from the Vision360 Agent base license:**

## 1.3 VISION360 AGENT ANYWHERE BUNDLE

This license includes the Vision360 Agent license as well as the Unity Agent Anywhere license, meaning the Unity Agent client is available as a Windows client, a web client or as a Teams application.

## 1.4 VISION360 SUPERVISOR ANYWHERE BUNDLE

This license includes the Vision360 Agent license as well as the Unity Supervisor Anywhere license, meaning the Unity Supervisor client is available as a Windows client, a web client or as a Teams application.

As previously stated there is no Vision360 Supervisor license, however if the supervisor is also an call center agent then a Vision360 Agent license (or this bundle) should be assigned to ensure all actions are recorded. If the supervisor is not an agent of any call centers then the Unity Supervisor client license and Vision UC User license should be assigned separately.

### 1.5 VISION360 RECEPTION ANYWHERE BUNDLE

This license includes the Vision360 Agent license as well as the Unity Reception Anywhere license, meaning the Unity Client is available as a Windows client, a web client or as a Teams application.

If the receptionist is not associated to a call center then the Unity Reception client license and Vision UC User license should be assigned separately.

**Please note: Unity Reception Web and Teams clients are still in development.**

## 2 LICENSING AND EVENT CAPTURE RESTRICTIONS

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Although Vision360 licenses are user-based, license assignment is required in order to record and retain some group service events, as outlined below:

### 2.1 CALL CENTER

When a call center call is answered by an agent, if that agent doesn't have a Vision360 Agent license assigned (referred to as an unlicensed agent in this section) the entire call will not be recorded, including into the call center queue. Therefore it will not show in any historical reports or statistics as an incoming call, although it will show as a queued call before being answered by the unlicensed agent. This also applies to outbound DNIS calls; if the agent that placed the call is unlicensed then the call will not show in any reports, not even queue-level reports.

If an abandoned call was received, but either an unlicensed agent called the remote party back, or the remote party called back into the call center and the call was answered by an unlicensed agent, then that abandoned call will still be listed in the Unreturned Abandoned Calls report.

Missed calls and abandoned calls into the call center queue will be captured regardless of license assignment, but any calls that are answered by an unlicensed agent will not be shown, meaning dashboards and reports will show inaccurate data.

If a call is received by a call center that has no licensed agents associated to it, then the call will not be recorded at queue level. This is irrespective of the call outcome so includes overflowed, abandoned, escaped, transferred and stranded calls.

### 2.2 HUNT GROUP

A user that has either a Vision360 Agent or Vision360 UC User license assigned is considered a licensed user for hunt groups, because UC User functionality is included in the Agent license.

When a hunt group call is answered by an agent, if that agent is unlicensed the entire call will not be recorded, including into the hunt group. Therefore it will not show in any historical reports or statistics, even as a received call.

Missed calls into the hunt group will be captured regardless of license assignment, but any calls that are answered by an unlicensed agent will not be shown, meaning all dashboards and reports will show inaccurate data.

If a call is received by a hunt group that has no licensed users associated to it, then the call will not be recorded at hunt group level, irrespective of call outcome.

## 2.3 AUTO ATTENDANT

All auto attendant calls are recorded so long as at least one user in the group is licensed, either with a Vision360 Agent or UC User license.

## 2.4 CLI TRACKING

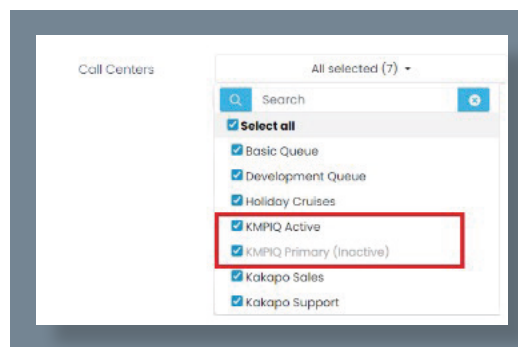
Vision360 will record all events for licensed users, meaning if a call was transferred from a licensed user to an unlicensed user, Vision will show that the call was transferred to the number/extension of the unlicensed user, but not what happened to it while it was with the unlicensed user. If the call is then transferred from the unlicensed user to another licensed user Vision will show this call leg, but will show the call as coming directly from the remote party, rather than from the unlicensed user.

This includes call center and hunt group environments; if a queued call was answered by an unlicensed agent the call will not be recorded for the call center/hunt group or agent, but if it is then transferred to a licensed user it will appear in the logs for that user, however it will show as a transferred call from the unlicensed agent.

## 2.5 CHANGING GROUP SERVICE IDS

Please note that all group services (such as call centers, hunt groups etc) are identified by the service ID, because this ID is used to record and capture events from the VoIP platform.

Group services are stored in Vision360, which periodically refreshes the VoIP environment in order to ensure that all group services are being monitored based on license assignment, as outlined above. However if a group service ID has been modified then the next time the VoIP environment is refreshed the group service with the old ID will be marked as "inactive" in Vision360, because that group service no longer exists. Similarly, the group service with the new service ID (which is in fact the same group service in BroadWorks) will be added as a new group service, because it didn't exist the last time the VoIP environment was refreshed.

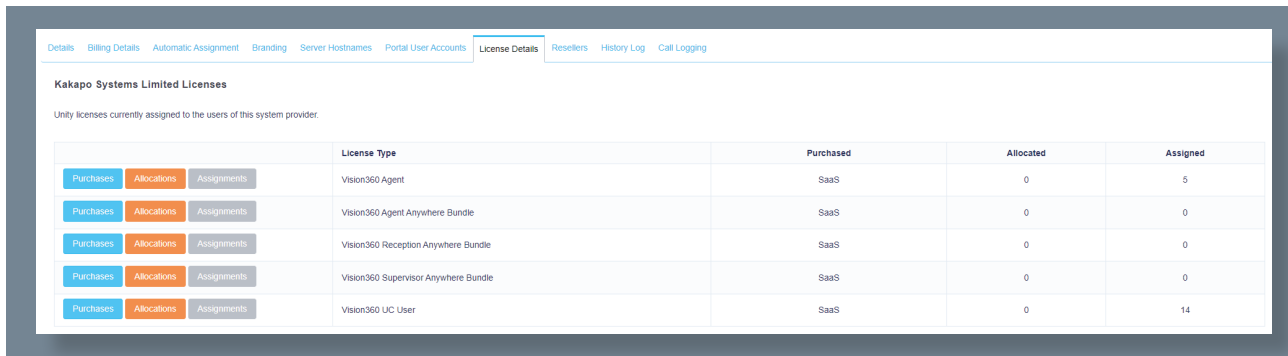


This means that when a group service ID is changed it will appear as two group services in Vision360, one inactive and the other active. This means that if reports are required for a duration that covers the time that the ID was changed, then both call centers should be included in the report filter, as shown below where the name and service ID for a call center were modified.

# 3 PROVISIONING

Vision360 licenses are provisioned through the Kakapo partner portal or provisioning API in exactly the same way as other user licenses, as outlined below.

Once the System Provider has been configured for a specific Vision Instance, Vision360 base licenses and bundles will immediately become available in the license pool, as shown below. This can be restricted to only those Vision360 licenses that the System Provider wishes to resell and will be confirmed as part of onboarding.



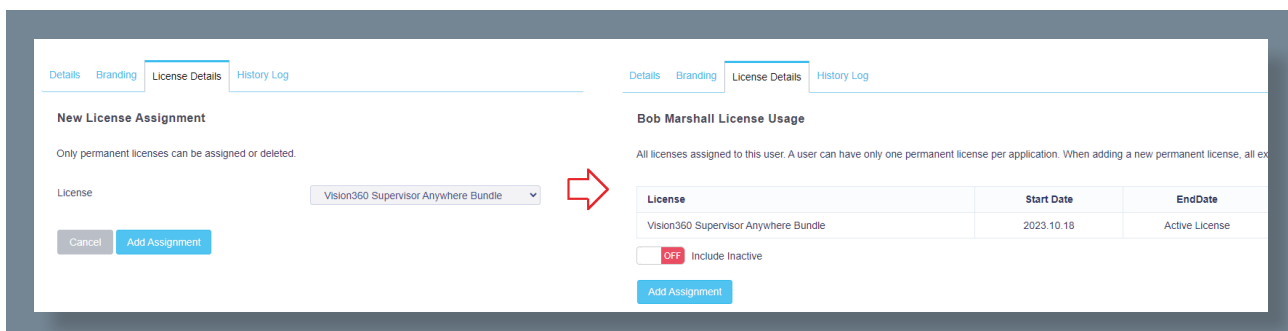
**Kakapo Systems Limited Licenses**

Unity licenses currently assigned to the users of this system provider.

	License Type	Purchased	Allocated	Assigned
<a href="#">Purchases</a> <a href="#">Allocations</a> <a href="#">Assignments</a>	Vision360 Agent	SaaS	0	5
<a href="#">Purchases</a> <a href="#">Allocations</a> <a href="#">Assignments</a>	Vision360 Agent Anywhere Bundle	SaaS	0	0
<a href="#">Purchases</a> <a href="#">Allocations</a> <a href="#">Assignments</a>	Vision360 Reception Anywhere Bundle	SaaS	0	0
<a href="#">Purchases</a> <a href="#">Allocations</a> <a href="#">Assignments</a>	Vision360 Supervisor Anywhere Bundle	SaaS	0	0
<a href="#">Purchases</a> <a href="#">Allocations</a> <a href="#">Assignments</a>	Vision360 UC User	SaaS	0	14

## 3.1 END-USER ASSIGNMENT

When assigning a license to a single user click on the License Details tab for that user, then add a license and select the Vision360 license from the dropdown. This assumes the portal admin is permitted to assign licenses.



**New License Assignment**

Only permanent licenses can be assigned or deleted.

License:

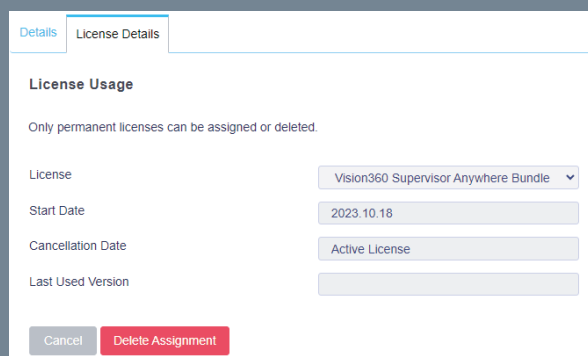
**Bob Marshall License Usage**

All licenses assigned to this user. A user can have only one permanent license per application. When adding a new permanent license, all ex

License	Start Date	EndDate
Vision360 Supervisor Anywhere Bundle	2023.10.18	Active License

☐ OFF Include Inactive

The license can then be unassigned by clicking into the license and clicking Delete, assuming the portal admin is permitted to delete licenses.



**License Usage**

Only permanent licenses can be assigned or deleted.

License:

Start Date:

Cancellation Date:

Last Used Version:

The provisioning workflow can be configured to ensure that only one Vision360 Agent or Vision UC User license is assigned to the user, meaning that:

**3.1.1 When a Vision360 UC User license is assigned:**

- No licenses are automatically unassigned, meaning it is possible to have the Vision360 Agent and UC User licenses assigned concurrently.

**3.1.2 When a Vision360 Agent license is assigned:**

- Any Vision UC User base license is unassigned.
- Any Vision360 Agent Anywhere Bundle is unassigned.
- Any Vision360 Supervisor Anywhere Bundle is unassigned.
- Any Vision360 Reception Anywhere Bundle is unassigned.

**3.1.3 When a Vision360 Agent Anywhere Bundle is assigned:**

- Any Vision360 UC User base license is unassigned.
- Any Vision360 Agent base license is unassigned.
- Any Vision360 Supervisor Anywhere Bundle is unassigned.
- Any Vision360 Reception Anywhere Bundle is unassigned.
- Any Unity Agent client license (Standard, Enterprise, Anywhere) is unassigned.
- Any Unity Agent Web client license (Standard) is unassigned.

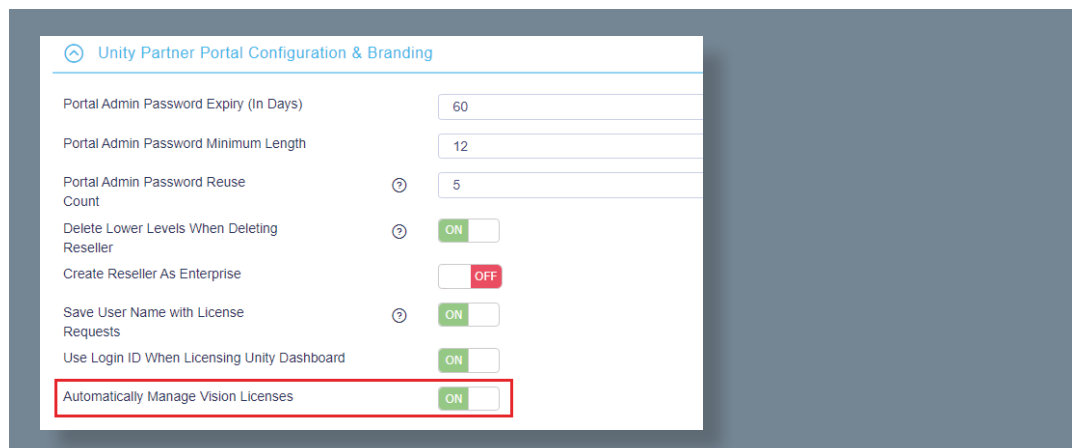
**3.1.4 When a Vision360 Supervisor Anywhere Bundle is assigned:**

- Any Vision360 UC User base license is unassigned.
- Any Vision360 Agent base license is unassigned.
- Any Vision360 Agent Anywhere Bundle is unassigned.
- Any Vision360 Reception Anywhere Bundle is unassigned.
- Any Unity Supervisor client license (Standard, Enterprise, Anywhere) is unassigned.
- Any Unity Supervisor Web client license (Standard) is unassigned.

**3.1.5 When a Vision360 Reception Anywhere Bundle is assigned:**

- Any Vision360 UC User base license is unassigned.
- Any Vision360 Agent base license is unassigned.
- Any Vision360 Agent Anywhere Bundle is unassigned.
- Any Vision360 Supervisor Anywhere Bundle is unassigned.
- Any Unity Reception client license (Standard, Enterprise, Anywhere) is unassigned.

Automatic Vision360 license management can be enabled or disabled through System Provider configuration settings, as shown below.

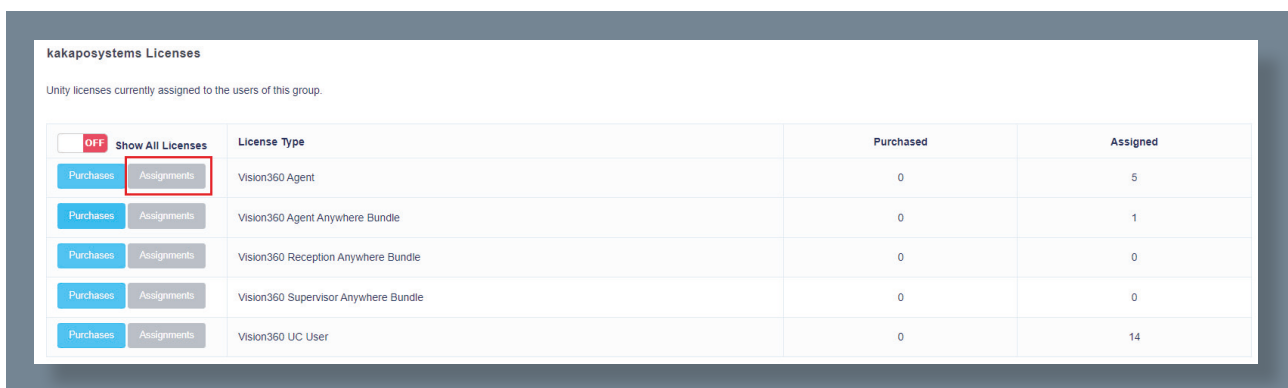


If all Unity provisioning is manually performed through the partner portal then this setting should be enabled as it will ensure an end-user isn't over-licensed. Otherwise if a provisioning platform is being used then this setting should be disabled as it could result in license assignments in the Kakapo portal not matching those in the provisioning platform. In this case the onus is on the provisioning platform to ensure the user is not over-licensed.

If manually migrating a user from one license to another please ensure the new license is assigned before the old license is unassigned, in order to ensure that the user is always licensed and therefore all events are captured.

### 3.2 BULK ASSIGNMENT

As is the case with all Unity licenses, bulk assignment of Vision360 licenses is available at the Group level in the partner portal. Click on the License Details tab then click the 'Assignments' button of the license you wish to bulk assign.

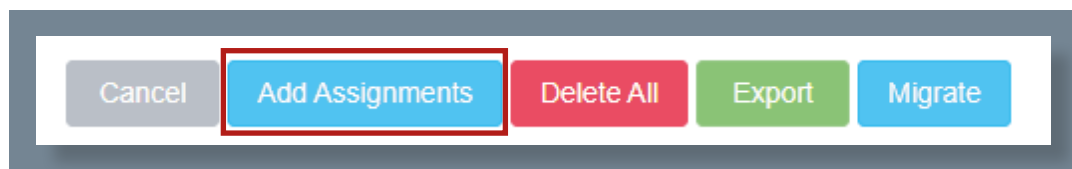


**kakaposystems Licenses**

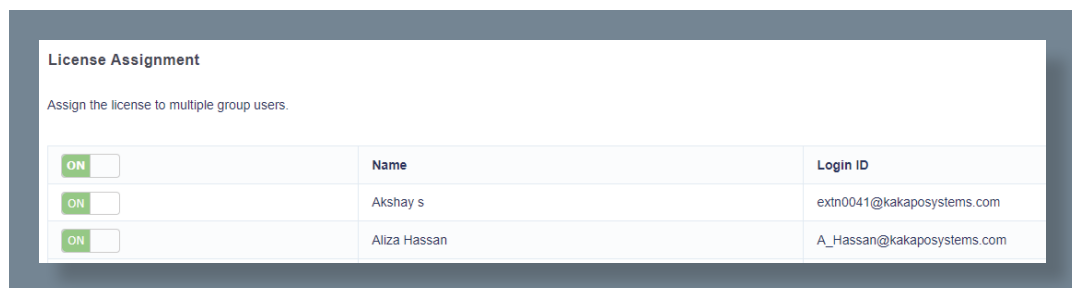
Unity licenses currently assigned to the users of this group.

		License Type	Purchased	Assigned
<input type="checkbox"/> OFF	Show All Licenses			
Purchases	Assignments	Vision360 Agent	0	5
Purchases	Assignments	Vision360 Agent Anywhere Bundle	0	1
Purchases	Assignments	Vision360 Reception Anywhere Bundle	0	0
Purchases	Assignments	Vision360 Supervisor Anywhere Bundle	0	0
Purchases	Assignments	Vision360 UC User	0	14

Then click 'Add Assignments' at the bottom of the list showing current assignments.



You will be presented with a list of all users in the Group that don't currently have that license assigned. To assign the list to all users in the list check the top-most box, otherwise select the users to be assigned the license, then click 'Add Assignments' at the bottom of the list and confirm when prompted.



**License Assignment**

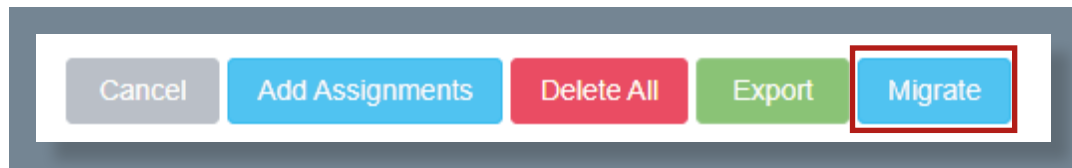
Assign the license to multiple group users.

	Name	Login ID
<input checked="" type="checkbox"/> ON	Akshay s	extn0041@kakaposystems.com
<input checked="" type="checkbox"/> ON	Aliza Hassan	A_Hassan@kakaposystems.com



### 3.3 BULK MIGRATION

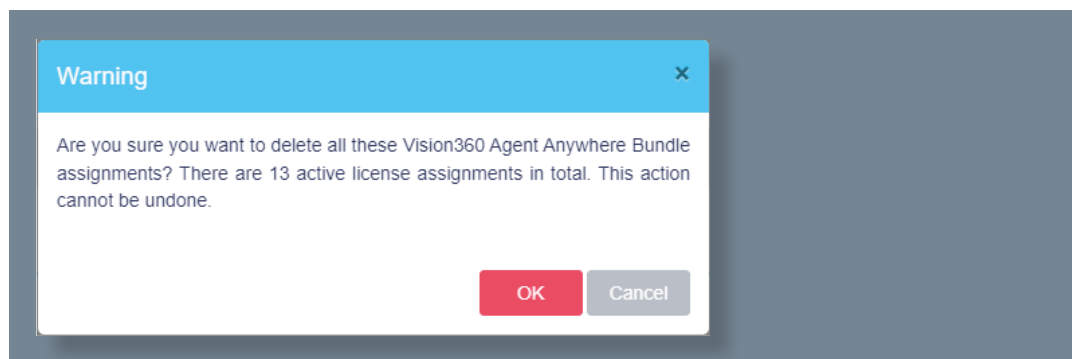
To migrate licenses for multiple users use the same method as above to select the license that you want to migrate licenses **from**, then click the Migrate button at the bottom of the list.



The new license will be assigned before the old license is unassigned.

### 3.4 BULK UNASSIGNMENT

All Unity licenses, including Vision360 licenses, can be bulk unassigned at the Group, Reseller or System Provider levels of the partner portal, by following the same actions as above to select the license to be unassigned, then clicking the 'Delete All' button at the bottom of the current assignments list and confirm the action when prompted.



### 3.5 LICENSE MANAGEMENT THROUGH THE PROVISION API

Please email [Vision360@kakaposystems.com](mailto:Vision360@kakaposystems.com) to request the Provision API developers guide. New licenses have been added to support Vision360, these should be used when managing Vision360 licenses through the Provision API.

Application Name	License Name
Vision360	UC User
Vision360	Agent
Vision360	Agent Anywhere Bundle
Vision360	Supervisor Anywhere Bundle
Vision360	Reception Anywhere Bundle

Please note that in Vision a user can only have one Agent and one UC User license assigned at a time. Therefore if a UC User license is already assigned to the end user and another UC User license is assigned through the API, a success response will be returned but an additional license will not be assigned to the user in Vision. Then if a UC User license is unassigned that license will be removed in Vision, a license count is not incremented or decremented per user. This may result in the user being licensed in the provisioning platform but not in Vision, so it is imperative that rules are built into the provisioning platform workflow to ensure that the same license can't be assigned twice.

If migrating a user from one license to another please ensure the new license is assigned before the old license is unassigned, in order to ensure that the user is always licensed and therefore all events are captured. All provisioning actions are real-time.

### **3.6 TRIAL LICENSES**

Trial licenses are not available for Vision360, however an evaluation Vision360 platform is available which is free of charge for a limited time while testing/evaluating the platform. Licensing and provisioning for the evaluation platform is managed outside the Kakapo partner portal. Please contact [Vision360@kakaposystems.com](mailto:Vision360@kakaposystems.com) for more information.



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