

**BT Mobile**

# **BT Autobalance**

## **Administrator User Guide**



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# Getting Started

## Introduction

BT Autobalance is an on-line tool that allows mobile phone users to identify their personal and business usage by tagging and un-tagging calls. This process is aided by the use of rules, address books and other mechanisms to minimise the amount of effort required each month.

BT Autobalance works using a workflow process and each step must be completed before the next step is available. The system will guide you through the process and as each stage is complete the next stage will be available.

BT Autobalance has three functionality levels:

## Administrator

Each company using BT Autobalance will have an Administrator who is responsible for ensuring that the service is set up and used correctly for that company. The Administrator has a number of activities to perform each month, before, during and after the Handset users access the system. When new billing data has been loaded the Administrator will be notified automatically by email (the Administrator may or may not have a mobile phone, in which case they will have one logon for their Administrator functionality and another for their particular handset).

## Authoriser

Authorisers are only necessary when a company has too many handsets to be managed by a single Administrator. Authorisers are very similar to Administrators, but with either fewer powers (they cannot create other users) or restricted powers (they can only create and set rules for handsets in their area of the company structure).

## User

The ultimate user of BT Autobalance is the handset user. Each month they will receive an SMS message advising them that their billing data is now available on-line and an estimate of their personal usage.

The user then visits BT Autobalance where they are presented with a list of the numbers they have dialled that month with an indication of the volume, duration and cost of calls to that number. The user then tags or un-tags each number to indicate whether the calls are personal or business.

## Browsers

Great care has been taken to optimise this service for use across all browsers. The advanced functionality, required to make the service function relies on established web standards, which some older browsers do not support fully. As a result, some users may encounter problems when using older applications like Netscape 4. There are a number of more up-to-date browsers available, such as Netscape 6 and Internet Explorer 5. These are free of charge and easy to install. You may wish to contact your IT department for help if you are experiencing problems with this service.



The service is optimised for Netscape Navigator 6 or above and Internet Explorer 5 or above with a screen resolution of 1024 x 768 pixels.

## Activate your Account

When data is first loaded, the Administrator will be sent an Authenticode and Keyword. This is then used to activate your account.

To activate your account, click on the 'New User - Activate your account' link on the log-in page, and this will take you to the register screen where you create your log in. You must enter the Authenticode and Keyword. Your user name will be based on the entries in the first name and surname boxes. You must also enter your payroll number (if applicable).

Email address: The email address you enter will be used to advise you when a new statement is available to view and to confirm your user name and password clue.

Register...	
To register, please enter your keyword and authentication code.	<b>Keyword</b> <input type="text"/>
	<b>Authentication code</b> <input type="text"/>
Please enter your name, this will be used to assign you with a unique user name.	<b>First name</b> <input type="text"/>
	<b>Surname</b> <input type="text"/>
Please enter your Payroll Number.	<b>Payroll Number</b> <input type="text"/>
	<b>Retype</b> <input type="text"/>
Passwords must be 8 alphanumeric characters starting and ending with an alpha character.	<b>Enter password</b> <input type="text"/>
	<b>Retype password</b> <input type="text"/>
You also need to provide a clue to your password should you forget it.	<b>Clue</b> <input type="text"/>
In order that we may email you with updates, please enter your email address:	<b>Email address</b> <input type="text"/>
	<b>Email address again</b> <input type="text"/>
 <b>Previous</b> <b>Continue</b> 	

## Sign in

The service is located at <https://www.bt.com/autobalance>.

Each time you visit you will need to sign in using your user name and password. You will have created these using the registration link on the log-in page.

Please note as an Administrator your password will need to be changed every X days. This is currently set to 30 days. The number of days before your password expires is displayed on the 'BT Telecommunications page' as is the last date and time you successfully logged in.

You have a maximum of three attempts to sign in. If the third attempt is still not successful, your user name will be frozen. You will then need to call customer services in order to have the password reset.

## Forgotten Password

If you have forgotten your password, you can click the link on the sign in page, and BT Autobalance will send you an email detailing your password clue.

## Welcome to BT Autobalance (Step 1)

### Welcome to BT Autobalance

**What is BT Autobalance?**  
BT Autobalance allows your users to classify their calls in ways that are meaningful to your business. Users do this by 'tagging' calls to identify them.  
[You can define what a 'tagged' call is](#), it may mean a Personal call or a Business call or something else, you decide.

---

**Step 1: Define Your System Settings**

Before your users can start to 'tag' their calls in this bill you must define your system settings. These include:

- [Manage Company Structure](#)
- [Manage Authorisers](#)
- [Manage Rule Sets](#)

Your existing system settings will be copied from your previous bill.

- [View Current System Settings](#)

When you are happy with your settings for this bill click the 'Apply System Settings' button. This will schedule rule processing tasks for handsets under your control and notify your authorisers. Once applied you will not be able to change the settings again for this bill.

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**Step 2: Approve Users Tagging**

When your users have submitted their tagged/untagged calls you can approve them and produce reports that contain the value of the tagged and untagged calls.

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**Step 3: Close Bill**

When you have approved all the submitted calls you can close the bill. The bill will then become read-only.

### Manage Company Structure

If you are a new customer, when your first month's data is loaded, all handsets will be grouped into 'Unallocated'. You can then create your company structure allowing you to move handsets into the appropriate nodes, and allowing you to apply rules to a particular group of handsets within each node of the company structure. Each month as new data is loaded any pre-existing handsets will remain in the appropriate section of the company structure, while any new handsets will be shown in 'unallocated'.

Please note handsets can only be assigned to the lowest level in the company structure.

When you have defined the levels for your company structure, you can then create the elements that make up the structure and allocate your handsets into their respective element. Levels describe the tiers within an organisation, for instance, company, region, division etc. Elements are typically cost centres, departments or other groups of phones.

### Manage Structure

Back to: [BT Autobalance Welcome](#)

**Company Structure Level:** [My Company](#)

- [My Company](#)
  - [Marketing](#)
  - [Sales](#)
  - [Unallocated \(27\)](#)

**Update the Company My Company**

Code:

Name:

[Continue](#) →

**Create a new Division in My Company**

Code:

Name:

[Continue](#) →

**Managing your company structure**

You can add, delete, move and rename users and departments of your company structure as you wish. On the left, click on the department of your company structure you want to manage.

Please use the [Configure Company Structure](#) section before setting up a hierarchy.

## Configure Company Structure

Before you can build your own company structure you need to define how many logical levels or tiers the structure will contain.

A simple example of a company structure is:



You can create and name up to 9 individual levels. Each level can then support many elements. For example, using the example above, you can create multiple regions, divisions, cost centres or departments.

When you have configured the levels select Company Structure to create the elements within your structure and move handsets into their relevant element.

N.B. Phones can only be placed within the bottom level of a structure.

## Configure Company Structure

Back to: [BT Autobalance Welcome](#)

### Company Structure Maintenance

Welcome to the company structure setup.

By organising your phones into hierarchical groups, you can analyze your bill in ways

Your company structure currently has 4 tiers.

Change it now to have  tiers (2..9)

Your company name would be a suitable description for the top tier.


Tier 1:

Tier 2:

Tier 3:

Tier 4:

Phones can only exist in a bottom tier group (Cost Centre) or be Unallocated.

**Continue** 

Now that your structure is setup, you can [manage](#) your company structure.

### Adding Elements

When you use the system for the first time there will two default levels: the top level or company level and an 'Unallocated' element in the level below. Initially all your handsets will be in the 'Unallocated' element. The number of handsets is contained in brackets at the end of the element description e.g. 'Unallocated (34)'.

To add an element click on the level you wish to add to. Two boxes will be displayed at the bottom of the page, which will allow you to enter a cost code and a description for the new element.

Please note only the description will be displayed on the site. Click the 'Go' button to confirm your entry.

### Editing Elements

Select the element you wish to edit by clicking on it. Amend the description in the boxes provided and click the 'Go' button to update your structure.

### Moving Handsets

To move handsets from one element to another first click on the number at the end of the element description where the handsets are currently located.

A selection screen will now be displayed listing all the phones and their usernames. A search facility is provided if you wish to select a specific handset or group of handsets - you can search by phone number or user name.

Select the handset(s) to be moved by clicking in the check box next to the phone number. Next, click on the cost centre name that you would like to move the handsets to. To move the handsets click 'Go'.

Note that if the list of handsets you are choosing from extends to 2 or more pages, you will need to select and move the handsets from 1 page at a time



## Deleting Elements (Nodes) within the Company Structure

The following logic applies to deleting nodes within the company structure:

- An element within the company structure or an individual handset cannot be deleted if a rule set is attached
- Handsets or Users are attached to this element
- If an Authoriser is associated with that node, the Authoriser must be moved/deleted (the node and associated rules can then be deleted)
- If no Authoriser exists and the conditions above are met and rule sets are associated with the element these will be deleted, thus rules that belong to an element are deleted with the element.

## Manage Authorisers

As an Administrator you can create Authorisers, who can be set up and assigned to nodes within the Company Structure. Once assigned the new Authoriser will be able to see all data at that level and any levels below.

Authorisers can create groups of rules for the nodes of the company structure they are responsible for. They are then responsible for the handset users below them; they can set up and maintain rules for their users, approve, override and skip handsets, using the Submission Management screen.

To create a new Authoriser:

- Click the 'Add Authoriser' button
- Enter their first and last names in the boxes provided
- Enter the new users email address - this will be used to send them their login details and temporary password
- Select the level you wish to give them access to by clicking the 'Select' link. You will now be presented with a view of your company structure. Click the corresponding radio button next to the required level
- You cannot assign an Authoriser to a node that already has an Authoriser associated with it or has an Authoriser at a higher level, for example if you have a Software Department and below this two cost centres, 1. Research & 2. Development. If you assign an Authoriser at Software you cannot then assign another Authoriser at Research, to allow this to happen you would have to reassign the Software Authoriser to Development and the other Authoriser to Research.
- Click 'Go' to confirm the new Authoriser details. Once you have applied your system settings, any new Authorisers will receive an email detailing the website address, their sign on name and a temporary password. The first time they sign on they will be need to set up their own password

### Manage Authorisers

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Back to: [Manage Authorisers](#)


**Enter details for new authoriser :**

First name:

Last name:

Email address:

Node description:  [Select..](#)

**Continue** 

## Manage Rule Sets

Rule Sets is a way of 'grouping' rules together. Multiple rule sets can be created by both Administrators and Authorisers. Administrators and Authorisers can create/maintain and attach rule profiles to nodes within the company structure. Please note, only one rule profile can be applied to individual nodes within the company structure.

The first time you log into BT Autobalance and create rules, a system default set of rules will already be available. This rule set will be applied to all handsets that you or the Authoriser do not apply a user-defined rule set to. For example you could apply the system default rule to a node within the company structure that you do not want to have any tagged calls, or assign this to the unallocated node of the company structure.

To create a new rule set click on 'create new'. The rule maintenance screen will be displayed. Each new rule will show a key to tagged statuses, which can be used as a reference to guide you through the tagging statuses.

Each rule set covers Call Category (for example International Calls, Roaming Calls and Premium Rate Numbers), Transmission Type (Voice, Data and SMS), Time of Day, Peak/Off Peak, (Please note that when using Peak/Off Peak within a rule set only Weekday (Peak Rate) will be populated, so selecting this will tag **ALL** your calls), Learnt Tagging, Base Tagging, Personal Calls Limit and Adjustment figure.

Rules are displayed on three pages, and each rule or individual category can be tagged, left untagged, tagged and locked or untagged and locked. If you do not lock your calls, the user can change the tagging. If a call is locked this cannot be amended. The default for each rule is no tagging.

A defined order of rule priorities can also be created per rule set, where 1 is the highest priority. Each rule must have a name assigned to it, and a summary of the rule created is available. This summary will show all headings i.e. call category etc but will only show those categories which have been tagged, for example in call categories if you had only set Premium rate to be tagged and locked, this is the only categories that would be shown in the summary. All others would be displayed as 'No Tagging Options will be applied.' Previous rules created by the Administrator can be edited if required.

Address book tagging while not detailed as a separate rule, will always be switched on, and forms part of the tagging rules priority.

If learnt tagging is switched on, and a user fully tags a dialled number in a statement, this tagging will be carried through to all future statements, if base tagging is switched on any calls where the user has entered an '\*' or another defined character will be automatically tagged. NB The use of Base tagging is network dependent.

The tagged calls limit allows you to specify against each rule a tagged calls limit, if any of your handsets tagged calls exceed this limit you will be able to view them on the submission management screen.

The adjustment figure will be added as an extra column to the handset report export, and can be used for example if your company has agreed that the handsets within a particular group can have up to ten pounds of their calls free. Payroll can then deduct this amount from their tagged total.

Once you are happy with the creation of your rule you can enter the name and also see a summary of your tagged options before the rule is saved. Once saved you are taken back to the manage rule sets screen where the new rule is displayed with the last updated date.

Please note rule names must be unique within a node. If you are an Authoriser on "Northern Division" you cannot create two rules with the same name (e.g. "SMS Only"). However, if you are an Authoriser on "Southern Division" for the same company you could still have a rule called "SMS Only".

The ability to copy one rule profiles settings to another rule profiles will be available. The ability to delete rules is also available. Rules, however, can only be deleted if rules for the billing period you are viewing have not yet been applied.

Clicking on the Search Filter 'Show Authoriser created rules only' displays all rules created by an Authoriser. An Administrator cannot amend these but they can 'copy as new'. A search facility by rules name is also available.

**Manage Rule Sets**  
 Back to: [BT Autobalance Welcome](#)

Rule Description	Last Updated
<input type="radio"/> Tech Support	14-Jun-2005 10:00
<input type="radio"/> Weekend/Evening	01-Jun-2005 14:31
<input checked="" type="radio"/> Weekend	01-Jun-2005 14:31
<input type="radio"/> International/Roamed	01-Jun-2005 14:29
<input type="radio"/> Premier Rate	01-Jun-2005 14:28
<input type="radio"/> Learnt/Tagging	01-Jun-2005 13:51
<input type="radio"/> System Default Rule	23-May-2005 11:04

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**Search filter**  
 Show authoriser created rules only  
 Rule description contains

**Rule Maintenance**  
 Back to: [Manage Rule Sets](#)  
**Create New Rule Profile** Page 1 Of 3

**Tagging Overview:** Using the following key as a guide, set your rule tagging options:

- Not tagged (users can tag)
- Tagged (users can untag)
- Not tagged and locked (users cannot change these)
- Tagged and locked (users cannot change these)

**Call Category**  
 BT Autobalance can automatically tag calls based on their Call Category. Call categories can also be locked either tagged or untagged.

International	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Private Wire	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Roamed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
National	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Local	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Mobile	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Premier Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Premier Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Voicemail	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Other	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Transmission Type**  
 BT Autobalance can automatically tag calls based on their Transmission Type. Transmission Types can also be locked either tagged or untagged.

Voice	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
WAP / Information Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
SMS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
GPRS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Fax	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
MMS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

### Rule Maintenance

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Create New Rule Profile Page 2 Of 3

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#### Time of Day

BT Autobalance can automatically tag calls based on the time they were made. The time period can also be locked either tagged or untagged.

	Time From	Time To						
Weekday	00 00	00 00	<input type="checkbox"/> All	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weekend	00 00	00 00	<input type="checkbox"/> All	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

---

#### Peak/Off Peak Times

BT Autobalance can automatically tag calls based on their Peak/Off Peak status. Peak/Off Peak calls can also be locked either tagged or untagged.

Weekday (Peak Rate)	<input checked="" type="radio"/>	<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weekday (Off-Peak)	<input checked="" type="radio"/>	<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weekend (Off-Peak)	<input checked="" type="radio"/>	<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

---

#### Learnt Tagging

Dialled Numbers that are fully tagged in the previous month can be automatically tagged this month (providing they are not untagged and locked).

Apply Learnt Tagging  Yes  No

---

#### Base Tagging

BT Autobalance can automatically tag calls that have been marked by the user at the time the call was made. The following characters identify base tagged numbers 'A', '\*'.

Apply Base Tagging  Yes  No

---

#### Personal Calls Limit And Handset Adjustment Values

A personal calls limit value can be set. Handsets that exceed this value can be viewed on the 'Submission Management' screen. An adjustment figure can be set which will be added to every handset on the 'Handset Report Export'.

Personal Calls Limit: £

Adjustment Figure: £

### Rule Maintenance

Back to: [Manage Rule Sets](#)

Create New Rule Profile Page 3 Of 3

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#### Tagging Rule Priorities

You can prioritize the tagging of the rules in this profile. 1 is the highest priority. Higher priority rule tagging will be done before lower priority rule tagging.

Call Category Tagging	<input type="text" value="1"/>
Transmission Type Tagging	<input type="text" value="2"/>
Time Of Day Tagging	<input type="text" value="3"/>
Peak/Off Peak Tagging	<input type="text" value="4"/>
Address Book Tagging	<input type="text" value="5"/>

---

#### Rule Profile Name

Enter a textual description that will be saved with the rule profile.

Enter Rule Profile Name

## Assigning Rule Sets

The Administrator and Authoriser can create and maintain rule sets, which are then assigned to nodes within the company structure.

The following rule applies. Only one handset can be assigned to one rule profile. As an Administrator you can view all rule profiles, by default your own rules will be displayed on the view rule sets page. There is an option to view all rules created by the Authorisers by using the search filter, or by entering the name of the rule you wish to view.

Once your rules have been created you can then assign them to nodes within your company structure. If a rule is applied at the highest level(s) within your company structure this will apply to all nodes below this, however a further rule can then be applied to a node below this, the rule applied at the lowest node will always be used.

As an Administrator you can assign rules to nodes within the company structure even if the nodes are under the control of an Authoriser. The Authoriser can choose to use your rule, or create a new rule, which is then used. One rule therefore, does not take priority over another, and if an Administrator/Authoriser applies a new rule profile to a node, which already has, a rule profile attached by the Administrator/Authoriser the new rule profile will override the old.

The old rule sets will still be available for viewing by the Administrator and the Authoriser who created the rule set but it will not be associated with a node.

Please note that each rule set 'stand alone' and no rule profiles takes priority over another rule profiles.

Once you assign a rule to a node within the company structure, a summary of the rule profiles currently assigned is displayed. This shows the rule, the node of the company structure and the rule creator.

### Rule Assignment : Weekend/Evening

[Back to: Manage Rule Sets](#)

A rule profile can be assigned to one or more groups in the company structure. A selected group will include any child groups that it may contain.

#### Select group...

- My Company
  - Marketing
  - Sales
  - Unallocated

Assign group to rule profile

#### Rule profiles currently assigned:

Rule	Group	Rule Creator
System Default Rule	My Company	Administrator
International/Roamed	Cost Centre K	Administrator
International/Roamed	Fred	Administrator
Learnt/Tagging	Cost Centre U	Administrator
Premier Rate	Bob	Administrator
Premier Rate	Department Y	Administrator
Tech Support	Department Q	Administrator
Weekend	Department J	Administrator

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## View Current System Settings

This allows you to see your current system settings this details for each node within the company structure the set of rules applied and the assigned Authoriser.

A hyper link is available on the rule profiles description, which will allow the Administrator/Authoriser to view the individual rules set up for each rule profiles. A summary of the number of Authorisers set up is also shown. Clicking on this link takes the user to the Authoriser Set up Functionality.

Please note this report will only be available for the open and previously viewed bills and will not show historic information, therefore the company structure and assigned rules shown will be the company structure and assigned rules as of the present time, not when the bill was originally viewed.

**View System Settings**

[Back to: BT Autobalance Welcome](#)

Demo Company 2

---

The company structure is shown here with its current authoriser and rule profile assignments.

You currently have **4 authorisers**.

**Rule profiles currently assigned:**

Group	Rule	Assigned Authoriser
My Company	<a href="#">System Default Rule</a>	
My Company > Unallocated	<a href="#">System Default Rule</a>	
My Company > Sales	<a href="#">System Default Rule</a>	
My Company > Sales > Marketing	<a href="#">System Default Rule</a>	jeremy williams
My Company > Sales > Marketing > Fred	<a href="#">International/Roamed</a>	jeremy williams
My Company > Sales > Marketing > Bob	<a href="#">Premier Rate</a>	jeremy williams
My Company > Sales > Department Y	<a href="#">Premier Rate</a>	andy auth
My Company > Sales > Department Y > Cost Centre U	<a href="#">Learnt/Tagging</a>	andy auth
My Company > Sales > Department J	<a href="#">Weekend</a>	
My Company > Sales > Department J > Cost Centre K	<a href="#">International/Roamed</a>	amanda pearson
My Company > Sales > Department J > Cost Centre F	<a href="#">Weekend</a>	
My Company > Marketing	<a href="#">System Default Rule</a>	
My Company > Marketing > Department S	<a href="#">System Default Rule</a>	
My Company > Marketing > Department S > Cost Centre T	<a href="#">System Default Rule</a>	amanda pearson
My Company > Marketing > Department S > Cost Centre M	<a href="#">System Default Rule</a>	

[Export this report](#)

[Print this report](#)

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## Apply System Settings

Once you have created the company structure, assigned Authorisers who created and assigned the rule profiles can click on the 'Apply System Settings' button.

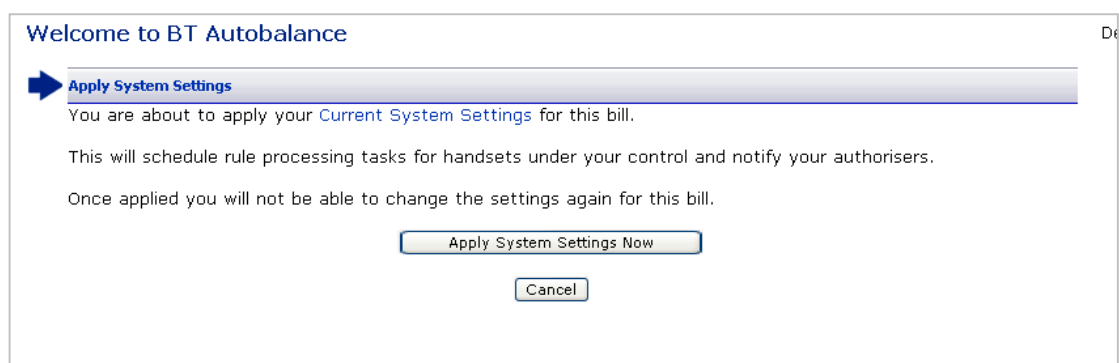
At this point a further screen will be displayed detailing that this is an irreversible step and once applied this functionality will be read only. The option to view your current system settings is also available via a hyperlink on this page for a final check.

Clicking on 'apply system settings now' will schedule an overnight job, which will apply the rules to the handsets you are responsible for, and Authorisers are notified that the site is available for viewing.

If any new Authorisers have been created, they will receive a registration email with their user name and temporary password. Subsequent emails will inform them that the next month of data has been loaded. New users will receive a SMS detailing their Authenticode and Keyword, which is used by them to activate their account. Subsequent emails will display the tagged total and the date to submit their tagging by.

Please note when system settings have been applied the following functionality becomes read only: Company Structure, Add Authoriser, assigning rules to nodes, (although new rules can still be created, which can then be used in the next statement.)

System settings will be applied overnight as a batch process.



## Rule Deployment

Clicking on 'apply system settings now' will schedule an overnight job, which will apply the rules created by you to the handsets you are responsible for. Authorisers are notified that the site is available for viewing, and users will receive SMS's.

## Call Tagging Logic

The following logic is applicable: Any locked status takes priority over any other tagging. For example if a rule tags a call as tagged and unlocked and the next rule tags this as untagged and locked, the call will be untagged and locked, and the call will not change status, as locked takes priority, and once a call is locked the status cannot change.

However if a call is untagged and locked and then the next rule tags and locks the call, the call would remain untagged and locked.

To explain this more fully a number of scenarios are detailed. For simplification we will just use Call Category and Transmission type, but the scenarios apply to all rules types within a rule. The priority of Rules is that Call Category is Priority 1 and Transmission Type is Priority 2. The Call is Premier Text and an SMS, Tagged is Personal and Untagged is Business.

### Scenario 1

Premier Text is Personal  
SMS is Business  
The Call Is Personal

### Scenario 2

Premier Text is Business  
SMS is Personal  
The Call is Personal

### Scenario 3

Premier Text is Personal  
SMS is Personal & Locked  
The Call is Personal & Locked

### Scenario 4

Premier Text is Personal & Locked  
SMS is Business  
The Call is Personal & Locked

### Scenario 6

Premier Text is Personal & Locked  
SMS is Business & Locked  
The Call is Personal & Locked

### Scenario 7

Premier Text is Business and Locked  
SMS is Personal  
The Call is Business & Locked

### Scenario 8

Premier Text is Business & Locked  
SMS is Personal & Locked  
The Call is Business & Locked

### Scenario 9

Premier Text is Personal and Unlocked  
SMS is Business and Locked  
The call is Business and Locked



## BT Welcome to Autobalance (Step 2)

### Approve Users Tagging

Once the SMS's have been sent to your users (either with their Authenticode and Keyword if they are new users, or an SMS detailing their tagged call spend) and emails sent to Authorisers either with their login details if they are new users or an email informing them that new data has been loaded onto the site), step 1 'Define Your System Settings' will be greyed out, and all functionality contained within Step 1 will be read only.

Step 2 'Approve Users Tagging' is now highlighted. A summary of the status of your handsets is displayed. Clicking on the Submission Management button takes you to the BT Autobalance Submission Management screen. This screen allows you to manage not only your own users, but also view and manage the users under your Authorisers control.

For further information see the Submission Management section.

**Welcome to BT Autobalance**

**What is BT Autobalance?**  
 BT Autobalance allows your users to classify their calls in ways that are meaningful to your business. Users do this by 'tagging' calls to identify them.  
 You can define what a 'tagged' call is, it may mean a Personal call or a Business call or something else, you decide.

---

**Step 1: Define Your System Settings**  
 Your rules have been processed and your users have been notified.

- [Notification Details](#)
- [View Current System Settings](#)

You can still view the following system settings but you can no longer edit them for this bill.

- [View Company Structure](#)
- [View Authorisers](#)
- [View Rule Sets](#)

---

**Step 2: Approve Users Tagging**

- There are 50 users who have not viewed their calls.
- No handsets are waiting for approval.
- No handsets have been overridden.

---

**Step 3: Close Bill**  
 When you have approved all the submitted calls you can close the bill. The bill will then become read-only. You can force the bill to be closed earlier which will result in all unsubmitted handsets being marked as skipped.

### Notification Details

Once System Settings have been applied, the scheduled overnight job has created/notified Authorisers and Users and they have been notified. Step 1 is greyed out and Step 2 'Approve Users Tagging' is now highlighted. A further option 'Notification Details' is now available under Step 1. This shows all notifications, master and reminder SMS that have been sent out by BT Autobalance, here you can see the notification type, the task created, the status, total submitted, total sent and the date and time completed.

Notification Details						
Back to: <a href="#">BT Autobalance Welcome</a>						
Notification details for this month						
Notification Type	Task Created	Status	Total Submitted	Total Sent	Completed	
Master notification	03-Jun-2005 14:33:00	Notifications sent	47	47	03-Jun-2005 14:33:10	
Master notification	03-Jun-2005 14:34:00	Notifications sent	3	3	03-Jun-2005 14:36:10	

## Submissions Management

### Handset View and Status

This section of the Submission Management screen will detail a breakdown of Handsets, Breakdown, and Workflow status for the following:

- My Handsets Only - Which will only show the handsets you are responsible for
- All Handsets - Which will show all Handsets (Administrators and Authorisers)
- Individual Authorisers View – See Below

BT Autobalance Submission Management  
All Handsets
Demo Company 1  
February 2005 Bill

---

#### Submission Handsets

You can choose which handsets are shown on the submission management screen.

Show:

#### Find Handset

Find a handset by entering a handset number or name. Results will be limited to the selected view.

Search:

---

Status	Handsets	% Breakdown
Data Loaded - No Rules Applied:	0	
Being Viewed:	50	<div style="width: 100%;"><div style="width: 100%;"></div></div> 100.0%
Viewed:	0	
Waiting for Approval:	0	
Approved:	0	
Overridden:	0	
Skipped:	0	
<b>Total:</b>	<b>50</b>	

#### Tagged Calls Limit

Currently, 50 handsets exceed your Tagged calls limit.

---

Call Summary	Volume	Duration	Cost
Tagged:	13,087	1451:49:24	£65,064.86
Untagged:	2,109	237:55:21	£10,536.14
<b>Total:</b>	<b>15,196</b>	<b>1689:44:45</b>	<b>£75,601.00</b>

#### Handset Report Export

An adjustment figure can be specified in your rule sets. This figure will be added to every handset in the export.

[Export Handset Report to CSV](#)

Money is shown as pence, e.g. £1.25 will be 125

---

#### Handset & Payroll Number Management

[Click here](#) to manage handsets and payroll numbers

---

#### Current Bill Deadline Date

The current bill's tagging completion date that will be shown on notifications is : **22 Jun**

### View Authoriser's View

When viewing an Authoriser's handsets using the drop down box on the Submission Management screen, you will have access to the following functionality:

- The option to 'override' a handset belonging to an Authoriser
- The option to approve a handset in the Authorisers view that is at status 'awaiting approval'

If the Authoriser does not log in or does not apply rules you can:

- Apply the existing rules if they had been set up for other statement. This could be either the rules set up by the Authoriser previously or the system default set of rules. This is achieved by selecting 'apply system setting'. Once an Authoriser has been notified that they can view their bill, you cannot then create rules for them, you can only apply the Authorisers system settings on their behalf.
- The Administrator can send the Authoriser an email to remind them to apply their rules. The wording of the email is as follows 'You have not yet applied your rules for April. If you do not apply them soon the Administrator shall apply them on your behalf. You will not be able to change the rules once they have been applied.'

BT Autobalance Submission Management  
Andrew Clifford (Being Viewed)
Demo Company 1  
February 2005 Bill

---

**Submission Handsets**

You can choose which handsets are shown on the submission management screen.

Show: Andrew Clifford (Being Viewed)

Status	Handsets	% Breakdown
Being Viewed:	3	<div style="width: 100%; height: 10px; background-color: #e91e63;"></div> 100.0%
Viewed:	0	]
Waiting for Approval:	0	]
Approved:	0	]
Overridden:	0	]
Skipped:	0	]
<b>Total:</b>	<b>3</b>	

When all handsets are approved, overridden or skipped you can mark the bill for this authoriser as completed (you will no longer be able to make changes).

This bill is now complete

Call Summary	Volume	Duration	Cost
Tagged:	378	40:44:39	£1,889.81
Untagged:	393	43:59:13	£1,878.62
<b>Total:</b>	<b>771</b>	<b>84:43:52</b>	<b>£3,768.43</b>

**Find Handset**

Find a handset by entering a handset number or name. Results will be limited to the selected view.

Search:

---

**Tagged Calls Limit**

Currently, 3 handsets exceed your Tagged calls limit.

---

**Handset Report Export**

An adjustment figure can be specified in your rule sets. This figure will be added to every handset in the export.

[Export Handset Report to CSV](#)

Money is shown as pence, e.g. £1.25 will be 125

---

**Handset & Payroll Number Management**

Click [here](#) to manage handsets and payroll numbers

---

**Current Bill Deadline Date**

The current bill's tagging completion date that will be shown on notifications is : **22 Jun**

For each of the views above the following is available:

If rules have not yet been applied for the statement you are viewing, the screen will display all the handsets with the status of 'Not Viewed.' You can still click on the icon to view the handsets but no calls will have been tagged or untagged as rules have not yet been applied. Once rules have been applied the following statuses are available:

**Being Viewed** - Displays the number of handsets and % of all handsets that have yet to view their latest bill. The handset icon provides a hyperlink to a list of all these users. An option to 'submit on behalf of the user' by using the override feature is available.


**Viewed** - Displays the number of handsets and % of all handsets that have viewed their latest bill but not yet submitted their tagged/untagged usage records. The handset icon provides a hyperlink to a list of all these users. An option to 'submit on behalf of the user' by using the override facility is also available.

**Waiting for Approval** - Displays the number of handsets and % of all handsets that have submitted their completed usage records. The handset icon provides a hyperlink to a list of all these users. An option to approve all or some of the users along with the option to unlock individual users is provided.

**Approved** - Displays the number of handsets and % of all handsets that the Administrator has approved. The handset icon provides a hyperlink to a list of all these users. An option to unlock individual users is provided. Once phone numbers have been submitted to the Administrator they are locked and cannot be re-submitted unless the Administrator unlocks them.

**Overridden** - Displays the number of handsets and % of all handsets that the Administrator has submitted on behalf of their user(s). The handset icon provides a hyperlink to a list of these users. An option to unlock individual users is provided.

**Skipped** - Displays the handsets who have not had rules applied for this billing period or where the bill has been closed before they have submitted their handsets. Skipped allows the Administrator to close the bill down without any overnight processing of rules.

**Total** - Grand total of number of handsets. The handset icon  provides a hyperlink to a summary of all users that displays CTN, username, tagged total, untagged total, total bill and submission status.

### Call Summary

Call summary shows the volume, duration and cost of the tagged and untagged calls. This is available for each handset submission view and is updated automatically as users submit their statements.

Call Summary	Volume	Duration	Cost
Tagged:	13,087	1451:49:24	£65,064.86
Untagged:	2,109	237:55:21	£10,536.14
<b>Total:</b>	<b>15,196</b>	<b>1689:44:45</b>	<b>£75,601.00</b>

### Find Handset

A search facility is provided which allows you to search for a handset by number or name. Please note depending on your submission handset view at the time, only those handsets contained within the selected view will be searched for.


**Find Handset**

Find a handset by entering a handset number or name. Results will be limited to the selected view.


Search:

### Tagged Calls Limit

The tagged call limit is set within each rule set and any handsets whose tagged calls are above this limit are displayed on the Submission Management screen.

Clicking on the handset icon  will return a list of handsets that can be viewed. This can be used to highlight for each statement, those users who have a higher than average tagged call spend, and can be further investigated.

**Tagged Calls Limit**

Currently, 50 handsets exceed your Tagged calls limit. 

### Adjustment and Handset Report Export

The handset report export can be run at any time. This is generally run once all handsets have either submitted their statements or been overridden by yourself or the Authoriser.

This report can be run for All Handsets, only the Administrators Handsets, or the individual Authorisers handsets. Once this report is run this can be sent to your payroll department.

This report details the total of untagged and tagged calls for each handset, as well as the overall total. To facilitate in understanding of VAT costs, the report will also show the following, Tagged Spend Vat Liable, Tagged Spend VAT Exempt, the values that add up to the total tagged spend, Untagged Spend VAT Liable, Untagged Spend VAT Exempt and the values that add up to the total untagged spend.

If an adjustment figure has been entered in any rule set which is then assigned to handsets, this will be added to each handset in the report export, and can be used if for example your company allows for £5.00 of personal calls each month. This will indicate to payroll when you send the report to them that £5.00 can be taken off the tagged calls total, or alternatively you can enter a negative field in the adjustment and this will be shown in the report.

### Handset and Payroll Number Management

This function allows you to amend/add the Payroll number for your handsets and also change the name of your handsets. This is either a minor name change (the handset isn't changing ownership) or a major name change, (the handset is changing ownership).

On first data load for your company, BT Autobalance will populate this screen with the handset names contained in the data. Thereafter any names within your data will be ignored, and it will be your responsibility to manage any name change within the handsets in BT Autobalance.

There are a number of ways payroll can be entered into BT Autobalance. The user can enter this when they first register, in the payroll number field, or you can create a .csv file, containing handset number, handset name and payroll number which can then be uploaded onto the site.

## Handset & Payroll Number Management

Back to: [Submission Management](#)

Handset	Name	Payroll Number	Trigger New User
07570000000	Lara Ditsch		<input type="checkbox"/>
07360000001	Oralia Halonen	234561	<input type="checkbox"/>
07435000002	Emmy Boyarsky		<input type="checkbox"/>
07642000005	Marshall Garren		<input type="checkbox"/>
07989000007	Marilee Steib		<input type="checkbox"/>
07013000008	Mariette Fearon		<input type="checkbox"/>
07427000011	Edwina Kibble		<input type="checkbox"/>
07615000013	Wilbur Colberg		<input type="checkbox"/>
07916000014	Gricelda Camejo		<input type="checkbox"/>
07850000018	Leigh Lifer		<input type="checkbox"/>
07050000020	Jong Crandle		<input type="checkbox"/>
07488000021	Quinton Clingman		<input type="checkbox"/>
07484000023	Kay Nilges		<input type="checkbox"/>
07690000024	Tracey Mezick		<input type="checkbox"/>
07284000025	Pat Alessio		<input type="checkbox"/>
07417000027	Jung Leroy		<input type="checkbox"/>
07261000029	Vera Whitefield		<input type="checkbox"/>
07470000031	Jammie Nault		<input type="checkbox"/>
07599000032	Sallie Llanes		<input type="checkbox"/>
07700000033	Adella Holroyd		<input type="checkbox"/>

Page 1 of 3

\* Indicates the handset has been marked for a major label change. This will be done when the next bill is loaded.

**Bulk Upload**

## Bulk Upload

This functionality allows for a 'bulk load' of User details, containing the Handset Number, the Handset Name, and Payroll Number.

The file to be uploaded can be in two formats:

.CSV Format. This file must be in the following format or the file will be rejected, "07125000000","Amanda Pearson","123654". Each field must be surrounded by quotes, and separated by a comma. This file is suitable for creating using Microsoft Notepad.

.CSV format creating using Excel. This file must be in the following format 07125000000,Amanda Pearson,123654. Each field must not have any quotes but be separated by a comma.

Please note that the handset name does not need to be entered and can be represented as the following, "07125000000","","123654"

This bulk upload will over write any existing payroll details and no changes will be made to Handset Name, as this is controlled manually within the Handset and Payroll Number Management screen.

Please note if a payroll number is entered here when the user logs in using the 'New User - Activate your Account' screen, the payroll number they enter must match the payroll number entered here or they will be unable to log in.

For Handset Name change two options are available:

- Simple Name Change – which allows you to change a handset name, this new name will be automatically displayed on all screens where the handset label is displayed. (Please note this name change will be displayed in all previous and future statements)
- Trigger a new user – editing the handset name and ticking the 'trigger new user' box, allows you to indicate that this handset has changed ownership, this change will come into force the next time data is loaded, and a new SMS will be sent to the new user. The new user will not be able to see the previous statements and the old user will not be able to log in.

## Welcome to BT Autobalance (Step 3)

### Close Bill

As Autobalance works on a workflow process and each step must be completed before the next step becomes active, only one bill can be open at any one time. The first time data is loaded the bill will be automatically opened by the system. Going forward you can still view previously submitted bills, but you cannot open a previously unviewed bill, if another bill is still open.

As the Administrator once you have approved all the handsets under your control and each of your Authorisers has completed and closed their bill you can then create the Handset Export Report and send this to your payroll department for them to deduct the personal calls for your users. The bill is now ready to be closed.

Please note the Authoriser can close their section of the Bill, by selecting option 3 'Close Bill'. When this is selected, their status in the Administrators submission handset section is '(Authorisers Name) Bill Closed' A summary of their section of the bill is then displayed, with details of the handsets, for example, 'There are 8 handsets which have been approved'. There is also the option once the bill is closed to view the rules applied for that month. This functionality is also available to the Administrator.

Once your bill is closed, (this is done immediately with no overnight batch processing) all steps are greyed out and the bill becomes read-only. You are now ready to move onto your next bill. Once the bill is closed a summary of the status of the handsets will be displayed.

There are a number of scenarios where the bill may be closed before the Authorisers have closed their bill or users have not yet submitted their statements.

## Skipped

A status of skipped will only be displayed once a bill has been closed. This is controlled by the system and the Administrator/Authoriser cannot manually set a handset to skipped. A handset is seen as skipped in the following scenarios:

1. The Authorisers have not logged in and not applied rules. The Administrator has also not applied rules for this Authoriser. The Administrator closes the bill, all handsets under the Authoriser's control are marked as skipped, as no rules have been applied (not even system settings by the Administrator). These handsets will have no tagging applied by the system or by the user and they are seen as excluded from BT Autobalance this month. (Their tagged calls will be zero in the handset export to payroll).
2. If the Administrator does not apply a rule to any node under his control, the system will automatically apply the system default set of rules to this node. Any tagging in the system default rule will be applied. If no users view their calls or submit their bill before the Administrator closes the bill, when the bill is closed these handsets are seen as skipped even though some tagging had been applied. Any tagging will count toward their tagged total.
3. It is also worth noting that even if an Administrator/Authoriser has applied rules and handsets have been viewed. These can also be seen as skipped. In this situation if a handset is at status 'Being Viewed', 'Viewed' and 'Awaiting Approval' and the Administrator/Authoriser closes the bill, any tagging applied will be included in their tagged total, but these handsets will be shown as skipped.
4. Handsets are also skipped in the situation where on the same day the Administrator closes the bill and the Authoriser applies their rules, in this situation as rules processing is done overnight and the bill is closed immediately, no rules will be applied and the handsets will be skipped and no tagging will be applied to the handsets under this Authoriser.

### Welcome to BT Autobalance

**What is BT Autobalance?**  
BT Autobalance allows your users to classify their calls in ways that are meaningful to your business. Users do this by 'tagging' calls to identify them.  
[You can define what a 'tagged' call is](#), it may mean a Personal call or a Business call or something else, you decide.

---

**Step 1: Define Your System Settings**  
Your rules have been processed and your users have been notified.

- [Notification Details](#)
- [View Current System Settings](#)


You can still view the following system settings but you can no longer edit them for this bill.

- [View Authorisers](#)
- [View Rule Sets](#)

---

**Step 2: Approve Users Tagging**  
When your users have submitted their tagged/untagged calls you can approve them and produce reports that contain the value of the tagged and untagged calls.

---

 **Step 3: Close Bill**

- All your handsets have been viewed.
- All your users who have viewed their calls have submitted them for approval.
- No handsets are waiting for approval.
- There are 7 handsets that have been overridden.
- No handsets were skipped.

- [View Rules Applied For May 2005](#)

**This bill is now closed**

# Dashboard

## Dashboard

The Dashboard contains an overview of your current bill.

This is broken down into four sections:

- Cost Summary - displays overall summary information including:- total cost of calls, recurring and non-recurring costs along with VAT cost, total number of calls, total duration and the total number of phones contained within your bill.
- Trend Analysis - graphical representation of the spend on current and any previous bills.
- Watchpoints - phones and dialled numbers that you have chosen to watch. Compares overall spend from this bill to the previous bill.
- Observations and Actions - your chosen observations with links to appropriate reports for further information

Clicking on the people icon will take you to a list of handsets and associated costs.

April 2005 Bi

**Company Structure Level:** My Company

---

**Cost Summary**

	Costs	Credits
Calls:	£73,301.88	£0.00
Monthly Charges:	£0.00	£0.00
Other Charges:	£0.00	£0.00
<b>Totals</b>		
Total Cost:	£73,301.88	
VAT:	£0.00	
Total Calls:	14,741	
Total Duration:	1645:38:32	
Number of Phones:	50	

**Monthly Trend Analysis**

Total Cost

Built using ChartFX Development/Test version

---

**Watch Points (edit)**

**Observations and Actions (edit)**

- ① £4,330.94 was spent on 902 International calls. Average call cost: £4.80  
See [Destination Analysis Report](#)
- ① £11,464.18 was spent on 2,392 SMS message(s). Average call cost: £4.79  
See [SMS Transmission Summary Report](#)
- ① Internal calls account for 51.0% of all calls, costing £38,003.23  
See [Internal Calls Report](#)
- ① Average handset cost is £0.00 before call charges and credits  
See [Cost Allocation Report](#)
- ① Users' average call spend is £1,466.04  
See [Call Usage Report](#)
- ① Voice calls account for 8.5% of all calls  
See [Transmission Summary Report](#)
- ① Average price per minute £0.74
- ① Average call cost £4.97
- ① Average call duration 00:06:42
- ▼ Users' Average call spend has decreased by £46.05 (3.1%)
- ▼ Call spend has decreased by £2,302.57 (3.0%)
- ▼ SMS message usage has decreased by 201 (7.8%)



## Observations and Actions

Observations provide you with a quick overview of the trends associated with your bill. For many of the observations an 'Action' is suggested. Actions are links to reports that will allow you to investigate the observation.

You can set up your own trigger points so that the Dashboard only alerts you to the information you need.

For instance you may only wish to know if your total spend has risen by more than 10 % over the previous month. Use the combination boxes via the 'edit' link to select the thresholds that should trigger the observation.

**Observations and Actions (edit)**

- ⓘ £53.86 was spent on 186 Mobile calls. Average call cost: £0.29  
See [Destination Analysis Report](#)
- ⓘ £27.28 was spent on 90 Voice call(s). Average call cost: £0.30  
See [Transmission Summary Report](#)
- ⓘ Internal calls account for 0.0% of all calls, costing £0.00  
See [Internal Calls Report](#)
- ⓘ Users' average call spend is £46.04  
See [Call Usage Report](#)
- ⓘ Average handset cost is £0.00 before call charges and credits  
See [Cost Allocation Report](#)
- ⓘ Voice calls account for 14.1% of all calls  
See [Transmission Summary Report](#)
- ⓘ Average call duration 00:02:04
- ⓘ Average price per minute £0.28
- ⓘ Average call cost £0.58

## Watchpoints

You can set up to 5 phones and 5 dialled numbers as watchpoints. Once set, the watchpoints summary will show whether the phone and the dialled number usage has increased or decreased from the previous month.

Note: When you make changes to your watchpoints the service will take a few minutes before the home page is updated. You can continue using the service as normal during this time.

### Edit Watchpoints

---

**Dialled Numbers**

Dialled Number 1

Dialled Number 2

Dialled Number 3

Dialled Number 4

Dialled Number 5

**Phones**


Phone 1

Phone 2

Phone 3

Phone 4

Phone 5

**Continue** 

# Company Address Book

## Manage Address Book

This allows you the ability to create and maintain a company address book. The company address book entries replace the destination description in all reports for the Administrator/Authorisers and the Users, company address book entries will be displayed in all exports and downloads.

You can manually add/amend and delete entries to the address book, this is achieved by clicking on the address book link on the menu bar and this screen will show all existing entries. Alternatively, you can add an address book entry at call level, at the view call details screen (available as you drill down through the Destination Analysis Report, the Transmission Summary Report, Peak/Off Peak, Handset Summary Report and the Call Search) each entry displays an address book icon, clicking on this will allow you to easily add an entry to the address book, and this new description will be shown against all calls of this number.

A search facility is available, which allows you to search for existing entries by name or number.

New entries can be entered by selecting the 'New' button. For each entry a name must be entered and this replaces the dialled number description, a type must also be entered for each dialled number, the following options are available: Email/Home/Work/Mobile/Fax and Base Tagged. Duplicates of types can be entered.

The facility to tag the entries using the tagged statuses is available. Any tagged status will be carried through to the next month's calls and so on, as this tagging will not be implemented on the current month data.

When you delete an entry from the company address book all occurrences of this number in previous statements for all users will default to the original destination description.

A user cannot override the company descriptions with their own address book.

The ability to print a page or the complete Address book is available, as is the option to delete the address book.

### Manage Address Book

Filter  Name Name Search

<input type="checkbox"/> Name	Number	Type
<input type="checkbox"/> Answer Machine	121	Mobile
<input type="checkbox"/> Answer Phone	901	Work

Delete 

Page 1 of 1
New

[Print This Page](#)  
[Print Entire Address Book](#)  
[Export Entire Address Book](#)  
[Import Address Book](#)  
[Delete Entire Address Book](#)

## Import Entire Address Book

The Administrator can import an existing address book in a csv format into the Company Address Book. The import must be in the following format, "Name", "Dialled Number", "Type"  
The file to be uploaded can be in two formats:

.CSV Format. This file must be in the following format or the file will be rejected, "Name", "Dialled Number", "Type". Each field must be surrounded by quotes, and separated by a comma. This file is suitable for creating using Microsoft Notepad.

.CSV format creating using Microsoft Excel. This file must be in the following format Name, Dialled Number, Type. Each field must not have any quotes but be separated by a comma.

If no type is entered or the type does not match the available options (Email, Home, Work, Mobile, Fax, Base Tagged) this will be populated as base tagged. If the entry already exists it will not be replaced by the entry in the import.

A preview of the first ten entries will be displayed with the option to 'submit all' or 'cancel'. The header will only be recognised if it is "Name", "Number", "Type".

The limit of the import will be set to 3MB.

## Export Entire Address Book

The Administrator can export the existing address book in a csv format, the following columns are exported:

- Name
- Dialled Number
- Type

This can then if required be updated offline and then using the import Company Address Book facility updated back onto the site.


## Reports


### Reports Overview

All the summary reports share the same functionality:-

- Resort columns - clicking on the icon next to a column title re-sorts the report by that field.
- Percentage bar chart - gives a graphical representation of the sorted field.
- Pie chart - when a colour pie chart is displayed you can drill down to more detailed information by clicking on the section of the graph you are interested in.
- Drill down - clicking on an icon allows you to drill down to the next level of detail within that report.
- Export - all reports have the facility to be exported, clicking on the 'export this report' allows you to either save or open the report results in a .csv format which can then be viewed and manipulated using excel.
- Printer Friendly Button - this allows printing of multi-page reports by changing the report format to a single long page. This can then be printed by the browsers 'print' function or Atlas 'Print' page. You will be presented with the option to 'Print Report' selecting this will print the complete report. Please note you still have the option to print the currently viewed page of the report by utilising the Explorer print functionality.
- The option to 'hide' zero entries within a report is available

For example using the Destination Analysis report:


 'Calls' icon this drills down into the data via the actual calls made. For example, if you click on this icon whilst viewing a summary for calls made to area code 'London' the next report will show a list of all the area codes for London, drilling down further on a particular area code will show all calls that start with this area code.

 'Phone' icon this drills down into the data via the phone that made the calls or incurred the charge. For example, if you click on this icon whilst viewing a summary of roamed calls the next report will show a list of all the phones that have made roamed calls.

## Destination Analysis


The Destination Analysis report breaks down your calls into destination types e.g.:- International, National, Mobile, Roamed, and so on. For each destination type volume, duration, cost, average duration, average cost, average pence per minute are shown. A bar chart showing the percentage breakdown for each range is displayed for volume, duration and cost.



A summary of the report is shown at the top of each section of the report.


Clicking the  icon will re-sort the report. For example, clicking on the icon in the cost column header will group the report by highest or lowest total cost.

The pie chart gives a graphical representation of the ranges by volume, duration and cost depending on which column you are sorting on.

There are two drill down options:

Clicking the  icon next to a destination type allows you to drill-down to a list of the calls that make up the destination type, which will be grouped together. For instance, if you drill down on 'National' you will see a summary, grouped by area code, of all 'National' calls. Again, all the columns are re-sortable.

Drill down to find out who has made the calls to any area code by clicking the  icon, displayed next to the destination type. Here you will see displayed a list of handsets, which you can further drill down using the  icon, which will take you to the calls summary screen as detailed below.

























From each of the summary pages you can choose to display all the individual calls that make up the destination type. The call details report shows in time and date order:- phone number, username/label, number dialled, destination description, duration and cost of the call. All columns in this report are re-sortable. For example, you could click the  icon on the cost column and see the calls ranked in either descending or ascending cost, or for all calls to a certain destination and so on.

The option to either hide or display zero entries within the report is also available, & the call details report is limited to returning 2,500 call records or 125 pages.

### Destination Analysis - My Company

**Filters**  
showing data for: My Company

**Summary:**      **637** 21:55:47 £368.310

Traffic Category ▼	Volume ▼	Duration ▼	Cost ▼	Average Duration ▼	Average Cost ▼	Avg p/min ▼	Breakdown of Volume
Roamed  	231	09:06:54	£261.310	00:02:22	1.13	0.48	 36.3%
Premium Rate  	199	04:52:36	£43.710	00:01:28	0.22	0.15	 31.2%
Mobile  	186	06:04:36	£53.860	00:01:58	0.29	0.15	 29.2%
Private Wire  	11	01:29:11	£7.560	00:08:06	0.69	0.08	 1.7%
Voicemail  	5	00:12:00	£1.000	00:02:24	0.20	0.08	 0.8%
Other  	4	00:09:58	£0.820	00:02:30	0.21	0.08	 0.6%
Local  	1	00:00:32	£0.050	00:00:32	0.05	0.09	 0.2%
International 	0	00:00:00	£0.000				
National 	0	00:00:00	£0.000				
Premier Text 	0	00:00:00	£0.000				

Export this report Page: 1 of 1  
Print this report

Volume of total calls by Traffic Category

Roamed

Premium Rate

Mobile

Private Wire

Voicemail

Other


Local



## Transmission Summary


The call class report lets you analyse your bill by the type of traffic:-

- Voice
- SMS
- GPRS
- WAP/Information Services
- MMS (Multi Media Services)
- Email
- Fax

For each call class total volume, duration, cost, data volume, average duration, average cost and average pence per minute are displayed.

Clicking the  icon will re-sort the report. For example, clicking on the icon in the cost column header will group the report by highest or lowest total cost.

Clicking the  icon displayed against each transmission type takes you to a list of handsets, which can be further drilled down on using the  icon to see a summary of the selected transmission type for that phone.








Clicking the  icon next to a phone allows you to drill-down to a summary of the selected call class for that phone.




The option to either hide or display zero entries within the report is also available, and the call details report is limited to returning 2,500 call records or 125 pages.

Transmission Summary - My Company
Corporatecindy  
May 2005 Bill

**Filters**  
showing data for: My Company


**Summary:**                      **637** **21:55:47** **£368.310**                      **0**

Transmission Type	Volume	Duration	Cost	Data (KB)	Average Duration	Average Cost	Avg p/min	Breakdown of Vo
GPRS	180	01:10:30	£15.910	0	00:00:24	0.09	0.23	 28.3%
WAP / Information Services	109	04:51:39	£25.500	0	00:02:41	0.23	0.09	 17.1%
Fax	92	05:10:40	£210.650	0	00:03:23	2.29	0.68	 14.4%
Voice	90	05:41:18	£27.280	0	00:03:48	0.30	0.08	 14.1%
Email	69	02:27:19	£45.270	0	00:02:08	0.66	0.31	 10.8%
MMS	55	02:29:06	£38.870	0	00:02:43	0.71	0.26	 8.6%
SMS	42	00:05:15	£4.830	0	00:00:08	0.12	0.92	 6.6%

Export this report                        Page: 1 of 1 

Print this report

Volume of total calls by Transmission Type



■ GPRS

■ WAP / Information Services

■ Fax

■ Voice

■ Email

■ MMS


■ SMS



## Peak/Off Peak


This report allows you to analyse your calls by weekday in and out of hours, and weekends. The time periods are:-

- Weekdays (Peak Rate)
- Weekend (Off Peak)
- Weekday (Off Peak)

For each group total volume, duration, cost, average duration, average cost and average pence per minute are displayed.

Clicking the  icon will re-sort the report. For example, clicking on the icon in the cost column header will group the report by highest or lowest total cost.

Clicking the  icon displayed against each category takes you to a list of handsets, which can be further drilled down on using the  icon to see a summary of the selected transmission type for that phone.

Clicking the  icon next to a phone allows you to drill-down to a summary of the selected call class for that phone.





The option to either hide or display zero entries within the report is also available, and the call details report is limited to returning 2,500 call records or 125 pages.

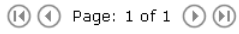
Please note for BT Autobalance only Weekday Peak Rate will be populated.

Peak/Off-peak Analysis - My Company
Corporate  
May 2005

**Filters**  
showing data for: My Company


**Summary:**      **637** 21:55:47 **£368.310**

Category	Volume	Duration	Cost	Average Duration	Average Cost	Avg p/min	Breakdown of Volume
Weekday (Peak Rate)  	141	08:08:31	£124.120	00:03:28	0.88	0.25	22.1%
Weekend (Off-Peak) 	0	00:00:00	£0.000				}
Weekday (Off-Peak) 	0	00:00:00	£0.000				}

Export this report 

Print this report

Volume of total calls by Category




Weekday (Peak Rate)




## Handset Summary



















The Handset Summary report displays a summary of all calls on each individual handset within your company, the following information is displayed for each individual handset: volume, duration, recurring charges, one-off charges, call charges, credits, tax, a total cost field for each handset and a breakdown.

The option to either hide or display zero entries within the report is also available.

Clicking the  icon will re-sort the report. For example, clicking on the icon in the cost column header will group the report by highest or lowest total cost.

Clicking the  icon next to a Handset allows you to drill down to a list of the individual calls for each handset.

Note: The call details report is limited to returning 2,500 call records or 125 pages. An option is provided at the summary stage for you to refine your search criteria.

Handset Summary - My Company										Corporatecindy May 2005 Bill	
Filters											
showing data for: My Company											
one line per: Handset ( <a href="#">show zero entries</a> )											
<b>Summary:</b>		<b>637</b>	<b>21:55:47</b>	<b>0.00</b>	<b>0.00</b>	<b>368.31</b>	<b>0.00</b>	<b>0.00</b>	<b>368.31</b>		
Handset	Label	Volume	Duration	Recurring Charges	One-Off Charges	Call Charges	Credits	Tax	Total	Br	
07770326445	 User Name Not Known	92	05:08:12	0.00	0.00	142.57	0.00	0.00	142.57		
07771511321	 User Name Not Known	101	03:58:38	0.00	0.00	57.23	0.00	0.00	57.23		
07771974412	 User Name Not Known	98	03:41:54	0.00	0.00	50.06	0.00	0.00	50.06		
07771854413	 User Name Not Known	106	02:49:46	0.00	0.00	44.29	0.00	0.00	44.29		
07771457965	 User Name Not Known	33	01:22:01	0.00	0.00	20.65	0.00	0.00	20.65		
07771566328	 User Name Not Known	63	02:05:21	0.00	0.00	20.55	0.00	0.00	20.55		
07770822541	 User Name Not Known	47	01:13:47	0.00	0.00	16.86	0.00	0.00	16.86		
07771758960	 User Name Not Known	97	01:36:08	0.00	0.00	16.10	0.00	0.00	16.10		
<a href="#">Export this report</a>										14   Page:	
<a href="#">Print this report</a>											

## Configuration Settings

### Describing call tagging

Configuration settings are only available to Administrators and allows you to define more meaningful names for tagged and untagged calls. For example you could change tagged to be personal and untagged to be business. Once this has been defined these names unless changed will be carried through to all subsequent months.

### User tag submission duration

When handset users are sent their notification informing them that the bill is ready for viewing a submission date is included as part of the message. This date is the date by which the user must complete and submit their tagging. This date is not enforced, but is just a reminder to your users. The timing of this date is set within this section.

### Reminder notification

As an Administrator you can configure within this section an automatic reminder SMS/Email to be sent to users who have viewed their calls but not yet submitted them for approval. Within here you can enter the number of days before the submission date above that this reminder is to be sent.

**Configuration (Read-Only)**  
Back to: [BT Autobalance Welcome](#)

---

**Describing Call Tagging**

You can define the descriptions to be used for tagged and untagged calls. For example, 'tagged' calls could be 'Personal' and 'untagged' could be 'Business'.

'tagged' calls  will be described as

'untagged' calls  will be described as

---

**User Tag Submission Duration**

When handset users are sent their notification informing them that the bill is ready for viewing a submission date will be added urging the user to complete their tagging by this date. The submission duration can be specified below.

The current bill's tagging completion date that will be shown on notifications is **2 Jul**.

Tag submission duration (days):

---

**Reminder Notification**

You can configure an automatic reminder to be sent to each user who has not submitted their calls this month.

Users will currently be sent a reminder on **27 Jun**

Notification Method:

Remind before deadline (days):

---

## My Profile

### Change Password

To change your password enter your existing password in the box provided. Now enter your new password in the two boxes provided.

Note. Take care to ensure you enter this information correctly. Passwords are case sensitive

### Change Password

---

Please enter your old password and then your new password twice.


Password must be 8 alphanumeric characters, starting and ending with an alpha character.

Old password

New password

Confirm password

Password clue

**Continue** 

## Call Search

### Call Search

The 'call search' function allows you to run custom reports on your billing data. As a guide we have provided definitions for each criteria available on the screen.

**Dialled number:-** as the user you can search for a dialled number, or a number, which starts with a set of numbers. Example of this is area codes, so you code enter 017 and the search criteria would then look for all calls made to Dublin, and the phone number starts with 7.

**Date range:-** this provides calendar functionality in order to specify a date range for calls you would like to see. The calendar will show dates, which are earlier than calls have been made.

**Call time:-** this function allows a search for calls, which have been made between certain hours of a day.

**Call spend:-** this function allows a search for calls above or below a selected amount. This can be useful for identifying expensive calls.

**Call duration:-** this allows the user to search for calls of a certain duration, this could be useful if you are interested in a duration band which crossed the predetermined breaks, then they could use this search to look for those calls.

**Call category:-** the drop down box provides call category criteria for the report e.g. National

**Call transmission types:-** the drop down box provides a list of the different transmission type available from BT.

**Peak rate status:-** the drop down box allows filtering of calls made only in the peak or off peak time band at either weekends or weekdays.

**Handset selection:-** this allows the selection of a handset, to be interrogated, instead of running the report over all handsets. It narrows down the search if you are looking for usage on one handset.

As a user, you can enter information into one or more of these fields. The more information you enter the narrower the search criteria are. If no records are found to match the criteria, try removing an element or check if you are entering a full dialled number or an area location.

Note: The call details report is limited to returning 2,500 call records. An option is provided at the summary stage for you to refine your search criteria.

## Call Search

### Call Criteria

#### Dialled Number

Digits:   starts with

#### Date Range

from:  [Select...](#)

to:  [Select...](#)

#### Call Time

Hour Min between   and

#### Call Cost

between  and

#### Call Duration

Mins:Secs between : and :

#### Call Category

Show:

#### Transmission Type

Show:

#### Peak Rate Status

Show:

#### Handset Selection

All Handsets

Use All Handsets

Use Selected Handset

[Choose Handset...](#)

Clear 

Search 