

BT Mobile

BT Autobalance

Authoriser 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.

The Authoriser level is an optional level. If the Authoriser level is not implemented the Administrator carries out the Authoriser functions. The Authoriser sits between the Administrator and the User. They are assigned to a node within the company structure and can create and maintain rule profiles to be applied to their users.

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).

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.

Sign In

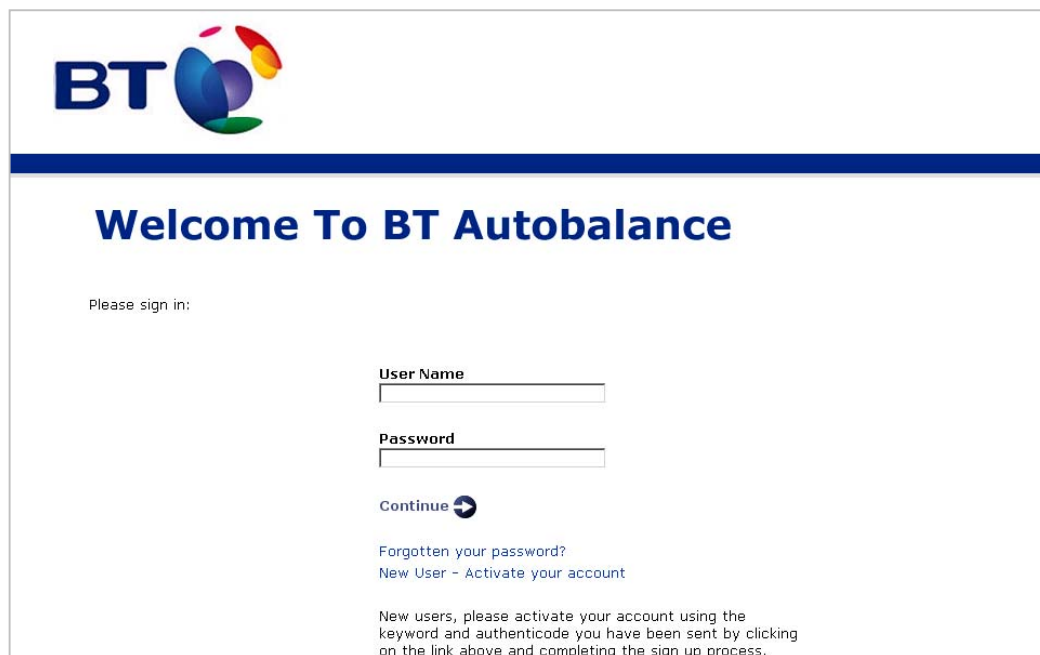
As an Authoriser you are created by the Administrator of your company and assigned to a node within the company structure.

Please note: Only one Authoriser can be assigned to a particular node within the company structure.

When your Administrator applies system settings you will be sent an email detailing your user name and temporary password. These are then entered into the log-in screen, where you will then be taken to a further screen to enter a new password of your choice, which is then used each time you enter the site.

Each time you visit you will need to sign in using your user name and password. 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.

Log in at www.bt.com/autobalance.




BT

Welcome To BT Autobalance

Please sign in:

User Name

Password

Continue 

[Forgotten your password?](#)
[New User - Activate your account](#)

New users, please activate your account using the keyword and authenticocode you have been sent by clicking on the link above and completing the sign up process.

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.

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

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

Manage Company Structure

As an Authoriser your Administrator will have assigned you to a level within the Company structure, and all the handsets within this level(s) are your responsibility. You will not be able to view/amend or delete handsets outside of your level of the company structure.

Using the Company Structure Editor you can perform the following functions within your section of the Company structure:

Manage Structure

Back to: [BT Autobalance Welcome](#)


Company Structure Level: Phil Division

- **Phil Division**
 - **Phil Department-1 (1)**


Update the Division Phil Division

Code:

Name:

Continue 


Delete the Division Phil Division

Continue 

Create a new Department in Phil Division

Code:

Name:

Continue 

Adding Elements

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. 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 handsets 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 handset 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, therefore rules that belong to an element are deleted with the element.

The Authoriser can view and amend their section of the Company Structure and they can create, amend and delete nodes.

Manage Rule Sets

Rule sets are a way of 'grouping' rules together. Multiple rule profiles are available. 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.

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 Administrator created rules only' displays all rules created by the Administrator, you will not be able to view any rules created by other Authorisers.

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

Rule Description	Last Updated
<input type="radio"/> Premier Rate <input type="button" value="Create New"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Assign"/> <input type="button" value="Show Details"/> <input type="button" value="Copy As New"/>	17-Jun-2005 12:47

Page 1 of 1

Search filter
 Show administrator 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.

Call Category	Not Tagged	Tagged	Not Tagged & Locked	Tagged & Locked
International	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Private Wire	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roamed	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
National	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mobile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Premium Rate	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Premier Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Voicemail	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input 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.

Transmission Type	Not Tagged	Tagged	Not Tagged & Locked	Tagged & Locked
Voice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WAP / Information Services	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GPRS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Rule Maintenance

Back to: [Manage Rule Sets](#)

Create New Rule Profile Page 2 Of 3

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		<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Weekday	00 00	00 00	<input type="checkbox"/> All	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Weekend	00 00	23 59	<input checked="" type="checkbox"/> All	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

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: £

Assigning Rule Sets

The Administrator and Authoriser can create and maintain rule sets, which are then assigned to nodes within the company structure. For further information see Manage Rule Sets.

The following rule applies; only one handset can be assigned to one rule profile. As an Authoriser you can view your own rules and any rules created by the Administrator.

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. If however, a further rule is applied to a node below this, the rule applied at the lowest node will always be used.

As an Authoriser you can assign rules to your elements of the company structure even if rules have already been assigned by an Administrator. In this situation you can choose to use the Administrator's rule, or create a new rule, which is then used. One rule does not therefore, 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 : Roamed/Weekends

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...

- Phil Division
- Phil Department-1

Rule profiles currently assigned:

Rule	Group
System Default Rule	Phil Division

Page 1 of 1

View Current System Settings

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

A hyperlink 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. The company structure and assigned rules shown will therefore, be the company structure and assigned rules as of the present time, not when the bill was originally viewed.

View System Settings CorporateABB

Back to: [BT Autobalance Welcome](#)

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

Rule profiles currently assigned:

Group	Rule
My Company > Phil Division	System Default Rule
My Company > Phil Division > Phil Department-1	System Default Rule

[Export this report](#) ⏪ ⏩ Page 1 of 1 ⏪ ⏩

[Print this report](#)

Apply System Settings

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

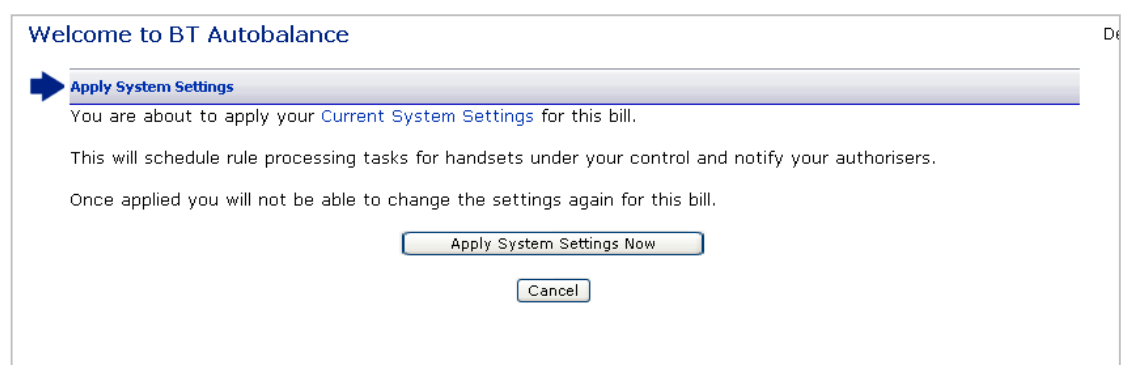
At this point a further screen will be displayed detailing that this is an irreversible step and once applied this functionality will be read only. The option to view your current system settings is also available via a hyperlink on this page for a final check.

Clicking on 'apply system settings now' will schedule an overnight job, which will apply rules to the handsets you are responsible for.

New users will receive a SMS detailing their Authenticode and Keyword, which is used by them to activate their account.

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.

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), 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.

Step 1: Define Your System Settings

Your rules have been processed and your users have been notified.

- [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 Rule Sets](#)

Step 2: Approve Users Tagging

- All your handsets have been viewed.
- There is 1 user who has viewed their calls but not yet submitted them for approval.
- No handsets are waiting for approval.
- No handsets have been overridden.

[Submission Management](#)

When all handsets are approved, overridden or skipped you can mark the bill as completed (you will no longer be able to make changes). The administrator will then know you are ready for the bill to be closed.

This bill is now complete

Step 3: Close Bill

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

Submissions Management

Submission Management Overview

The Submission Management screen is where you manage the handsets under your control. You can approve handsets that have submitted their statement and override handsets and approve their tagging on their behalf (to cater for users who do not log into the system). You can also unlock handsets of users who have submitted their statements incorrectly and want to re-submit.

A call summary of tagged and untagged calls is displayed, as is the ability to search for a handset, and view handsets which have exceeded their Tagged call limit.

The handset report export details the tagged call cost of each of the handsets, with the payroll number and the adjustment figure if one has been entered at rule set up stage.

The current bill deadline date relates to the date entered in the configuration settings screen, and is the date by which users are asked to submit their tagging by. This date is included in SMS sent to the user informing them of their tagged spend.

BT Autobalance Submission Management
CorporateMD
May 2005 Bill

Status	Handsets	% Breakdown
Being Viewed:	0	
Viewed:	1	<div style="width: 100%; height: 10px; background-color: #e67e22;"></div> 100.0%
Waiting for Approval:	0	
Approved:	0	
Overridden:	0	
Skipped:	0	
Total:	1	

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

The administrator will then know you are ready for the bill to be closed.

This bill is now complete

Find Handset

Find a handset by entering a handset number or name.

Search:

Tagged Calls Limit

You can set a limit within your rule sets for tagged calls. You will be alerted here if the limit has been exceeded.

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


Call Summary	Volume	Duration	Cost
Tagged:	0	00:00:00	£0.00
Untagged:	64	01:59:59	£15.21
Total:	64	01:59:59	£15.21


Handset View and Status


The Submission Management screen will detail a breakdown of Handsets, Breakdown, and Workflow status for your handsets, and 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.


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 therefore, not applied rules and also, the Administrator has also not applied rules for the Authoriser. The Administrator closes the bill and 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 therefore 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, the handsets will be 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, that 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.

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
Total:	15,196	1689:44:45	£75,601.00

Find Handset

A search facility is provided which allows you to search for a handset by number or name. Please note you will be able to search for handsets that are in your section of the company structure.


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 handset users have either submitted their statements or been overridden by yourself.

This report can be run for all the handsets under your control. The Administrator can run this for all handsets.

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.

Welcome to BT Autobalance (Step 3)

Close Bill

As BT 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 Authoriser, once you have approved all the handsets under your control you can close your section of the bill, and if required send your handset export to payroll.

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.

[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.

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

- [View Current System Settings](#)

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

- [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**

- No handsets are waiting for approval.
- No handsets have been overridden.
- There was 1 handset skipped.
- [View Rules Applied For April 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.

Dashboard for North-Division
CorporateM
May 2005 B

Company Structure Level: North-Division

Cost Summary		
	Costs	Credits
Calls:	£15.21	£0.00
Monthly Charges:	£0.00	£0.00
Other Charges:	£0.00	£0.00
Totals		
Total Cost:	£15.21	
VAT:	£0.00	
Total Calls:	64	
Total Duration:	01:59:59	
Number of Phones:	1	

Monthly Trend Analysis

Total Cost

Built using ChartFX Development/Test version

Watch Points (edit)

Observations and Actions (edit)

- Call volume has increased by (0.0%)
- £0.70 was spent on 7 SMS message(s). Average call cost: £0.10
[See SMS Transmission Summary Report](#)
- Internal calls account for 0.0% of all calls, costing £0.00
[See Internal Calls Report](#)
- Average handset cost is £0.00 before call charges and credits
[See Cost Allocation Report](#)
- Voice calls account for 89.1% of all calls
[See Transmission Summary Report](#)
- Average price per minute £0.13
- Average call cost £0.24
- Average call duration 00:01:52
- No International calls were made
- Your busiest day was April, 1, 64 calls made
[See Distribution Through the Billing Period](#)

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.

Set Observations

Observation Category	Threshold
Show the average call cost	<input checked="" type="checkbox"/>
Show the average price per minute	<input checked="" type="checkbox"/>
Show the average duration	<input checked="" type="checkbox"/>
Show average handset call cost	<input checked="" type="checkbox"/>
Show average handset rental cost	<input checked="" type="checkbox"/>
Show Internal calls spend	<input checked="" type="checkbox"/>
Call spend for	International <input type="button" value="v"/>
Show call spend for	SMS <input type="button" value="v"/> <input checked="" type="checkbox"/>
Show transmission percentage	Voice <input type="button" value="v"/> Always show <input type="button" value="v"/>
Show transmission trend	SMS <input type="button" value="v"/> Always show <input type="button" value="v"/>
Show total volume change	Always show <input type="button" value="v"/>
Show total spend change	Always show <input type="button" value="v"/>

Continue

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 


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


 'Calls' icon this drills down into the data via the actual calls made.

 'Phone' icon this drills down into the data via the phone that made the calls or incurred the charge.

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:

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.



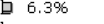

From each of the summary pages you can choose to display all the individual calls that make up the destination type. The call details report shows in time and date order:- phone number, username/label, number dialled, destination description, duration and cost of the call. All columns in this report 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, and the call details report is limited to returning 2,500 call records or 125 pages.

Destination Analysis - North-Division

Filters
showing data for: North-Division


Summary: **64** **01:59:59** **£15.210**

Traffic Category	Volume	Duration	Cost	Average Duration	Average Cost	Avg p/min	Breakdown of Volume
Mobile	38	00:58:59	£10.210	00:01:33	0.27	0.17	 59.4%
National	21	00:53:03	£4.340	00:02:32	0.21	0.08	 32.8%
Voicemail	4	00:07:03	£0.580	00:01:46	0.15	0.08	 6.3%
Local	1	00:00:54	£0.080	00:00:54	0.08	0.09	 1.6%
Premier Text	0	00:00:00	£0.000]
International	0	00:00:00	£0.000]
Other	0	00:00:00	£0.000]
Roamed	0	00:00:00	£0.000]
Private Wire	0	00:00:00	£0.000]
Premium Rate	0	00:00:00	£0.000]

[Export this report](#) [Print this report](#)

Page: 1 of 1

Volume of total calls by Traffic Category




■ Mobile
■ National
■ Voicemail
■ 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 - North-Division
CorporateMD
May 2005 Bill

Filters
showing data for: North-Division


Summary: **64** **01:59:59** **£15.210** **0**



Transmission Type	Volume	Duration	Cost	Data (KB)	Average Duration	Average Cost	Avg p/min	Breakdown of Volume
Voice	57	01:59:52	£14.510	0	00:02:06	0.25	0.12	89.0%
SMS	7	00:00:07	£0.700	0	00:00:01	0.10	6.00	10.9%
Email	0	00:00:00	£0.000	0				
MMS	0	00:00:00	£0.000	0				
Fax	0	00:00:00	£0.000	0				
WAP / Information Services	0	00:00:00	£0.000	0				
GPRS	0	00:00:00	£0.000	0				

Export this report Page: 1 of 1

Print this report

Volume of total calls by Transmission Type




 Voice
 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.

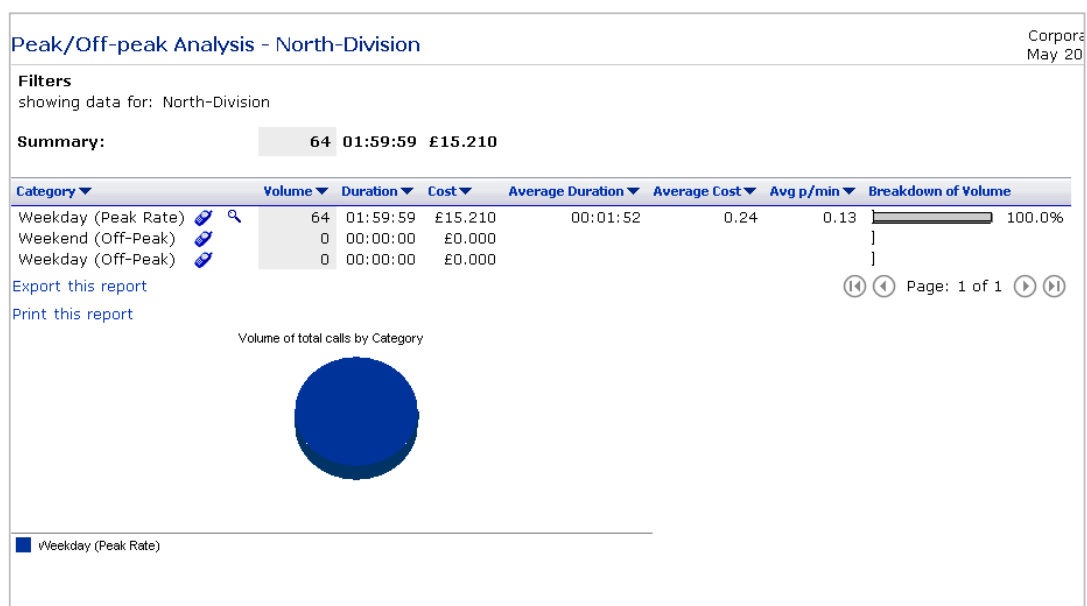
Clicking the  icon will re-sort the report. For example, clicking on the icon in the cost column header will group the report by highest or lowest total cost.

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.




Handset Summary




The Handset Summary report displays a summary of all calls on each individual handset within your section of the company structure. 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 - North-Division										CorporateMD May 2005 Bill
Filters										
showing data for: North-Division										
one line per: Handset (show zero entries)										
Summary:		64	01:59:59	0.00	0.00	15.21	0.00	0.00	15.21	
Handset	Label	Volume	Duration	Recurring Charges	One-Off Charges	Call Charges	Credits	Tax	Total	Brea
07918070037	 User Name Not Known	64	01:59:59	0.00	0.00	15.21	0.00	0.00	15.21	 
Export this report Print this report										

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 