BT Mobile

BT Autobalance User Guide





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Getting Started

Introduction

BT Autobalance is an on-line analysis tool that allows you to identify your personal and business usage by tagging and un-tagging calls.

Your Administrator or Authoriser of the service may have set rules that control which calls can be tagged or un-tagged by yourself. For example the Administrator may have set a rule that all text messages are personal and locked. In this example, you would see that all your text messages were pre-tagged and you would not be able to change them.

Alternatively the Administrator may have set a rule that all Weekend calls are personal but unlocked. All your weekend calls would be tagged, but you would be able to override this if required.

Using BT Autobalance you can:

- Tag your call usage
- Notify your Administrator or Authoriser that you have completed your tagging
- Download and/or print a list of tagged and/or untagged calls
- Create and maintain a personal address book of dialled numbers

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 fully support. 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 your first statement is available for viewing and your Administrator/Authoriser has set up and deployed your rules, you will be sent an SMS message detailing your 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. This will take you to the register screen where you create your log-in.

You must enter the Authenticode and Keyword that was included in your first SMS. Your user name will be based on the entries in the first name and surname boxes. You must enter your payroll number. If your payroll number has already been entered by your Administrator a check will take place to ensure that the payroll number you entered matches the one already held. If this doesn't you will not be able to log-in and must contact your Administrator.

Please ensure you enter a password clue as this will be emailed to you if you select the 'Forgotten my password' link on the log-in page.

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.	Keyword Authentication code
Please enter your name, this will be used to assign you with a unique user name.	First name
Please enter your Payroll Number.	Payroll Number Retype
Passwords must be 8 alphanumeric characters starting and ending with an alpha character.	Enter password Retype password
You also need to provide a clue to your password should you forget it.	Clue
In order that we may email you with updates, please enter your email address:	Email address
	Email address again
Previous	Continue 😜

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.

The date and time you last successfully logged in will be displayed on the BT Welcome Page.

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 support 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

This is the main section of BT Autobalance and is used to identify your tagged and untagged calls and you can view the rules the Administrator/Authoriser has set up on your behalf.

To see the rules click the 'see the rules' hyperlink. This will display a summary of the rules that applies to your bill for this billing period, and the name of the Administrator/Authoriser who created and applied the rule.

Please note: these rules cannot be changed and are displayed for reference only.

When you first visit the BT Autobalance Welcome screen, a summary of the tagged and untagged calls is displayed that have met the rules profile set up by your Administrator/Authoriser. The Administrator can change the wording of tagged and untagged to be more meaningful. For example, they could set tagged to be personal and untagged to be business.

Within this screen there are two options:

- **Review Calls** This takes you to a summary list of all your calls for the selected billing period and allows you to review and amend your tagging at summary and detail level.
- Submit for Approval Once you are happy with your tagging you can submit your calls for approval. You will be asked if you are sure you want to submit your calls. If you select 'Yes' your statement will become 'locked' and no further changes can be made. (Please note: Your Administrator/Authoriser can still unlock your statement if a mistake has been made and you have submitted your statement incorrectly. This is a manual process and you must inform your Administrator/Authoriser that you wish to unlock your bill.)

You can also view, export, print and email two reports, which show your tagged and untagged calls.

Please note if you have made any entries in your personal address book these will not be displayed in any exports or prints. The original destination description will be displayed. This is to ensure you are covered by data protection.

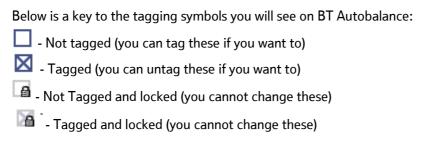


Review Calls

Review Calls shows a list of all your calls at summary level for the selected statement. This summary reflects the tagging of the rules that has been applied to you. Any call that displays a tagging symbol that is 'locked' (indicated by a padlock) a cannot be changed by yourself.

A summary of your tagged and untagged calls will be displayed at the top of the screen and this will be updated in real time if you amend your tagging.

Tagged Symbols Key



A summary of dialled numbers is displayed, and calls can be fully tagged/untagged at summary level or detail level. Clicking on the icon allows you to drill down to the individual call level,. Only those dialled numbers that are unlocked can be tagged or untagged.

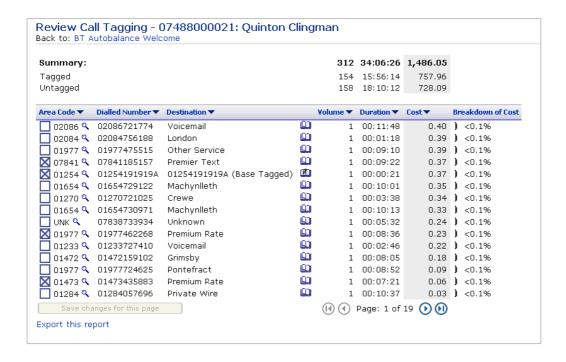
As tagged changes are saved page by page, a message will be displayed if you try to move onto another page of calls without saving the original page. The following message will be displayed, 'The tagging changes made have not been saved, do you want to save them?' Clicking 'Yes' will save your changes and move you onto the next page, clicking 'Cancel' will keep your changes as unsaved.

Clicking on a tagged symbol which is displayed with a line through it for example \square means that the dialled number is only partially tagged, and once drilled down you can see the tagging of the individual calls.

An address book icon is displayed against each dialled number at summary level and a red book icon indicates that this entry is a company address book entry, This is read only and can not be amended. A blue book icon with a pen indicates that this entry is already in the address book.

Please note all base tagged entries are automatically added to the address book. In this scenario the dialled number will be displayed in the destination field with the type as 'general'. Clicking on the icon will take you to the address book where this entry can be amended, this is also true of dialled numbers who have the book icon displayed without a pen.

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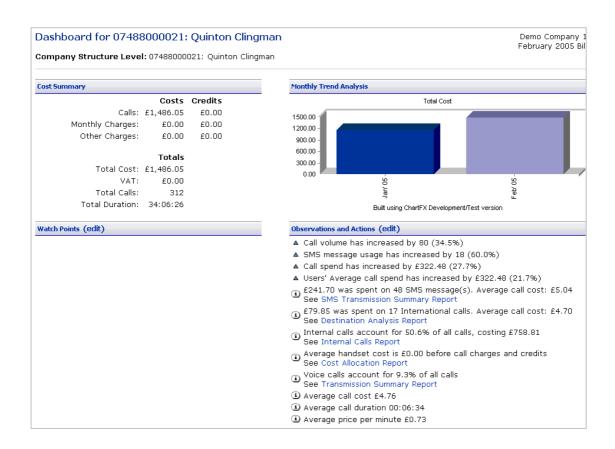


Dashboard

The Dashboard contains an overview of your current bill.

It is broken down into four sections:

- Cost Summary displays overall summary information including:- total cost of your calls, monthly charges, credits and other charges, along with VAT cost, total number of calls, total duration and the total cost of your bill.
- **Trend Analysis** graphical representation of your spend on your current and any previous bills.
- Watchpoints dialled numbers that you have chosen to watch. It compares overall spend from this bill to the previous bill.
- Observations and Actions your chosen observations with links to appropriate reports for further information

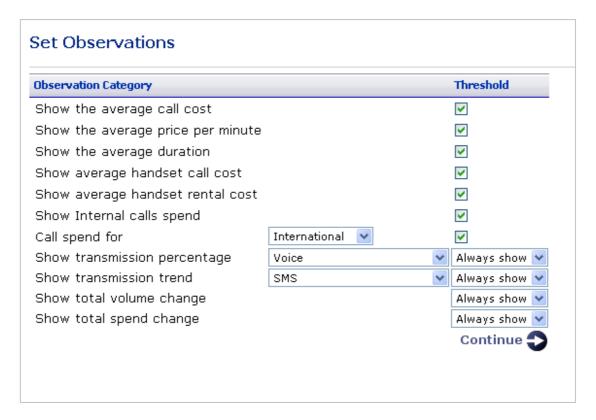


Observations and Actions

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.



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.



Personal Address Book

This allows you to create your own personal address book. The address book entries replace the destination description in your review calls tagging screen, all reports and the view call details screen.

Add/amend and delete entries to the address book

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. This screen will show all existing entries.

Alternatively, you can add an address book entry at call level, from the View Call Details screen (available as you drill down through the Destination Analysis Report, the Transmission 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 within this screen is also available. This allows you to search for existing entries by name or number.

New entries can be entered by selecting the 'New' button. For each new entry a name must be entered and this replaces the dialled number description. A type must also be entered for each dialled number and 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 thereafter. The tagging will not be implemented on the current months data.

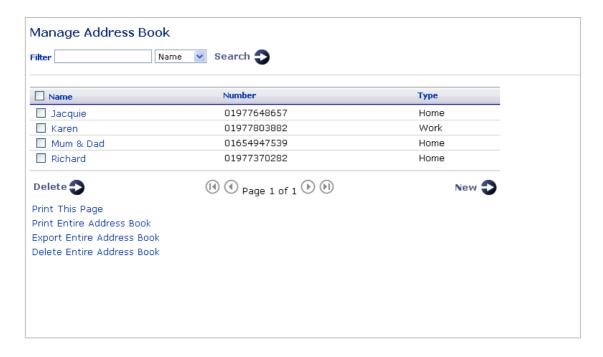
When an entry is deleted from the personal address book all occurrences of this number in previous statements will default to the description held in the call table.

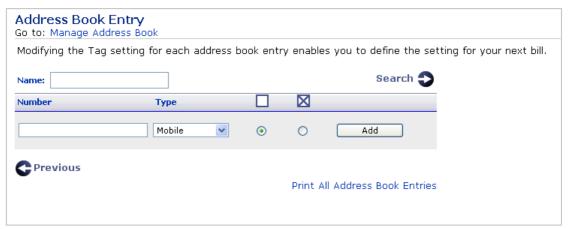
A base tagged entry is automatically added to the address book. The name will be displayed as the destination description and the type as base tagged. This can be amended if required. The corresponding non based tagged number will also be added.

Please note: If a number is tagged as base tagged by yourself, all other occurrences of this number (even if they have not been base tagged) will also be tagged.

Please note: Any numbers already in the company address book will take priority over any personal address book entries. You will not be able to amend this entry, and the following message is displayed 'Company Address Book Entry - Read Only'.

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Data Protection

If you have used your address book to change the destination descriptions these personal descriptions will not be visible to the Administrator or the Authoriser and will be replaced by the original given descriptions when viewed/downloaded by the Administrator.

If you also print or download your data this will display the original destination description (rather than the personal address entry). If an entry has been made in the Company Address book this entry will be retained and will be displayed in any downloads /exports by the Administrator/Authoriser or yourself.

Reports

Reports Overview

The four reports you have available to you share the following 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.
- Drilling down to the individual calls within a report shows an address book entry against each call.
- Please note there is no tagging of calls within these reports, all tagging is done through the 'Review Calls' screen.

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.

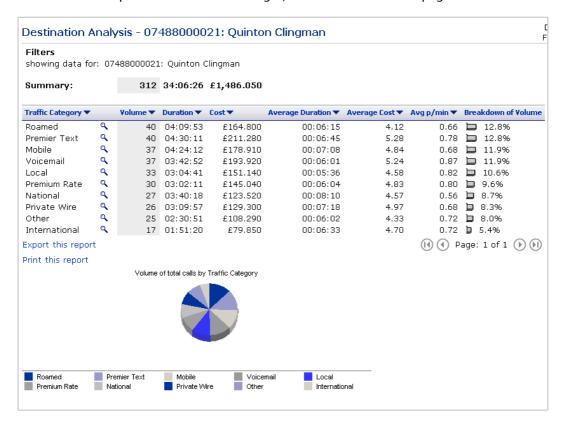
Clicking the **v** icon will re-sort the report. For example, clicking on the icon in the cost column header will group the report by highest or lowest total cost.

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

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.

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 \blacksquare 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 call details report is limited to returning 2,500 call records or 125 pages.



Transmission Summary

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

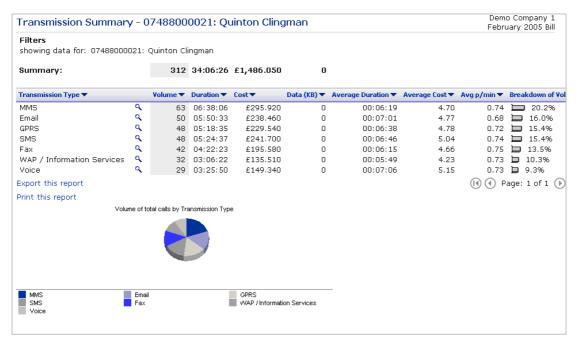
- Voice
- SMS
- GPRS
- WAP/Information Services
- MMS (Multi Media Services)
- Email
- Fax

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

Clicking the **s** 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 $\frac{4}{3}$ icon next to a phone allows you to drill-down to a summary of the selected call class for that phone.

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.

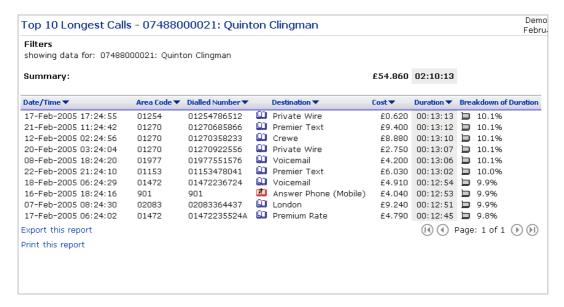


Longest Calls

The Longest Call report allows you to view for each statement the 10 longest calls that you made. For each call the date and time, area code, dialled number, destination description, cost and duration are displayed.

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

Clicking the micron 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.

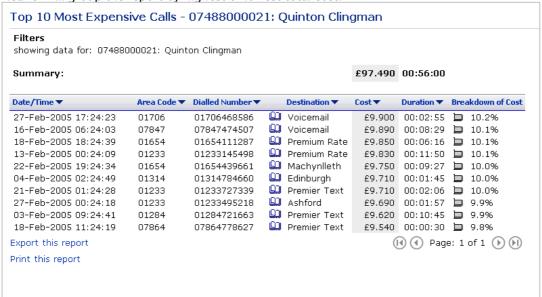


Expensive Calls

The Expensive Calls report allows you to view for each statement the 10 most expensive calls that you made. For each call the date and time, area code, dialled number, destination description, cost and duration are displayed.

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

Clicking the **v** 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.



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.

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.

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