

# **BT**

# **Inbound Analyst**

**User Guide**

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# Overview

## Introduction

**Inbound Analyst** reads electronic data for inbound services and presents the information in easily understood graphical and numerical reports.

**Enhanced Rawcall Data** – Enhanced Rawcall Data information can be imported into Inbound Analyst to allow analysis of inbound calls taking account of numeric, cost and demographic information.

**Output directly to Excel** including graphics, save as comma delimited files or print reports.

**Create and Manage Community Groups** to enable you to report on groups of inbound numbers.

**Create and Manage Customer Groups** to enable you to report on groups of callers from pre-defined demographic areas.

## BT Account and Config references

Please see the following information to help you identify your BT Account or Config Number from your ERD data:

### Using CD Rom data

The Config (Account) number is the **first** reference number **before** the '/' printed on the CD label as the following example shows:

REF. No. **nnnnnn** /Address id

### Using Web download data

The Config (Account) number is contained within the data file name as the following example shows:

WWW  
Old format = ERD\_CCYYMMDD\_ **nnnnnnnn**.csv  
New format = ERD\_CCYYMMDD\_P\_ **nnnnnnnn**.csv

### Using SSH/FTP data

The Config (Account) number is contained within the data file name as the following example shows:

FTP  
Old format = ERD\_ **nnnnnnnn**\_CCYYMMDD.csv  
New format = ERD\_ **nnnnnnnn**\_CCYYMMDD\_P.csv

## Reading Data

Electronic data is read into a project file for subsequent analysis. As the records are read, some pre-processing is performed to speed the process of producing reports.

All records are read into project files containing a number of tables. For each import, either a new project can be created or an existing project selected. If an existing project is selected, records can be appended to any existing records or the existing records first deleted. This facility allows multiple disks to be combined in a single project.

By default, the project files will be created in a Project sub-folder of the program folder (for example Program Files\InboundAnalyst\Projects). You may however select any other path, including network drives.

## Import Process

From the Homepage click the **Import Data** link. The Import screen will be presented offering the choice to **Create New Project** or use an **Existing Project**

If you select **Create New Project** you will be offered a dialogue box from which you can choose the path and file name. If you choose an existing file name, the selected file will be over-written. Once you have selected the file name, a project is automatically created and a message is displayed to tell you when this has been successfully completed.

If you select **Existing Project** a dialogue box will be displayed showing existing files. By default this will display the files in the Projects folder.

Once you have selected the project file, a panel is displayed from which you choose the type of file to be imported, select either Enhanced Rawcall Data from CD or Enhanced Rawcall Data from Download as appropriate.

### Enhanced Rawcall Data from CD

The first time an import is performed, the program will default to offer the D drive.

The ERD folder location will be displayed, followed by the ERD folder for each number group or for Call Optimiser. Select the ERD location (the folder above the ERD folder) and click **Select**.

### Enhanced Rawcall Data from Download

A dialogue box will open, navigate to the location of your downloaded file, select the file and click open.

A message will then be displayed stating the previously used account number, you will then be asked to confirm that you wish to use this account number. If you answer no or this is the first time you have used BT Inbound Analyst you will be asked to enter an account number.

Next click **Start Import**.

The import progress bar will be displayed during import process.

Note that summary data is stored from the import in a central database for creation of trend reports. Up to 12 periods will be stored for any one Account number. Since customers may have more than one disk for a given period, the trend data will store data for each import irrespective of dates. If 2 different disks are imported with the same dates and same Account number then the summary values from both will appear in the trend data. If the same files are imported twice against the same Account number, this will result in duplicate entries in the trend reports.

Please note that the call collection period for Enhanced Information Statistics differs from the collection period for billing of inbound services calls. Minor discrepancies between call totals reported on EIS and the customer bill are therefore likely to occur on occasions.

All information contained in Enhanced Information Statistics should therefore be treated as Management Information only, and not as a means of reconciliation against bills for inbound service facilities.

## Homepage

The homepage is displayed when you first open Inbound Analyst.

From here you can choose to view your favourite reports, Import Data, choose another BT Online Service, Run Inbound ARG or BT Billing Analyst.

The Management facilities are also located here (these can also be accessed from the report screens).

## Dashboard

The BT Inbound Analyst Dashboard indicates the report totals on a set of dials. The dials indicate red, amber or green according to the information set up in the **Dashboard Settings** menu. The dashboard can be accessed by clicking the **Dashboard** tab. The Dashboard can also be displayed after an import, to enable this check the appropriate box in the **Dashboard Settings** menu. To drill down to the full report click on the appropriate dial.

### Dashboard Settings

This menu enables you to choose which reports you would like displayed on the dashboard. You may choose five from a total of eleven reports available to be displayed. It is also possible to display the same report with different settings.

When you first open the dashboard the default settings are displayed, these can be amended as required. You can also set the dial to 'start' or 'stop' at a set point. The settings differ for each report.

Select the report you wish to display on the dashboard from the appropriate drop down menu and enter the required settings. To save the settings click **OK**, to close the menu without saving click **Cancel**. You can also choose to limit the information shown by choosing to view the information by Inbound Number or Customer Group.

The caution settings will be displayed in amber and the warning settings will be displayed in red on the dials. The colours and figures displayed on the dials change according to the settings used.

### Export/Import Dashboard Settings

You can save your current Dashboard Settings to a text file. On the dashboard screen click the **Export Settings** link, navigate to where you would like the file saved, enter a file name and click **Save**.

To import previously saved Dashboard Settings click the **Import Settings** link, navigate to where the file is saved, select the required file and click open. The settings will be imported and the Dashboard display will change accordingly.

The Dashboard display can also be copied to Excel using the **Copy to Excel** function.



## Reports

### **Reports**

The reports are divided up into different areas which can be selected from the appropriate tab. Each tab contains reports relevant to that tab.

To view any of the reports simply click the appropriate report link. Many reports have drill down facilities which allow you to see greater detail by clicking on a line in the report. Column sorting is available on most top level reports, click the appropriate column header to sort the column.

When a report is displayed on the screen you can choose to print it, save the details to a comma delimited file (CSV) or to open it directly into Excel (requires Microsoft Office 97 or later). Excel will open automatically and both the numeric figures and graphic details will be shown as an Excel spreadsheet.

## My Reports

This area allows the user to select and display reports.

To choose the reports click the **Select My Reports** on the top right hand side.

Select the reports required by clicking on them, the report title will change colour to show that they have been selected. Click **Apply Changes** to save the settings.

## Favourite Reports

Your top five favourite reports can be run from the homepage, by clicking on the relevant link on the left hand side.

### Select Favourite Reports

To select a favourite report click on the **Select Favourite Reports** link a list of available reports will be displayed, click on the report to select it and then click on the next heading as required. Click **Apply** to save the changes.

## Parameters

A **Selection Parameter** panel provides facilities to limit reports by

- Day/Date Range
- Selected Dates
- Defined Hours or Specified Shifts
- Cost/Revenue
- Call Duration
- Answer Time
- Ineffective Calls
- Inbound Number
- Answer Location
- Calling Number
- Cost Centres

Reports may also be selected for specific Community Groups, Answer Point Groups, Customer Group and Calling Number Groups provided these have first been set up from the appropriate management screens.

The parameter selectors are colour coded to show which reports they apply to.

The date selectors default to offer the dates for the earliest call record and the last call record for the selected project.

Any **Parameters** selected will be displayed at the top of the report.

Reports can be selected by Inbound Number for All or Selected Numbers.

Reports can be selected by Answer Location for All or Selected Location.

The 'Default Parameters' link will re-set the parameters for the selected project.

### Shift Pattern Profile

Up to eight shifts can be selected for this report. Shift Patterns 1,2,3 (if selected) will also be displayed on a Pie chart. A fourth pie chart will show the split for all selected shifts.

## **Digital Main Switching Unit (DMSU)**

The Digital Main Switching Unit (DMSU) is a BT 'main network switch' located in major towns and cities and provides the call routing interconnection between the local exchanges connected to it, to other DMSU's and their local exchanges across the UK BT network. Each DMSU therefore has a group of local exchanges it serves and interconnect points with other fixed line and mobile operator networks

## **Cost per Loss functionality for the Lost Caller Detail Report**

The Cost per Loss functionality which is found in the Lost Caller Detail Report allows the user to calculate their Annual Projected Loss.

To use the calculate enter the percentage of successful calls and the average order value, BT Inbound Analyst will then automatically calculate the project loss.

The calculation is based upon date selection so please ensure you have selected the appropriate date range from the selection parameters on the main screen.

## Call Frequency Report

The Call Frequency Report shows details of callers who have called multiple times within a given time frame.

When you first open the report the details will default to;

5 or more calls in 7 days  
3-4 calls in 7 days  
2 calls in 7 days  
2 or more calls in 28 days

These parameters can be changed either by clicking on a line or by Importing the settings from CSV. The report settings can also be saved to a CSV file.

### Setting Parameters Within the Report

To change the parameter within the report click on the setting you wish to change. You then have the option to either;

Show the count of Inbound Numbers receiving (however many) calls in (however many) days.

or

Show the count of Inbound Numbers receiving (however many) to (however many) calls in (however many days)

Click the radio button to select your choice and enter amount of calls/days as appropriate. Click **Apply** to apply the selections made to the report or click **Cancel** to exit without saving the changes.

### Importing Report Parameters from a CSV file

To import the settings from a CSV file click the **Import Report Settings from CSV** link and select where you want to import your file from and click **Open**.

The settings will automatically be imported and a message will be displayed to confirm that the import has completed. If an invalid file has been selected a message will be displayed to advise the user of this.

The CSV file should be in the following format:

```
[CALLFREQPARAM]  
1,4,7  
4,0,7  
2,2,7  
10,20,7
```

In order to import settings to show the count of inbound numbers receiving (however many calls) in (however many days) the record must show the middle number as '0' (as shown in the third record in the above example). To show count of inbound numbers receiving (however many) to (however many) calls in (however many days) the record will need to be in the format 2,2,7 (as shown in the first, third and fourth records in the example above).

### **Saving Report Parameters to a CSV file**

To save the parameters to a CSV file click the **Save Report Settings to CSV** link, select the location/name of where you would like to save the file to and click **Save**



## Auto Report Processor

The Auto Report Processor will automatically produce selected reports with outputs either to Excel or Print.

Click the **Auto Report Processor** link, located under the Sales/Customer Service Reports tab or the All Reports Tab. Select which reports you wish to produce, you can select or de-select all of the reports by clicking the **+all or -all** links as appropriate. Once you have chosen the required reports click run and the reports will be output to the selected format.

### Report Parameters

Parameters can be used in conjunction with the **Auto Report Processor** so that reports can be run for selected numbers or selected community groups. If Parameters are not selected then the report will use all numbers in the project.

To select the parameters for a report highlight it and click the **Select Inbound Numbers** or **Select Community Groups** link. At the top of the screen select whether to include all numbers/community groups or use selected numbers/community groups. You can choose to apply these numbers to all selected reports or to restrict the selection to the currently selected report. If you choose the apply to all reports option, any subsequent reports added will also use the same parameters.

### Applying Selection to more than one report

Select the numbers or community groups required for the report, numbers can be multi-selected using the Ctrl or Shift keys, and then by clicking on the **>**. The selected numbers will appear on the right hand side. Check the radio button **Apply These Parameters to All Reports Selected in the Brochure** at the bottom right hand side of the screen to apply your changes to all selected reports.

**Please note** that if another report is added and the parameters selected are changed, if the Apply All Radio button is checked then the selection will also apply to all previously selected reports.

### Individual Selection

Using this option you can apply different selections to different reports. Select the numbers required for the report, numbers can be multi-selected using the Ctrl or Shift keys, and then by clicking the on the **>**. The selected numbers will appear on the right hand side. If the parameters are to be used for this report only then check the radio button **Apply the Parameters to this Report only**. To remove any numbers from a report, select the numbers from the box on the left hand side, numbers can be multi-selected using the Ctrl or Shift keys, and then by clicking the on the **<**.

To view selected parameters for a report, highlight it in the list and then click the appropriate parameter, to exit without making any changes click **Cancel**. If you change any of the parameters but only want them to apply to the report you are viewing please ensure that the **apply these parameters only to this report** radio button is selected, if not the parameters for all other reports will be overwritten.

## Manage Facilities

### Answer Point Groups

Answer Point Groups provide the facility to enable reports to be produced for pre-defined groups of Answer Points. The names of the Answer Point Groups and the Answer Points allocated within the groups are defined using the Manage Answer Point Groups facility on the Home Page or Report tabs. The groups apply to all projects for which the data has been imported using the same BT Account reference.

To create or edit Answer Point Groups click the **Manage Answer Point Groups** link. A form is displayed offering three options. To retrieve Answerpoint information from the current project click **Retrieve Answer points from Call information** or to update existing information with the latest details click **Update Answer Points From Call Information**. A message will be displayed on completion.

#### Edit Answer Point Groups

Click **Edit Answer Point Groups** link

A list of the references retrieved will now be displayed on the left of the screen. To add an answer point group name, click the **Add** link under the right hand panel then type in the name of the group. Click **OK** and the name will be added to the panel. Continue to add names as required. To apply the Answer Point Group names to the references, click on a reference or hold the shift key down to select a group of references, then double click the Group name to be applied from the right hand box. Continue to set up the Answer Point Groups then click on **Save Changes** to save the details. Exit the screen on completion.

To edit an Answer Point Group name, click on the name in the right hand panel then click on **Edit**. Type in the new name then click **OK**. The name will be updated in the right hand panel and also for every instance where it occurs in the left hand panel.

To delete a group name, click on the name in the right hand panel then click on **Delete**. The name will be deleted from the right hand panel and also from every instance where it occurs in the left hand panel.

To add a reference enter the number in the **Add Answer Point** area and click **Add**.

To remove a reference and its associated Answer Point Group, click on the reference in the left hand panel then click on **Delete Selected Reference**. Click **Save Changes** before exiting the screen. Multiple entries can be selected by either holding down the shift key or the ctrl key.

To find a reference, click on **Find Reference** then enter the name of the reference to find.

The details displayed in the left hand panel can be saved to an external comma delimited file by clicking on **Save as CSV** then selecting the name of the file to be saved as. These details can also be printed by clicking on **Print**.

To remove Answer Point Groups from the right hand grid, highlight them and click on **Delete All Groups**

#### Import Answer Point Groups from CSV

On the main Manage Answer Point Groups screen, click on **Import Answer Point Groups from CSV**. Click **Open CSV** and select where you want to import your file from and click **Open**. You will then be asked "Does the first line contains header information?" Reply as appropriate and the Import process will start.

When completed a message will tell you "Operation Complete. Click Save Changes to record changes". Click **OK**.

## Community Groups

Community Groups provide the facility to enable reports to be produced for pre-defined groups of inbound numbers. The names of the Community Groups and the inbound numbers within the groups are defined using the Manage Community Groups facility on the Home Page or Report tabs.. The groups apply to all projects for which the data has been imported using the same BT Account reference.

To create or edit Community Groups click the **Manage Community Groups** link. A form is displayed offering three options. . To retrieve numbers information from the current project click **Retrieve Numbers from Call information** or to update existing information with the latest details click **Update Numbers From Call Information**. A message will be displayed on completion.

### Edit Community Groups

Click on **Edit Community Groups**.

A list of the references retrieved will now be displayed on the left of the screen. To add a community group name, click on **Add** under the right hand panel then type in the name of the group. Click **OK** and the name will be added to the panel. Continue to add names as required. To apply the Community Group names to the references, click on a reference or hold the shift key down to select a group of references, then double click the Group name to be applied from the right hand box. You can choose to apply the Community Group Name as Community Group Name, Community Group Name 2 or Community Group Name 3 by checking the appropriate radio button beneath the Community Group Name box. Continue to set up the Community Number Groups then click on **Save Changes** to save the details. Exit the screen on completion.

To edit a Community Number Group name, click on the name in the right hand panel then click **Edit**. Type in the new name then click **OK**. The name will be updated in the right hand panel and also for every instance where it occurs in the left hand panel.

To delete a group name, click on the name in the right hand panel then click **Delete**. The name will be deleted from the right hand panel and also from every instance where it occurs in the left hand panel.

To add a reference enter the number in the **Add Inbound Number** area and click **Add**.

To remove a reference and its associated Community Group, click on the reference in the left hand panel then click **Delete Selected Reference**. Click **Save Changes** before exiting the screen. Multiple entries can be selected by either holding down the shift key or the ctrl key.

To find a reference, click **Find Reference** then enter the name of the reference to find.

The details displayed in the left hand panel can be saved to an external comma delimited file by clicking **Save as CSV** then selecting the name of the file to be saved as. These details can also be printed by clicking **Print**.

To Remove Community Groups from the right hand grid, highlight them and click **Delete All Groups**

**In the Summary by No Answered Calls, Summary by No Ineffective Calls, Calls to Each Inbound Number and Cost Revenue by In bound Number for all Groups reports, there is a button to select "View by Community Groups". In all instances this report will show all community groups from all three columns. Where a telephone number has two or**

**more community groups applied to it the values associated with those numbers will be applied to each of the applicable groups.**

**The totals at the top of the report however, to show the correct totals as if the numbers were in only one Community Group, therefore the totals at the top of the report will not always match the totals of the value in the report.**

### **Import Community Groups from CSV**

On the main Manage Community Groups screen Click on **Import Community Groups from CSV**. Click **Open CSV** and select where you want to import your file from and click **Open**. You will then be asked "Does the first line contains header information?" Reply as appropriate and the Import process will start.

When completed a message will tell you "Operation Complete. Click Save Changes to record changes". Click **OK**.

Before saving the user will need to select either of the following options;

**Delete Existing Entries** - This will overwrite all existing entries with the information contained in the CSV file

**Keep Existing Entries and not overwrite** - This option will add any information contained in the CSV file which was not previously available. No existing entries will be overwritten

## Customer Groups

Customer Groups provide the facility to enable reports to be produced for pre-defined groups of callers. The names of the Customer Groups and the callers within the groups are defined using the Manage Customer Groups facility on the Home Page or Report tabs. The groups apply to all projects for which the data has been imported using the same BT Account reference.

When a project is selected on the reports selection screen, the Customer Groups selector is automatically filled with the names of the Customer Groups which match the BT Account reference for the selected project. Select the Customer Group option to display the Customer Groups drop down selector. Select a Customer Group from the list to apply to the reports.

To create or edit Customer Groups click the **Manage Customer Groups link**. A form is displayed offering three options. Click **Retrieve Customer Details From Call Information**. On the next screen choose from the 5 options displayed, depending on how you want to group your callers, then click **Retrieve Data**. Once the data has been retrieved, click **Save Changes**. To update existing information with the latest details click **Update Customer Details From Call Information**.

### Edit Customer Groups

Click on **Edit Customer Groups**.

A list of the references retrieved will now be displayed on the left of the screen. To add a customer group name, click **Add** under the right hand panel then type in the name of the group. Click **OK** and the name will be added to the panel. Continue to add names as required. To apply the Customer Group names to the references, click on a reference or hold the shift key down to select a group of references, then double click the Group name to be applied from the right hand box. Continue to set up the Customer Groups then click **Save Changes** to save the details. Exit the screen on completion.

To edit a Customer Group name, click on the name in the right hand panel then click **Edit**. Type in the new name then click **OK**. The name will be updated in the right hand panel and also for every instance where it occurs in the left hand panel.

To delete a group name, click on the name in the right hand panel then click **Delete**. The name will be deleted from the right hand panel and also from every instance where it occurs in the left hand panel.

To remove a reference and its associated Customer Group, click on the reference in the left hand panel then click **Delete Selected Reference**. Click **Save Changes** before exiting the screen. To find a reference, click **Find Reference** then enter the name of the reference to find.

The details displayed in the left hand panel can be saved to an external comma delimited file by clicking **Save as CSV** then selecting the name of the file to be saved as. These details can also be printed by clicking **Print**.

### Import Customer Groups from CSV

This facility is used where you want to import customer group details from a csv file into the project database.

On the main Manage Customer Groups screen, click on **Import Customer Groups from CSV**. Click **Open CSV** and select where you want to import your file from and click **Open**. You will then be asked "Does the first line contains header information?" Reply as appropriate and the

Import process will start.

When completed a message will tell you "Operation Complete. Click Save Changes to record changes". Click **OK**.

Next you need to select which type of reference has been imported (TV Region, PostCode etc), Select as appropriate and click **Save Changes** to keep the import or **Clear Import** to cancel any changes made.

## Calling Number Groups

Calling Number Groups provide the facility to enable reports to be produced for pre-defined groups of calling numbers. The names of the Calling Number Groups and the callers within the groups are defined using the Manage Calling Number Groups facility on the Home Page or Report tabs. The groups apply to all projects for which the data has been imported using the same BT Account reference.

When a project is selected on the reports selection screen, the Calling Number Groups selector is automatically populated with the names of the Calling Number Groups which match the BT Account reference for the selected project. Select the Calling Number Group option to display the Calling Number Groups drop down selector. Select a Calling Number Group from the list to apply to the reports.

To create or edit Customer Groups click the **Manage Calling Number Groups** link. A form is displayed offering three options. Click **Retrieve Calling Numbers From Call Information** to retrieve the calling numbers from the call information or to update the references using the latest billing data, click **Update Calling Numbers From Call Information** . A message will be displayed on completion.

### Edit Calling Number Groups

Click on **Edit Calling Number Groups** .

A list of the references retrieved will now be displayed on the left of the screen. To add a calling number group name, click **Add** under the right hand panel then type in the name of the group. Click **OK** and the name will be added to the panel. Continue to add names as required. To apply the Calling Number Group names to the references, click on a reference or hold the shift key down to select a group of references, then double click the Group name to be applied from the right hand box. Continue to set up the Calling Number Groups then click **Save Changes** to save the details. Exit the screen on completion.

To edit a Calling Number Group name, click on the name in the right hand panel then click **Edit**. Type in the new name then click **OK**. The name will be updated in the right hand panel and also for every instance where it occurs in the left hand panel.

To delete a group name, click on the name in the right hand panel then click **Delete**. The name will be deleted from the right hand panel and also from every instance where it occurs in the left hand panel.

To add a calling number click on **Add Calling Number** enter the calling number and click ok.

To remove a reference and its associated Calling Number Group, click on the reference in the left hand panel then click **Delete Calling Number**. Click **Save Changes** before exiting the screen. Multiple entries can be selected by either holding down the shift key or the ctrl key.

To find a reference, click **Find Calling Number** then enter the name of the reference to find.

The details displayed in the left hand panel can be saved to an external comma delimited file by clicking **Save as CSV** then selecting the name of the file to be saved as. These details can also be printed by clicking **Print**.

To remove a calling number from a group, highlight the number in the grid and click **Remove Calling Number from group**.



### **Import Calling Number Groups from CSV**

To import Calling Numbers from a comma delimited file click **Import From CSV File**, select the required file and click open, a display panel showing you the first column of data found in the selected csv file will open. Click the appropriate link for the data displayed, the next column of data will be shown in the display panel. Map the data to the links as required. If a column of data is shown that you do not want to use click on **Next/Ignore**. Click **Previous** to go back one column of data. To ignore the first row, which may display header information, check the **Ignore 1st Row** radio button. When you have completed your selection of data click **Start Import**. The message will appear "Do you want to merge the new numbers with existing numbers? Click **Yes** to append new records without over-writing existing details or **No** to over-write existing entries. When completed a message will appear stating, "CSV file loaded successfully". Click **OK** followed by either **Save** or **Cancel**.

## Edit Calling Number Groups from a Report

Calling Number Groups can be edited from the Repeat Call Analysis by Calling Location and Call Analysis by Multiple Inbound Number reports. Right click on a calling number in the report and the edit form will be displayed.

This will show the selected Calling Number and, if it has already been allocated to a group, it will show the current entry. A new entry can be applied by typing into the Calling Number Group text box next to the Calling Number. Alternatively a number can be selected from the list displayed on the right of the form by double clicking the required number. The add, edit and delete links operate as described in the Calling Number Groups Section. After editing the Group details, click **Save Changes** to save the details or **Cancel Changes** to disregard the changes, then click **Exit** to return to the report.

Note that changes made from this screen will be reflected in the Calling Number Group screen. After editing an entry, the selected report will be re-run to update the entry.

## Alias Management

This facility allows you to set up **User Defined Names** to be applied in place of Inbound Numbers/Answer Points on selected reports within the Report section. From these reports it is possible to switch between showing an **Alias** or the **Inbound Number, Answer Point** or both **Inbound Number and Answer Point**

Originating details that are read in from the Enhanced RawCall Data can be used to set up the Alias detail by using the Retrieve Information facility.

Using the Append Inbound Number/Answer Points From CSV File option a set of Inbound Numbers and Answer points can be appended by importing from a csv file.

Within the Apply to Reports section the user selects which option they wish to use the Aliases with. The options are Replace Inbound Numbers and Answer Points with Aliases, Replace Inbound Numbers with Aliases, Replace Answer Points with Aliases and Do Not Apply Aliases.

The Alias Management facility is located in the Utilities section of the BT Inbound Analyst.

Click on the Alias Management link then click Select Project to select the project. Note that if you have not yet created a project you must first do so from the Import Data facility on the main screen.

## Retrieve Information

The first stage to set up **Alias** details is normally to retrieve the inbound numbers and answer points from the billing information. Click this [link](#) and a form will be displayed offering a number of options. Only one option can be chosen.

Select the appropriate option then click **Retrieve Data**. A message will be displayed asking "Do you want to delete existing entries?". If you answer **No** to this question, existing entries will be left unchanged and any duplicate entries found whilst retrieving will be ignored. If you answer **Yes** to this question another warning will be displayed. If you again answer **Yes**, all existing entries will be removed and the details retrieved from the billing information.

Once the details have been retrieved an Operation Complete message will be displayed. Click **Save Changes** to save the details or **Cancel Changes** to revert to previous data. Click **Exit** to exit from the form.

To apply aliases to the retrieved telephone numbers refer to Edit Aliases.

## Append Information

This facility is used where you want to append information from a csv file into the project database. Details read in are appended to existing records without previously deleting records.

Click on **Append Information from Comma Delimited (csv) file** and the **Select Import File** option will be displayed. Click the link and select where you want to import your file from and click **Open**. The screen will change to show the facility for importing. At the top of the screen the file selected will be shown. In the centre of the screen there is a display panel showing you the first column of data found in the selected csv file. Click on the appropriate link for the data displayed, the next column of data will be shown in the display panel. For the **Use** link a '2' in the data indicates an Inbound Number and a '3' indicates an Answer Point. Map the data as required. If a column of data is shown that you do not want to use click on **Next**. **Previous** will take you back one column of data. When you have completed your selection of data click **Start Import**. The message will appear "Do you want to over-write existing Aliases? Click **Yes** to over-write or **No** to only append new records without over-writing existing details. You will then be asked "Do you want to skip the first line because it contains header information?" If you click **Yes** the Import process will start. When completed a message will tell you "Import Complete". Click **OK** and the screen will change. Select either **Save** or **Cancel**.

## How to Add an Inbound Number/Answer Point

On the Edit Inbound Numbers/Answer Points form, click **Add Alias**. You can add just a single number or a continuous range of numbers.

If you want to add a range of telephone numbers (for example DDI number range) then enter the first number in the range in the **Start Telephone Number** box and add the last few digits of the last number in the range to the **To Telephone Number** box. If you only want to add a single number ignore the **To Telephone Number** box. You can also add the **Alias** to apply to the number range in the **Alias** box. If this name does not already exist in Alias Management it will be automatically added to the list of names in the right hand grid on completion. Alternatively names can be added after the telephone numbers have been saved. Click **OK** to add the numbers or **Cancel** to exit without adding the numbers.

Once the numbers have been added **Save Changes** must be clicked to save the details.

## Edit Alias Details

To view or edit the Alias details click **Edit Aliases** on the Alias Management screen.

Any Inbound Number/Answer Point details currently created will be displayed colour coded in the grid on the left of the screen. Note that this grid also shows the Alias for each number where it has been set up. Each of the Aliases created will be displayed in the grid to the right. Below this grid are 3 links – Add, Edit and Delete.

### Add

To Add a new name click on **Add**. A box will be shown with the message "Please enter the Alias". Type in the name and click **OK**. Use **Cancel** if you do not want to add the new name.

### Edit

**Edit** is used when you want to rename a name throughout the whole project. First click on the alias you want to edit. This will highlight it. Click on **Edit** and the message will appear "Are you sure you want to rename the Alias? This will change the alias throughout the project. Are you sure you want to continue?" Click **Yes** to proceed or **No** to stop the edit. If you click **Yes** the message will appear "Please Enter the Alias you wish to apply to xxxx " where xxxx is the current alias. Enter the name and click **OK**. The message will now tell you "Alias renamed. Please save the changes by clicking on **Save Changes**."

### Delete

**Delete** is used when you want to delete an Alias throughout the whole project. First click on the name you want to delete. This will highlight it. Click on **Delete** and the message will appear "Are you sure you want to delete the selected Alias? This will remove the Alias from all Inbound Numbers/Answer Points Numbers. To submit your changes please click save." Click **Yes** to proceed and **No** to stop the delete. If you click **Yes** you will have removed the Alias from the set up table and throughout the project.

### Save to CSV

To save details to a comma delimited (CSV) file, click **Save as CSV**, select the appropriate file name and destination and click **Save**.

## Find an InboundNumber/Answer Point

Below the telephone number list, the facility to Find a Telephone Number is located. Click on **Find Inbound Number/Answer Point**. The following message "Please Enter the Inbound Number/Answer Point you wish to Search for" and a box to type the details in will appear with the option to proceed on OK or Cancel. Click **OK** and the details will be highlighted in the main grid. If the details are not found a message will be displayed to inform you.



## Delete Selected Inbound Numbers/Answer Points

To delete selected Inbound Numbers/Answer Points numbers, click on the number in the grid to highlight it then click the **Delete Inbound Numbers/Answer Points**. A range of entries may be selected by clicking on the first entry in the range then holding down the shift key and clicking on the last entry in the range. If multiple entries are selected you will be prompted to confirm that you want to delete the selected numbers. Click Save Changes to commit the changes.

## Understanding Edit Aliases Colours

To help the user to identify which telephone numbers are **Inbound Numbers, Answer Points, both Inbound Numbers and Answer Points** or **Numbers not identified from the Bill** a series of **colour codes** are used within the Inbound Number/Answer Point grid.

Green background identifies Inbound Number

Lilac background identifies Answer Point

Grey background identifies Number Not Identified from Bill

The colouring is set at the time that the numbers are added to Alias Management. These colours are **NOT** updated with subsequent imports.

Options exist within the Edit Alias facility to Save as a csv and Print the detail held in the Inbound Number/Answer Point grid.

## Applying Aliases to Reports

To apply the Aliases to selected reports click **Apply Aliases to Reports** and four options will appear. The available options are **Replace Inbound Numbers and Answer Points with Alias entries, Replace Inbound Numbers only with Alias entries, Replace Answer Points only with Alias entries and Aliases not Applied.**

By selecting an option the user chooses how they wish the Alias entries to be shown on the available reports. The user may at any time change the option they wish to apply by selecting the new option. Once a selection has been made the user can go to the Itemised Report screen and run the report, for example All Call Records, and view the Aliases in place of the relevant Inbound Numbers/Answer Points. To turn off the Aliases click **Disable Aliases** The report will be run showing Inbound Numbers/Answer Points and the option will change to **Enable Aliases** . Using this option the user can switch the Aliases on or off as required.

## Edit Aliases from a Report

Alias entries can be edited whilst a report to which Aliases can be applied is displayed. Irrespective of whether the Alias management is enabled, right clicking on a telephone number or Alias entry on the report will result in an edit form being displayed.

This will show the selected Inbound Number/Answer Point and, if it already has an Alias, it will show the current entry. A new entry can be applied by typing into the Alias text box next to the Inbound Number/Answer Point. Alternatively a number can be selected from the list displayed on the right of the form by double clicking the required entry. The add, edit and delete options operate as described in Edit Aliases. After editing the Alias details, click **Save Changes** to save the details or **Cancel Changes** to not save the changes, then click **Exit** to return to the report.

Note that changes made from this screen will be reflected in the Alias Management screens. After editing an Alias entry, the selected report will be re-run to update the entry.

## Cost Centre Management

The cost centres are referenced to the report data by the Inbound Number. The Inbound numbers are always stored without spaces and must be entered accurately to be effective.

The Cost Centre Management link can be found in the 'Manage Facilities' area of the Homepage and under the main tabs in any of the reports pages.

Note - When setting up Cost Centres, if you have not yet created a project you must first do so from the Import Data facility on the main screen.

The Cost Centre Management facility allows you to

- Edit the cost centre structure information used in the reports
- Assign Cost Centres to Inbound Numbers
- Add Inbound Numbers
- Find Inbound Numbers
- Delete Inbound Numbers
- Retrieve Previously Deleted Inbound Numbers
- Remove Cost Centre Details
- Import Cost Centres from a Comma Delimited (CSV) file
- Save the Cost Centre structure to a Comma Delimited (CSV) file
- Remove all Cost Centres from the project - but leave the Inbound Numbers

## Edit Cost Centres Structure

When you first view this screen the Inbound Numbers will already be shown in the Inbound Number column - populated during import. To sort the grid click on the heading of the desired column at the top of the grid.

The bottom of the screen is divided into 5 boxes, one for each cost centre level. At the base of each box there are three links for Add, Edit and Delete. These links are used to set up the cost centre levels. After making changes to the cost centres the details must be saved by clicking the 'Save Changes' link.

### Add

To Add a new cost centre, for example Level 1, click on the Add link under the Cost Centre 1 list box. A box will be shown with the message "Please Enter the Cost Centre Name you wish to add for Cost Centre Level 1". Type in the cost centre name and click 'OK'

Use 'Cancel' if you do not want to add the new name.

### Edit

The Edit link is used when you want to rename a cost centre throughout the whole project. First click on the cost centre name you want to edit. This will highlight it. Click on 'Edit' and the message will appear "Are you sure you want to rename the cost centre? This will change the cost centre name throughout the project. Do you want to continue?" Click Yes to proceed or No to stop the edit. If you click Yes the message will appear "Please Enter the new Cost Centre Name you wish to apply to (followed by the cost centre name). Enter the name and click OK. The message will now tell you " Cost centre renamed". Please save the changes by clicking on the "Save Changes" link.

### Delete

The Delete link is used when you want to delete a cost centre throughout the whole project. First click on the cost centre you want to delete. This will highlight it. Click on 'Delete' and the message will appear "Are you sure you want to delete the selected Cost Centre? This will remove the Cost Centre from all Inbound Numbers. To submit your changes please click save." Click 'Yes' to proceed or 'No' to stop the delete. If you click 'Yes' you will have removed the cost centre from the set up table and throughout the project.

### Save Changes

The link to save changes made to the cost centres is located at the bottom of the screen. Click on the link to save your changes.

### Cancel Changes

The link to cancel changes made to the cost centres is located at the bottom of the screen. Click on the link to cancel your changes.

## **Assigning Cost Centres to Inbound Numbers**

Select the Inbound Number you wish to assign a Cost Centre to by clicking on the left column of the row and then double click on the required Cost Centre from the levels below.

Hold down the SHIFT key whilst selecting numbers for selecting a group of records.

Hold down the Ctrl key to select multiple numbers.

## **Add Inbound Number**

Below the main cost centre display grid the facility to Add an Inbound Number is located.

Type in the Inbound Number with no spaces and click on the Add button. This number will be added to the main grid. In future, when data is imported with the same BT Account and Config Number the number will be automatically applied to the Inbound Number list.

Click the 'Save Changes' link to save the number added.



## Find an Inbound Number

Below the main cost centre display grid the facility to 'Find Inbound Number' is located.

Click on the 'Find Inbound Number' link. The following message "Please Enter the Inbound Number you wish to Search for" and a box to type the number in will appear with the option to proceed - 'OK' or 'Cancel'.

Click 'OK' and the number will be highlighted in the main grid. If the number is not found a message will be displayed to inform you.

## Delete Inbound Number

Below the main cost centre display grid the facility to Delete an Inbound Number is located.

This function only allow deletion of numbers that have been manually added to the Inbound Number list, and not any numbers added automatically during data import or via a CSV import.

Highlight the row in the grid of the Inbound Number you wish to delete then click on the 'Delete Inbound Number' link. You will be prompted to confirm the removal of the number. Upon accepting the prompt the number will be deleted from the main grid.

Click the 'Save Changes' link to save the changes made.

## Retrieve Previously Deleted Inbound Numbers

Below the main cost centre display grid the facility to 'Retrieve Deleted Inbound Number' is located.

This function allows the retrieval of previously deleted numbers. As only user added numbers can be added and deleted then only these deleted numbers will be available for retrieval.

Click the 'Retrieve Deleted Inbound Number' link, a window will be displayed with a list of previously deleted numbers. Choose the service number to be retrieved and click 'Retrieve'.

The number will be retrieved and added to the grid on the Cost Centre Management screen.

Click the 'Save Changes' link to save the changes made.

## Remove Cost Centre Details

Below the main cost centre display grid the facility to 'Remove Selected Cost Centre Detail' is located.

This function allows the removal of all Cost Centre details for an Inbound Number. It will leave only the Inbound Number in the grid.

Select an Inbound Number by clicking on the row and click the 'Remove Selected Cost Centre Detail' link, a window will be displayed asking for confirmation of removal of the cost centre details for the chosen Inbound Number. Select 'Yes' to delete the details or 'No' to abort the process.

Upon successfully deletion the Inbound Number will remain on the grid on the Cost Centre Management screen but all Cost Centre details will be cleared.

Click the 'Save Changes' link to save the changes made.

## Import Cost Centres from a Comma Delimited (CSV) file

At the bottom left hand side of the screen the facility to 'Import Cost Centres from Comma Delimited (CSV) File' is located.

This function allows the import of a Cost Centre structure for Inbound Numbers from a pre defined format, Comma Delimited text file.

The function will delete the previously entered Cost Centre structure and all Cost Centre assignments from the Inbound Number in the main management grid.

Click the 'Import Cost Centres from Comma Delimited (CSV) File' link, a window will be displayed asking for Selection of the Import File.

Clicking on the 'Select Import File' link will display a lookup box for locating the CSV text file - this file must have a .CSV file extension.

Once the file has been located and opened each section of the text file will be displayed with the section heading - this section needs to be identified as being either the 'Inbound Number' or Cost Centre 1 - 5.

As each section is identified, the selection link is grayed and cannot be selected again. The next section in the text file will be displayed awaiting identification. All the sections of the file can be navigated using the 'Next' and 'Previous' links.

Once all sections have been identified - click on the 'Start Import' link - a window will be displayed requesting confirmation - 'All Cost Centre records will be deleted, then records will be imported from the CSV file. Also note that any Inbound Numbers imported from a CSV file cannot be removed individually. Do you want to continue?'. Clicking the 'Yes' button will start the process, 'No' will abort the process.

If the CSV file has a first line that contains header information a window will display asking for confirmation that this line is to be skipped during the import.

Upon successful import of the data from the CSV file the management grid will be populated with the newly imported data and the Cost Centre Level 1 to 5 structure selection boxes will also be updated to reflect the new Cost Centre structure.

Click the 'Save Changes' link to save the changes made.

\* An example of the CSV format

```
"Inbound Number","CostCentre 1","CostCentre 2","CostCentre 3","CostCentre 4","CostCentre 5"  
"0800XXXX000","CC1","CC2","CC3","CC4","CC5"  
"0800XXXX001","CC1","","CC3","",""  
"0800XXXX002","CC1","","","CC4",""  
"0800XXXX003","CC1","","",""
```

## **Save the Cost Centre structure to a Comma Delimited (CSV) file**

At the bottom left hand side of the screen the facility to 'Save as CSV' is located.

This function allows the Cost Centre structure for all Inbound Numbers in the main grid to be save to a Comma Delimited text file.

Click the 'Save as CSV' link, a window will be displayed asking for the file name to be used for the exported data and it's location on the users machine.

Once the file and save location has been specified, click on the 'save' button.

A window will be displayed requesting confirmation of the following 'Warning - Only allocated Cost Centres will be saved - Cost Centre names that have not been allocated to an Inbound Number will not be saved to this file'. Click 'Ok' to continue.

Upon successful completing the Save function the CSV file will be available in the location specified during the Save process.

## **Remove all Cost Centres from the project - but leave the Inbound Numbers**

At the bottom left hand side of the screen the facility to 'Remove All Cost Centres and Leave Inbound Numbers' is located.

This function allows the removal of all the Cost Centre structure for all Inbound Numbers in the main grid, and also the removal of all the Cost Centres setup in the Cost Centre Level 1 - 5 boxes.

Click the 'Remove All Cost Centres and Leave Inbound Numbers' link, a window will be displayed asking for confirmation of deleting all Cost Centres associated with the selected project, this will leave only the Inbound Numbers listed in the main grid.

Following the removal of the Cost Centres from the main grid, confirmation will be requested for the removal of all Cost Centre Names from the Cost Centre Level 1 - 5 selection boxes.

Upon removal of both sets of information the grid will remain with only Inbound Numbers listed and the Cost Centre Level 1-5 selection boxes will be empty.

Click the 'Save Changes' link to save the changes made.

## Utilities

### Password Protection

When the program is first opened there is no password protection. To apply a password, click the **Password Protection** link on the Homepage. Enter a name and a password. The password must be verified by typing the same password into a second box. The password is protected from view as it is typed. The back delete key can be used if mistakes are typed. Click **Save**. Password protection will then be applied the next time the program is opened. A user will then be asked to enter the Name and Password in order to access the program.

To edit an existing password, open the program using the existing password then click the **Password Protection** link. Type the new Name and Password then click **Save**. If the name that is entered already exists, the password for that name will be over-written. If the name does not exist, existing names/passwords will be left in place and the new name will be added. This is to allow multiple users under password control.

To remove password protection, open the program using the existing password then click the **Password Protection** link. Click **Remove Password Control**. All passwords will be deleted from the computer and the form will disappear.

To exit from the Password form without saving a password, click **Cancel**. If you click **Save** without entering a name or a password, the form will remain in position, nothing will be saved and a message will be displayed asking that you complete the form. If the password is not correctly validated, the form will remain in position, nothing will be saved and a message will be displayed stating that the password was not validated.



## Database Management

This facility allows existing project databases to be removed. Click the **Database Management** link on the homepage, click on the database name in the list and then click **Open**. A message will appear asking you to confirm you wish to delete the chosen database, click **Yes** or **No** as appropriate.

On completion a message will be displayed.

Note that once you confirm deletion, a database cannot be restored.

## Folder Management

This functionality enables you to set the location of the folders the BT Inbound Analyst uses to store data. This is particularly useful for users who have restricted access to the c:\ program files location. **Please note that the folders you set for this functionality must be writeable.**

The Folder Management facility is located on the Homepage, in the utilities section.

The default settings currently set to C:\Documents and Settings\All Users\Application Data\BTBA, if you would like to select a different location click the relevant 'Set' link and navigate to the required path. If you then decide you would like to use the default path click **Set Directory to Shared (default)** and all folder locations will return to the default setting.

The Folder Management screen will indicate if the selected folder is writeable, if 'No' shows next to the selected path this means that the folder selected is not writeable or that the folder has not yet been created. If the folder has not been created you will need to exit out of Folder Management and create the required folder. .

You can choose to move your files from the BT Inbound Analyst folder or just copy them by checking/unchecking the **Move Files** box as appropriate.

Once you have selected your location **Save** will be enabled, click this to move/copy your files.

## Account Settings

This function allows you to make changes to account settings. From the homepage click the **Account Settings** link.

Select the project you require to make the changes to.

### Delete First Call Records

This allows you to delete first call records up to and including a specified date, these records are displayed in the **New Callers** report. Click **Delete First Call Records**, enter the date for which you wish to delete the records (any records prior to this date will also be deleted) and click ok. A confirmation message will be displayed on completion.

## Screen Resolution

### **Screen Resolution**

Inbound Analyst is optimised to operate with a screen resolution of 1024 by 768 but will auto re-scale for screen resolutions of 800 by 600.

## Further Assistance

### **Support**

For further information or support please telephone 0808 100 1088 or email: [BTIA@bt.com](mailto:BTIA@bt.com)