BT Analyst Converge user guide

Empowerment through information

Contents

1. Introduction – what is BT Analyst Converge?

BT Analyst Converge is a powerful, user-friendly, online billing analysis tool.

You can access and investigate your billing data whenever you want, from wherever you are, with BT Analyst Converge. All you need is an Internet connection and Internet Explorer 6 or above.

And because your BT OneBillPlus (OneBill) data is uploaded automatically, you don't have to wait for your CD or manually import data yourself. We'll send an email as soon as your data is ready to view. As well as being faster, this can help reduce paper wastage, as you have complete control over which reports, bills and invoices are printed.

We have developed BT Analyst Converge to meet your needs – and your feedback continues to shape its evolution. The latest updates and developments are highlighted on the welcome screen as soon as they are available.

The initial log in screen now contains information about updates. There is also a message board, and links to our online training and Frequently Asked Questions. So before you click through the application please take a few minutes to see if any changes which are relevant to you have been made.

2. In the beginning...

Logging in to BT Analyst Converge takes you to a list of the OneBill invoices currently available for you to analyse. There is also an archive of bills which can be retrieved and analysed as required, found under **OneBill, Tools, Download.** If you need a OneBill to be made available for analysis, use the **feedback** tab to request this.

You can give an account a more memorable name by clicking in the **Friendly Name** column. You also have the opportunity to select an individual or multiple invoices for the same OneBill to view as an online version of your paper invoice.

If you need to get in touch with your billing contact, their details are in the top left hand corner of the invoice. Clicking on any of the blue hyperlinks on the invoice will take you to the **All Services Bill by Service** report, which separates out the different charge elements by service type, eg: telephony, BT Mobile, Featurenet etc and offers further drill-down if the hypertext is blue or red. Clicking on any hypertext will move you from the **OneBill** tab to either the **Fixed**, **Mobile** or **Private Circuit** tab.

Whenever a graph/bar chart appears, click on the results inside the graph or bar to access more information.
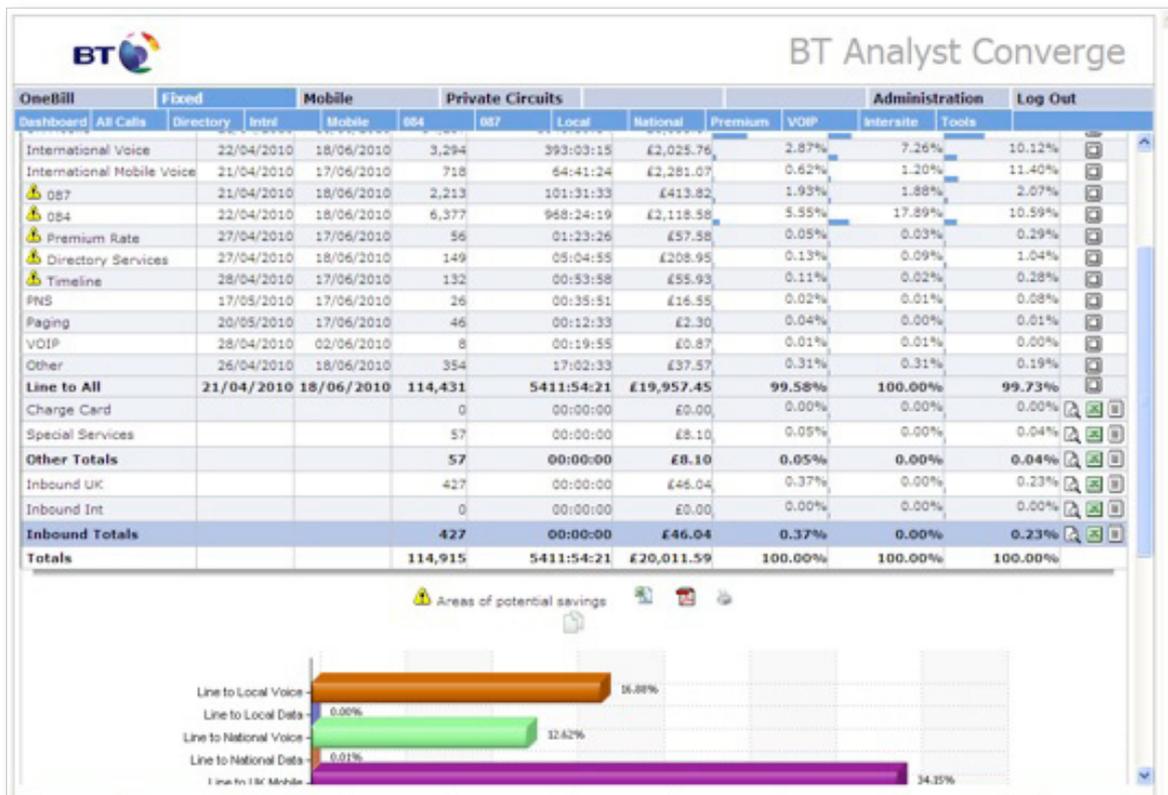
You can output the reports in different formats depending on whether you need to save, export, or print them.

3. Tabs and menu bars

The tabs at the top of the screen include **OneBill, Fixed, Mobile, Private Circuits** and **Administration.** You will always know where you are as the section you are currently working within is dark blue – the other sections are light blue. The top menu bar that sits under the tabs contains options relevant to the section you are currently working within.

There are some important functions along the bottom tool bar, particularly the **Options** tab which allows you to switch on some key features, for example cost centre levels, phonebook and service numbers as well as a short cut to change your invoice selection.

4. Everything about the OneBill tab...

Look here for information across your total OneBill – including a copy of the invoice you've selected, the VAT statement. A key feature is the download option under tools which gives you access to the raw data itself, invoice by invoice, in a similar format to that provided by your OneBill CD. There is usually a stack of historic raw data available for selection, and you just need to follow the online prompts to save this to your PC or server.

5. Dashboard...in the Fixed, Mobile or Private Circuit tabs

There is a **Dashboard**, always located in the top left hand side, on each of these tabs. It's the place to look for all the important reports, including, within **Fixed**, the **Hotspot** report**, Call Profiles for Calling Number, Called Number** and by **Phonebook** names, **Zero Usage** report, **Telemarketing** report and the **Report Wizard.**

Take care when using the **Bill Report** feature as it will take you back to the OneBill tab, even if you are in the **fixed** tab when you start.

The **Hotspot** report is really useful to get the key highlights on the invoice or invoices selected. The **Calling, Called** and **Phonebook profiles** give you a quick way to retrieve call information on a particular number. The **Zero Usage** report gives a list of the lines without usage, with the option to exclude any BT Broadband lines. The **Telemarketing** report focuses on charges and volumes of calls for any non-geographic services, whether 0800, 087 or 084. The **Report Wizard** is a four-step route to slicing and dicing call information to home-in, for example, on a particular call type for a particular service number on a particular day.

6. Administration

The key features in the **Administration** tab, are the **Cost Centre, Phonebook** and **Users** tabs. Cost Centres are covered in more detail in Chapter 7 of this User Guide. The **Phonebook** functionality allows you to add a friendly name against any calling or called number and is covered in Chapter 8.

In the **Users** tab, those with a **Primary** level of access can make changes to other company users, including disabling their access. If you have this level of access you will appear in green in the **Edit** column, or red if you don't. To make any changes, simply click in the **Edit** column to open up the fields, make your changes and then submit.

If you need Primary level of access and do not have it, simply contact a Primary user within your company user list and ask them to change this. You don't need to contact BT.

Other tabs include **Format** which allows you to change the font, or font size for example, within the application.

7. Cost centre facility

You can mirror your budgeting and finance structure by creating, managing and reporting on cost centres in BT Analyst Converge. Setting up cost centres when you first use BT Analyst Converge means that you can apportion charges to different parts of your organisation. You can then pull out just this information as a report to email to people, so that they see the details of costs they are responsible for. It is also possible to produce an overall summary report with results displayed by cost centre, so that someone who needs to see how the total costs break down by cost centre can do so. This makes it easier to get to the heart of any budget or finance issues.

There are eight cost centre levels, including Post Code, in BT Analyst Converge, which enables you to accurately label even the most complicated structures and quickly isolate and investigate the information you need to report on.

Cost centre information can be applied to your fixed, mobile, private circuit and Featurenet accounts.

Cost centres for Featurenet services can be applied at account and line level – account level works within the **OneBill** tab, and line level work is within the **Fixed** tab. We have provided these two independent types of cost centres to allow you to identify non-usage charges at site/account level within the overall OneBill charges and then to separately identify any individual line charges within the **Fixed** tab.

Top Tip: If you know you have Featurenet accounts or Featurenet lines but these do not appear in the **Cost Centre** tab, within **Administration** – either as Featurenet accounts/lines with cost centres or without cost centres, then you may need to search for the individual number and reassign the type from Fixed to Featurenet. It may also be missing if the Featurenet account/lines have no usage.

7.1 How to set up and manage your cost centres

Setting up your cost centres couldn't be easier, and there are three ways to do this:

1. To help you get started with cost centre reporting, we've set up a template for you to download, complete and return to us. We will then upload your cost centre data to your account as a one-off service. The template is available from within the Administration tab, Cost Centres.

This will give you a great head start and you can then add, edit and delete your cost centre details as described below.

2. You can also input your cost centre information yourself by clicking on the **Administration** tab at the top of the screen, and then **Cost Centre** on the top menu bar.

The easiest way to start is to select 'fixed lines without Cost Centres' from the drop down menu in the 'Search your Cost Centres as you type' section. You can then update the results as a whole, select several to update, or update on an individual basis.

Top Tip: If you have regional offices you can home-in on the dialling code (eg 0161) within the 'fixed numbers without Cost Centres' to generate just those numbers and update them all at the same time.
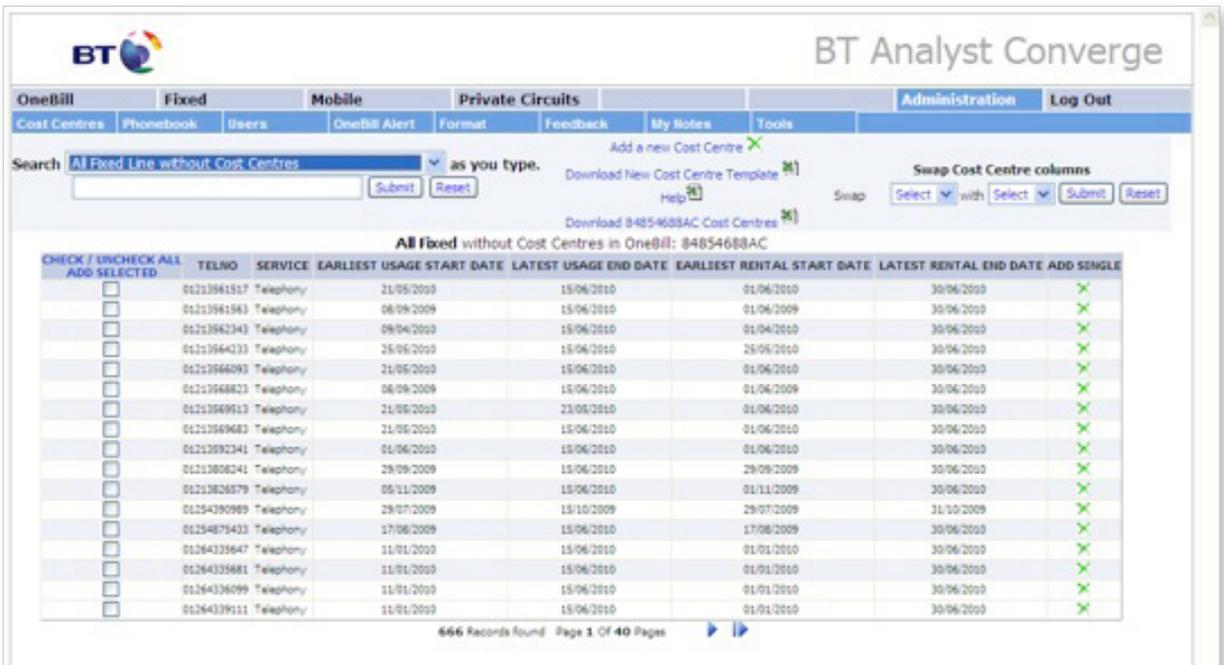
3. You can also choose to 'add a Cost Centre' if you need to add a new number on an individual basis – this is also located in the **Administration** tab, under **Cost Centres.** Clicking on 'add a Cost Centre' brings up a form where you can allocate cost centre labels from those currently within your account or by typing the details in the fields provided.

Top Tip: If you know of a new number which will appear in a future OneBill, you can set up the cost centre structure in readiness by following the 'add a cost centre' route.

Maintaining your cost centres couldn't be easier. If you need to change a cost centre, then this can be done in any of the three ways to set up cost centres. Once your cost centres are switched on (using **Options** on the bottom tool bar), then click on the cross or existing cost centre information to open up the cost centre box to make the changes.

7.2 Filtering results by cost centres

At the bottom of the **Fixed, Mobile** or **Private Circuits** screens, there is a **Cost Centre** menu button with three options: **Wizard, Advanced** and **Selected. Wizard** and **Advanced** are simply different ways of viewing your cost centre hierarchy, and you can choose to work with whichever suits you best. **Selected** shows a summary of every line or number associated with your currently selected cost centres.

To 'filter' or analyse your data on the basis of your cost centres you'll need to go to either **Wizard** or **Advanced** to make your selection, and then choose to **run** or **drill** to make further selections from other cost centre levels.

For example, if the invoice view is displayed and you've made a cost centre selection using the **Advanced** option with the **Cost Centres** tab, the view returned will be the invoice now filtered by the cost centre or cost centres selected. The selection made will show on the invoice itself so you can confirm this at any time.
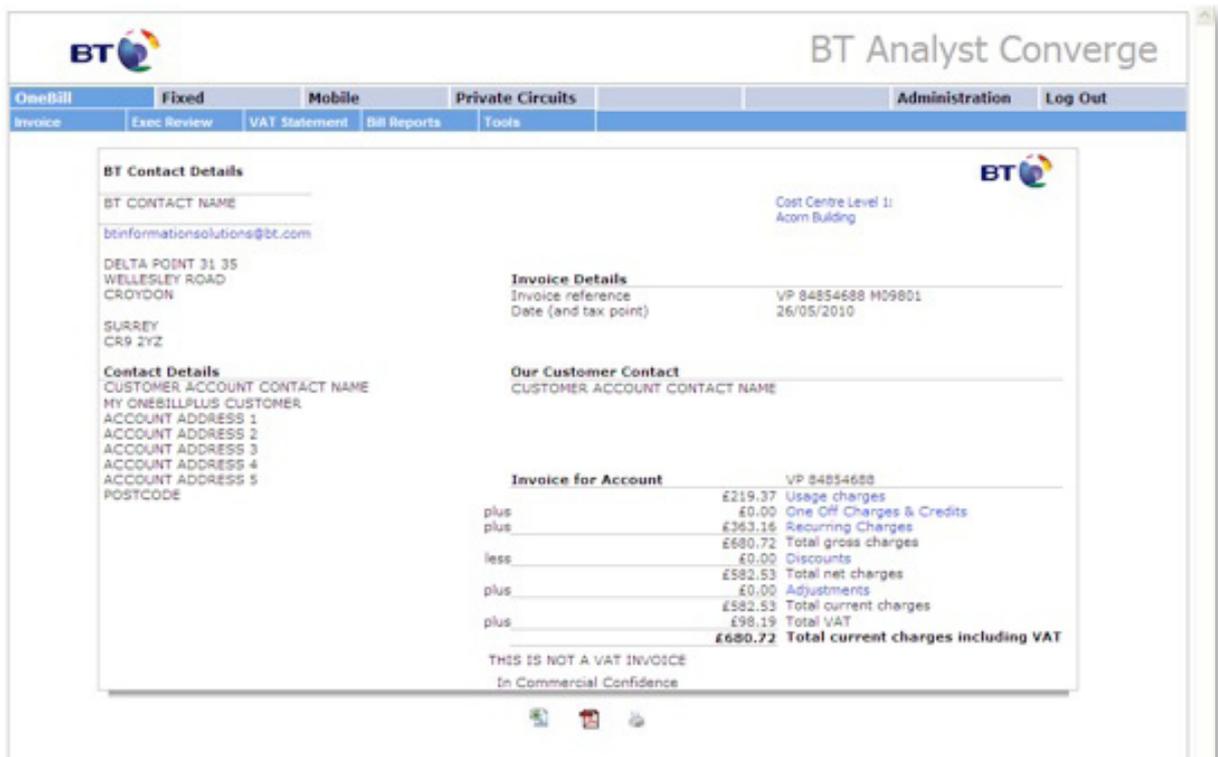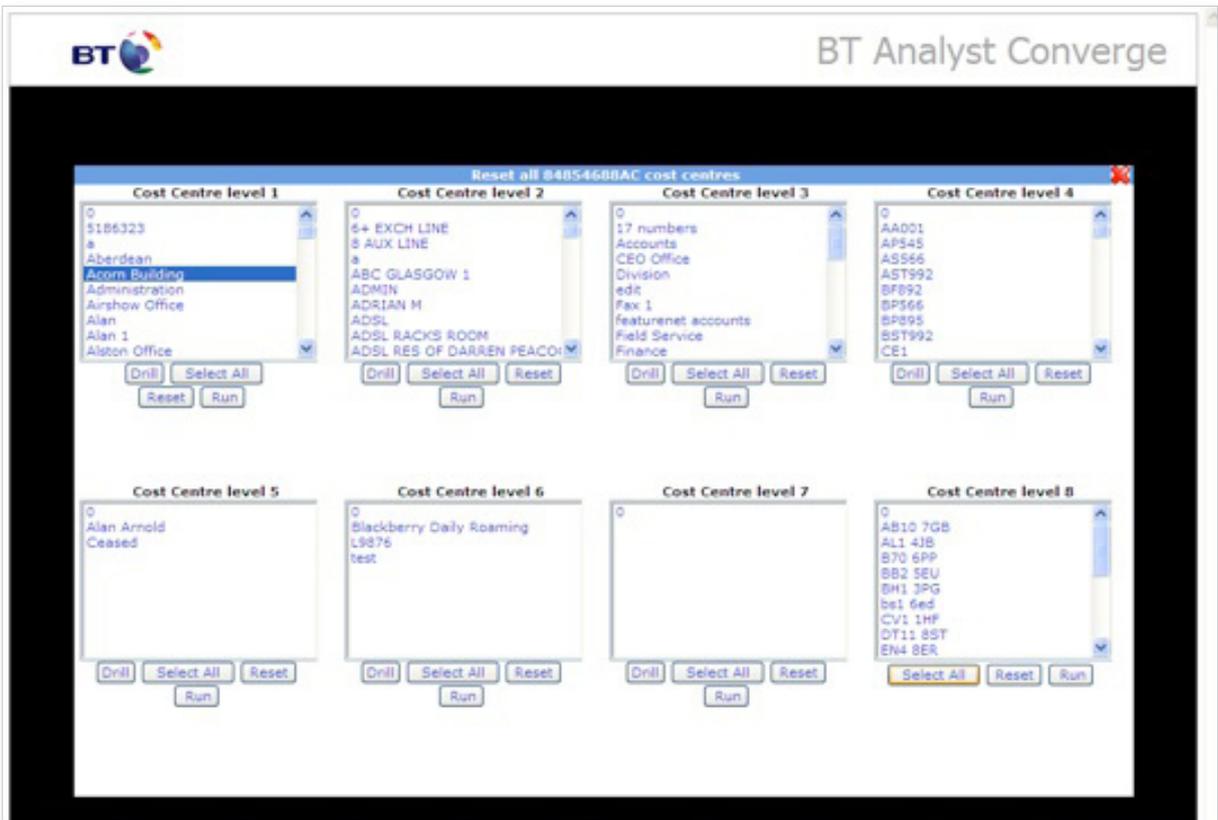
The same principle applies to all the reports available within the application, whether you're in the **OneBill, Fixed, Mobile** or **Private Circuit** tabs.

Top tip: If you've been filtering using the Advanced or Wizard functionality within **Cost Centres** tab, and you want to see the full view again, go to **Options** on the bottom tool bar, and switch off Cost Centre filter options.

7.3 Creating and running reports to include cost centre information

If you want to run reports, for example, the **Bill by Service Number** report, to include cost centre information, then once you are in the relevant report, go to **Options** on the bottom tool bar and make your selection from the **Cost Centre Columns Display Options**. Once you've clicked on submit, the results returned will be the original report selected, but now with additional column or columns showing the cost centres selected.

It's worth noting that within the **OneBill** tab, any selection of an individual cost centre will show information across both **Fixed** and **Mobile** if both services are on the same OneBill and contain the same cost centre information.

As with all reports in BT Analyst Converge you will be able to click on any of the charges shown as a hyperlink to access a more detailed breakdown of the calls made and a graph of the information.

You can then delve further into the information by clicking on any hyperlinks in the **Usage Charges** column indicating that there is usage available for analysis.

Top tip: If you have used the **Advanced** or **Wizard** functionality and want to view the full data again, you need to go to the **Options** screen and change your **Cost Centre Filter Option** back to **Switch Off.**

7.4 Creating a report showing cost centres summary information

To create a quick summary report to see where costs are distributed across different departments, click **Options** and tick the appropriate cost centre level (in this case level 1). Then go to **Bill Reports, Bill by Cost Centre** and either select the product of interest or **All Services**.

The top line may not have an entry in CC1 as any lines without any cost centres allocated will show here. It's simple to see which individual lines do not have a CC1 entry – go to **Bill Reports**, **Bill by Service Number**, **All Services** and any will have a + in this column. To add cost centre information, click on the + to update.

8. Phonebook

It's impossible to know what every telephone number on your report is – even those that come up often. You can use the **Phonebook** to attach a more meaningful label to your numbers – both called and calling. Simply click **Administration** and then **Phonebook** to manage your **Phonebook** entries. Alternatively you can click on a number when it appears in a report and label it then.

The **Phonebook** facility can be switched on via **Options** in the bottom menu bar – to show two additional columns in the report you're viewing, for the calling and called number.

> **Top Tip: Premium rate numbers are very expensive – by viewing report results with Phonebook turned on, it allows you to see immediately who is calling and whether or not it is legitimate. The Payphone Plus link may provide additional information on the premium rate service number.**

9. Service Names

The **Service Name** functionality, available for selection under **Options,** may show further information on the premium rate and non-geographic numbers, where this has already been ascertained.

In this example, we are in the **Fixed** tab, and from the **Line Outbound Call Profile** – this is the default view when you first go into the **Fixed** tab, or you can reach it by going to **All Calls, Call Profile** – have selected Lines to **Premium Rate, Itemised Calls by Cost.**

The **Service** information shows under the relevant heading and is shared information amongst all our users, not just by your or your company. By clicking on the +, you'll be able to see the time and date stamp of when the information was added.

10. Options

The **Options** button allows you to switch on key functionality, including showing different levels of cost centres, filtering by **Cost Centres, Phonebook, Service Name, Invoice** column headings and selection of multiple invoices. Simply click **Options,** and switch on the functionality you require and then click submit. There are also several options for personalising your online view, including changing the font, font size and number of records to be returned.

You can check which options you have selected at any time by looking at far right box in the bottom right hand corner of the screen. Any functionality switched on is in black.

Top Tip: If **Cost Centre** columns don't appear when you are viewing results, don't panic. Your preferences are retained and you should be able to refresh them by going to **Options** and clicking **submit.** To reset your choices at any time simply click **Options,** choose 'switch all off' and click **submit.**

11. Feedback

The beauty of BT Analyst Converge is that it is continually evolving and your feedback helps to produce a product that is better suited to your needs. You can submit feedback, and view our responses, via the **Feedback** button at the bottom of the screen or within the **Administration** tab at the top.

12. Trending

Trending reports are available at invoice and call usage levels showing a comparison between invoices selected.

A quick way to change your selection of invoices is to go to **Options** along the bottom, and then use the **Invoice Filter Options** on the right hand side.

To compare the summary charges on two or more invoices, simply go to Bill Reports in the OneBill tab, Bill By Invoice, All Services
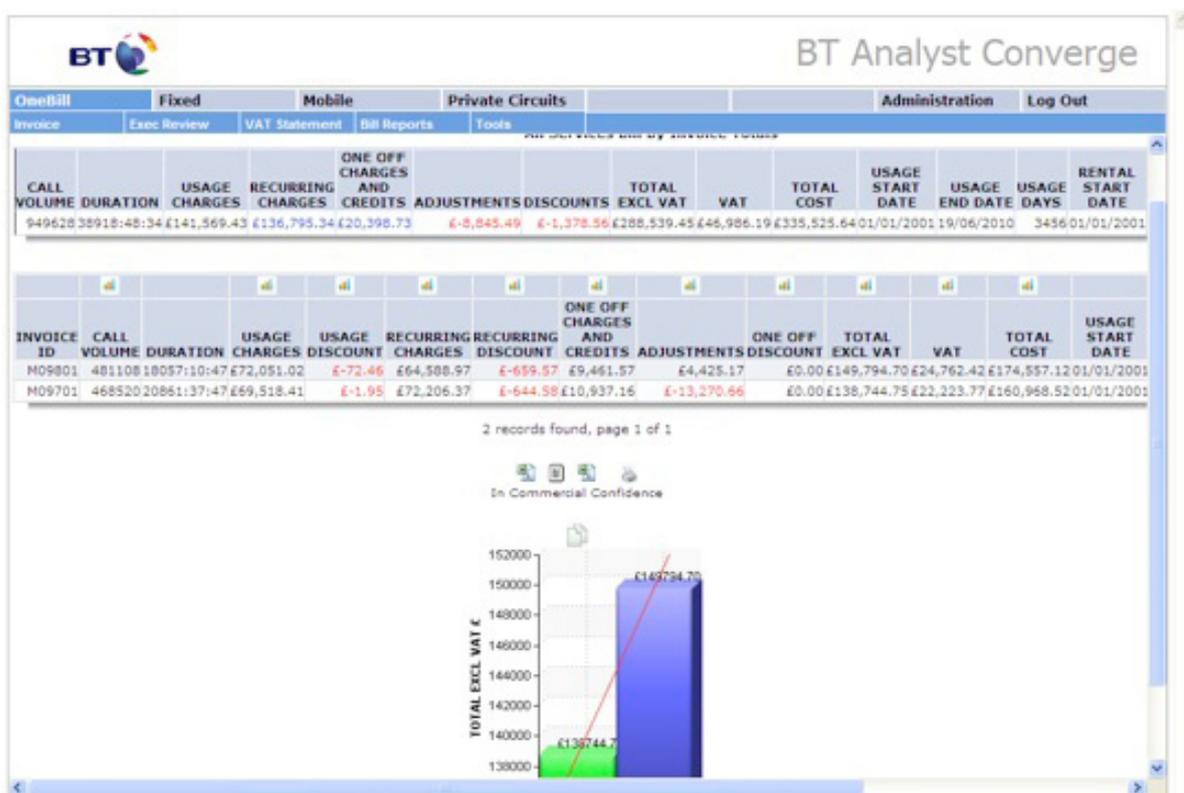
To compare any of the elements of usage charges, go to either the **Fixed** or **Mobile** tab, select the element of interest (in the example below, **All Calls** has been selected), **Trending.**

13. Useful reports

How can I quickly identify usage on a specific service number?

You can do this whilst in **Bill Reports, Bill by Service Numbe**r, by clicking on the **search** functionality – magnifying glass – at the top of the **service number column.** This opens up a free text field – you can search by a full or partial service number.

How can I see the **Bill by Service** report across multiple invoices?

You can quickly do this by selecting multiple invoices either going to change invoice on the bottom tool bar and making your selection, or by going to **options**, again on the bottom tool bar, and then making your selection from the **Invoice Filter Options**. Then with these selected, use the **options** tab again and click on show **Invoice Column Display Options**, and then run the **Bill Reports, Bill By Service** report.

Offices worldwide

The telecommunications services described in this publication are subject to availability and may be modified from time to time. Services and equipment are provided subject to British Telecommunications plc's respective standard conditions of contract. Nothing in this publication forms any part of any contract.

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