



User Guide

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Introduction

Welcome to BT Analyst Elite

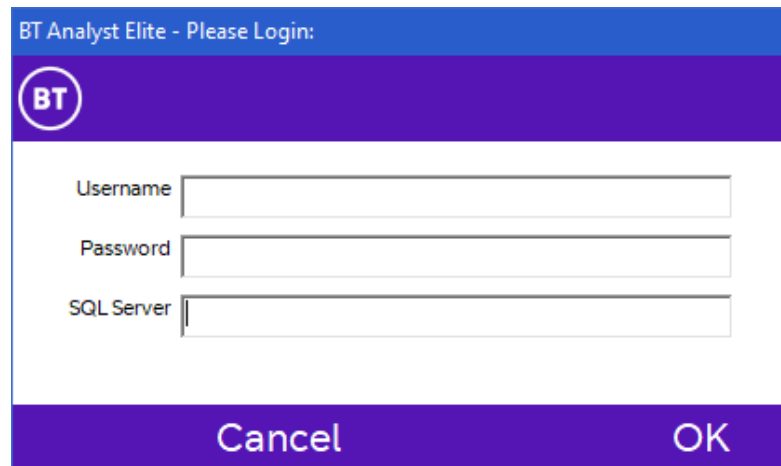
Analyst Elite is a software package that enables you to view the details of your monthly BT bill through a wide variety of reporting facilities. Through these reports, you may check the basic summarised details of your bill, or view more detailed information on any aspect of the bill.

Analyst Elite also includes various management facilities that allow you to view the charges applied to separate areas of your organisation.

As you receive each bill, the bill data file can be imported into Analyst Elite. Once imported, you can view the details of your bill at various levels, from simple summary reports to comprehensive, itemised reports.

Login

When BT Analyst Elite starts, you will be presented with a Login screen, as shown below:

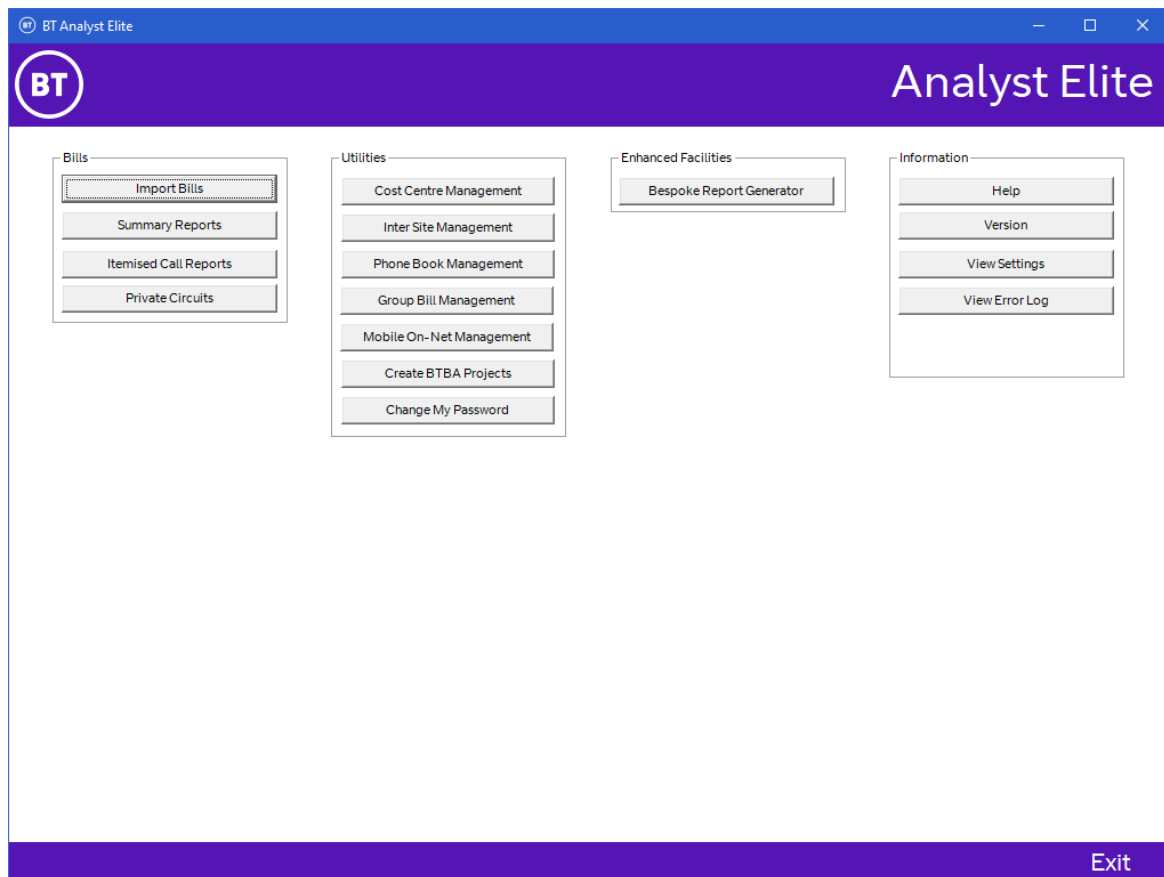
A screenshot of a login dialog box titled "BT Analyst Elite - Please Login:". The dialog has a blue header bar with the title and a purple bar below it containing a white circle with the letters "BT". Below the purple bar is a white area with three input fields: "Username", "Password", and "SQL Server". Each field has a small vertical line on its left side. At the bottom of the dialog is a purple bar with the words "Cancel" and "OK" in white text.

Your username and password should be provided by your system Administrator. The SQL Server is the name of the SQL Server instance on which Elite has been set up.

Once you have entered your credentials, click "OK". If the credentials are valid, the main menu will then be displayed.

Main Menu

Once you have logged in, you will be presented with the Main Menu, as shown below:



When first opening Analyst Elite, all buttons are enabled. However, once a project has been selected, the buttons on the menu are enabled depending on the type of project that has been loaded. Therefore, some buttons may be greyed-out.

The options from the main menu are split into four categories:

Bills

The "Bills" category includes the following sections:

Import Bills

Clicking this button takes you to the "Import" screen. This screen allows you to import your latest bill data into Analyst Elite. Please see the "Import Bills Screen" section for more details.

Summary Reports

Clicking this button takes you to the Summary Reports screen. These reports offer an overview of the various charges contained within the bill, e.g. your Invoice, or summaries of Usage charges, Recurring Charges or Discounts. Please see the “Summary Reports Screen” section for more details.

Itemised Reports

Clicking this button takes you to the Itemised Reports screen. These reports show a more detailed view of the charges that make up the bill. For example, all calls made within the billing period, the 100 Most Frequently called numbers, or calls to Directory Enquiries. Please see “Itemised Call Reports Screen” on page 35 for more details.

Private Circuits

Clicking this button takes you to the Private Circuits Reports screen. These reports are dedicated to Private Circuit charges contained in the bill, e.g. Maintenance charges, Circuit Activity and Network Charges.

Utilities

The “Utilities” category is comprised of the following sections

Cost Centre Management

Analyst Elite provides the possibility of creating a Cost Centre structure that reflects the organisation of your company, and assigning each telephone number on the bill to one of those Cost Centres. For example, you may wish to create a Cost Centre for each office or branch, and then assign all telephone numbers within each office to the relevant Cost Centre.

The Cost Centre Management screen provides the facilities to create and amend a Cost Centre structure as required. Please see “Cost Centre Management” on page 42 for more details. Cost Centre changes made in one project will be carried over automatically to any other projects using the same account number.

Inter Site Management

Some reports within Analyst Elite provide information on calls between different telephone numbers within your organisation. The Inter Site Management facility allows you to associate each of your telephone numbers with a site name, which can then be included in Inter Site reports, making it clearer which sites have been in communication

with each other. Changes to the Inter Site setup of one project will be carried over automatically to other projects under the same account number. Please see “Inter Site Management” on page 53 for more details.

Phone Book Management

This facility allows you to assign a name to any of the telephone numbers appearing in your bill, whether they are your telephone numbers, or those of the recipients of the calls. You can then set these names to appear in many of the Analyst Elite reports, either instead of, or as well as the actual numbers. Name changes made to the currently loaded project will be carried over to any other projects using the same account number. For more information, please see the “Phone Book Management” section.

Group Bill Management

Group Bill Management allows you to assign Group Names to specific Bills within your project. Group names may be added, deleted, or amended, as required.

Mobile On-Net Management

This facility is used to identify calls between originating handsets and numbers added to this facility as On-Net. Any changes or additions via this facility will not be shown in the current project but will apply to the next and any subsequent imports.

Enhanced Facilities

Bespoke Report Generator

This is a separate program distributed with BT Analyst Elite that allows you to formulate your own reports, where Analyst Elite may not provide the exact content that you require. You may select which columns to include in your report, set parameters, and define any column totals you require. Reports can be saved, so that they may be run against any project.

Scheduler Client

This program is run in conjunction with Elite Scheduler Server, which should be run on the Elite Server. Scheduler Client is used to automatically run Elite reports against any project. The user may define which reports to run as part of a schedule, and specify a date and time to run it. Reports can be output to Excel or CSV and, if required, emailed to report recipients. See the Elite Scheduler Client User Guide for more details.

Information

Help

This displays the in-program Help facility. It includes an overview, and then detailed information on each section of the application. It also includes a Search facility to look for specific items.

Version

This displays the version number of your installation of BT Analyst Elite. It is recommended that you always install the latest version. It also displays the date on which your version of Elite will expire, the date and version of the current Call Lookup file (BASpNum), and the folder path being used for system files.

View Settings

This displays the current user, and its user level, the Timeout setting for reports, the number of records to include on each page of a report, and the maximum number of calls to include in CSV output files. It also displays whether Excel and HTML outputs are available on the computer.

View Error Log

This displays the error log for the current user. Where problems are being experienced, it is useful to forward this file to User Support to aid in fault resolution.

Import Bills Screen

Clicking on the “Import Bills” button on the main menu opens the following window:

Call Import Analyst Elite

Good To Know

Getting Started:

- Select BT Bill Files to import. This can be a single file, or multiple files.
- Select if the bill should be imported to a new project, or appended to an existing project.

1st Line Support:
btinformationsolutions@bt.com

2nd Line Support:
evolutiononline@bt.com

Did You Know?

- BT Billing Analyst is our desktop tool to analyse your data.
evolutiononline@bt.com
- Inbound Analyst is our desktop tool to analyse your Inbound data.
btia@bt.com

Useful Links

BT.com

Select BT Bills To Import

Create New Database

Existing Database

☒ Delete existing records

☐ Append to existing records

Database Name: xDemo3

Import File: V:\PROPERTY OF BT\DEMO AND DOCUMENTATION DATA\02916888-M08401-MY ONEBILLPLUS CUSTOMER-2009JUN05-(6920.92)-F7.VP

Start Import **Stop Import** **Exit**

This is the window used to import your monthly bill. There are a number of ways to import bills, which are detailed below:

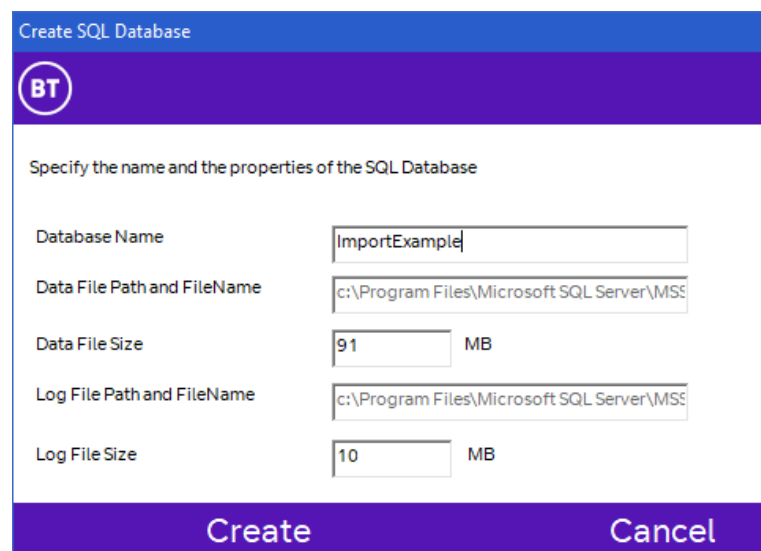
Importing a single bill to a new project

When you first open the Import screen, a button is displayed entitled “Select BT Bills To Import”. Click this button, and select the data file you wish to import. Files valid for import will have an “F7” file for OneBill imports, or have a “.DAT” file extension for newer BT Bill files.

Please note that data files are often distributed to customers within a “Zip” file, which compresses the data into a smaller file. This Zip file **cannot be imported into Analyst Elite**. The data files must be extracted from the zip before importing. Similarly, some Windows setups allow the user to use the “Open File” dialog box to navigate into, and select files from within a Zip file. As above, this should **not** be done when selecting data files to import. The files **must** be extracted to a standard Windows folder to be imported.

The file you have selected will then be displayed in a textbox in a new frame, which will appear lower down the screen..

Click the button marked “Create New Database”. The following window will be displayed:



Create SQL Database

BT

Specify the name and the properties of the SQL Database

Database Name: ImportExample

Data File Path and FileName: c:\Program Files\Microsoft SQL Server\MSS

Data File Size: 91 MB

Log File Path and FileName: c:\Program Files\Microsoft SQL Server\MSS

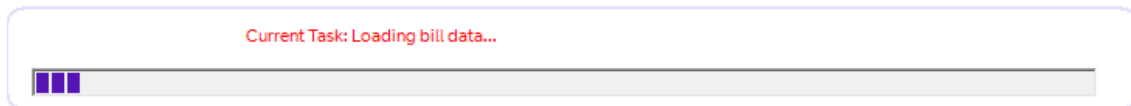
Log File Size: 10 MB

Create Cancel

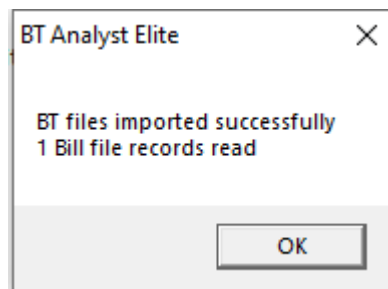
Using this window, you may set a database name, and adjust the file sizes for the data and log files, if you wish. It is recommended that you leave these sizes at the default values, unless specifically required.

Click the “Create” button, and Analyst Elite will create the new database on the server.

Click the “Start Import” button at the bottom of the screen to begin the import. The progress of the import will be displayed, as shown below:



Once the import has completed, Analyst Elite will confirm completion and detail the number of records imported, as shown below:



Elite will then display the Invoice for the project imported. Where more than one invoice is contained in the data, Elite will display an Invoice Summary, containing details for each Invoice.

Appending a Single Bill to an Existing Project

If you want to view charges across an extended period, it is possible to import a number of data files to a single project. To do this, take the following steps:

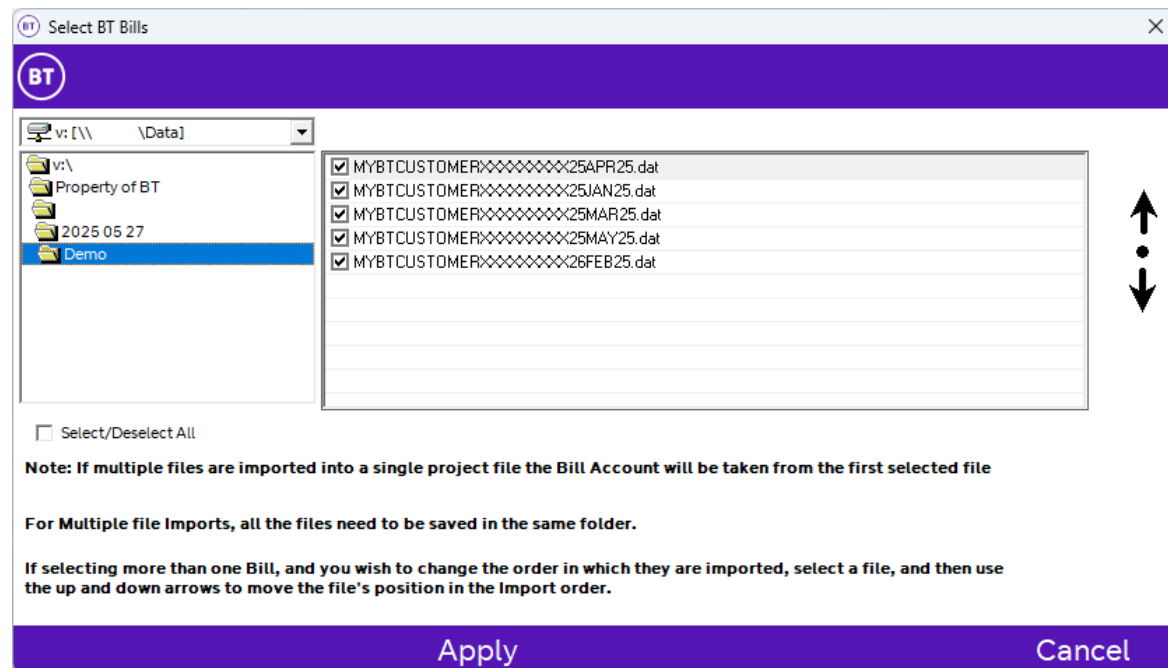
1. Once you have selected the data type and data file to be imported, click the button marked "Existing Database".
2. From the list of projects displayed, select a project into which your new file will be imported.
3. Select if you want to delete any existing records (i.e. to keep the project, but to remove all current data from it, and replace the data with the contents of your selected file), or to append the data in your current file to the project.
4. Select which import options you require using the checkboxes displayed.
5. Click "Start Import"

The import will then progress, as for creating a new database.

Importing Multiple BT Bill Data Files

Analyst Elite provides the option to import multiple BT Bill data files at the same time. This can be done taking the following steps:

1. Click “Select BT Bills to Import. The following dialog will be displayed:



Use the controls on the left-hand side to navigate to the folder containing your data files. The data files must be contained in a single folder.

Select the files you wish to import by checking the boxes next to the relevant filenames. You may change the order in which the files are imported by highlighting a file, and clicking the “Up” and “Down” arrows at the side of the form. Once you have selected the files you require, click the “Apply” button. If you wish to cancel the import, click “Cancel”.

Once you have made your choice, the first file selected will be displayed on the import screen in the box marked “Import File”.

You may now either import all the data to a new project, or append them to an existing project. Where an existing project is to be used, you may delete out old records, or append the new data to the existing records.

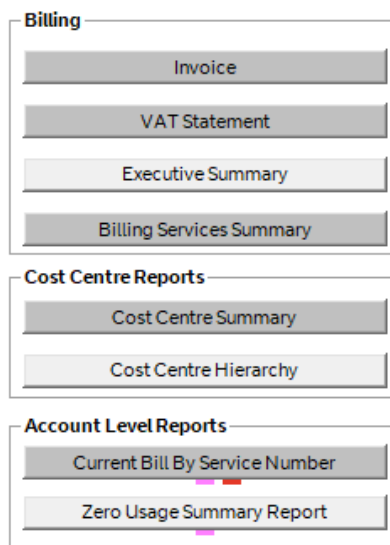
Once the import has completed, Analyst Elite will open the Invoice Summary report, showing summarised information on all invoices contained in the imported files.

Reports Overview

BT Analyst Elite provides three sets of reports: Summary Reports, Itemised Call Reports, and Private Circuits Reports, each accessed by a button on the Main Menu.

Report Drilldowns

The buttons for the reports on both Summary and Itemised screens are colour-coded, as shown below:



Buttons with a darker background colour signify that the report for that button contains “Drilldowns”. That is, once the report has opened, it is possible to click on a line in that report to view further, more detailed reports. Those buttons with a lighter background are single-level reports.

For example, if you click on the “Current Bill By Service No.” report on the Summary Reports screen, the following report is produced:



Click on a line to drill for more detail. Sort report by clicking column headings. Right click on a telephone number to update the Phone Book for that entry

Service No/Ref	Account No	Service	Total Ex VAT(£)	VAT(£)	Total(£)	Gross Recurring(£)	Gross Usage(£)	One Off Char
Total Charges			8853.55	1770.71	10624.26	9575.86	259.29	
01189 565	TH16 93	Telephony	44.53	8.91	53.44	44.53	0.00	
01189 061	WM3 361	Broadband	112.74	22.55	135.29	112.74	0.00	
01189 278	WM3 514	Broadband	126.10	25.22	151.32	126.10	0.00	
01214 833	WM3 815	Broadband	111.01	22.20	133.21	111.01	0.00	
01223 364	WM3 315	Broadband	112.74	22.55	135.29	112.74	0.00	
01223 122	GP00 58	Telephony	0.00	0.00	0.00	0.00	0.00	
01223 125	GP00 58	Telephony	0.00	0.00	0.00	0.00	0.00	
01223 135	GP00 58	Telephony	0.00	0.00	0.00	0.00	0.00	
01223 136	GP00 58	Telephony	0.00	0.00	0.00	0.00	0.00	
01223 143	GP00 58	Telephony	0.00	0.00	0.00	0.00	0.00	
01256 886	WM4 948	Broadband	103.59	20.72	124.31	102.69	0.90	
01616 261	GP00 58	Telephony	0.00	0.00	0.00	0.00	0.00	
01616 263	GP00 58	Telephony	0.00	0.00	0.00	0.00	0.00	
01616 265	GP00 58	Telephony	9.71	1.94	11.65	0.00	9.71	
01616 267	GP00 58	Telephony	8.43	1.69	10.12	0.00	8.43	
01616 271	GP00 58	Telephony	9.40	1.88	11.28	0.00	9.40	
01616 272	GP00 58	Telephony	7.13	1.43	8.56	0.00	7.13	
01616 273	GP00 58	Telephony	0.00	0.00	0.00	0.00	0.00	

This report reflects information from your BT billing data and is indicative only. Totals may differ from the invoice by less than 5 pence due to rounding.

Invoice Reference: VP 7 270 27401
Date (and Tax Point): 07/05/2025

[Outputs...](#)
[Report Details](#)
[Enable Phonebook](#)
[Exit](#)

This report shows each service number found in the bill, and the charges associated with it. If you want more detail on a specific service number, click on the line in the report that contains that service number. Analyst Elite will respond by showing you a further report, like this:

Bill Detail				
for MY ONEBILLPLUS CUSTOMER				
Account No = SS5054	Network Services	Tel.No./ref =	0124267	Monthly Bill
Tax Pt Date = 12/08/2009				
Cost Centre 1	Cost Centre 2	Cost Centre 3	Cost Centre 4	Cost Centre 5
TELEPHONY				
Usage	Charge(£)	Usage From	Usage To	
Network Services facilities	0.10	06/07/2009	04/08/2009	
Direct-dialled local	2.24	06/07/2009	04/08/2009	
Direct-dialled national	31.79	06/07/2009	04/08/2009	
Direct-dialled Mobile & Premium Rate	17.69	06/07/2009	04/08/2009	
Direct-dialled other	2.24	06/07/2009	04/08/2009	
Total Usage	54.06			
Recurring	Charge(£)	Recurring From	Recurring To	
Line Rental	14.87	01/08/2009	31/08/2009	
Customer Option Charge	0.00	01/08/2009	31/08/2009	
Total Recurring	14.87			
Total (Excl VAT)	68.93			
VAT	10.35			
Total Adjustments	0.00			
Total(Incl VAT)	79.28			

Call Detail
Special Call Charges
Recurring Charges
One Off Charges & Credits
Adjustments

Bill Details for 0124267 Cost Centre level 1 = TELEPHONY. Only Categories with charges raised on the bill will be displayed.

Invoice Reference: VP 033
Date (and Tax) 12/08/2009 Print Outputs... Report Details Previous Exit

This report shows you what charges have been applied to your chosen service number, to result in the summary figures you viewed in the report at the previous level.

Many reports allow you to drill down to multiple levels, showing different levels of detail. You just need to select a line in the report that is of interest. Some reports, such as the one above, also allow you to jump to other reports (in this case the “Call Detail” report), via buttons displayed at the side of the report grid.

Report Options

Report Navigation

Where more detailed reports are available, but those reports do not refer to a specific line at the current level, a “Next Level” button is provided, to allow you to go to the next level of detail.

As you navigate through the levels of the report, “Previous” buttons are provided (as above), which allow you to navigate back to the last level of detail that you were viewing. So, for example, you could view the details for one service number, click

“Previous” to go back to the preceding report, then drill down on another service number to see the details for that number.

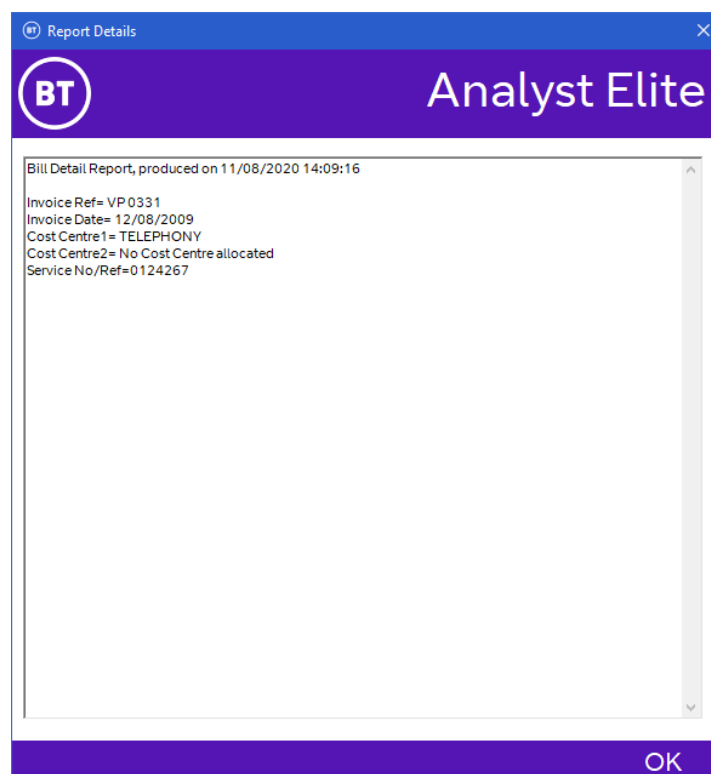
At any point, you may click the “Exit” button, which will close all reports, and return you to the Summary Reports screen.

Output Options

Analyst Elite offers two options for outputting reports. Most allow the user to output the report to an Excel worksheet (where Excel is installed on the PC), or to output to a Comma Separated Values file (or “CSV file”). In some cases, the report content is too large to allow an Excel facility, so this will not be offered.

Report Details

Each report includes a “Report Details” button. Pressing this button displays a window showing the report title, and time at which the report was produced. It also describes the parameters that have been set before running the report, as shown below:



Phonebook Options

Many reports include columns where phonebook entries are displayed either alongside, or instead of, the originating and called numbers. Where this is the case, there will also be a button which will allow you to enable, or disable, the phonebook (marked “Enable Phone Book”, or “Disable Phone Book” respectively). By changing the Phonebook settings, you may alter the display of the report to include, or leave out, phonebook entries for the service numbers included in the report.

When phonebook entries are displayed, it is also possible to amend the phonebook entries, without having to go to the “Phonebook Management” screen. Where a service number, or its phonebook entry, is displayed, click that entry with the right mouse button. The following window will appear:

BT Edit Phone Book details

BT

0124522
Selected Tel.No

Type a name in the box above or double click on a Phone Book name from the Phone Book Names list to apply that name to the selected telephone number

Phone Book Names

PERSONNEL
MANUFACTURING

Add Edit Delete

Save Changes Cancel Changes Help Exit

To enter a phonebook entry for the selected number, click on the “Add” button to enter a new name. This new name will then appear in the “Phone Book Names” list:

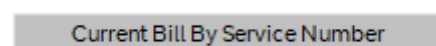
You may now use this name for any service number.

To apply the name to the chosen service number, double-click the name in the list. That name will then be displayed next to the service number. Click “Save Changes”, and the name will be stored for the number. Click “Exit”, and the report you are viewing will refresh, replacing your chosen service number with the phone book name, where applicable.

You may amend or delete the phonebook name for a given service number using the same screen.

Report Parameters

On the right-hand side of both reports screens, in frames marked “Selection Parameters” are various parameters that may be used to focus the reports on specific areas in which you might be interested. The parameters only apply to specific reports and Bill types – the parameters that apply to each report are signified by the colour-coding below each report button, to match the background colours of the parameters on the right. So, for example, on the Summary Reports screen, the “Current Bill By Service No.” report has a button like this:



The red line underneath signifies that the “Source Bill Reference” parameter (on the right-hand side, with a red bar next to it) may be used in conjunction with the report (please note that this parameter is only applicable for “BT Bill” type bills).

The pink line underneath signifies that the “Account/Cost Centre Selection” parameters (on the right-hand side, with a pink bar next to it) may also be used.

If a report button has **no** lines displayed underneath, then parameters do not apply to that particular report (e.g. the Invoice report).

Parameters are also applied to all drilldowns from each report. So if you set parameters and run a report, then drill down, any lower-level reports will also be limited to those parameters you have set.

Any combination of applicable parameters may be applied to a report.

The parameters offered are as follows:

Account/Cost Centre Selection

Applies to: All Reports

This parameter enables you to select specific areas of the bill to include in your report. The default setting is to include **all** numbers included in the bill. You may, however, choose to limit the report to the following:

- **Selected Originating No/Cct ID**
This limits the report to a specific Originating number. If you select this option, a dropdown box appears next to it, from which you may select a single originating number to include in the reports.

- **Multi-level Cost Centre Select**

This allows you to focus reports on a specific Cost Centre, from anywhere within your Cost Centre structure (see “Cost Centre Management” on page 42 for more details). If you select this option, a set of dropdown boxes appears, allowing you to select a Cost Centre at each level of the structure, down to five levels. So, for example, if you wanted to view details for the level 2 Cost Centre “Manufacturing”, which was a member of the level 1 Cost Centre “London”, you would enter the following:

Account/Cost Centre Selection

☐ All Accounts
☐ Selected Originating No/Cct ID
☒ Multi level Cost Centre Select

Select Level 1: London
 Select Level 2: Manufacturing
 Select Level 3:

The Level 3 parameter would be left blank. Choosing these parameters, will produce reports showing information solely for the chosen Cost Centre.

- Cost Centre level “X”

It is possible to view the reports with the content limited to a specific Cost Centre, at a particular level. Continuing the example from above, your organisation might comprise a number of departments (recorded at Cost Centre level 1), which are distributed throughout a number of cities (recorded at Cost Centre level 2). It would be possible to view the details for **all** departments within one city by selecting the “Cost Centre level 2” parameter, and entering, “Manufacturing”, for example (as below).

Account/Cost Centre Selection

☐ All Accounts
☐ Selected Originating No/Cct ID
☐ Multi level Cost Centre Select
☐ Cost Centre level 1
☒ Cost Centre level 2
☐ Cost Centre level 3
☐ Cost Centre level 4
☐ Cost Centre level 5

Cost Centre level 2: Manufacturing

This will show figures for **all** departments present at the Manufacturing Level 2 Cost Centre. As you can see, it is possible to set a parameter for all five levels of your Cost Centre structure.

Source Bill Reference

Applies to: Summary Reports

This parameter is only valid for “UK BT Bill” type projects. A BT Bill project may consist of a number of Source Bills. By clicking the dropdown box, it is possible to select a single Source Bill, on which to base the reports.

Percent difference to highlight when comparing costs

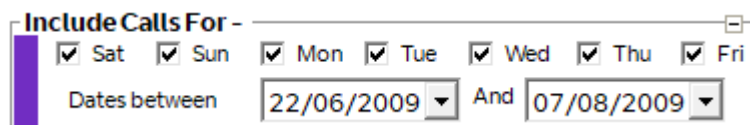
Applies to: Summary Reports

This parameter applies only to Archive Reports. Please see “Archive Reports” on page 36 for more details

Include Calls For

Applies to: Itemised Reports

This parameter defines which days, and which dates, will be included in the report to be run.



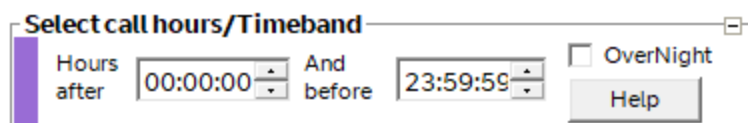
To include only certain days in the report, check or uncheck the tickboxes next to the days as required. You can also set the report to run only for a given date range by setting the start and end date for the report using the dateboxes shown.

You must check at least one day for the report to run. Similarly, you must enter dates where the end date is **on or after** the start date, otherwise the report will not run.

Select Call Hours

Applies To: Itemised Reports

You can select reports to include calls only within certain time ranges.

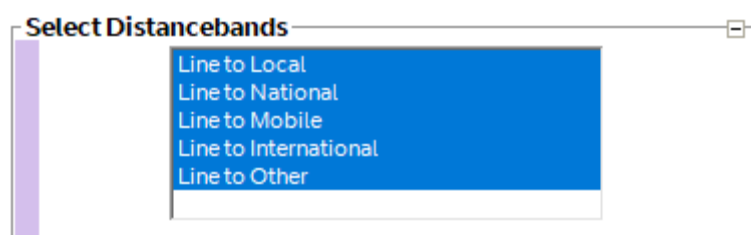


For time ranges within the same day, enter a start time and finish time as required. If the times you wish to include in the report run from one day to the next, (e.g. from 17:00 on Monday to 08:00 on Tuesday), select the times as necessary, then check the “OverNight” tickbox on the right-hand side. If you select a finish time that is earlier than the start time, but do **not** check this box, the report will not run.

Select Distance Bands

Applies To: Itemised Reports

Telephone calls have an associated distance band, dependent on the originating, and receiving telephone numbers. All the distance bands available are displayed in a list as part of this parameter setting:



The standard setting for Analyst Elite is to include all these distance bands. However, it is possible to alter this by selecting one or more distance bands from the list provided. If distance bands are selected, only those chosen will be included in the report.

Thresholds

Applies To: Itemised Reports

This parameter enables you to include only calls within a given cost or duration range.



To run reports with a Cost or Duration range parameter, enter a lower and upper range of in the respective textboxes. Please note, the lower range must be equal to, or smaller than, the upper range, for the report to run.

Exclusions

This parameter allows you to exclude required originating numbers from reports.

Exclusions

Define numbers to exclude from

If you click on the “Exclusions” button displayed, the following window will be provided:

Numbers to Exclude

BT

Please enter called number ranges below then click OK

	TelNo
*	

Load Nos

Save Nos

Delete All

Delete

Partial numbers may be entered, for example 01 will find calls to all numbers beginning with 01, A02 will find calls to all numbers beginning A02

Cancel

OK

You may now enter as many service numbers as you require in the list marked “TelNo”. When you have entered all the numbers you wish to exclude, click the button marked “Save Nos” to save your list.

You may amend the list at any point by selecting any of the numbers you have entered, and clicking the “Delete” button. You may also delete all the numbers in one go by clicking the “Delete All” button.

If you have a set of numbers that you regularly wish to exclude from reports, but do not wish to enter that list every time, you can save the list to a CSV file. To do this, click on “Save Nos” and then, in the dialog box provided, enter a name for the file and save it in your preferred location.

If you want to retrieve these numbers again at a later point, click on “Load Nos” and, with the dialog box provided, select the file you saved earlier. The file will then be loaded into the list.

Once you have made all the changes you require, click “OK”. To exit without saving your changes (since the last time you clicked “Save Nos”), click “Cancel”.

Resetting Default Parameters

If you wish to undo any parameters you may have set, and to return to the original settings for the project, click the “Default Settings” button. This will reset all parameters.

Summary Reports Screen

Clicking the Summary Reports button on the main menu opens the following screen:

Summary Reports

Analyst Elite

BT One Bill Summary Reports
With the exception of the invoice and VAT statement, VAT figures are indicative only and in a few instances may show differences from the account level charges applied.

Billing

- Invoice
- VAT Statement
- Executive Summary
- Billing Services Summary

Cost Centre Reports

- Cost Centre Summary
- Cost Centre Hierarchy

Account Level Reports

- Current Bill By Service Number
- Zero Usage Summary Report

Report Select Panels

- BT One Bill Cost Element Reports
- Archived Reports

Click the Report Help button for help regarding the use of parameter selection.
The darker coloured buttons indicate that drill-down is possible for the report.
One Bill Project, Featurenet reports not available for this project

Select Database

ImportExample

Featurenet Reports

- Invoice Charges Summary
- Discount Summary
- Recurring Charges
- Discount Breakdown
- One Off Charges & Credits
- Commitment Charge Summary
- Cost Centre Summary
- Group Bill Summary
- Call Summary

Selection Parameters
Coloured markers indicate which parameters apply when selecting reports.

Account/Cost Centre Selection

- ☒ All Accounts
- ☐ Selected Originating No/Cct ID
- ☐ Multi level Cost Centre Select
- ☐ Cost Centre level 1
- ☐ Cost Centre level 2
- ☐ Cost Centre level 3
- ☐ Cost Centre level 4
- ☐ Cost Centre level 5

Source Bill Reference
(One Bill Reports only)

0 Percent difference to highlight when comparing costs - set to 0 for no compare

Report Help Default Settings Stop Report Exit

On the left-hand side, in the frame marked “BT Summary Reports”, are the various reports that can be run, displayed in the three frames marked “Billing”, “Cost Centre Reports”, and “Account Level Reports”.

Further reports are available, which may be viewed by clicking one of the buttons marked “BT Cost Element Reports”, or “Archived Reports”. The reports associated with these buttons are then displayed immediately to the right of those already shown, as displayed below:

Summary Reports

BT

Analyst Elite

Select Database

ImportExample

BT One Bill Summary Reports

With the exception of the invoice and VAT statement, VAT figures are indicative only and in a few instances may show differences from the account level charges applied.

Billing

Invoice

VAT Statement

Executive Summary

Billing Services Summary

Cost Centre Reports

Cost Centre Summary

Cost Centre Hierarchy

Account Level Reports

Current Bill By Service Number

Zero Usage Summary Report

Report Select Panels

BT One Bill Cost Element Reports

Archived Reports

Cost Elements By Category

One Off Charges & Credits

Recurring Charges

Cost Elements Summary

Usage Charges

One Off Charges & Credits

Recurring Charges

Adjustments

Discount

Cost Elements Detail

One Off Charges & Credits

Recurring Charges

Adjustments

Featurenet Reports

Invoice Charges Summary

Recurring Charges

One Off Charges & Credits

Cost Centre Summary

Call Summary

Discount Summary

Discount Breakdown

Commitment Charge Summary

Group Bill Summary

All Accounts

Selected Bill No

Selection Parameters

Coloured markers indicate which parameters apply when selecting reports.

Account/Cost Centre Selection

All Accounts

Selected Originating No/Cct ID

Multi level Cost Centre Select

Cost Centre level 1

Cost Centre level 2

Cost Centre level 3

Cost Centre level 4

Cost Centre level 5

Source Bill Reference

(One Bill Reports only)

0

Percent difference to highlight when comparing costs - set to 0 for no compare

Report Help

Default Settings

Stop Report

Exit

On the right-hand side of the form are the various parameters that may be assigned to the reports. Please see "Report Parameters" on page 23 for more details.

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V11.0
24/06/2025

Report Descriptions

Invoice

This report shows the most basic information on the charges contained in the project. Where more than one bill is contained in the project, the Invoice report is preceded by an Invoice Summary, listing the details for each bill. You may then select a specific Invoice to view.

VAT Statement

This report shows the VAT rates applied to each bill in the project. Where more than one VAT rate has been applied, each rate will be displayed, along with the charges to which that rate has been assigned. It is possible to drill down on each rate to view the specific charges allocated to it.

Executive Summary

This report shows a summary of all charges, discounts and VAT, for each service.

Billing Services Summary

This report shows a summary of all charges after discounts and VAT, for each service. It is then possible to drill down to view further details for each service.

Cost Centre Summary

This report shows the costs at each level in your Cost Centre Structure. You may drill down through the structure by clicking on a line in each level of the report. You may also jump to a particular level of your Cost Centre structure by selecting the required level from a dropdown box at the top right-hand corner of the report. Selecting a Cost Centre level shows **all** Cost Centres at that level, regardless of which Cost Centres you may have drilled down through up to that point.

Cost Centre Hierarchy

This report shows the Cost Centre details for each service number in the bill, showing the Cost Centre at each level, the amount of discount, the discount option and address details for that Cost Centre.

Current Bill By Service Number

This report shows the details for each service number, including the account number under which it appears, the service used, Gross charges, and Cost Centre details.

Zero Usage Report

This report details those service numbers which have had a Usage charge of zero in the loaded bill.

One Off Charges & Credits by Category

This report shows the totals for each type of One Off Charge or Credit.

Recurring Charges by Category

This report shows the totals for each type of Recurring charge.

Usage Charges Summary

This report shows a summary of each Usage charge applied to each service number, along with a total Usage charge for each of those numbers.

One Off Charges & Credits Summary

This report shows a summary of each One Off charge and credit, for each service number, along with a total Usage charge for each of those numbers.

Recurring Charges Summary

This report shows a summary of each Recurring charge type applied to each service number, along with a total of all Recurring charges for that number.

Adjustments Summary

This report shows a summary of each Adjustment type applied to each service number, along with a total of all Adjustments for that number.

Discount Summary

This report shows a summary of each Discount type applied to each service number, along with a total of all Discounts for that number.

One Off Charges & Credits Detail

This report shows detailed information on all One Off Charges applied to each service number, **where that information is available in the data.**

Recurring Charges Detail

This report shows detailed information on each Recurring charge within the bill, **where that information is available in the data.**

Adjustments Detail

This report shows detailed information on each Adjustment within the bill, **where that information is available in the data.**

Archive Reports

A number of archive reports are provided to enable the user to view details from previously archived projects. Each time a bill is imported, the summary information for the bill is automatically archived to a file with a name based on first ten characters of the name given to the project, with the letters “Arch” and the bill date appended to the end of the file name. When one of the archive reports is selected, the user is automatically shown a list of the available archives to view. Note that only archives with the same account number as the currently selected project may be viewed.

Archived by Cost Centre

This report shows the costs at each level in your Cost Centre Structure for a selected Archive file. The report always commences at cost centre level 1 and allows you to drill down through the structure by clicking on a line in each level of the report.

Archived by Service No

This report shows the details for a selected archive file for each service number, including the account number under which it appears, the service used, Gross charges, and Cost Centre details.

Compare Current/Archive

This report allows a primary archive and up to 2 secondary archives to be selected for comparison against the current project. The report shows the total values for each cost centre for the selected project and each selected archive. It also shows the percentage difference between the current project and the primary archive and highlights entries that are not present in both the current project and the primary archive. The report always commences at cost centre level 1 and allows you to drill down through the structure by clicking on a line in each level of the report.

Compare Recurring Current/Archive

This report compares the recurring charges contained in the current bill with those contained in a selected archive. This allows the user to identify how recurring charges have behaved over the selected timescale

Compare Usage Current/Archive

This report compares Usage statistics across the current bill, and a selected archive.

New Numbers and Cessations

This report identifies those service numbers which have either begun use, or been taken out of use within the timescale of the selected project and archive.

Itemised Call Reports Screen

Clicking on the “Itemised Call Reports” button on the Main Menu opens the following screen:

The window consists of two main sections, one containing buttons to run the various reports provided, and one containing parameters that may be applied to the reports. For details on report parameters, please see “Report Parameters” on page 23.

Report Descriptions

100 Most Expensive Reports

- All Calls

This report shows the 100 most expensive calls in the bill, regardless of destination.

- UK Calls

This report shows the 100 most expensive calls within the UK, excluding calls to Mobiles.

- Countries

The costs for calls to international destinations are totalled, and the countries and international mobile destinations with the 100 highest totals are displayed.

- Calls to Mobiles

This report displays the 100 most expensive calls to UK mobile phones.

- Destinations

This report shows the 100 telephone numbers that were called, at the greatest cost within the bill's timespan.

- Roamed From Mobile

This report shows the 100 most expensive calls roamed from a mobile phone.

100 Most Freq Called

- All Calls

This report shows the 100 most frequently called telephone numbers during the bill's timespan.

- UK Calls

This report details the 100 most frequently called UK telephone numbers excluding calls to mobiles

- Countries

This report shows the 100 most frequently called countries and international mobile destinations.

- Calls to Mobiles

This report details the 100 most frequently-called UK mobile phones.

- Roamed From Mobile

This report shows the 100 most frequently called, roamed, mobile handsets

100 Longest

- Calls by Duration

This report shows the 100 longest calls made during the timespan of the bill.

General Reports

- All Call Records

This report displays **all** calls made during the bill, to all destinations.

- Calls To Number

This report allows you to display all calls to a specified number, or numbers. If you click on the report button, the following window is displayed:

Enter Numbers for Report

BT

Please enter called number ranges below then click OK

CalledNo	
▶	
*	

Load Nos

Save Nos

Delete All

Partial numbers or phonebook names may be entered, for example 01 will find calls to all numbers beginning with 01, A02 will find calls to all numbers beginning A02

Wildcards (%) may be used when selecting by phonebook names to replace groups of characters, e.g. to select phonebook names containing John enter %John%.

Caution - When selecting by phonebook names, if wildcards are entered anywhere other than at the end of the phonebook name, BTBA will not check for duplicate selections.

Cancel OK

Enter all the numbers you wish to include in the report in the list marked "CalledNo". As detailed on the window, it is possible to use partial numbers and wildcards in your criteria. So, in the window displayed above, all numbers beginning with "02" will be included in the report. Any numbers **not** beginning with "02" will be omitted.

Phonebook entries may also be included in the search list. You may also use wildcards with phonebook entries but, unlike searching for numbers, you **must** specify the wildcard. So, for example, if you want to search for all numbers with a phonebook name starting "Accounts", you must enter "Accounts*" in the list.

If you have a list of numbers and names that you will need to use again, you can save the list in a CSV file, by clicking on "Save Nos", and specifying a location and filename. The file may be loaded at any point by clicking the "Load Nos" button, and then selecting the previously-saved file.

If you wish to delete a number from the list, left-click the grey box on the left-hand side of the row containing that number (your mouse pointer will change to a black arrow), and then press the "Delete" key. This will remove that single entry from the list.

When you have made the changes required to the list of numbers and names, click "OK" to proceed with the report.

The numbers you have entered will be applied to the report from this point on, until you make new changes, or delete the numbers using the "Delete All" button.

- Calls Not To Number

This report allows you to show all calls made that were **not** to selected numbers. It operates in a similar fashion to the "Calls To Number" report: when you click the report button, you may enter all numbers you wish to exclude from the report. These numbers may be saved and loaded in a similar fashion to that described above.

- Calls From Tel. No

This report shows all calls in the bill that were made by a specified service number.

If you click the report button, the following window is displayed:

Enter the number you wish to show in the report and click “OK”. The report will then load. It is possible to enter “partial” numbers, that is, you may enter the first digits of a number, to retrieve statistics for all service numbers beginning with the digits you have entered. For example, if you entered “118”, the report would include statistics for “118000”, “118500”, and so on.

- Directory Enquiries

This report displays all calls to Directory Enquiry services.

Call Summary Reports

- All Calls Summary

This report summarises the calls made by the distance band of the call. For each distance band, the report displays the total number of calls, the total duration, the total cost, and the percentage of the overall call cost.

- Summary by Tel No.

This report shows, for each service number in the bill, the total calls made, the total duration in minutes, and the total cost.

- Summary by Cost

This report displays the number, duration, and cost of calls within a number of “cost bands”, e.g. more than £0.20 and less than £0.50, or more than £1.00 and less than £2.00. It also shows, for each cost band, the percentage of calls that fell within that band.

- Summary by Duration

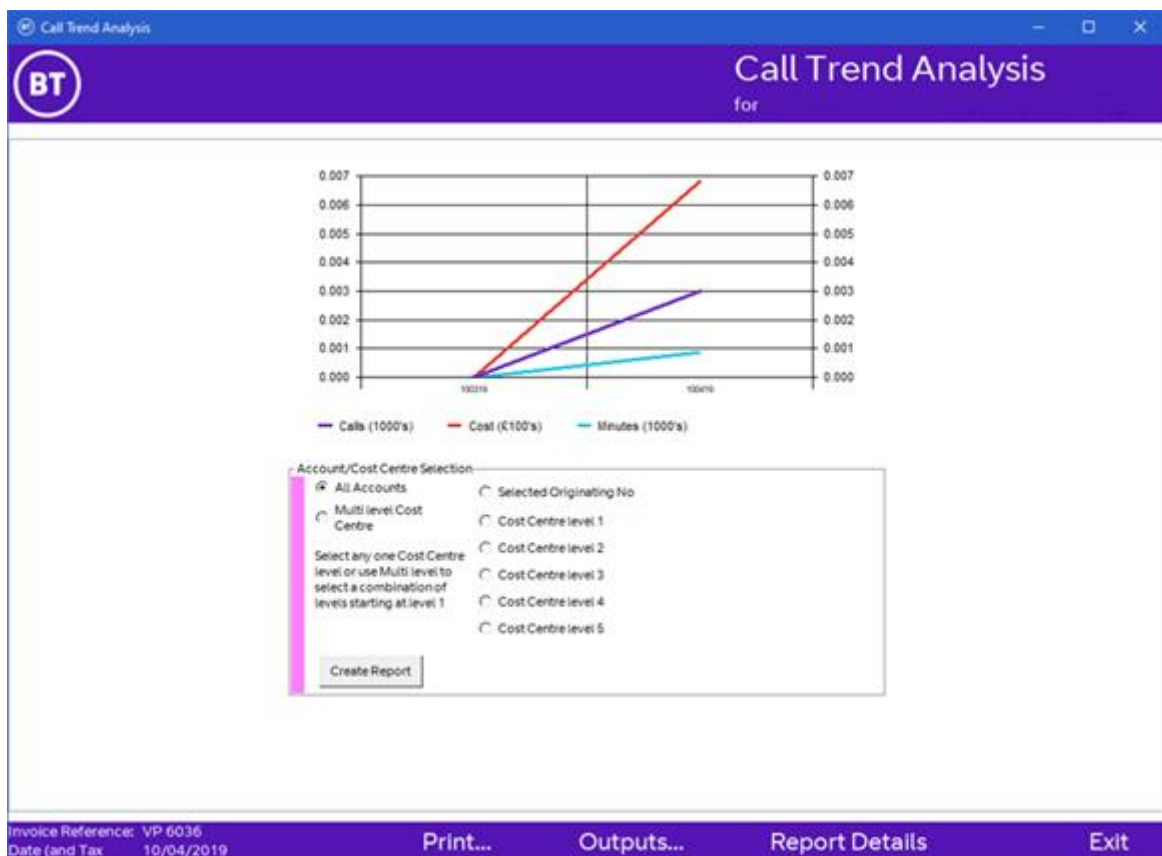
This report displays the number, duration and cost of calls within a number of duration bands, e.g. between 3 minutes and 7 minutes, or between 45 minutes and 1 hour. It also shows, for each duration band, the percentage of calls that fell within that band.

- Inter Site Analysis

This report displays statistics for calls where the call is between two numbers within your organisation, and works in conjunction with the Inter Site Management screen (see “Inter Site Management” on page 55 for details). It summarises the number, duration and cost of calls between each site. From this report it is possible to drill down to view all the calls between two chosen sites.

- Call Trend Analysis

This report shows how your call statistics have changed over time. You must have more than one bill imported for the report to run. The report displays the number, duration in minutes, and cost of calls over time, as displayed below:



As can be seen above, the report offers the facility to change the Account/Cost Centre parameter within the report itself. This means the statistics displayed in the report can be changed at will, without having to exit and set parameters on the Summary Reports screen. Please note that the parameter settings made on this screen will not affect those on the Summary Reports screen.

- GPRS Summary

This report displays, for each mobile handset, the total data transmitted, and the total cost.

Report Select Panels / Telemarketing Reports

The Report Select Panels frame includes a “Telemarketing” button, to open the Telemarketing reports. Telemarketing reports show **incoming** calls, rather than outgoing. The reports included are as follows:

- Summary By Number

This report displays a summary of the telemarketing calls produced by the organisation, and shows the number of calls, the cost, discount, and discounted cost.

- Summary By No. Group

This report displays the number groups which have made telemarketing calls. E.g. numbers 08005551231 and 0800555755 would both be included in the number group “0800”. For each number group, it displays the number of calls made, and the cost, discount, and discounted cost of those calls.

- All Records

For each telemarketing number, on each date within the bill, this report displays the number of calls made, and the cost, discount and discounted cost associated. It also shows the total number of overall calls made.

The report also includes a graph, showing the distribution of incoming calls over the period of the bill.

- Telemarketing Trends

This report shows how Telemarketing calls have changed over the period of the bill. It displays the number and cost of Telemarketing calls. Please note that two or more bills must be imported for this report to be displayed.

Mobile Reports

- International Summary

This report shows a summary of all mobile calls to each country, detailing the date of the first and last call, the total number of calls, total duration and cost, and the percentage of the total cost.

- Hardware Details

This report shows, for each mobile handset, the number, the order number, customer reference and quantity, the unit cost, and total price.

- Management Summary

This report displays, for each handset, its phonebook name, the total cost accrued, and its activation and cessation date.

- Mobile Call Category

This report displays, for each Call Class, the number of calls, their total duration and total cost.

Cost Centre Management

BT Analyst Elite provides the facility to create a structure reflecting that of your organisation, which can then be applied to bills you import, allowing you to see what charges have been applied to the various parts of your organisation, and what their usage statistics are.

Cost Centres are created in a hierarchy of up to five levels, each level being a “member” of the preceding level. So, for example, you could split your organisation into separate locations at level 1, and then into departments at level 2, specific offices at level 3, and so on. The above example could be reordered, using whatever kind of approach best suits your organisation. The Cost Centres you enter are then displayed in many of the reports, and can also be used as parameters on the reports screens, enabling you to view reports that are specific to individual parts of your organisation hierarchy.

Please note that making changes to the Cost Centre structure for one project will also change the structure for any other projects using the same Account number.

The management of Cost Centres will depend on the level set up for the Elite User Account being used, as follows:

- Level 1
Administrator level. Changes will be made to Master Cost Centre structure.
- Level 2
User manages their own Cost Centres
- Level 3
Read Only Cost Centres
- Level 4
Read Only Specified Cost Centres
- Level 5
Admin Update User Only

To make changes to your Cost Centre setup, go to the Main Menu, and click the button marked “Cost Centre Management”. This will take you to the following screen:

The screenshot shows the 'Cost Centre Management' window in the 'Analyst Elite' application. The window has a blue title bar with the BT logo and the text 'Analyst Elite'. Below the title bar, there is a 'Select Database' button and a text field containing 'ImportExample'. The main content area is divided into three sections: 'Update Cost Centres' with an 'Edit Cost Centres' button; 'Cost Centre Utilities' with buttons for 'Remove Cost Centres but leave Tel Nos/Cct IDs', 'Import Cost Centres from Comma Delimited (csv) file', 'Restore Cost Centre Details From Bill', and 'Update Featurenet Bill Numbers'; and 'Cost Centre Address Information' with buttons for 'Manage Address Information', 'Import Address Information from CSV', and 'Address Import Exceptions Report'. A blue footer bar contains 'Help' and 'Exit' buttons.

The options available on this screen are as follows:

Update Cost Centres

Edit Cost Centres

This facility allows to add, amend, or delete your overall Cost Centre structure, and to apply that structure to the numbers within your bill. Clicking the “Edit Cost Centres” button displays the following screen:

Cost Centre Management by Telephone number/Circuit ID

BT Analyst Elite

TelNo	CostCentre1	CostCentre2	CostCentre3	CostCentre4	CostCentre5	SourceAccount	Ad
0124267	London	Manufacturing				SS5054	
0124382	London	Manufacturing				SD3696	
0124440	London	Manufacturing				GB8874	
0124522	London	Manufacturing				EA9869	
0124522	London	Manufacturing				EA7133	
0124522	London	Manufacturing				EA1684	
0124522	London	Manufacturing				EA4592	
0124522	London	Manufacturing				GB8874	
0124532	London	Manufacturing				EA6293	
0124538	London	Manufacturing				EA3330	
0124538	London	Manufacturing				EA5257	
0124538	London	Manufacturing				GB8874	
0124538	London	Manufacturing				EA3846	
0124538	OFFICE	Manufacturing				GB8874	
0124538	TELEPHONY	Manufacturing				EA6094	
0124544	TELEPHONY	Manufacturing				EA9392	

To Quickly change records - Select the Tel no /Ref(s) you wish to change by clicking on that row(s) and then double click on the required Cost Centre from the levels below. Use the SHIFT key whilst selecting Tel no /Ref to highlight a group of records.

Add Tel No/Ref
Find Tel No/Ref
Delete Tel No/Ref
Remove Cost Centre Detail

Cost Centres Level 1
Cost Centres Level 2
Cost Centres Level 3
Cost Centres Level 4
Cost Centres Level 5

BT MOBILE
BT SYNCORDIA
CIRCUIT
London
OFFICE

Manufacturing
Test

Add Edit Delete
Add Edit Delete
Add Edit Delete
Add Edit Delete
Add Edit Delete

Double click Cost Centre to apply it to selected Tel No/Source Account. Single click to edit/delete cost centre then click edit or delete button.

Save Changes Cancel Changes Save As CSV Print Help Exit

The overall Cost Centre structure is controlled in the lower part of the screen, via five lists, as can be seen above. Each list contains the Cost Centres at levels one to five. You may add, edit or delete the Cost Centres at each level by clicking their respective “Add”, “Edit” and “Delete” buttons.

Please note that if you wish to apply a level 2 Cost Centre to a service number, that service number must already have a level 1 Cost Centre applied. However, for any given level 2 Cost Centre, it is not necessary for the **same** level 1 Cost Centre to be applied to all service numbers.

For example, you might have service number 1234555001, with a level 1 Cost Centre of “London”, and a level 2 Cost Centre of “Accounts”. You might then want to apply that “Accounts” Cost Centre to the service number 12345553450. That service number must have a level 1 Cost Centre applied, but it does **not** have to be “London”, it can be any of the level 1 Cost Centres you have defined.

The Cost Centres you have set up may be applied to the service numbers in the following way:

- Place your mouse pointer in the cell containing the service number you wish to allocate to a Cost Centre and left-click that row. The selected row will be highlighted.
- Assign whichever Cost Centres you wish to apply to the service number by double-clicking the Cost Centre names contained in the lists at the bottom of the screen. On clicking a Cost Centre name in a given list, that name should then appear in the grid at the top against your chosen service number, in the relevant column. I.e. if you double-click a Cost Centre in the third list, that name should then appear in the “Cost Centre Level 3” column for your chosen service number
- To assign a single Cost Centre name to multiple service numbers, you may select a range of numbers from the grid by left-clicking the first number in the range (as described above), locating the last number in the range, then holding down the shift key, and left-clicking that number. All the numbers in between should now be selected, and you may assign the Cost Centre names as above.

Where multiple service numbers must be selected, but they are not in one uninterrupted list, you may select each one by holding down the control key whilst clicking the numbers. All previously selected numbers will remain selected, and you may then allocate Cost Centre names as described above.

- When you have assigned the names required, click the “Save Changes” button. If you want to revert to the previously-saved state, and lose any changes you have made since, click the “Cancel Changes” button.

If a service number is not listed in the grid, it is possible to add new ones. Click the button marked “Add Service No/Ref”, and enter the new number.

To search for a particular service number within the list, click “Find Service No/Ref”, and enter the number you wish to find. If the number cannot be found, the message “Number not found” will be displayed.

If you wish to remove a Service number from the grid, select that number in the grid, and click on the “Delete Service No/Ref” button. Please note that only numbers that do **not** appear in the bill may be deleted and that after deletion, no Cost Centre details will appear in reports for that number.

If you wish to remove all the Cost Centre names for a service number, but leave the service number in the grid, select your chosen service number, and click the “Remove Cost Centre Detail” button.

It is recommended that you take a backup of your Cost Centre structure, once it has been set up. This may be done by clicking the “Save as CSV” button. This will allow you to specify a folder and filename under which the details may be saved. This file can then be imported at will, using the “Import Cost Centres from Comma Delimited (CSV) file” button on the Cost Centre Management screen.

Help on how to use the Cost Centre screen is available by clicking on the “Help” button.

Remove Cost Centres but leave Tel Nos/Cct IDs

If you wish to delete the whole Cost Centre structure for the project, click the “Remove Cost Centres but leave Tel Nos/Cct IDs” button. This will result in all Cost Centres being removed, but service numbers will remain in the project.

Please note that changes made to the Cost Centres of one project will be reflected in all projects imported using the same Account number.

Import Cost Centres from Comma Delimited (CSV) File

When a Cost Centre structure has been set up on the “Edit Cost Centres” screen, it is possible to output the structure to a CSV (Comma Separated Values) file. It is recommended that you back up your Cost Centre structure in this way whenever changes are made.

If you want to restore your Cost Centre structure from such a file, click the “Import Cost Centres from Comma Delimited (CSV) File” button. A new window will be displayed, whereupon you may then proceed using the following steps:

- Click the “Select Import File” button. A dialog box will appear allowing you to select your CSV file. Please ensure that you select a valid Elite Cost Centre CSV file. The file will then be read, and the contents displayed, as shown below:

Select appropriate buttons for displayed data - click next to ignore displayed data

TelNo		
'	Tel Number	Next
'00818	Cost Centre 1	Previous
'0118972	Cost Centre 2	
'0118972	Cost Centre 3	
'0120288	Cost Centre 4	
'0120288	Cost Centre 5	
'0120623		

WARNING - Files must be of a consistent format. BT One Bill files contain varying format fields. These are not suitable for import using this facility.

- You must now select what data appears in which section of the CSV file. Files output from Analyst Elite will include a column header, making it easier to identify the column. In the example shown, the first column is the Service Number, so you should click the “Tel Number” button on the right. The next column in the file will then be displayed. You must progress through the columns in the file, identifying which columns contain which details by clicking the relevant button.

If a column is displayed that is not required, you may click the “Next” button to go to the next column of figures. If you need to, you may also navigate backward through the columns by clicking “Previous”.

- Once you have identified the necessary columns, a new button will appear, marked “Start Import”. Click this button to import the content of the CSV file.
- You will receive the message “Do you want to Skip the first line because it contains header information?”. As mentioned previously, any files exported from Analyst Elite will include a column header, so you should click “Yes”, to prevent these column headers being imported as Cost Centre details. If no such column headers exist (for example, if you have made up your own Cost Centre file to import), click “No”, and the import process will include the first row in the file.
- Analyst Elite will proceed to import the file, and will notify you if the import has been successful or not. Two buttons marked “Save Changes” and “Cancel Changes” will then appear. Changes are not made permanent unless you click the “Save Changes” button. If you wish to discard your changes, click the “Cancel Changes” button.

Restore Cost Centre Details From Bill

Clicking this button will result in the Cost Centre details within the original bill data being retrieved, and overwriting any changes made since the initial import.

Update Featurenet Bill Numbers

This facility will update the bill numbers from the Featurenet disc for the project. You will be asked to confirm that you wish to perform the update before the process begins.

Manage Address Information

As part of Cost Centre Management, Analyst Elite provides the facility to record an address for each service number. Cost Centre address details are included in the Cost Centre Hierarchy report, to be found on the Summary Reports screen.

Clicking on the “Manage Address Information” button displays the following window:

Address Detail Management by Service Number/Ref

BT Analyst Elite

TelNo	CostCentre1	CostCentre2	CostCentre3	CostCentre4	CostCentre5	SourceAccount	Address De
00194	OFFICE					WM00194	TEST
01132420	TELEPHONY					MY02097	
011324230	OFFICE					WM35519	
01132423	TELEPHONY					MY48045	
01132449	TELEPHONY					MY46695	
01132455	TELEPHONY					MY78995	
01132462	TELEPHONY					MY19995	
01132463	TELEPHONY					MY17995	
01132464	TELEPHONY					MY77995	
01132504	TELEPHONY					MY36155	
01132504	TELEPHONY					MY10714	
01132504	TELEPHONY					MY79681	
01133911	TELEPHONY					MY47072	
01142720	TELEPHONY					SL37215	
01142720	TELEPHONY					SL28215	
01142720	TELEPHONY					SL78215	

To Quickly change records - Select the Service No/Ref(s) you wish to change by clicking on that row(s) and then double click on the required Address from the list below. Use the SHIFT key whilst selecting Service No/Ref to highlight a group of records.

Find Tel No/Ref Delete Address For Selected Number

Addresses

TEST

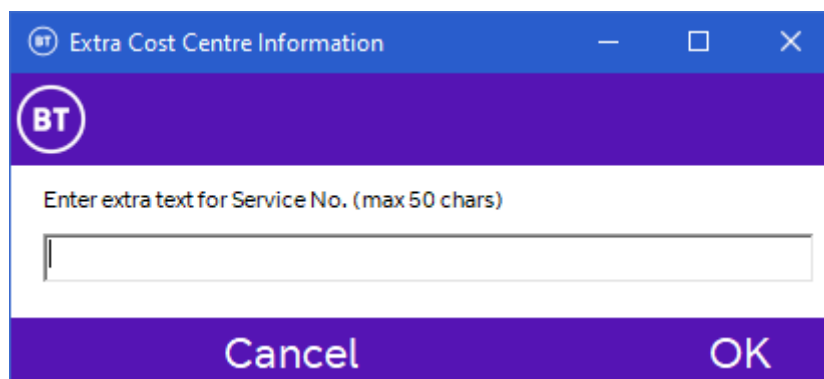
Add Edit Delete

Double click Address to apply it to selected Service No/Ref. Single click to edit/delete Address then click edit or delete button.

Save Changes Cancel Changes Save As CSV Help Exit

This window displays each of the service numbers, the Cost Centres assigned to it, the Source Account number, and any previously-stored address details.

To add address details to a service number, click the “Add” button. The following window will be displayed:



Type in the address you wish to use, and click “OK” to save it. Click “Cancel” to go back to the “Address Detail Management” screen without saving your changes.

The address you typed will then appear in the list at the centre of the screen. You may now apply this address to any of the service numbers in the grid at the top of the screen. To do this, click on the line in the grid showing your chosen service number, then double-click the required address. The address will then appear next to the selected service number. You may select multiple service numbers by selecting the first required number, then hold down the “shift” key, and select the last required number. All service numbers between those selected will also be highlighted, and may have a single address applied to them.

To delete an address, select the address you no longer want, and click the “Delete” button. This will remove the address from the list. Please note, that any service numbers to which this address has been assigned will have their addresses removed as well.

If you need to amend an address, click on the required address in the list, and click “Edit”. The address details will then be displayed in a new window, allowing you to make your changes. Please note that when you change an address, those changes will be copied to any service numbers bearing the original address.

If you need to remove the address from service numbers, but want that address still to be available for use, select the service numbers you wish to amend, then click the “Delete address for selected number” button.

To save the changes you have made, click “Save Changes”. To revert to the previous saved state, click “Cancel Changes”. Please note, if you cancel changes, any updates you have made since the last Save will be lost.

You may store your address information by clicking on the “Save as CSV” file. You may then specify a filename and folder into which you can save the addresses. This CSV file may then be used for mass-editing, or simply as backup. See “Import Address Information from CSV”, below, for more details on importing addresses from a CSV file.

Import Address Information from CSV

If you want to restore the address information from a backup file, or you have an updated address file you wish to load (see “Manage Address Information” section on page 50) click the “Import Address Information from CSV” button.

You will be prompted to specify a valid CSV file, containing address information. If the file is valid, the following window will be displayed:

Import CSV File

BT Analyst Elite

Select Import File: C:\Temp\ExampleCostCentres.CSV

The fields found in the selected CSV file are displayed in the table below (first ten rows only).
To proceed, click on a column header within the table, and then click one of the buttons in the panel below to set the field to which the data should be applied.
The chosen field will then be displayed at the top of the selected column. Once all fields have been set, click the Import button to import the CSV file.

Column1	Column2	Column3	Column4	Column5
Service No/Ref	CostCentre 1	CostCentre 2	CostCentre 3	Cos
'0123456789000	TELEPHONY			
'0123456789001	TELEPHONY			
'0123456789002	TELEPHONY			
'0123456789003	TELEPHONY			
'0123456789004	TELEPHONY			
'0123456789005	TELEPHONY			
'0123456789006	TELEPHONY			
'0123456789007	TELEPHONY			
'0123456789008	TELEPHONY			
'0123456789009	TELEPHONY			

Fields contained in the CSV file

Fields

Service Number Address Details

☒ First row contains data ☐ First row contains column headers

Import Exit

Each column found in the CSV is displayed in a grid. The fields required for the import are shown in a frame below it (in this case, Service Number and Address Details).

To proceed, you must identify which columns in the CSV file represent the required fields. In the example above, the service number is contained in the first column – click the top of this column (marked “Column1”). This will highlight the column, as shown below:

The screenshot shows the 'Import CSV File' window in the Analyst Elite application. The window has a purple header with the BT logo and the text 'Analyst Elite'. Below the header, there is a 'Select Import File' button and a text box containing the file path 'C:\Temp\ExampleCostCentres.CSV'. A message box states: 'The fields found in the selected CSV file are displayed in the table below (first ten rows only). To proceed, click on a column header within the table, and then click one of the buttons in the panel below to set the field to which the data should be applied. The chosen field will then be displayed at the top of the selected column. Once all fields have been set, click the Import button to import the CSV file.'

Column1	Column2	Column3	Column4	Column5
Service No/Ref	CostCentre 1	CostCentre 2	CostCentre 3	CostCentre 4
'01234-000	Fields contained in the CSV file			
'01234-001	TELEPHONY			
'01234-002	TELEPHONY			
'01234-003	TELEPHONY			
'01234-004	TELEPHONY			
'01234-005	TELEPHONY			
'01234-006	TELEPHONY			
'01234-007	TELEPHONY			
'01234-008	TELEPHONY			
'01234-009	TELEPHONY			

Below the table, there is a 'Fields' section with two buttons: 'Service Number' and 'Address Details'. The 'Service Number' button is currently selected. Below the buttons, there are two radio buttons: 'First row contains data' (which is selected) and 'First row contains column headers'.

At the bottom of the window, there are two buttons: 'Import' and 'Exit'.

Now click the “Service Number” button. The column title will then change to represent the change you have made, as shown below:

Import CSV File

BT Analyst Elite

Select Import File: C:\Temp\ExampleCostCentres.CSV

The fields found in the selected CSV file are displayed in the table below (first ten rows only).
To proceed, click on a column header within the table, and then click one of the buttons in the panel below to set the field to which the data should be applied.
The chosen field will then be displayed at the top of the selected column. Once all fields have been set, click the Import button to import the CSV file.

Service Number	Column2	Column3	Column4	Column5
Service No/Ref	CostCentre 1	CostCentre 2	CostCentre 3	CostCentre 4
'0123456789000	TELEPHONY			
'0123456789001	TELEPHONY			
'0123456789002	TELEPHONY			
'0123456789003	TELEPHONY			
'0123456789004	TELEPHONY			
'0123456789005	TELEPHONY			
'0123456789006	TELEPHONY			
'0123456789007	TELEPHONY			
'0123456789008	TELEPHONY			
'0123456789009	TELEPHONY			

Fields: Service Number Address Details

☒ First row contains data ☐ First row contains column headers

Import Exit

Repeat this process for the remaining column (in this example, to be found in Column8).

Lastly, in this case, as can be seen, the first row contains the column headers for the data, which should not be imported. For this reason, select the option “First row contains column headers” on the right-hand side of the “Fields” box. This will omit the first row from the import.

When all necessary selections have been made, click the “Import” button. The chosen file will then be imported. Once the operation is complete, a message will be displayed telling you the number of lines imported from the file, and the number of service numbers which have had their addresses updated.

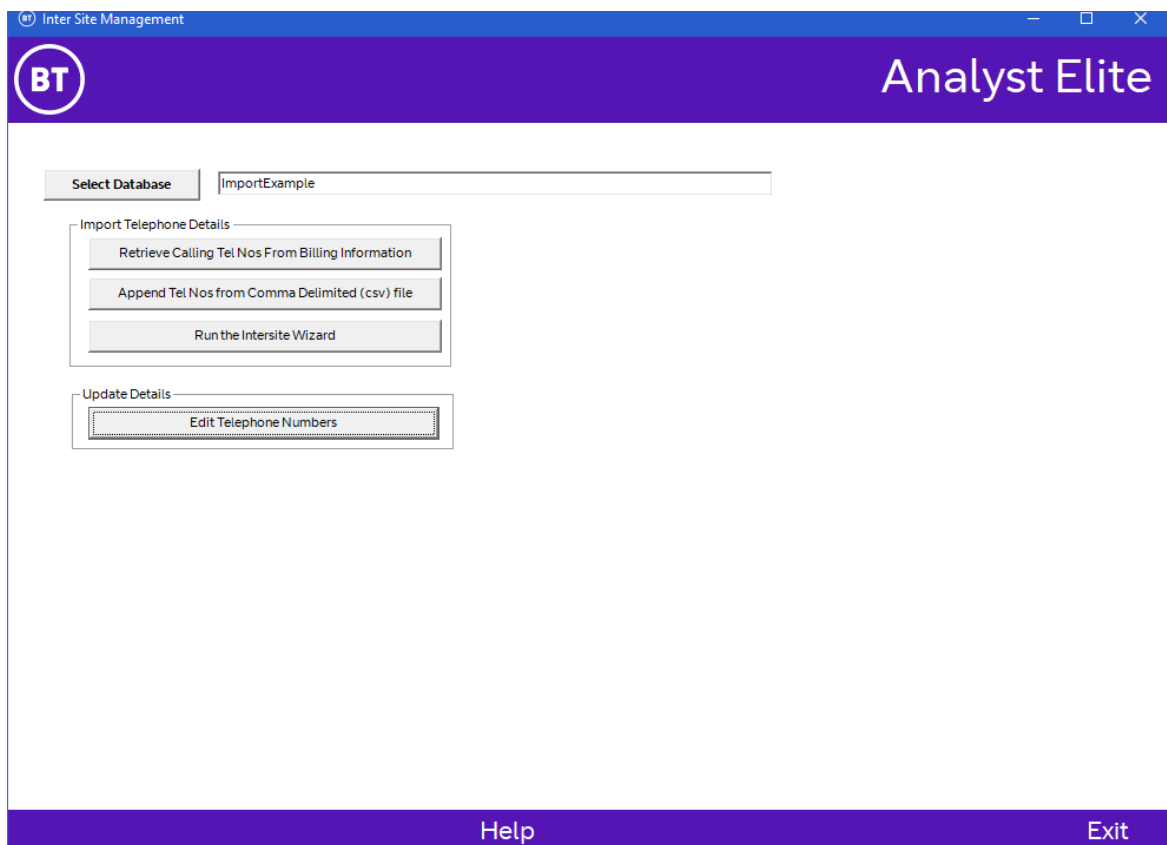
Address Import Exceptions

Whenever a bill is loaded, the service numbers associated with the account number are stored. Some service numbers will not have charges applied to them in every bill. This report displays those service numbers, along with their address details, that do not appear in the **currently loaded** project. If this is your current bill, this may be because they have ceased operation since the last bill.

Inter Site Management

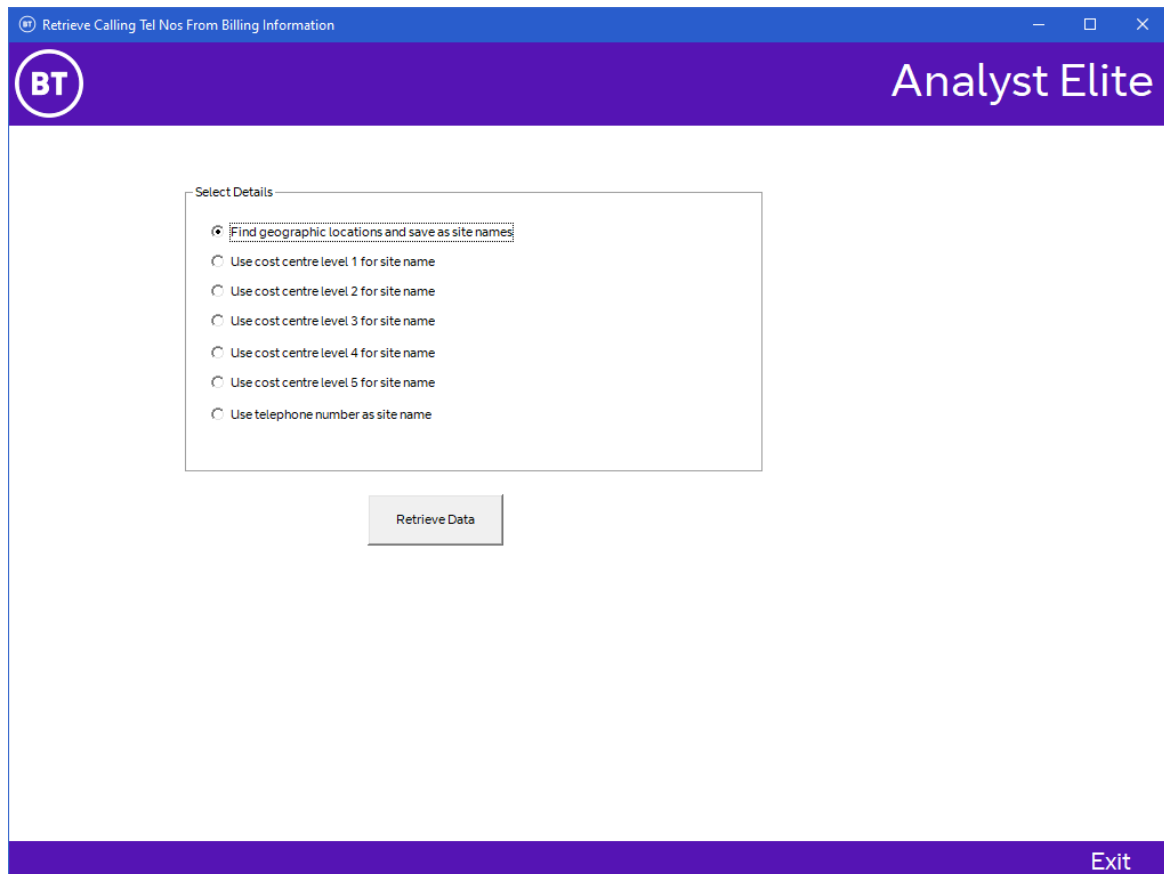
BT Analyst Elite offers the facility to report on calls between different parts of your organisation. Service numbers are imported from the bill data, and you may then apply site names to each number. Reports are then available on the Itemised Reports screen that identify calls between the sites you have specified.

To change your site setup, click the “Inter Site Management” button on the main menu. The following window will be displayed:



Retrieve Calling Tel Nos From Billing Information

To set up sites, it is first necessary to retrieve the service numbers from your bill. This can be done by clicking the “Retrieve Calling Tel Nos From Billing Information” button. The following window will appear:



The screenshot shows a software window titled "Retrieve Calling Tel Nos From Billing Information" with a purple header bar. The header bar contains the BT logo on the left and the text "Analyst Elite" on the right. The main content area is white and contains a "Select Details" dialog box. This dialog box has a list of radio button options: "Find geographic locations and save as site names" (which is selected), "Use cost centre level 1 for site name", "Use cost centre level 2 for site name", "Use cost centre level 3 for site name", "Use cost centre level 4 for site name", "Use cost centre level 5 for site name", and "Use telephone number as site name". Below the dialog box is a "Retrieve Data" button. In the bottom right corner of the window, there is an "Exit" button.

The options on this screen are defined by the bill type

This is for initial setup of the site names. The names may be changed at will once the service numbers have been imported, via the “Edit Telephone Numbers” screen (please see “Edit Telephone Numbers” on page 66 for details).

Select your choice of initial site name setup, and then click the “Retrieve Data” button. Please note that it will overwrite any site names set up, if this has already been done previously. Once the import operation has completed, you may save the new setup by clicking “Save Changes”, or discard them by clicking “Cancel Changes”.

Append Tel Nos from Comma Delimited (csv) file

The initial setup for site management requires telephone numbers to be imported from the billing information. However, it is possible to add more telephone numbers via this facility.

When you click this button, a new window will open, prompting you to select a CSV file. Once you have selected a valid file, the columns contained in the file will be displayed as below:

You must specify the location of each of the required fields, by clicking on the relevant button to the right of the list. In the example above, the first column is displayed, which is the telephone/service number, meaning you must click the “Service Number/Ref” button. If the column displayed is not required, click the “Next” button to move to the next column.

Once all necessary columns have been specified, the window will appear as below:

Import Telephone Details from CSV

BT

Analyst Elite

Select Import File C:\Data\BTBA CC.CSV

Select appropriate buttons for displayed data - click next to ignore displayed data

Tel Number

Exchange Location

Site Name

Next

Previous

WARNING - Files must be of a consistent format. BT One Bill files contain varying format fields. These are not suitable for import using this facility.

Start Import

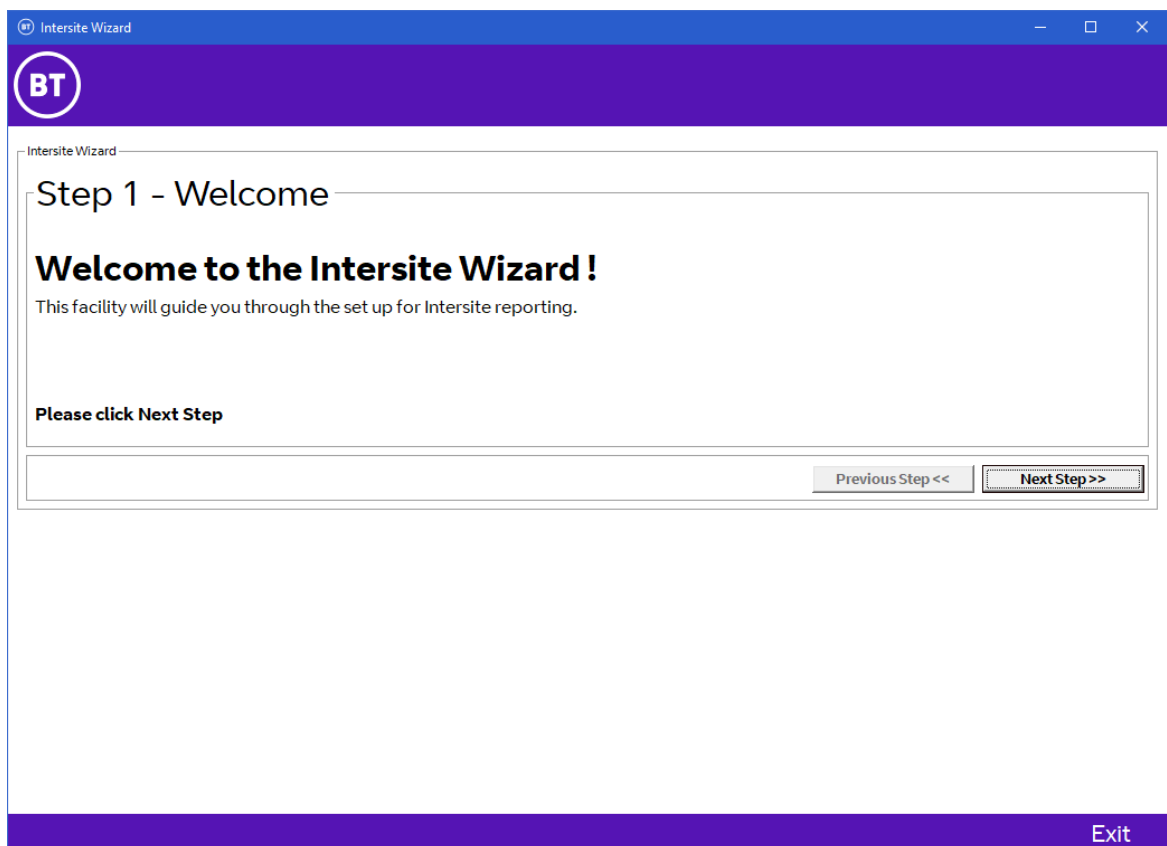
Exit

Click on the “Start Import” button to commence the import. Once the import has completed, buttons will be displayed allowing you to save or cancel your changes.

Intersite Wizard

A setup wizard is provided to guide you through setting up Intersite reporting. On clicking the “Intersite Wizard” button the welcome screen is displayed, as below:

Step 1 - Welcome



On clicking “Next Step”, the following window is displayed:

Step 2 – Retrieve Numbers

The screenshot shows a software window titled "Intersite Wizard" with a blue header bar containing the BT logo. The main content area is titled "Step 2 - Retrieve Numbers" and contains the instruction: "Choose how you want the Intersite locations to be identified from the retrieval options on the right." Below this instruction is a button labeled "Please click Next Step". To the right of the instruction is a box titled "Retrieval Options" containing seven radio button options: "Find geographic locations and save as site names" (which is selected), "Use cost centre level 1 for site name", "Use cost centre level 2 for site name", "Use cost centre level 3 for site name", "Use cost centre level 4 for site name", "Use cost centre level 5 for site name", and "Use telephone number as site name". At the bottom right of the main content area are two buttons: "Previous Step <<" and "Next Step >>". A purple footer bar at the bottom right contains the text "Exit".

Intersite Wizard

Step 2 - Retrieve Numbers

Choose how you want the Intersite locations to be identified from the retrieval options on the right.

Please click Next Step

Retrieval Options

- ☒ Find geographic locations and save as site names
- ☐ Use cost centre level 1 for site name
- ☐ Use cost centre level 2 for site name
- ☐ Use cost centre level 3 for site name
- ☐ Use cost centre level 4 for site name
- ☐ Use cost centre level 5 for site name
- ☐ Use telephone number as site name

Previous Step << Next Step >>

Exit

This window allows you to define how your sites will be named to begin with. You can change any of the names at a later point via the “Edit Telephone Numbers” facility on the Inter Site Management screen. Once you have made your choice of retrieval option, the following window is displayed:

Step 3 – Add DDI Ranges

Intersite Wizard

BT

Intersite Wizard

Step 3 - Add DDI Ranges

Use this stage to add any DDI number ranges. This will help you analyse the true spend between sites where calls are made to individual DDI extensions.

[Click Here](#) to add/manage DDI ranges

Please click Next Step

Previous Step << Next Step >>

Progress will appear here during each stage of the wizard

Tel No	Exchange Location	Site Name
000164954XXXX	NON-GEORGAPHIC	NON-GEORGAPHIC
000165056XXXX	NON-GEORGAPHIC	NON-GEORGAPHIC
000165056XXXX	NON-GEORGAPHIC	NON-GEORGAPHIC
000165057XXXX	NON-GEORGAPHIC	NON-GEORGAPHIC
000165060XXXX	NON-GEORGAPHIC	NON-GEORGAPHIC
000165062XXXX	NON-GEORGAPHIC	NON-GEORGAPHIC
00130XXXX	NON-GEORGAPHIC	NON-GEORGAPHIC
00194XXXX	NON-GEORGAPHIC	NON-GEORGAPHIC
00538XXXX	NON-GEORGAPHIC	NON-GEORGAPHIC
0113242XXXX	LEEDS	LEEDS

Site Names

- BOLTON
- BOURNEMOUTH
- FERNDOWN
- LEEDS
- NON-GEORGAPHIC
- NOTTINGHAM
- READING
- READING CENTRAL
- SHEFFIELD

Exit

This window allows you specify a range of Direct Dial numbers. This is of particular benefit when an organisation has a range of direct dialled numbers, all billed against a single number, as there may be calls to any of the numbers within that range – these numbers would not be found within the billing information.

If you click on the “Click Here” link, the following window is displayed:

DDI range select

BT

Select number

Tel No.	End
94799	1099

☐ Exclude all numbers ending in single '0'

Select default number range

100

Change Range End

To change the default DDI range applied to a telephone number, select the telephone number in the grid then over-type the value displayed below.

OK Ignore Range

Click apply to update with the selected number ranges

OK Cancel

This window allows you to assign a number range to a billed number. In the example above, looking at the line with the telephone number 9479911000, the numbers 9479911000 to 9479911099 will all be added to the site list. Therefore, any calls to these numbers will be picked up in the Intersite reports.

If they are not assigned in this fashion those calls will not be included, as they are not billed – the charges for those numbers are billed against another number.

If you wish to alter the range of numbers applied to a given service number, select that telephone number from the list, and once the “End” number has been displayed in the textbox shown, enter your required number and click “OK”.

Click “Apply” to save the changes, or “Cancel” to exit back to the Intersite Wizard.

Step 4 – Add Telephone Numbers

Step 4 - Add Telephone Numbers

Use this stage to add any additional telephone numbers that you would like to analyse using Intersite reporting. Typically these would be numbers not included in this bill which form part of your telephony estate i.e. lines with another network supplier.

[Click Here](#) to add more telephone numbers

Please click Next Step

Previous Step << Next Step >>

Progress will appear here during each stage of the wizard

Tel No	Exchange Location	Site Name
000164954XXXX	NON-GEORGAPHIC	NON-GEORGAPHIC
000165056XXXX	NON-GEORGAPHIC	NON-GEORGAPHIC
000165056XXXX	NON-GEORGAPHIC	NON-GEORGAPHIC
000165057XXXX	NON-GEORGAPHIC	NON-GEORGAPHIC
000165060XXXX	NON-GEORGAPHIC	NON-GEORGAPHIC
000165062XXXX	NON-GEORGAPHIC	NON-GEORGAPHIC
00130XXXX	NON-GEORGAPHIC	NON-GEORGAPHIC
00194XXXX	NON-GEORGAPHIC	NON-GEORGAPHIC
00538XXXX	NON-GEORGAPHIC	NON-GEORGAPHIC
0113242XXXX	LEEDS	LEEDS

Site Names

- BOLTON
- BOURNEMOUTH
- FERNDOWN
- LEEDS
- NON-GEORGAPHIC
- NOTTINGHAM
- READING
- READING CENTRAL
- SHEFFIELD

Exit

The telephone numbers initially added via the Intersite Wizard are those contained in the current bill. However, they may be additional numbers that should be included, for example, numbers with another network. These may be added at this stage of the wizard. If you click on the link “Click Here to add more telephone numbers”, the following window is displayed:

Add telephone numbers for inter-site reports

To add a range of telephone numbers, enter the full telephone number including STD code for the first number in the range to the 'Start telephone number' box, then enter a maximum of 4 digits for the end of the last number in the range to the 'To Number' box.

To add just a single telephone number, enter the full telephone number including STD code in the 'Start telephone number' box and leave the 'To number' box empty.

Start telephone number

To telephone number

Site name to use for number range

OK Cancel

To add a single number, type that number in the “Start telephone number” box, enter a site name as required in the “Site name..” box, and click “OK”.

To add a range of numbers, enter a “start” number in the relevant box (e.g. “01234555000”), and then the “end” of the range in the “To..” box (e.g. “020”). The intervening numbers (01234555001 to 01234555019) will be added automatically, with the site name if you have entered one.

Once you click “OK”, the next screen will be displayed:

Step 5 - Finished

BT

Intersite Wizard

Step 5 - Finished

Intersite setup is now complete and your changes have been saved.

Your settings can be reviewed on the next screen, where you can modify site names and make additional changes.

Please click Exit Wizard

[Previous Step <<](#) [Exit Wizard >>](#)

Progress will appear here during each stage of the wizard

Tel No	Exchange Location	Site Name
000164954	NON-GEOGRAPHIC	NON-GEOGRAPHIC
000165056	NON-GEOGRAPHIC	NON-GEOGRAPHIC
000165056	NON-GEOGRAPHIC	NON-GEOGRAPHIC
000165057	NON-GEOGRAPHIC	NON-GEOGRAPHIC
000165060	NON-GEOGRAPHIC	NON-GEOGRAPHIC
000165062	NON-GEOGRAPHIC	NON-GEOGRAPHIC
00130	NON-GEOGRAPHIC	NON-GEOGRAPHIC
00194	NON-GEOGRAPHIC	NON-GEOGRAPHIC
00538	NON-GEOGRAPHIC	NON-GEOGRAPHIC
0113242	LEEDS	LEEDS

Site Names

- BOLTON
- BOURNEMOUTH
- FERNDOWN
- LEEDS
- NON-GEOGRAPHIC
- NOTTINGHAM
- READING
- READING CENTRAL
- SHEFFIELD

[Exit](#)

Your Intersite setup is now complete. You will then be returned to the “Edit Telephone Details” screen, where you can make any further changes required. See “Edit Telephone Details” section below for more details.

Edit Telephone Numbers

If you click the “Edit Telephone Numbers” button on the Inter Site Management screen, the following window is displayed:

Tel No	Exchange Location	Site Name
000164954XXXX	NON-GEOGRAPHIC	NON-GEOGRAPHIC
000165056XXXX	NON-GEOGRAPHIC	NON-GEOGRAPHIC
000165056XXXX	NON-GEOGRAPHIC	NON-GEOGRAPHIC
000165057XXXX	NON-GEOGRAPHIC	NON-GEOGRAPHIC
000165060XXXX	NON-GEOGRAPHIC	NON-GEOGRAPHIC
000165062XXXX	NON-GEOGRAPHIC	NON-GEOGRAPHIC
00130XXXX	NON-GEOGRAPHIC	NON-GEOGRAPHIC
00194XXXX	NON-GEOGRAPHIC	NON-GEOGRAPHIC
00538XXXX	NON-GEOGRAPHIC	NON-GEOGRAPHIC
01132420XXXX	LEEDS	LEEDS
01132423XXXX	LEEDS	LEEDS
01132443XXXX	LEEDS	LEEDS
01132455XXXX	LEEDS	LEEDS
01132462XXXX	LEEDS	LEEDS
01132463XXXX	LEEDS	LEEDS
01132464XXXX	LEEDS	LEEDS

Site Names
BOLTON
BOURNEMOUTH
FERNDOWN
LEEDS
NON-GEOGRAPHIC
NOTTINGHAM
READING
READING CENTRAL
SHEFFIELD

Exchange locations are for guidance only - they are not used in reports

Cost centre details will not be affected by changes made within this facility.

Save Changes Cancel Save As CSV Help Exit

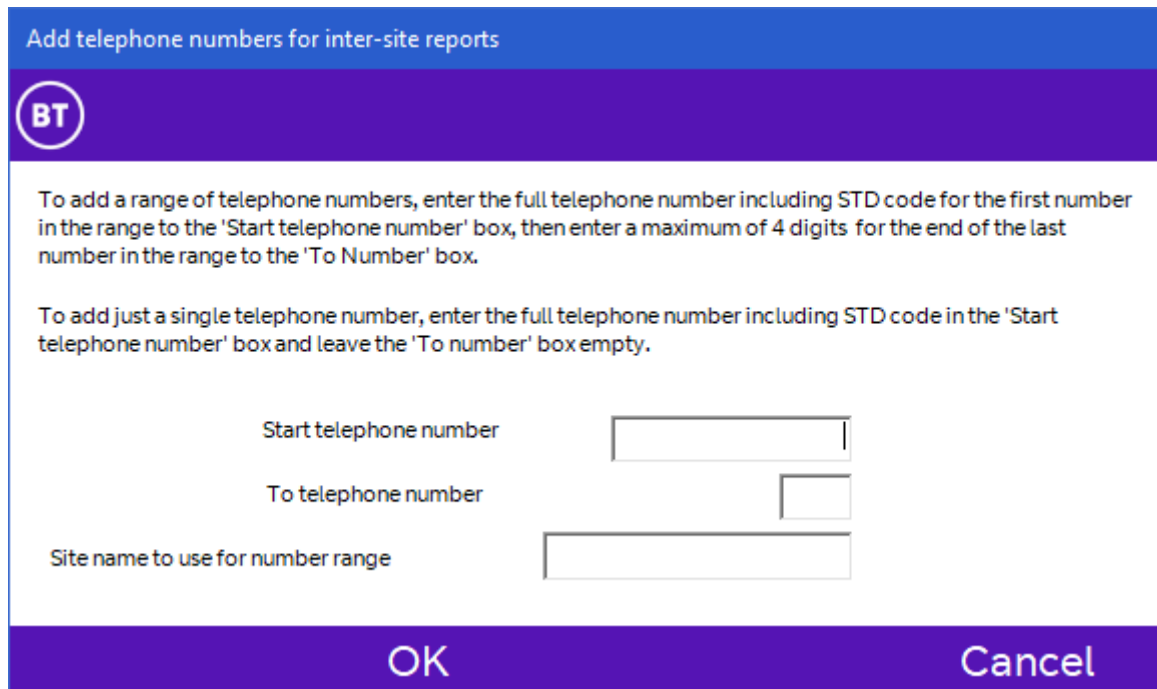
The window is also displayed once the Intersite Wizard is completed. Service numbers are listed on the left-hand side. The currently available site names are displayed in the list on the right-hand side.

To add a new site name, click the “Add” button below the site name list. A new window will be displayed, allowing you to enter the new name. Once the name has been entered, it will be added to the list on the “Edit telephone details” window.

To edit a site name, select it from the list, and click the “Edit” button immediately below. A new window will be displayed, allowing you to amend the site name. Once you have made your changes, the new name will be displayed in the original list, and also assigned to any service numbers that bore the old name.

To delete a site name, select it from the list, and click “Delete”. That number will be deleted from the list of site names. Any service numbers using that name will have their name removed, i.e. set to blank.

If a telephone number is missing from the list of service numbers displayed, you may add it by clicking “Add Tel No”. A new window will be displayed, as shown below:

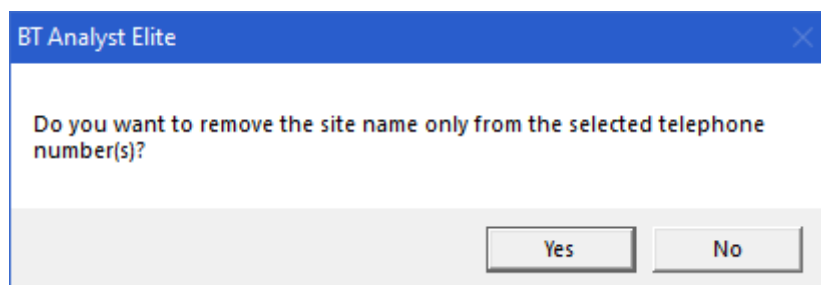


The dialog box has a blue header with the text "Add telephone numbers for inter-site reports" and a BT logo. Below the header, there is instructional text: "To add a range of telephone numbers, enter the full telephone number including STD code for the first number in the range to the 'Start telephone number' box, then enter a maximum of 4 digits for the end of the last number in the range to the 'To Number' box." and "To add just a single telephone number, enter the full telephone number including STD code in the 'Start telephone number' box and leave the 'To number' box empty." Below the text are three input fields: "Start telephone number", "To telephone number", and "Site name to use for number range". At the bottom, there are "OK" and "Cancel" buttons.

To add a single number, type that number in the “Start telephone number” box, enter a site name as required in the “Site name..” box, and click “OK”.

To add a range of numbers, enter a “start” number in the relevant box (e.g. “01234555000”), and then the “end” of the range in the “To..” box (e.g. “020”). The intervening numbers (01234555001 to 01234555019) will be added automatically, with the site name if you have entered one.

If you wish to delete the site assigned to a telephone number, or to delete the entry for a service number itself, click the “Delete Selected Site/Tel No” button. You will then be asked:



The dialog box is titled "BT Analyst Elite" and contains the question "Do you want to remove the site name only from the selected telephone number(s)?". At the bottom, there are "Yes" and "No" buttons.

If you want only to remove the site name from your selected telephone number, but leave the telephone number in the list, click “Yes”.

If you want to delete the whole entry, for both site name **and** telephone number, click “No”.

To find a telephone number within the list, click “Find Tel No”, and enter the number you wish to find.

Once you have made all the amendments you require, click “Save changes” to make the changes permanent. If you want to revert to the last saved state, and lose any changes made since, click “Cancel Changes”

You may save your current Intersite setup, for backup purposes. This backup file may then be imported at any point via the “Append Tel Nos From Comma Delimited (csv) file” facility.

Create DDI Ranges

It is possible to specify a range of Direct Dial numbers, by clicking the “Create DDI Ranges” button. This is of particular benefit when an organisation has a range of direct dialled numbers, all billed against a single number, as there may be calls to any of the numbers within that range – these numbers would not be found within the billing information.

Clicking on the “Create DDI Ranges” button displays the following window:

DDI range select

BT

Select number

Tel No.	End
947991	1099

Select default number range

100

Change Range End

To change the default DDI range applied to a telephone number, select the telephone number in the grid then over-type the value displayed below.

OK Ignore Range

Click apply to update with the selected number ranges

☐ Exclude all numbers ending in single '0'

OK Cancel

This window allows you to assign a number range to a billed number. In the example above, the numbers 9479911000 to 9479911099 will all be added to the site list. Therefore, any calls to these numbers will be picked up in the Intersite reports.

If they are not assigned in this fashion those calls will not be included, as they are not billed – the charges for those numbers are billed against another number.

If you wish to alter the range of numbers applied to a given service number, select that telephone number from the list, and once the “End” number has been displayed in the textbox shown, enter your required number and click “OK”.

Click “Apply” to save the changes, or “Cancel” to exit back to the Edit Telephone Details screen.

Phone Book Management

Analyst Elite provides the facility to apply a name to each telephone number in the bill, both your own numbers, and those of the numbers you are calling. These numbers are stored in the “Phonebook”, which can then be applied to all bills under a common account number.

The phonebook names can then be applied to many reports with Analyst Elite - in some cases instead of the actual numbers, in other cases alongside those numbers. It is possible to show the phonebook entries for calling numbers only, called numbers only, or both. If required the phonebook can be disabled so that no phonebook entries are shown.

The Phonebook can be updated when viewing reports that show Phonebook entries (see “Report Options” section on page 20). Larger updates to the Phonebook are done via the Phone Book Management screen, accessed by clicking the “Phone Book Management” button on the main screen. On clicking this button, the following window is displayed:

The screenshot shows the 'Phone Book Management' window within the 'Analyst Elite' application. The window has a blue header bar with the 'BT' logo on the left and the text 'Analyst Elite' on the right. Below the header, there is a 'Select Project' button and a text field containing 'ImportExample'. The main content area is divided into two sections: 'Import Telephone Details' and 'Setup Details'. The 'Import Telephone Details' section contains two buttons: 'Retrieve Tel Nos From Billing Information' and 'Append Tel Nos from Comma Delimited (csv) file'. The 'Setup Details' section contains two buttons: 'Edit Phone Book' and 'Apply Phone Book to Reports'. At the bottom of the window, there is a footer bar with 'Help' and 'Exit' buttons. A small text block at the bottom left of the main content area states: 'The Phone Book facility allows user defined names to be applied in place of telephone numbers and can be applied to ALL Itemised Reports (excluding Telemarketing, Intersite and Trends)'.

Retrieve Tel Nos from Billing Information

To set up a basic Phonebook, or to reset the Phonebook back to its initial state, click the “Retrieve Tel Nos from Billing Information” button. This will display the following screen:

The screenshot shows a software window titled "Retrieve Tel Nos From Billing Information" with a blue header bar. On the left of the header is the BT logo, and on the right is the text "Analyst Elite". The main content area is white and contains a "Select Details" section with three radio button options: "Retrieve Originating Tel Nos and Called Tel Nos" (which is selected), "Retrieve Originating Tel Nos Only", and "Retrieve Called Tel Nos Only". At the bottom of the window, there is a blue bar with two buttons: "Retrieve Data" and "Exit".

Three options are provided for your Phonebook setup. You may retrieve **both** originating **and** called numbers, originating numbers only, or called telephone numbers only. Your choice here will determine which numbers are available for display on later reports. If you select “Retrieve Originating Tel Nos Only”, you will only be able to apply names to numbers that are billed as originating numbers.

Make your choice as required, and then click the “Retrieve Data” button.

NB – Importing telephone numbers will overwrite any previous settings.

Once the import has finished, you may click “Save Changes” to make your import permanent, or “Cancel Changes” to cancel any changes made.

Once you have made your choices, click “Exit” to go back to the Phone Book Management screen.

Append Tel Nos from Comma Delimited (csv) file

It is possible to add to the list of telephone numbers held within the Phonebook, by importing a CSV (comma separated values) file. The CSV file must contain the telephone number, and a Phonebook name on each line, with each field being separated by a comma. For example:

01234555111, Head Office

To import the file, click the “Append Tel Nos from Comma Delimited (csv) file” button on the Phone Book Management screen. You can then specify the location of the CSV file you wish to import. The file will be checked, and then the following window will be displayed:

Import Telephone Details from CSV

BT Analyst Elite

Select Import File C:\Temp\ExampleCostCentres.CSV

Select appropriate buttons for displayed data - click next to ignore displayed data

Service No/Ref	Tel Number	Next
'01234XXX000		
'01234XXX001		
'01234XXX002		
'01234XXX003		
'01234XXX004		
'01234XXX005		
'01234XXX006		
'01234XXX007		

Phone Book Name Previous Use

WARNING - Files must be of a consistent format. BT One Bill files contain varying format fields. These are not suitable for import using this facility.

Exit

You must specify the location of each of the required fields (“Use” is optional), by clicking on the relevant button to the right of the list. In the example above, the first column is displayed, which is the telephone number, meaning you must click the “Service Number/Ref” button. If the column displayed is not required, click the “Next” button to move to the next column.

Once you have specified the required fields, a new “Start Import” button will appear. Click this button to start the import. The numbers included in your file will then be added to those held.

To save the new Phonebook settings, click “Save Changes”. To discard the changes, click “Cancel Changes”.

Edit Phone Book

If you click on the “Edit Phone Book” button, the following window is displayed:

Edit Phone Book Details

BT **Analyst Elite**

TelNo	Name
DXXXX	
F29XXX	
GB34579XXX	
jma6286XXX	
MC48420XXX	
MC54407XXX	
mobile.o2.coXXX	
Nma6286XXX	
SHUK279XXX	
SHUK379XXX	
SHUK586XXX	
SHUK931XXX	
wap.o2.coXXX	
XXX	
XXX	
*	

Phone Book Names

Add Edit Delete

Double click a single telephone entry to enter a name or select one or more entries and double click on a Phone Book name from the Phone Book names list to apply that name to the selected telephone number(s)

To multi select entries in the grid, click in the narrow left hand column, then hold down the Ctrl key and click additional entries or hold down the Shift key and click a second number to select a range.

- Indicates Originating and Called Number
- Indicates Originating Number
- Indicates Called Number
- Indicates Number not identified from bill

Add Tel No Delete Selected Tel Nos Find Tel No

Save Changes Cancel Save as CSV Exit

Each of the telephone numbers retrieved is displayed in a list on the left-hand side of the window. The numbers are colour-coded according to whether they are an originating number, a called number, or both. Numbers that were added separately from the bill are displayed in a colour of their own.

To add a telephone number to the list, click the “Add Tel No” button. The following window will be displayed:

Add telephone numbers for Phone Book

BT

To add a range of telephone numbers, enter the full telephone number including STD code for the first number in the range to the 'Start telephone number' box, then enter a maximum of 4 digits for the end of the last number in the range to the 'To Number' box.

To add just a single telephone number, enter the full telephone number including STD code in the 'Start telephone number' box and leave the 'To number' box empty.

Start telephone number

To telephone number

Phone Book name to use for number range

OK
Cancel

To add a single number, type that number in the “Start telephone number” box, enter a Phonebook name as required in the “Phonebook name..” box, and click “OK”.

To add a range of numbers, enter a “start” number in the relevant box (e.g. “01234555000”), and then the “end” of the range in the “To..” box (e.g. “020”). The intervening numbers (01234555001 to 01234555019) will be added automatically, with the Phonebook name if you have entered one.

To delete a given Telephone number from the Phonebook, select the required phone number, and click the “Delete Selected Tel Nos”. That number will then be removed from the list.

To locate a given telephone number from within the list displayed, click the “Find Tel No” button, and enter the phone number you wish to find. The number, if it exists, will then be located in the list.

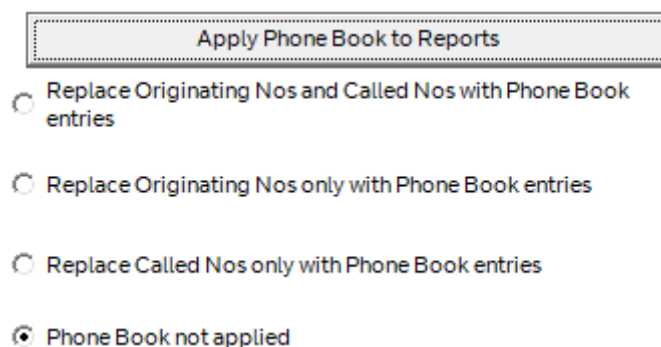
When you have made the changes required, click “Save Changes” to store the changes, or “Cancel Changes” to cancel the changes, and go back to the previously stored state.

You can save the current Phonebook setup to a backup CSV file, by clicking the “Save As CSV” button. You may then specify a location and filename where the file may be saved.

Apply Phone Book to Reports

This setting allows you to define how the Phonebook will be used when viewing Analyst Elite reports.

If you click the “Apply Phone Book to Reports” button, the following options will be displayed:



Apply Phone Book to Reports

☐ Replace Originating Nos and Called Nos with Phone Book entries

☐ Replace Originating Nos only with Phone Book entries

☐ Replace Called Nos only with Phone Book entries

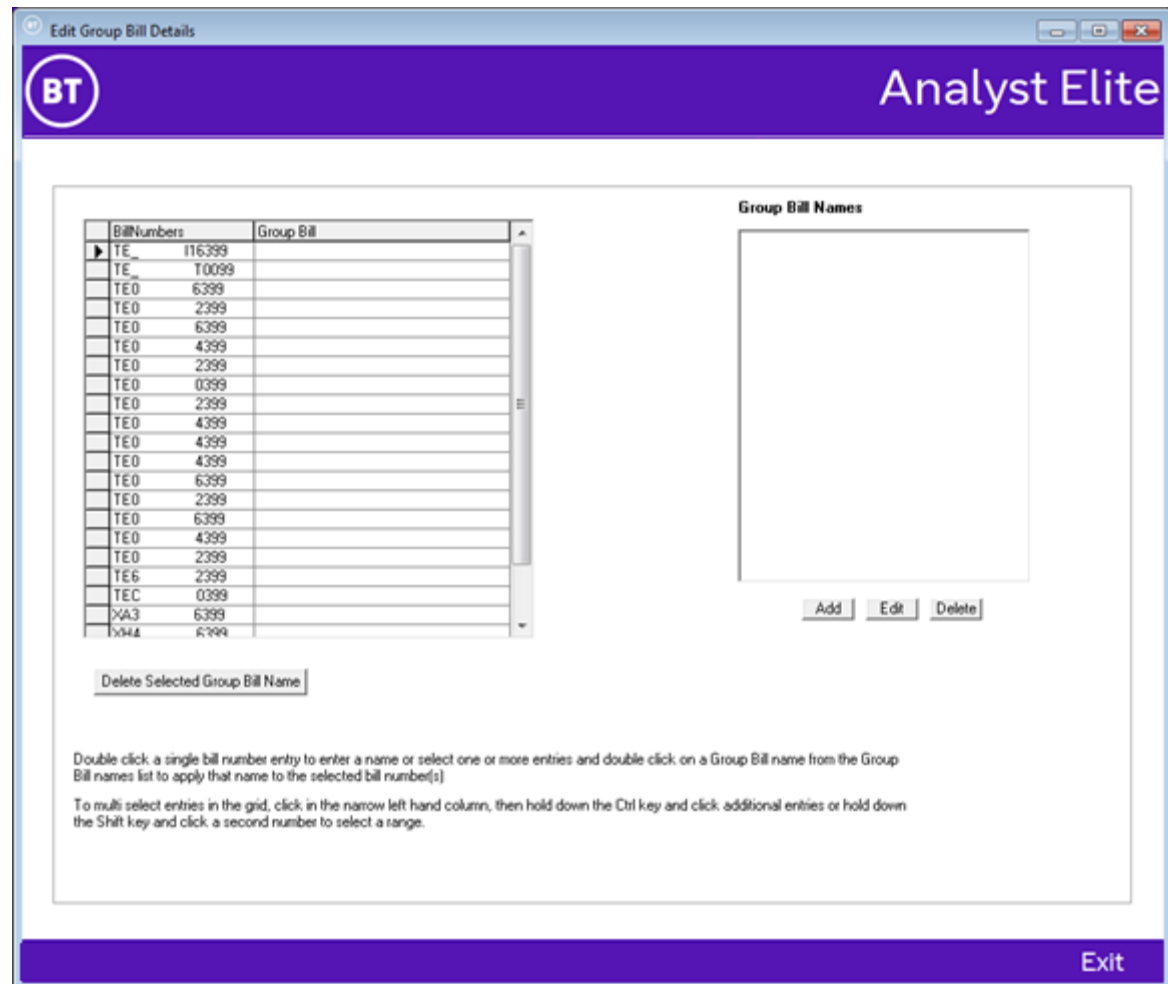
☒ Phone Book not applied

Click the option that matches how you would like phonebook entries to be applied. The options work as follows:

- **Replace Originating Nos and Called Nos with Phone Book entries** In reports using the phonebook, all numbers will be replaced with the names assigned to them in the Phonebook
- **Replace Originating Nos only with Phone Book entries**
All originating numbers displayed in reports will be replaced with their assigned Phonebook names. Called numbers will be displayed as numbers
- **Replace Called Nos only with Phone Book entries**
All Called numbers displayed in reports will be replaced with their assigned Phonebook names. Originating numbers will be displayed as numbers.
- **Phonebook not applied**
No phonebook entries will be used. All originating and called numbers will be listed as numbers.

Group Bill Management

This facility allows the user to add, edit or delete Group Bill names for Featurenet projects. Click the “Group Bill Management” button. The following window will be displayed:



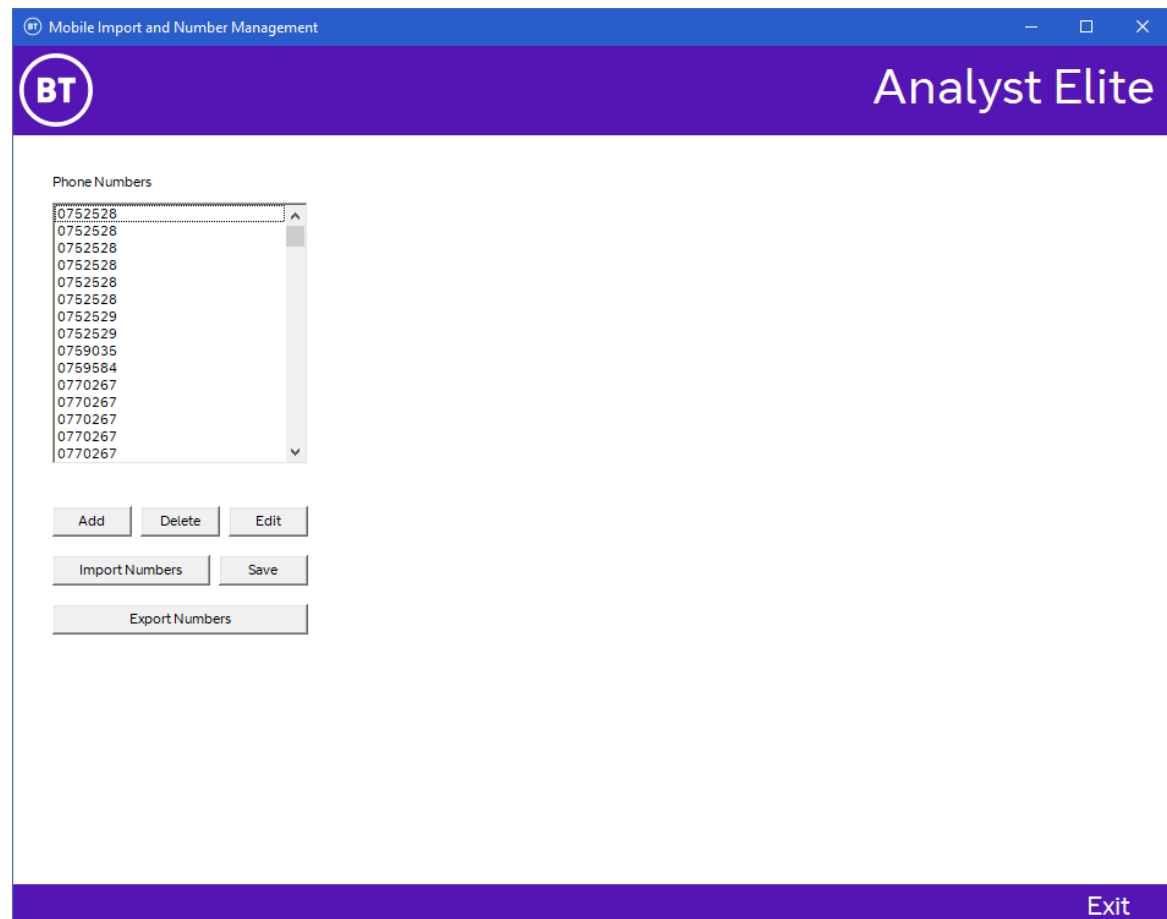
To create a new Group Bill Name, click “Add”, and enter a new name. To edit an existing Group Bill Name, select one from the list on the right, and click “Edit”. A window will then appear which will allow you to amend the name as required. To delete a name, select the desired name, and click “Delete”.

To assign Bills to a chosen Group Bill Name, select the bill numbers from the left-hand list, then double-click the required name from the list of names on the right.

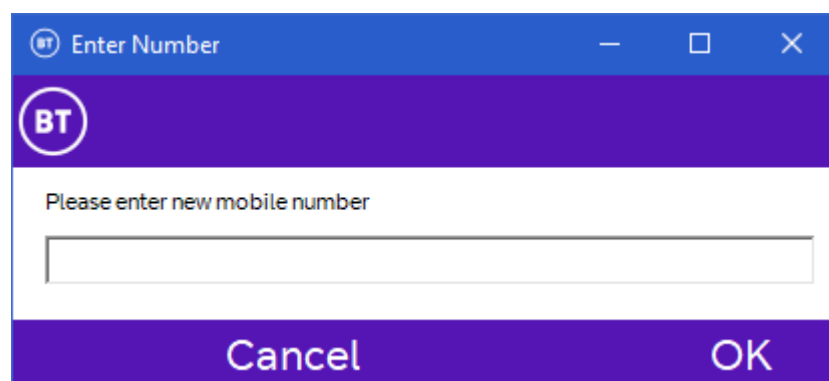
Mobile On-Net Management

This facility is used to identify calls between originating handsets and numbers added to this facility as On-Net. Any changes or additions made via this facility will not be shown in the current project but will apply to any subsequent imports.

On the Main Menu, click “Mobile On-Net Management”. The following window will be displayed:



To add a new number, click the “Add” button. The following window will be displayed:



Type in your chosen name, and click “OK”. The number entered will now appear in the list on the On-Net Management screen.

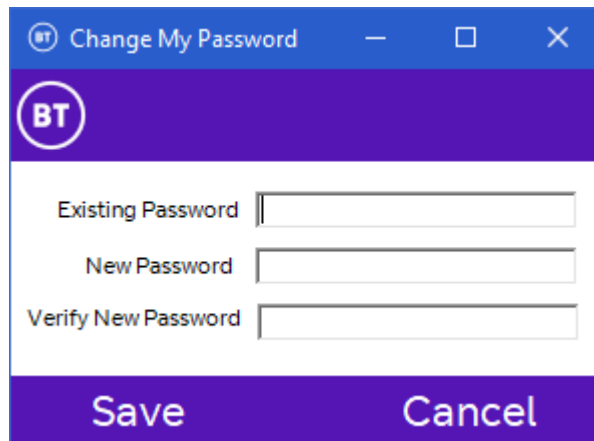
To edit an existing number, select a number and click “Edit”. The number will be displayed in a textbox allowing the desired changes to be made.

To delete a number, select the chosen number, and click “Delete”.

Numbers may also be imported from, or exported to, a CSV file.

Change My Password

If you wish to change the password you use to log into Analyst Elite, click the “Change My Password” button on the Main Menu. The following window will be displayed:

A screenshot of a Windows-style dialog box titled "Change My Password". The dialog has a blue header bar with the title and standard window controls (minimize, maximize, close). Below the header is a purple bar containing a white circular logo with the letters "BT". The main area of the dialog is white and contains three text input fields. The first field is labeled "Existing Password", the second is labeled "New Password", and the third is labeled "Verify New Password". At the bottom of the dialog is a purple bar with two white buttons: "Save" on the left and "Cancel" on the right.

Enter your existing password, then enter your chosen new password, and confirm it in the “Verify New Password” box. Then click “Save”. Your password change will then be saved.

More Information

Go to <https://business.bt.com/billing-analyst> for information on how to apply for BT Billing Analyst.