

User Guide

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Introduction

Welcome to BT Billing Analyst.

Billing Analyst 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, summary, details of your bill, or view more detailed information on any aspect of the bill.

Billing Analyst 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 Billing Analyst. Once imported, you can view the details of your bill at various levels, from simple summary reports to comprehensive, itemised reports.

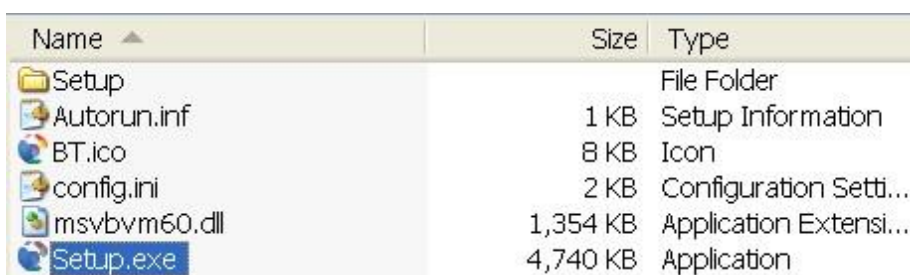
Installing BT Billing Analyst

The installation files for Billing Analyst can be downloaded from the following website:

https://business.bt.com/billing-analyst/?s_cid=btb_FURL_analystupdate

They are contained in a Zip file, and must be decompressed before attempting to install the software.

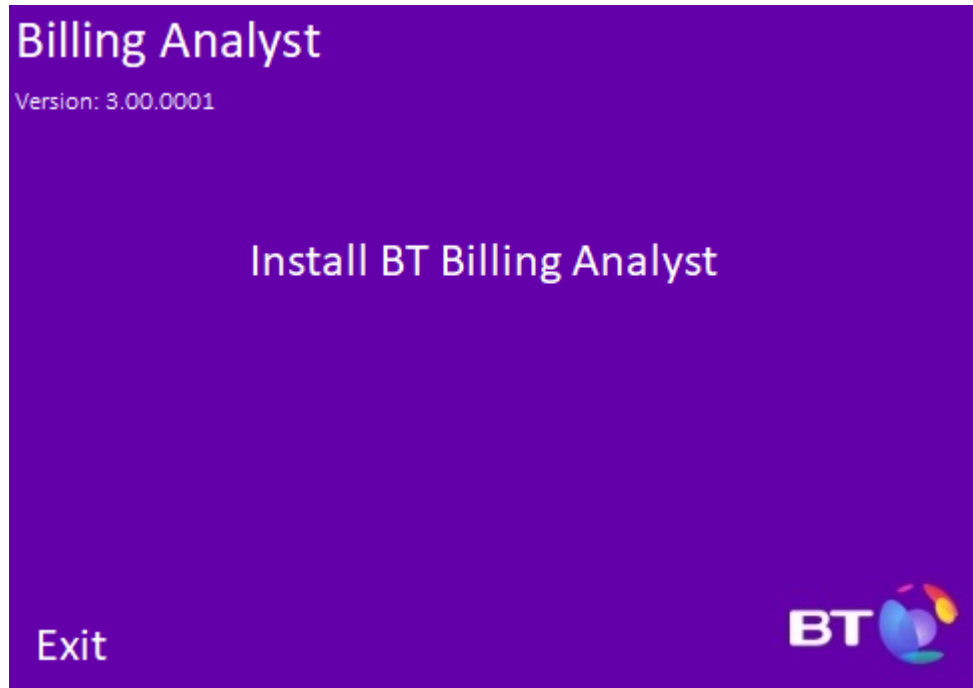
Once the Zip file has been decompressed, you should see the following files:



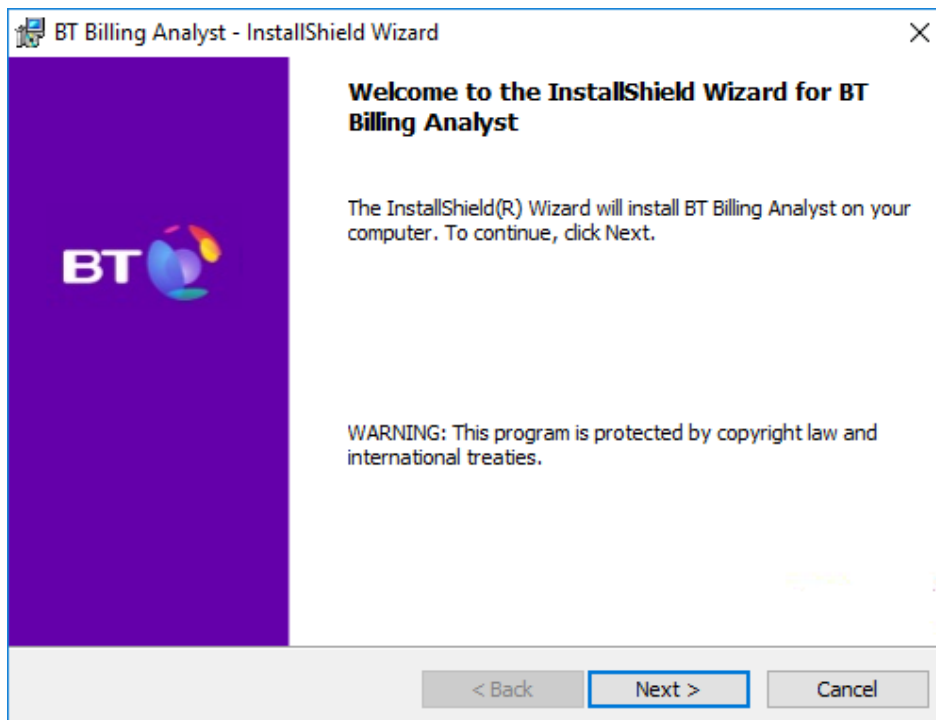
Name	Size	Type
Setup		File Folder
Autorun.inf	1 KB	Setup Information
BT.ico	8 KB	Icon
config.ini	2 KB	Configuration Setti...
msvbvm60.dll	1,354 KB	Application Extensi...
Setup.exe	4,740 KB	Application

Please note: for Billing Analyst to work properly, the installation **must** be carried out by a User with Administrator privileges on the computer. To enable online registration of the application, you also need to ensure that your computer is connected to the internet at the time of installation.

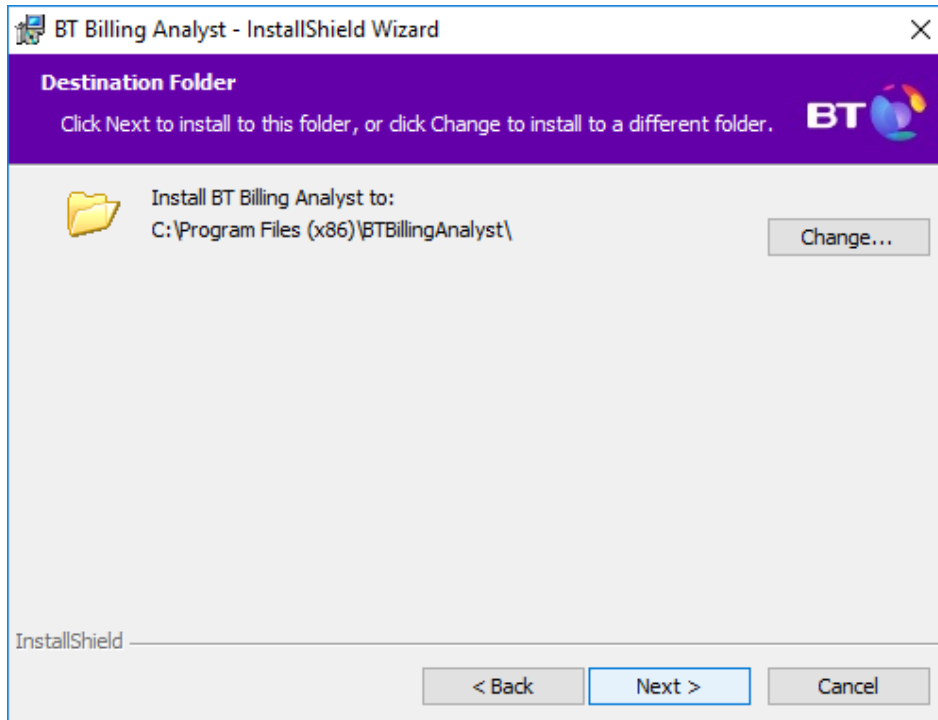
Right-click the file “Setup.exe”, and select “Run As Administrator” to start the installation process. Some system checks will be carried out on your PC, following which the window below will be displayed:



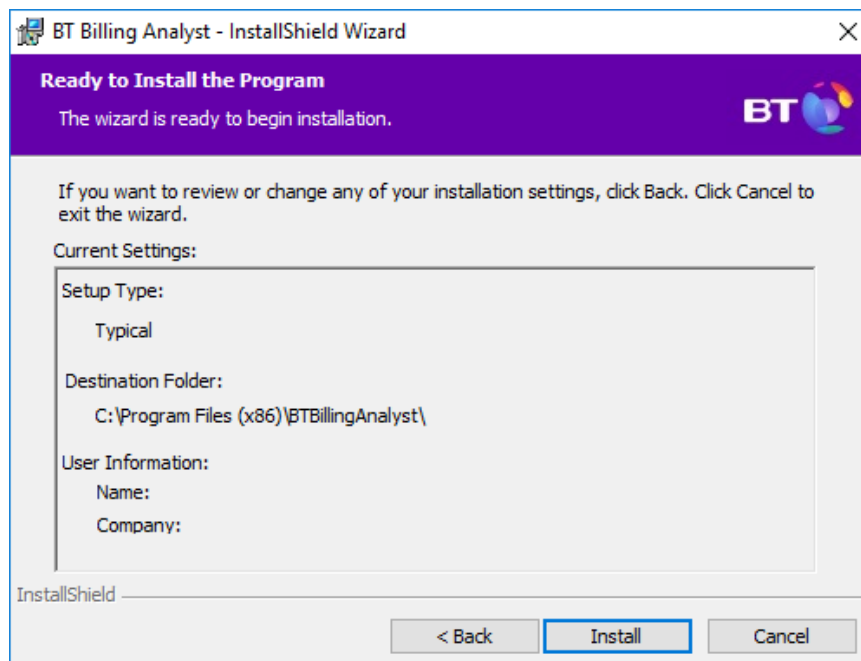
Left-click the legend “Install BT Billing Analyst” to continue. The installation process will then be carried out by an Installshield Wizard, as shown below:



Click “Next” to continue. The following window will then be displayed:



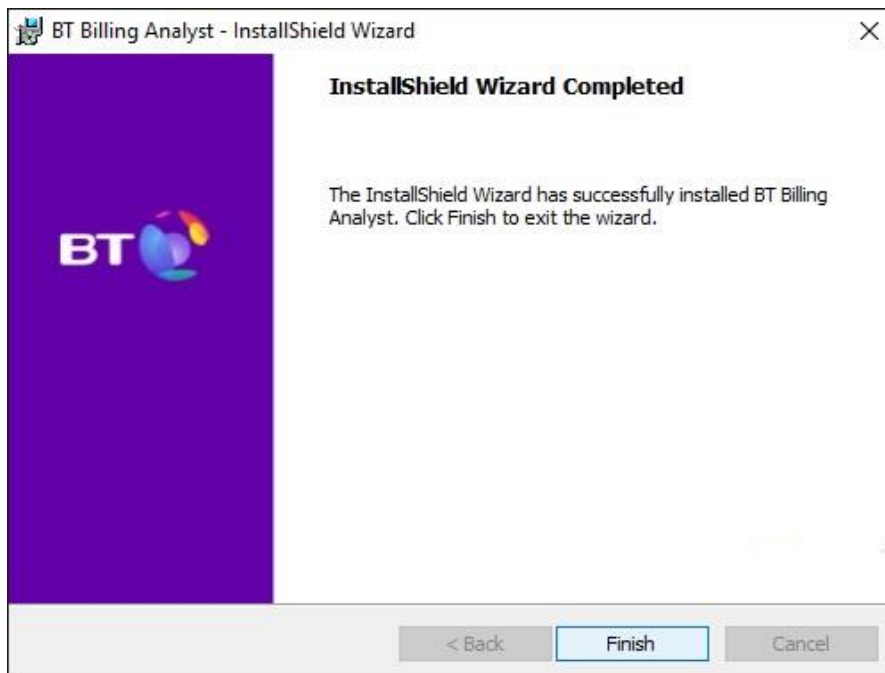
This window shows the default location to which BT Billing Analyst will be installed. If you wish to install the program to a different location, click on “Change”, and specify the folder of your choice. Once you are happy with the program folder displayed, click “Next” to continue to the next step, shown below:



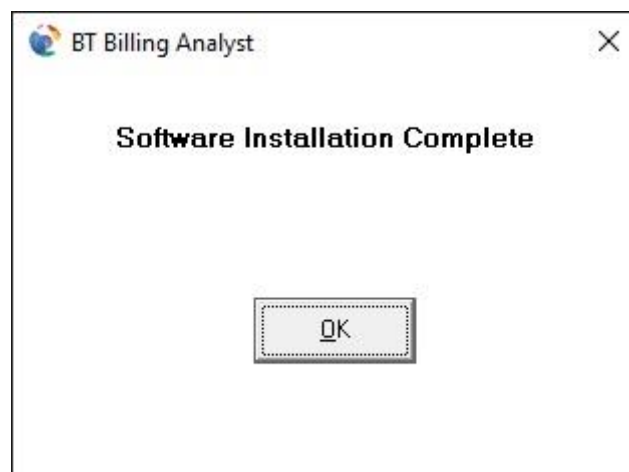
This window displays the installation setup specified in the preceding steps. If you wish to change anything, click “Back”, which will take you back through the

setup steps, allowing you to make changes as required. If you are happy with the settings made, click “Install”.

Installation will then proceed. Once installation is completed, the following window will be displayed:



Click “Finish” to continue. The installation will then briefly be checked to ensure everything has been set up, whereupon the following will be displayed:



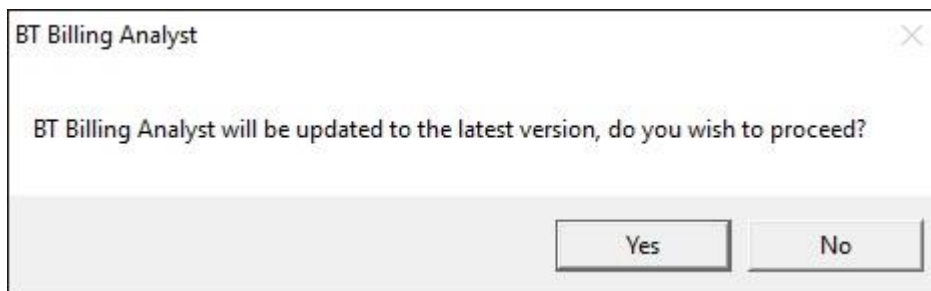
Click the “OK” button, which will close down the installation, and start up BT Billing Analyst.

As this is the first time you have run Billing Analyst, it will be necessary to register the application with BT, as described in the following section.

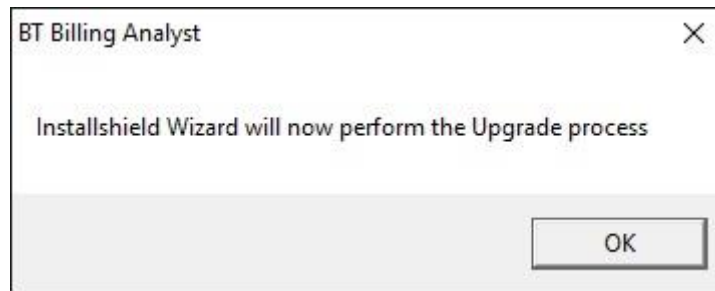
Updating BT Billing Analyst

BT provide regular upgrades to BT Billing Analyst, which are available from the BT website. It is recommended that you keep your installation of Billing Analyst updated to the latest version.

Once you have downloaded the upgrade files, right-click the file “Setup.exe”, and select “Run As Administrator”. If you have Billing Analyst already installed on your PC, the following window will be displayed:



If you click “Yes”, the following message will appear:



From this point, the Installshield Wizard upgrades your installation, following the same steps as for installation (see Page 8). You will not be required to register the product again, and you will not have to select any backup options.

Please note that no settings or projects are overwritten, or lost, as part of the upgrade process.

Running BT Billing Analyst for the First Time

Registration Process

The first time you run BT Billing Analyst you will be required to register the application with BT.

To complete online registration, you will need an active internet connection. If you do not have internet access on the computer on which you wish to use Billing Analyst, or if there are problems communicating with the BT registration site, when you click the “Click Here to Register” button the helpdesk telephone number will be displayed. If you contact the helpdesk, they will be able to help you complete the registration process. They will require the Billing Analyst serial number, which will be displayed on the Registration form, if online registration cannot be completed.

When Billing Analyst starts up the following window will be displayed:

Register BT Billing Analyst

BT Billing Analyst

Please complete and authenticate your registration details

Product: BT Billing Analyst Version: 3.00.0001 Default View: Professional

Company:

BT Account Number:

User Details

Email Address:

Re-enter Email Address for Validation:

Contact First Name:

Contact Last Name:

Job Title (optional):

Preferred Contact Number:

Import Options

Please let us know which products from the list below you regularly import and analyse using BT Billing Analyst.

BT One Bill BT IDC / Voiceport BT Geneva Openzone

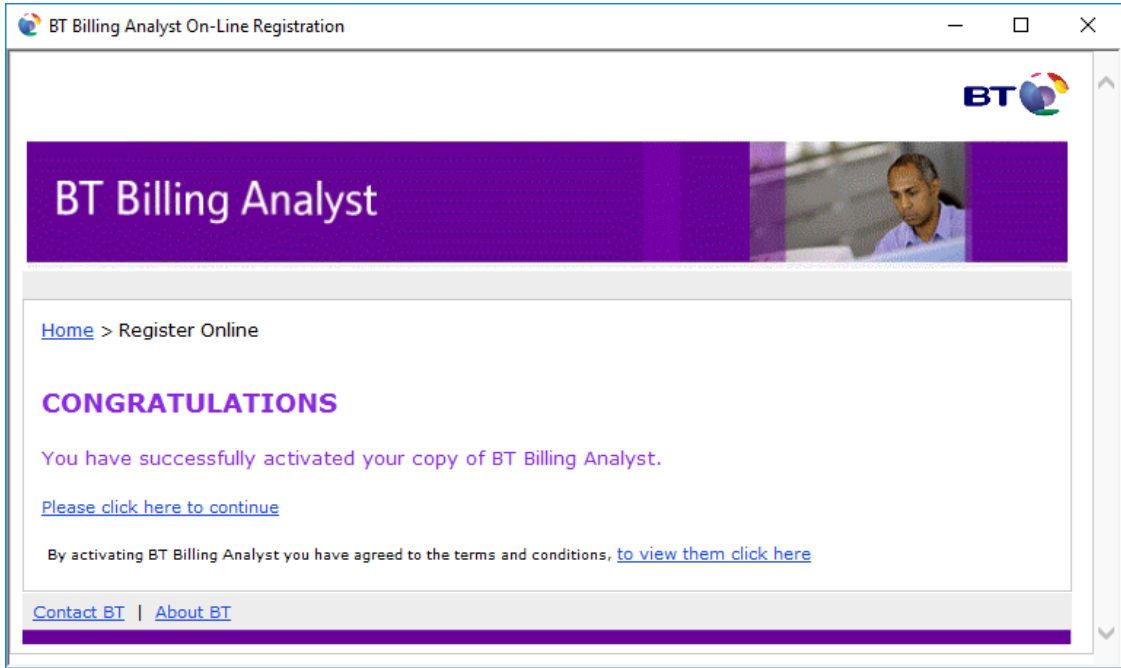
BT Featurenet BT Conferencing BT Analyst Alert

BT Private Circuits

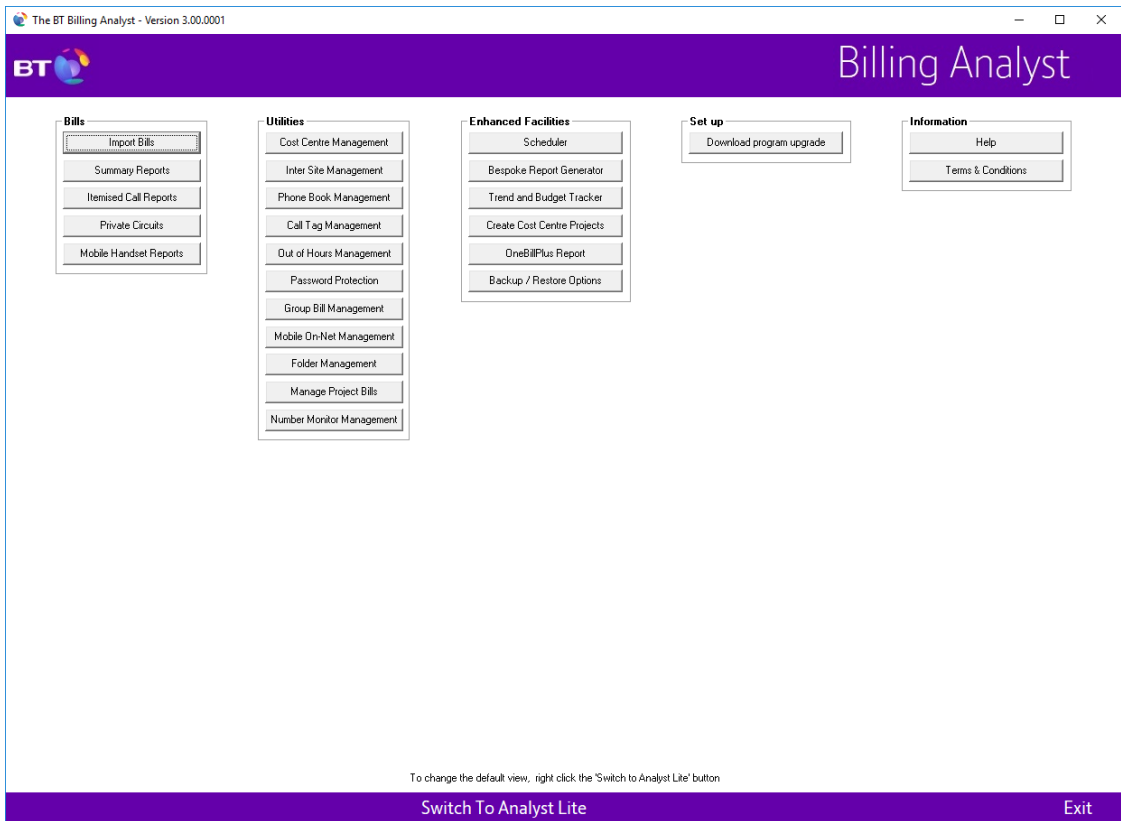
If you have on-line access to the internet, please ensure you have enabled the connection.

 I have read and accept the BT Billing Analyst Terms and Conditions

Please complete the details requested, and then click the button “Click Here to Register”. Your registration will be transmitted to BT, and that registration is confirmed, the following window will be displayed:

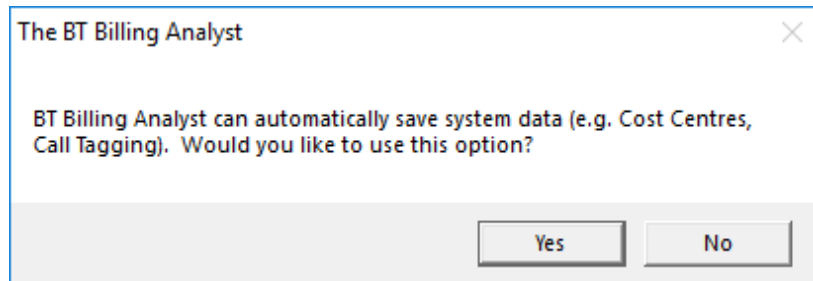


Click either on “Please click here to continue” or “Click here to close window”. The BT Billing Analyst main menu will then be displayed as shown below:



Backup Facility

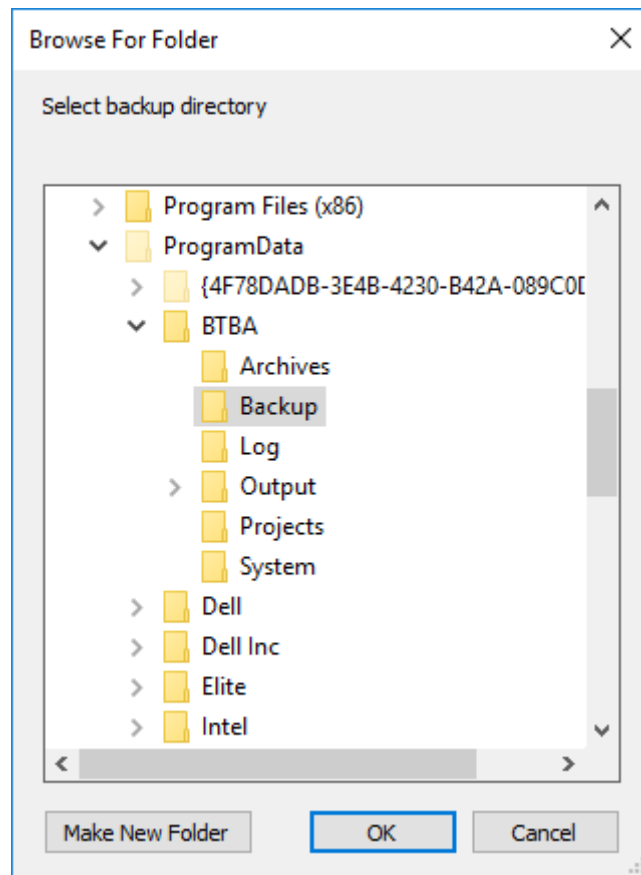
On the first run of Billing Analyst, you will be asked if you would like to use the automatic backup facility, as shown below:



Billing Analyst includes a number of management facilities that allow you tailor your reports to your own organisation. For example, Cost Centre Management allows you to assign telephone numbers to different sections of your organisation so that you can track the costs associated with each of those sections. Phone book management allows you to assign names to individual numbers, making it easier to identify telephone numbers within reports.

Changes you make to these management facilities can be saved automatically in a backup, which can be retrieved at any point should you wish to roll back settings to a previous state.

If you wish to make use of the automatic backup facility, click “Yes”. The following window will then appear:

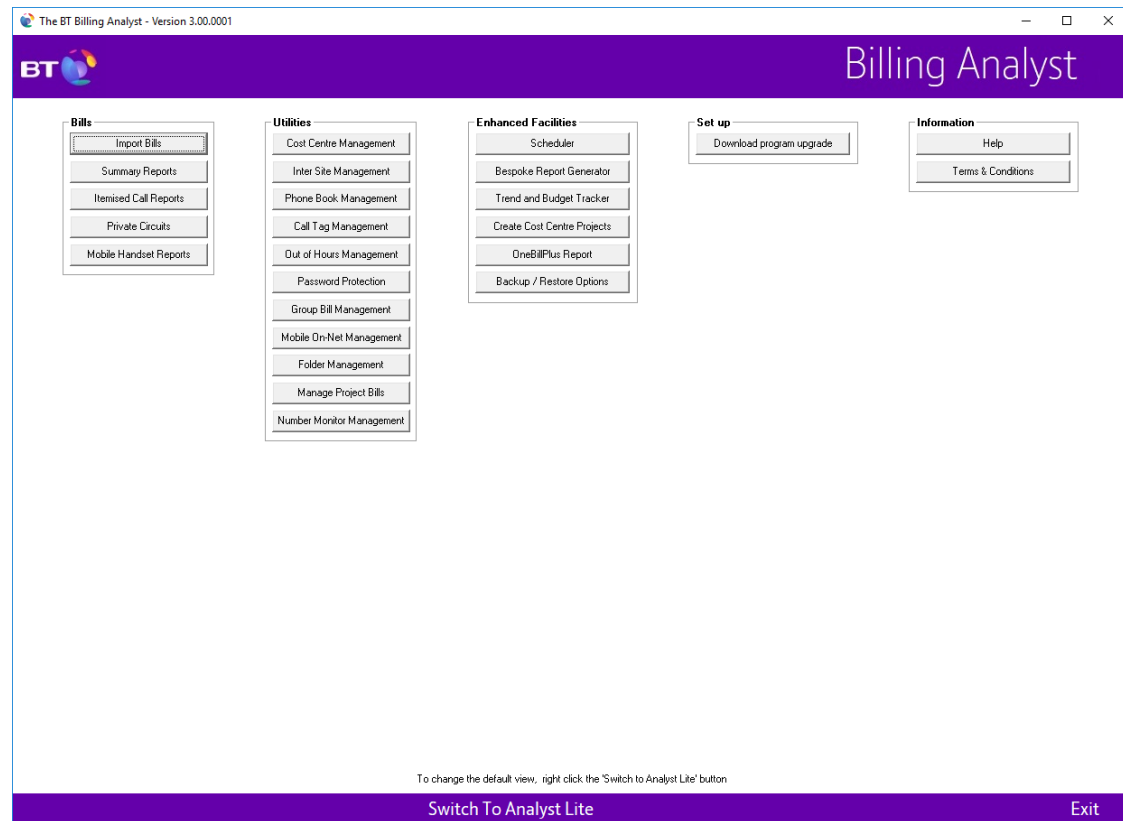


This window allows you to specify where you would like to keep your backups. The default folder is already shown, and it is recommended you put your backups here. However, you may save them where you wish. Please ensure that your user account has “write” access to the folder you choose.

For more information on using the Automatic Backup facility, please see “Backup / Restore Options” on page 97.

Main Menu

When BT Billing Analyst starts, you will be presented with the Main Menu, as shown below:



When first opening Billing Analyst, 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 five 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 Billing Analyst. 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 59 for more details.

Utilities

The “Utilities” category is comprised of the following sections

Cost Centre Management

Billing Analyst 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 49 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 Billing Analyst 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 59 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 Billing Analyst 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.

Out of Hours Management

It is possible to identify given times of day, or particular days, or specific dates as “Out of Hours”. Reports are then provided in the Itemised Reports section that can identify calls made during those periods.

Templates can be created as required with specific characteristics (e.g. one for general use, another for a normal holiday period, and so on), which can then be applied to the Out of Hours reports.

Please see “Out of Hours Management” on page 76 for more details.

Password Protection

Some users will prefer that only some individuals have access to BT Billing Analyst. This scenario is provided for, via the Password Protection screen, where a username and password may be entered that must, in future, be typed in to gain access to Billing Analyst. Multiple users may be recorded, if required. Please see “Password Protection” on page 79 for more details.

Folder Management

BT Billing Analyst needs to save information on your PC in order to function. Initially this data is stored in default locations, using accepted Windows storage locations. However, it may be necessary or desirable for the user to change where Billing Analyst data is stored. The Folder Management facility allows you to choose where data should be stored, and automatically moves Billing Analyst data files if you choose a new location. Please see “Folder Management” on page 80 for more details.

Number Monitor Management

Billing Analyst allows you to apply descriptions to specific Called numbers. A report is then available in the Itemised Reports screen that details calls to these numbers from each of your telephone numbers. Please see the “Number Monitor Management” section on page 82 for more details.

Information

Help

When the Help button is clicked, the following options are offered:

1. Product Help

Clicking this option displays the Help facility packaged with Billing Analyst. 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.

2. Version

Clicking the “Version” option displays the version number of your installation of BT Billing Analyst. It is recommended that you always installed the latest version. A program expiry date is also displayed, being the last date on which your version will function. Updates to BT Billing Analyst are regularly released, and you should receive warnings in the lead up to your expiry date that you need to update your software.

Terms & Conditions

Clicking this button displays the Terms and Conditions under which BT Billing Analyst may be used.

Download Program Upgrade

This button can be clicked to download the latest version of BT Billing Analyst. Billing Analyst will be closed down automatically, and a web browser will be opened at a BT web page from where the latest files may be downloaded for installation.

Enhanced Features

Create Cost Centre Projects

When a Cost Centre structure has been set up for an account (see “Cost Centre Management” on page 49 for details), it is possible to create individual bills for each Cost Centre within that structure, thus enabling you or other users to concentrate on a single Cost Centre, rather than seeing it as part of the overall bill. This facility allows you to split the current bill into separate projects for each Cost Centre, at whichever level of the Cost Centre structure you require. Please see “Create Cost Centre Projects” on page 83 for more details.

Backup / Restore Options

BT Billing Analyst includes a facility to back up changes made using the various management facilities provided, e.g. Cost Centres and Phonebook settings. These backups can then be used at a later date to restore settings to a previous state, should it be required. The Backup/Restore options screen allows you to switch these backups on or off, to change the folder where the backups are stored, to restore your settings from a previously saved backup, or to delete backup files that are no longer needed. Please see “Backup / Restore Options” on page 85 for more details.

Import Bills Screen

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

The screenshot shows the 'BT Billing Analyst Import' window. The title bar reads 'BT Billing Analyst Import'. The header is purple with the BT logo on the left and 'Billing Analyst' on the right. The main content area is divided into three panels:

- Select Import Type:** Contains radio buttons for 'BT OneBill', 'Multiple BT OneBill', 'Featurenet', 'BT Private Circuits', 'BT IDC/Voiceport', 'Multiple Voiceport', 'BT Conferencing', and 'BTGeneva Openzone'. Below this is a 'Selected source file(s)' text box and a 'Reselect Files(s)' button.
- Select Project:** Contains radio buttons for 'New Project File', 'Append to Existing Project File', and 'Multiple Project Destination Folder'. Below this is a 'Destination File/Folder' text box, a checkbox for 'Auto Tag Calls on Import', and a 'Reselect Project' button.
- Help:** Contains the text: 'Click the radio button for the data type you wish to import. Select the file to import.' and a checkbox for 'Don't show this help section again'.

At the bottom of the window, there is a purple bar with three buttons: 'Start Import', 'Stop Import', and '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

This can be done by taking the following steps:

1. In the box marked “Select Import Type”, click the option marked “BT OneBill”. This will open a dialog box allowing you to select the billing data file you wish to import, this will be a file ending with the file extension “.vp”. Find the file you wish to import, and double-click it, or select the file and click “Open”.

If the file you have selected is a valid billing file, the filename will be listed in the section marked “Selected source file(s)”.

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 Billing Analyst**. 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.

In the box marked “Select Project”, click the “New Project File” option. A dialog box will open, prompting you to select a name for your new project file

If you select the filename of a project that already exists, this file will be **overwritten**. You will be asked to confirm that it is ok to overwrite the existing file. If you do not want to overwrite the file, you will be given the option of appending the current data file to the project. If you do not want to do this, click “No”, and you will be given the opportunity to select a different filename,

Please note that if you overwrite an existing file, it is not possible to retrieve it.

3. At the bottom of the screen, click the link marked “Start Import”.

This will start the import process. The progress of the import is shown throughout the process at the bottom-left hand side of the screen, as shown below:

Import File	Stage	Progress
1/1	Create Project	✓ Completed
1/1	Import Summary Records	✓ 3314
1/1	Import Itemised Records	✓ 33671
1/1	Import Itemised Records (Mobile)	... 5500
1/1	Import Private Circuits	□
1/1	Save Cost Centres	□
1/1	Create Trend Entries	□
1/1	Save Summary Data	□
1/1	Create Archive	□

The “Import Summary Records” and “Import Itemised” stages include a count of the records imported so far. A progress bar at the bottom of the Import Status section to show what proportion of the import process has been completed.

Once the import process has completed, the Invoice report will be opened, showing you the details of the bill you have imported (see “Invoice” report description on page 37 for details).

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. In the box marked “Select Import Type”, click the option marked “BT OneBill”. This will open a dialog box allowing you to select the billing data file you wish to import, this will be a file ending with the file extension “.vp”. Find the file you wish to import, and double-click it, or select the file and click “Open”.

If the file you have selected is a valid billing file, the filename will be listed in the section marked “Selected source file(s)”.

In the section marked “Select Project”, click the option “Append to Existing Project File”. A dialog box will open, allowing you to select the existing project to which you want to append your data file. The existing project must be a valid BT Billing Analyst project file.

3. Click the “Click Here to Start Import” button. The import process will then proceed.

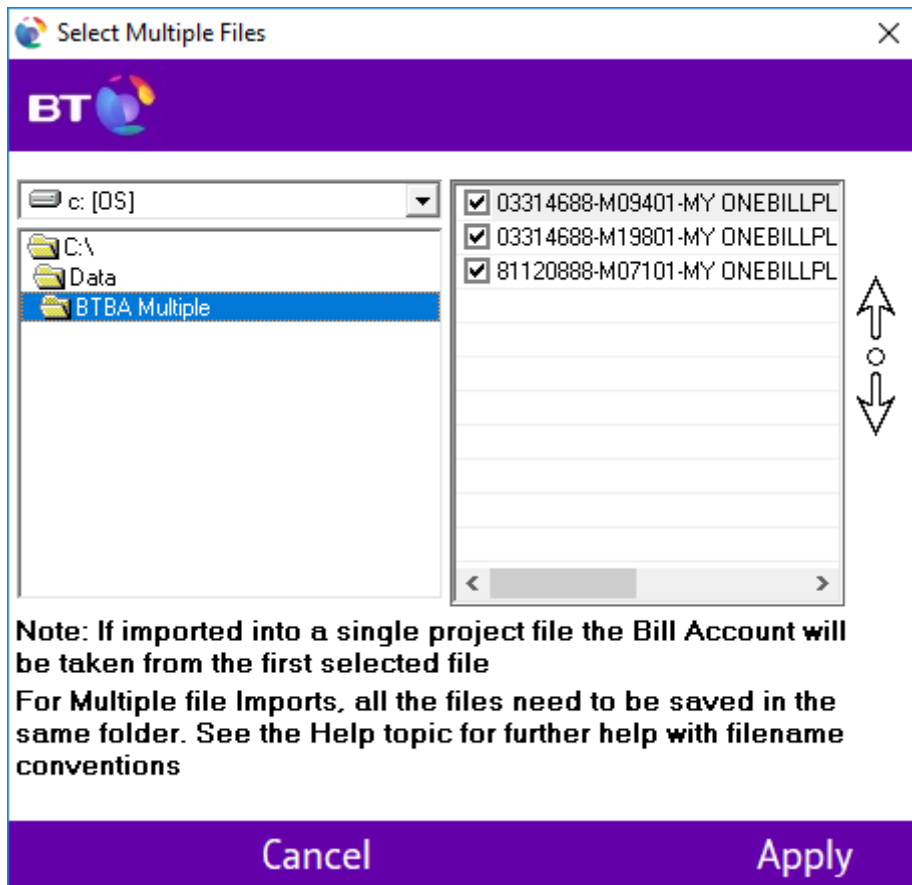
Once the import process has completed, the Invoice Summary report will open automatically, detailing summary information for the bills contained in the appended project. Please see “Invoice” Summary Report Description on page 37 for details.

Importing Multiple Data Files

When you have more than one data file to import, it is possible to import all these files in one run, rather than having to go through the import process for each one. This can be done taking the following steps:

1. In the section marked “Select Import Type”, click the option “Multiple BT OneBill”.

This will open a dialog box, where you can locate the files you wish to import. The data files must be contained in a single folder. When you have found that folder, the files within that folder will be shown:



Select the files you wish to import by checking the boxes next to the relevant filenames. Once you have selected the files you require, click the “Apply” button at the top-right of the form. If you wish to quit out of the “Multiple BT OneBill” option altogether, click “Cancel”.

Once you have made your choice, the files selected will be displayed on the import screen in the box marked “Selected source file(s)”.

Three options are now presented in the box marked “Select Project”:

- To import the selected files to a single project file, click “New Project File”
- To append all the selected files to an existing project file, click “Append to Existing Project File”
- To import each of the selected files to its own separate project file, click “Multiple Project Destination Folder”.

If you select this option, you will be prompted to select a folder into which the individual projects should be saved. The project files will be saved using the following naming convention:

<CompanyName><InvoiceDate>.mdb

Where <CompanyName> is the company name that appears in the file header of the data file, and <InvoiceDate> is the invoice date for that data file.

Similar to the single-file imports, you will be prompted for the account number of the files you are importing. If required you can enter a different account number for each file imported, as the import gets to it. If, however, the files all share a common account number, you may check an option marked “Apply this account to all files imported”. This will use the account number entered for all files you have specified, and you will not be prompted to enter the account number again.

Click the button marked “Click Here to Start Import”, to begin the import process. The progress of the import process will be displayed at the bottom left-hand side of the window, with the details for each file shown:

Import File	Stage	Progress
1/3	Create Project	✓ Completed
1/3	Import Summary Records	✓ 3314
1/3	Import Itemised Records	✓ 33671
1/3	Import Itemised Records (Mobile)	✓ 12329
1/3	Import Private Circuits	✓ 0
1/3	Save Cost Centres	✓ Completed
1/3	Save Summary Data	✓ Completed
2/3	Import Summary Records	✓ 6779
2/3	Import Advanced Service records	✓ 80
2/3	Import Itemised Records	... 10000
2/3	Import Private Circuits	
2/3	Save Cost Centres	
2/3	Save Summary Data	
3/3	Import Summary Records	
3/3	Import Advanced Service records	
3/3	Import Itemised Records	
3/3	Import Itemised Records (Mobile)	
3/3	Save Cost Centres	
3/3	Create Trend Entries	
3/3	Save Summary Data	
3/3	Create Archive	

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

Reports Overview

BT Billing Analyst provides four sets of reports: Summary Reports, Itemised Call Reports, Private Circuits Reports and Mobile Handset 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:

Current Bill By Service Number

BT

Current Bill By Service Number
for MY ONEBILLPLUS CUSTOMER

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

One Bill A/C	VP 03314688			Bill Total	VAT	Total Payable							
				£26525.83	£3938.52	£30464.35							
Service No/Ref	PhoneBook	Account No	Service	Total Ex VAT(£)	VAT(£)	Total(£)	Recurring(£)	Usage(£)	Gross Recurring(£)	Gross Usage(£)	One Off Charges & Credits(£)		
Total Charges				26525.83	3938.52	30464.35	15930.08	10390.38	15930.08	10565.43	205.37		
0081XXXX	0081XXXX	WM0081XXXX	Telephony	21.99	3.30	25.29	21.99	0.00	21.99	0.00	0.00		
0120629XXXX	0120629XXXX	EA9323XXXX	Telephony	14.87	2.23	17.10	14.87	0.00	14.87	0.00	0.00		
0122783XXXX	0122783XXXX	ND5223XXXX	Telephony	32.26	4.84	37.10	14.87	17.23	14.87	17.23	0.00		
0122851XXXX	0122851XXXX	LC0863XXXX	Telephony	14.87	2.23	17.10	14.87	0.00	14.87	0.00	0.00		
0123471XXXX	0123471XXXX	SM8358XXXX	Telephony	14.87	2.23	17.10	14.87	0.00	14.87	0.00	0.00		
0124267XXXX	0124267XXXX	SS9054XXXX	Telephony	68.93	10.35	79.28	14.87	54.06	14.87	54.06	0.00		
0124382XXXX	0124382XXXX	SD3696XXXX	Telephony	14.87	2.23	17.10	14.87	0.00	14.87	0.00	0.00		
0124522XXXX	0124522XXXX	EA9869XXXX	Telephony	178.97	26.85	205.82	65.34	7.26	65.34	7.26	106.37		
0124532XXXX	0124532XXXX	EA6293XXXX	Telephony	14.87	2.25	17.22	14.87	0.10	14.87	0.10	0.00		
0124538XXXX	0124538XXXX	EA6094XXXX	Telephony	59.48	8.92	68.40	59.48	0.00	59.48	0.00	0.00		
0124544XXXX	0124544XXXX	EA9392XXXX	Telephony	45.19	6.77	51.96	44.61	0.58	44.61	0.58	0.00		
0125237XXXX	0125237XXXX	TH7287XXXX	Telephony	29.74	4.46	34.20	29.74	0.00	29.74	0.00	0.00		
0125254XXXX	0125254XXXX	TH6787XXXX	Telephony	14.87	2.23	17.10	14.87	0.00	14.87	0.00	0.00		
0125681XXXX	0125681XXXX	TH6131XXXX	Telephony	15.00	1.25	17.25	14.87	0.13	14.87	0.13	0.00		
0126488XXXX	0126488XXXX	ST1511XXXX	Telephony	14.87	2.23	17.10	14.87	0.00	14.87	0.00	0.00		
0126827XXXX	0126827XXXX	EA9831XXXX	Telephony	625.63	93.89	719.52	625.63	0.00	625.63	0.00	0.00		
0126828XXXX	0126828XXXX	EA9373XXXX	Telephony	294.54	44.24	338.78	294.54	0.00	294.54	0.00	0.00		
0126829XXXX	0126829XXXX	EA9373XXXX	Telephony	171.43	26.78	198.21	157.36	170.07	157.36	170.07	20.00		

Invoice Reference: VP 03314688 M09401
Date (and Tax Point): 12/08/2009

Print Outputs... Report Details Disable Phone Book 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. Billing Analyst will respond by showing you a further report, like this:

Account No = EA1684XXXX	PSTN/SDN	Tel.No./ref = 0124522XXXX	Monthly Bill
Tax Pt Date = 12/08/2009			
Cost Centre 1	Cost Centre 2	Cost Centre 3	Cost Centre 4
TELEPHONY			Cost Centre 5
Usage	Charge(£)	Usage From	Usage To
Direct-dialled national	0.07	06/07/2009	04/08/2009
Direct-dialled international	0.47	20/07/2009	04/08/2009
Direct-dialled international	0.20	06/07/2009	04/08/2009
Direct-dialled Mobile & Premium Rate	5.31	20/07/2009	04/08/2009
Direct-dialled other	1.21	20/07/2009	04/08/2009
Total Usage	7.26		
Recurring	Charge(£)	Recurring From	Recurring To
Broken Period Rental	5.86	01/08/2009	31/08/2009
Line Rental	59.48	01/08/2009	31/08/2009
Maintenance	0.00	01/08/2009	31/08/2009
Customer Option Charge	0.00	01/08/2009	31/08/2009
Total Recurring	65.34		
OneOff & Credits	Charge(£)		
Connection	106.37		
Total OneOff & Credits	106.37		

Call Detail

Bill Details for 0124522XXXX. Only Categories with charges raised on the bill will be displayed.

Invoice Reference: VP 03314688 M09401
Date (and Tax Point): 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 Level” 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 Level” to go back to the preceding report, then drill down on another service number to see the details for that number.

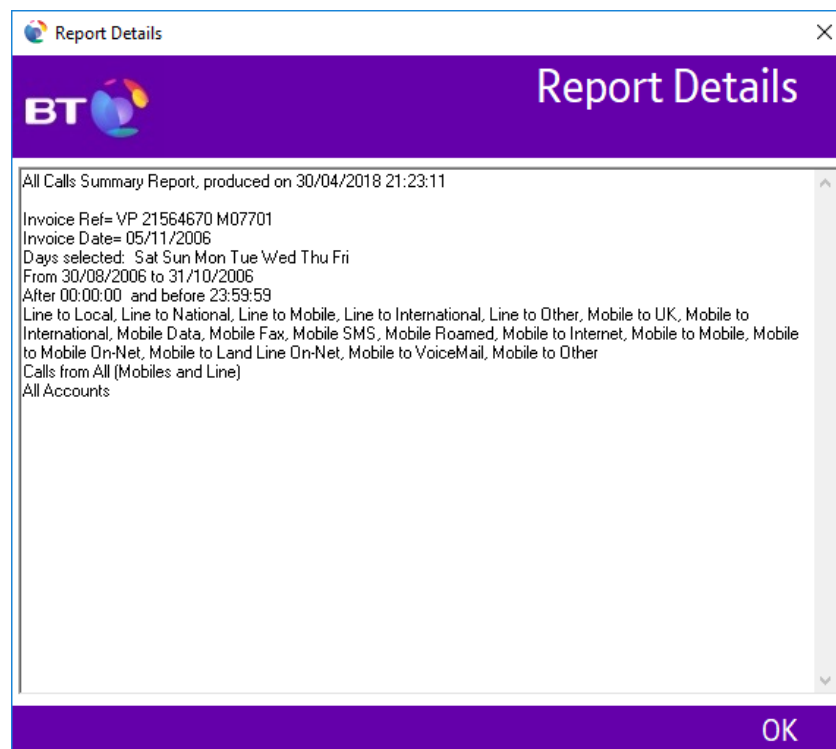
At any point, you may click the “Exit” button, which will close all reports, and return you to the Summary Reports screen.

Output Options

Billing Analyst offers up to three options for outputting reports. Most allow you to print the report, 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:



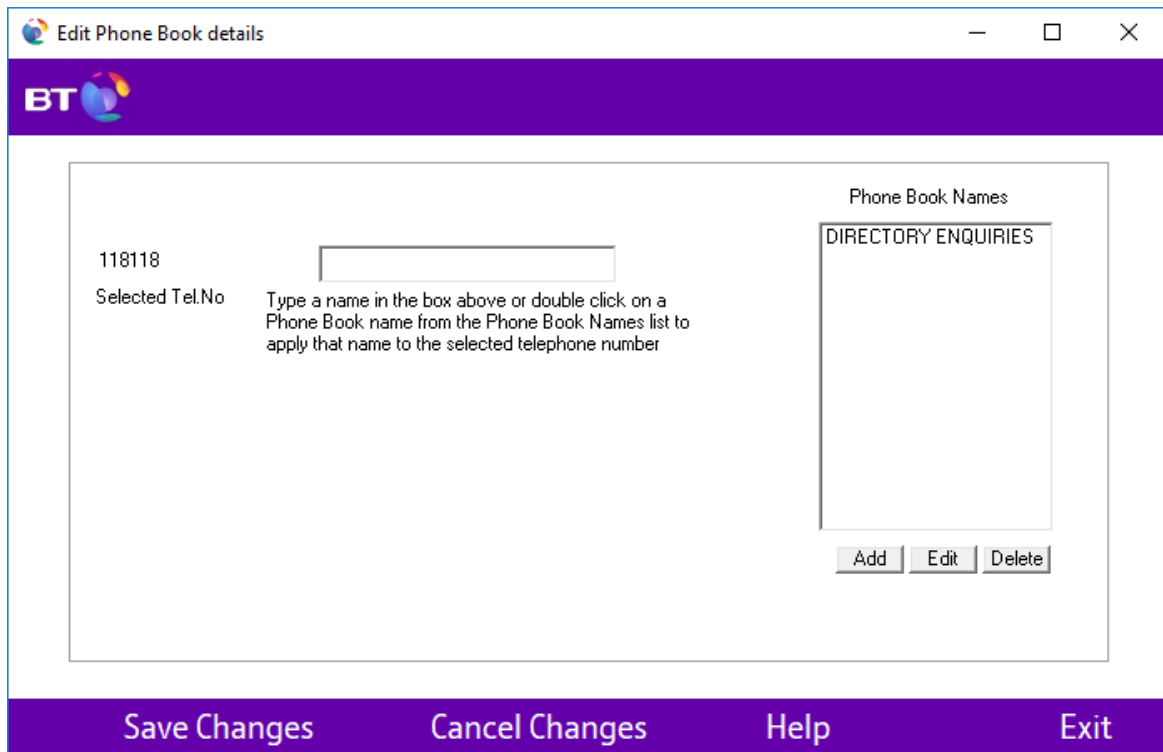
Phonebook Options

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:

The screenshot shows a window titled "Edit Phone Book details" with a purple header containing the BT logo. The main content area is divided into two sections. On the left, it displays "118118" as the "Selected Tel.No" and a text input field. Below the input field, there is a instruction: "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". On the right, there is a list titled "Phone Book Names" which is currently empty. Below the list are three buttons: "Add", "Edit", and "Delete". At the bottom of the window, there is a purple bar with four buttons: "Save Changes", "Cancel Changes", "Help", and "Exit".

To enter a phonebook entry for the selected number (0656XXXX33 in this case); 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 colourcoding 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 yellow line underneath signifies that the “Source Bill Reference” parameter (on the right-hand side, with a yellow background) may be used in conjunction with the report (please note that this parameter is only applicable for “OneBill” type bills).

The turquoise line underneath signifies that the “Account/Cost Centre Selection” parameters (on the right-hand side, with a turquoise background) 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 49 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:



The Level 3 parameter would be left blank. Choosing these parameters, and running the “Current Bill By Service No” report, as above, results in the following report:

Current Bill By Service Number

BT **Current Bill By Service Number**
for MY ONEBILLPLUS CUSTOMER

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

Service No/Ref	PhoneBook	Account No	Service	Total Ex VAT(£)	VAT(£)	Total(£)	Recurring(£)	Usage(£)	Gross Recurring(£)	Gross Usage(£)	One Off Charges & Credits(£)
Total Charges				26525.83	3938.52	30464.35	15930.08	10390.38	15930.08	10565.43	205.37
0081XXXX	0081XXXX	WM0081XXXX	Telephony	21.99	3.30	25.29	21.99	0.00	21.99	0.00	0.00
0120625XXXX	0120625XXXX	EA9239XXXX	Telephony	14.87	2.23	17.10	14.87	0.00	14.87	0.00	0.00
0122783XXXX	0122783XXXX	ND5223XXXX	Telephony	32.26	4.84	37.10	14.87	17.39	14.87	17.39	0.00
0122851XXXX	0122851XXXX	LC0863XXXX	Telephony	14.87	2.23	17.10	14.87	0.00	14.87	0.00	0.00
0123471XXXX	0123471XXXX	SM8358XXXX	Telephony	14.87	2.23	17.10	14.87	0.00	14.87	0.00	0.00
0124267XXXX	0124267XXXX	SS5054XXXX	Telephony	68.93	10.35	79.28	14.87	54.06	14.87	54.06	0.00
0124382XXXX	0124382XXXX	SD3696XXXX	Telephony	14.87	2.23	17.10	14.87	0.00	14.87	0.00	0.00
0124522XXXX	0124522XXXX	EA9869XXXX	Telephony	178.97	26.85	205.82	65.34	7.26	65.34	7.26	106.37
0124532XXXX	0124532XXXX	EA6293XXXX	Telephony	14.97	2.25	17.22	14.87	0.10	14.87	0.10	0.00
0124538XXXX	0124538XXXX	EA6094XXXX	Telephony	59.48	8.92	68.40	59.48	0.00	59.48	0.00	0.00
0124544XXXX	0124544XXXX	EA9392XXXX	Telephony	45.19	6.77	51.96	44.61	0.58	44.61	0.58	0.00
0125237XXXX	0125237XXXX	TH7287XXXX	Telephony	29.74	4.46	34.20	29.74	0.00	29.74	0.00	0.00
0125254XXXX	0125254XXXX	TH6787XXXX	Telephony	14.87	2.23	17.10	14.87	0.00	14.87	0.00	0.00
0125681XXXX	0125681XXXX	TH6131XXXX	Telephony	15.00	2.25	17.25	14.87	0.13	14.87	0.13	0.00
0126486XXXX	0126486XXXX	ST1511XXXX	Telephony	14.87	2.23	17.10	14.87	0.00	14.87	0.00	0.00
0126827XXXX	0126827XXXX	EA9831XXXX	Telephony	625.63	93.89	719.52	625.63	0.00	625.63	0.00	0.00
0126828XXXX	0126828XXXX	EA9737XXXX	Telephony	294.54	44.24	338.78	294.54	0.00	294.54	0.00	0.00
0126829XXXX	0126829XXXX	EA9735XXXX	Telephony	1711.43	263.78	1965.21	1671.36	170.07	1671.36	170.07	20.00

Invoice Reference: VP 03314688 M09401
Date (and Tax Point): 12/08/2009

Print Outputs... Report Details Disable Phone Book Exit

The “Bill Total” statistics at the top remain the same as they apply to the whole bill, but the content of the main report is very different, as the data contained has been limited to just the one 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).



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 OneBill” type projects. A OneBill 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 40 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.



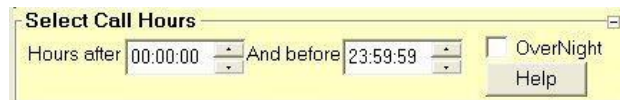
To include only certain days in the report, check or uncheck the tickboxes next to the days as required. You can also set the report to run only for a given date range by setting the start and end date for the report using the dateboxes shown.

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:

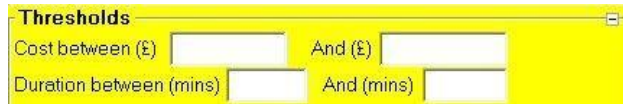


The standard setting for Billing Analyst is to include all these distance bands. However, it is possible to alter this by selecting one or more distance bands from the list provided. If distance bands are selected, only those chosen will be included in the report.

Thresholds

Applies To: Itemised Reports

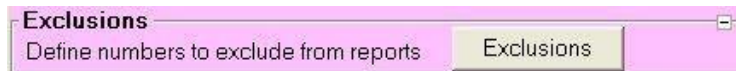
This parameter enables you to include only calls within a given cost or duration range.

A yellow dialog box titled "Thresholds" with a close button in the top right corner. It contains two rows of input fields. The first row is labeled "Cost between (£)" and "And (£)", each followed by a text input box. The second row is labeled "Duration between (mins)" and "And (mins)", each followed by a text input box.

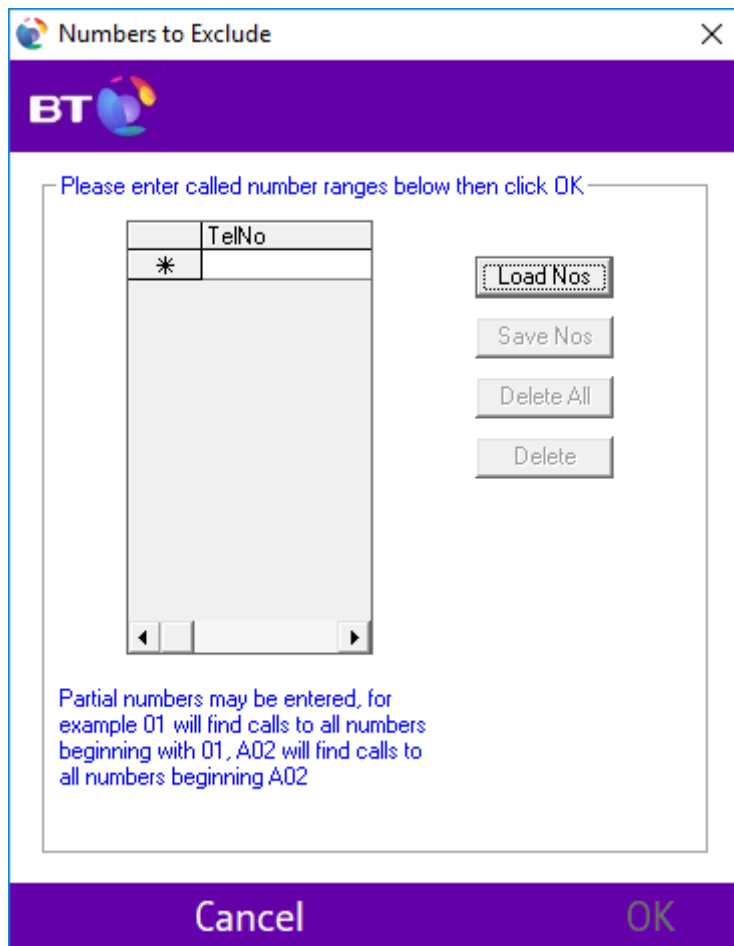
To run reports with a Cost or Duration range parameter, enter a lower and upper range of in the respective textboxes. Please note, the lower range must be equal to, or smaller than, the upper range, for the report to run.

Exclusions

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

A pink dialog box titled "Exclusions" with a close button in the top right corner. Below the title bar, it says "Define numbers to exclude from reports". To the right of this text is a button labeled "Exclusions".

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

A dialog box titled "Numbers to Exclude" with a close button in the top right corner. It features the BT logo in the top left. Below the logo, it says "Please enter called number ranges below then click OK". There is a table with a header "TelNo" and one row containing an asterisk (*). To the right of the table are four buttons: "Load Nos", "Save Nos", "Delete All", and "Delete". At the bottom of the dialog are "Cancel" and "OK" buttons. A note at the bottom of the main area reads: "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".

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.

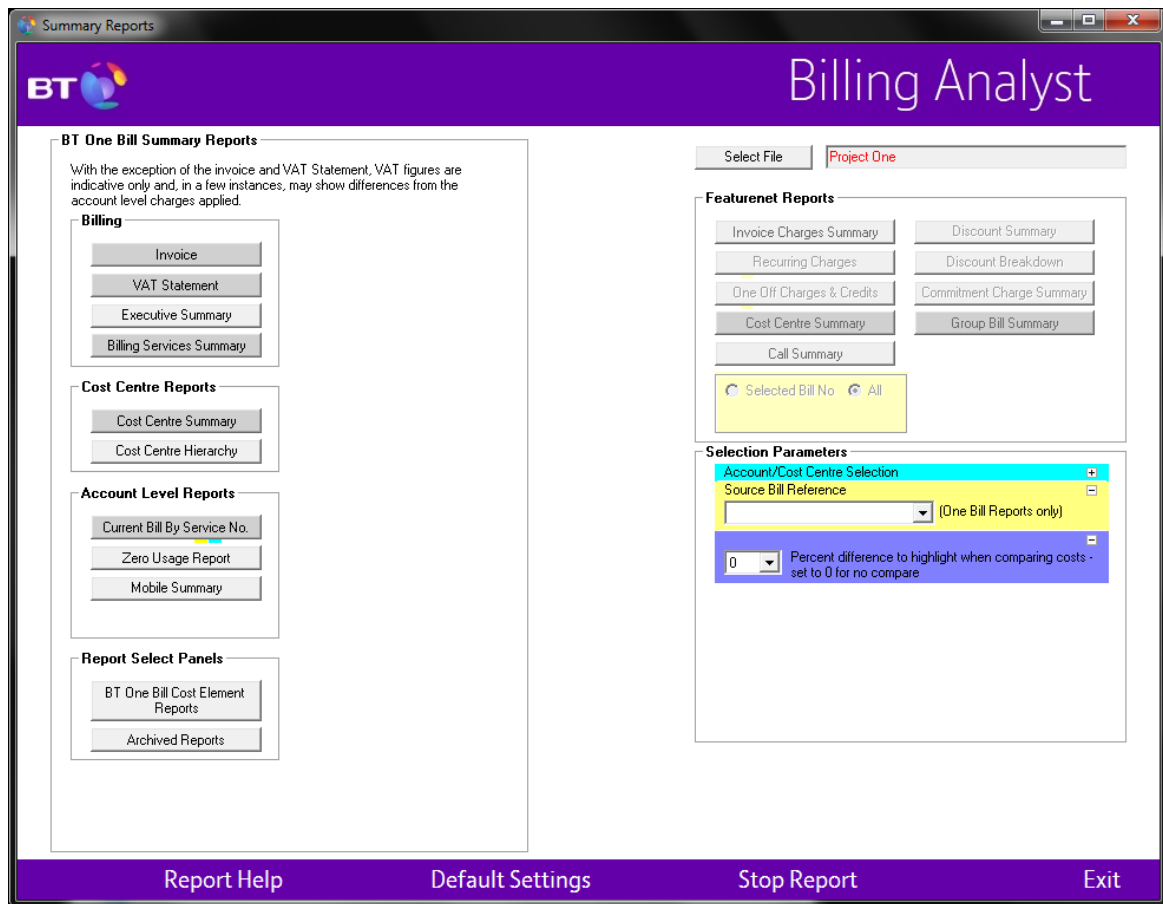
Once you have made all the changes you require, click “OK”. To exit without saving your changes (since the last time you clicked “Save Nos”), click “Cancel”.

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:



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:

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 31 for more details.

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 and 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, before 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, Net and 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.

Mobile Summary Report

This report details, for each mobile handset, the costs for each call type (Inclusive calls, direct dialled calls, SMS calls), and recurring charges.

Other Charges by Category

This report shows the totals for each type of charge categorised as “Other”.

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.

Other Charges Summary

This report shows a summary of each charge categorised as “Other” for each service number, along with a total of “Other” charges for that number.

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

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

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, Net and 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

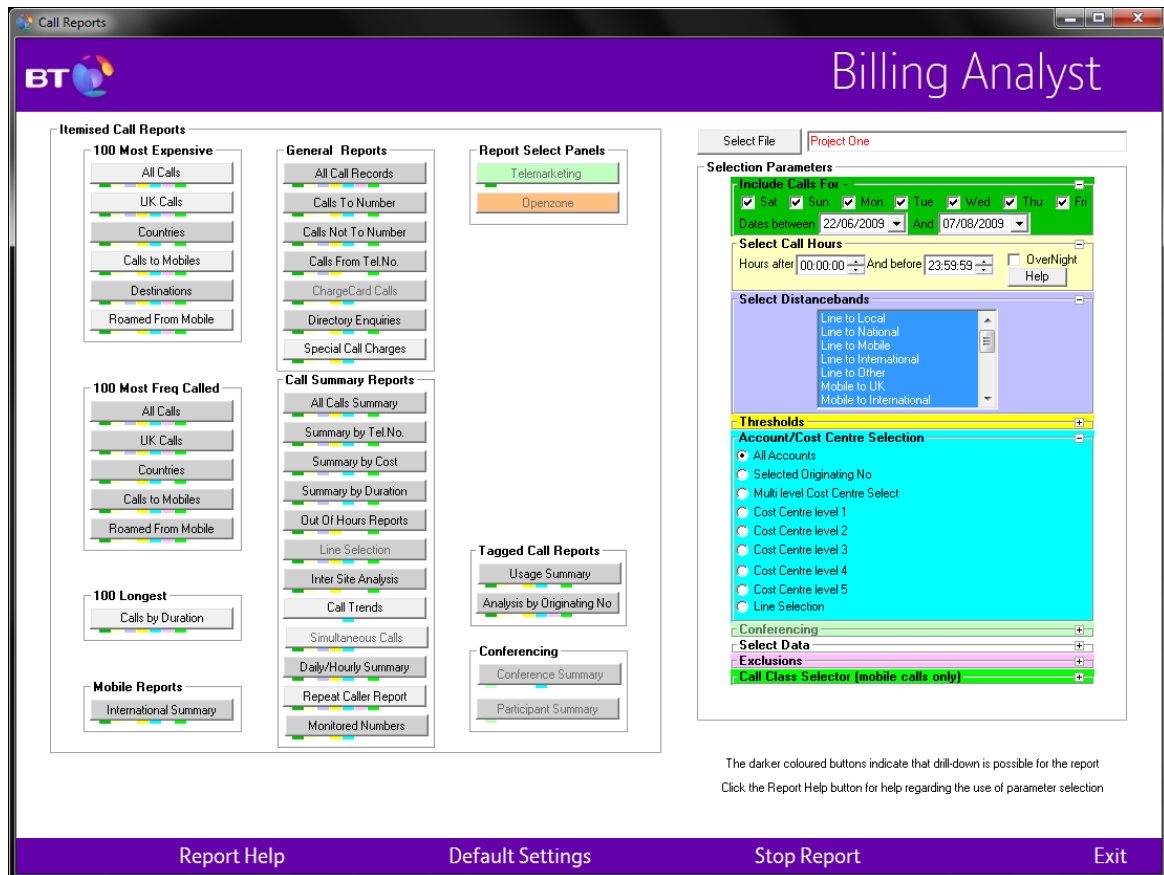
This report compares Usage statistics across the current bill, and a selected archive.

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 41.

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.

- 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
▶ 01
* ▶

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

Asterisks (*) 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 asterisks 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 lefthand 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.

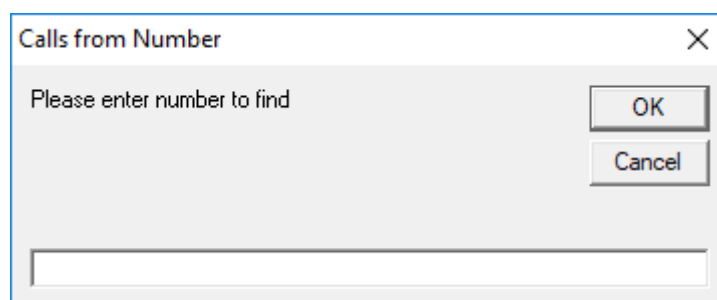
- **Calls Not To Number**

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

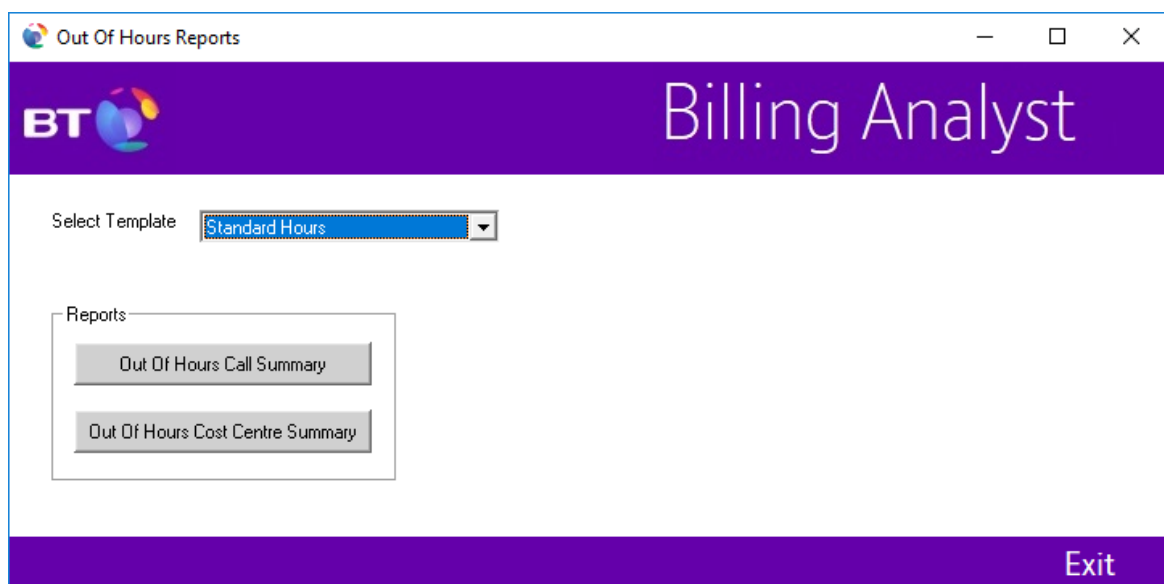
This report displays the number, duration, and cost of calls within a number of “cost bands”, e.g. more than £0.20 and less than £0.50, or more than £1.00 and less than £2.00. It also shows, for each cost band, the percentage of calls that fell within that band.

- 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.

- Out of Hours Reports

These reports work in conjunction with the Out of Hours Management screen. The reports will only become available once Out of Hours templates have been set up. When you click the report button, the following window is displayed:



To run a report, you must select an “Out of Hours template” from the dropdown box marked “Select Template”. Once you have selected a template, the report buttons below will be enabled.

The Out of Hours Call Summary displays the number, duration and cost of calls either “In Hours” or “Out of Hours”, depending on the settings made in the template.

The Out of Hours Cost Centre Summary displays, for both “In Hours” and “Out of Hours”, the total number, duration and cost of calls for each Cost Centre. The report initially displays the statistics for Level 1 Cost Centres; the user may then drill down on a given Cost Centre to view the statistics for Cost Centres at lower levels.

- **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 59 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.

- **Daily/Hourly Summary**

This report displays the number and cost of calls made each hour, each day, for the duration of the bill, in respective tables as displayed below:

Number of calls by Day and Hour Band																							
07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Totals						
11	22	48	55	46	62	38	19	28	29	23	41	34	22	22	10	7	533						
281	899	1253	1263	1073	790	992	1088	1050	786	412	172	101	55	32	24	8	10197						
323	828	1394	1370	1221	877	1053	1297	1155	900	450	213	105	78	45	44	10	11481						
334	775	1315	1349	1258	953	1069	1205	1187	912	495	232	118	89	58	40	13	11503						
254	801	1189	1207	1155	792	1051	1188	1059	793	421	194	111	81	54	23	9	10475						
355	840	1246	1259	1024	682	832	789	694	543	232	115	72	36	26	15	12	8726						
36	60	100	111	115	71	72	32	44	37	53	51	24	37	14	27	11	916						
1594	4025	6545	6654	5892	4227	4907	5629	5217	4000	2086	1018	565	398	251	183	70	53,831						

Cost of calls by Day and Hour Band (£)																							
07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Totals (£)						
6.22	10.60	9.14	10.75	9.12	57.38	132	9.59	5.92	3.75	9.68	4.90	5.64	6.17	6.36	2.01	5.34	298.57						
115	377	450	483	478	238	470	546	377	298	203	114	31.58	13.24	18.38	6.17	8.64	4290.84						
149	323	544	572	423	314	547	586	498	315	186	81.54	55.01	55.67	8.27	42.69	4.01	4777.40						
132	455	517	525	437	277	477	524	575	388	252	109	41.38	22.69	26.53	8.81	11.82	4867.71						
116	309	485	504	368	229	515	803.42	427	270	218	108	39.73	36.71	28.67	10.58	4.70	4453.07						
142	335	468	515	423	315	487	358	341	215	98.26	56.58	20.78	26.87	3.31	2.82	0.54	3871.82						
14.71	6.62	16.75	29.27	27.22	10.47	15.30	15.20	12.99	28.20	7.14	9.33	4.74	9.83	4.14	5.68	1.91	219.59						
£676	£1817	£2490	£2700	£2164	£1442	£2625	£2642	£2237	£1514	£975	£483	£199	£171	£96	£79	£37	£22,779.00						

Summary totals for Number and Cost of Calls per Hour and per Day. Please click on a column, row or cell to drill down. Average number of calls = 320. Average cost of calls = 135.59.

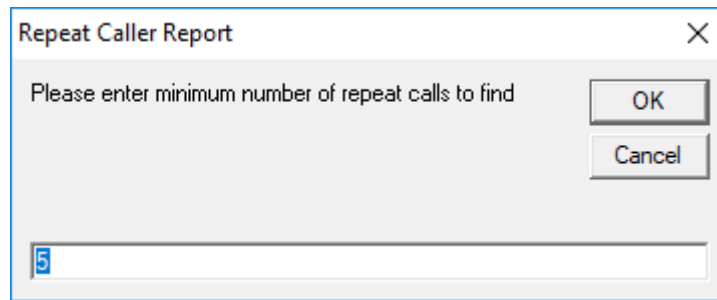
So in the example above, 76 calls were made on a Sunday between 00:00 (midnight) and 01:00am during the bill. 3087 calls were made on a Tuesday between 09:00am and 10:00am. You can scroll the report tables left and right to view the statistics for later in the day (depending on the size and resolution of your display).

The statistics within the table are colour-coded. Where the number/cost of calls is less than the average over the duration of the bill, the background of the table cell is coloured blue. Where the number/cost is greater than the average, the cell is coloured green. The cell where the highest number/cost is found is coloured red.

- **Repeat Caller Report**

This report displays instances where a given originating number has called a given receiving number a certain number of times. For example, it would show that originating number “A” has called receiving number “B” a total of 10 times within the duration of the bill.

When you click the “Repeat Caller Report” button, the following window is displayed:



In the textbox provided, enter the minimum number of repeat calls you wish to display in the report. So, for example, if you only want to see where a receiving number has been called 5 times by a single originating number, enter “5”, as above. Then click “OK”.

The report will then be displayed, showing each originating number, each receiving number that it has called more than “X” times (where “X” is the number you entered in the window above), the actual number of times a call has been made between the two numbers, and the total duration and cost of those calls.

□ Monitored Number Summary

This report works in conjunction with the “Number Monitor Management” facility (please see “Number Monitor Management” on page 82 for more details). It displays statistics for calls to those numbers saved in the Number Monitor Management screen, showing the originating numbers which called them, the Charge Group of the calls, and the number, duration and cost of those calls.

Once the report has opened, you may click on a line to show more details on the calls between your chosen originating number and receiving number.

Report Select Panels / Telemarketing Reports

The Report Select Panels frame includes a button, “Telemarketing”, 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.

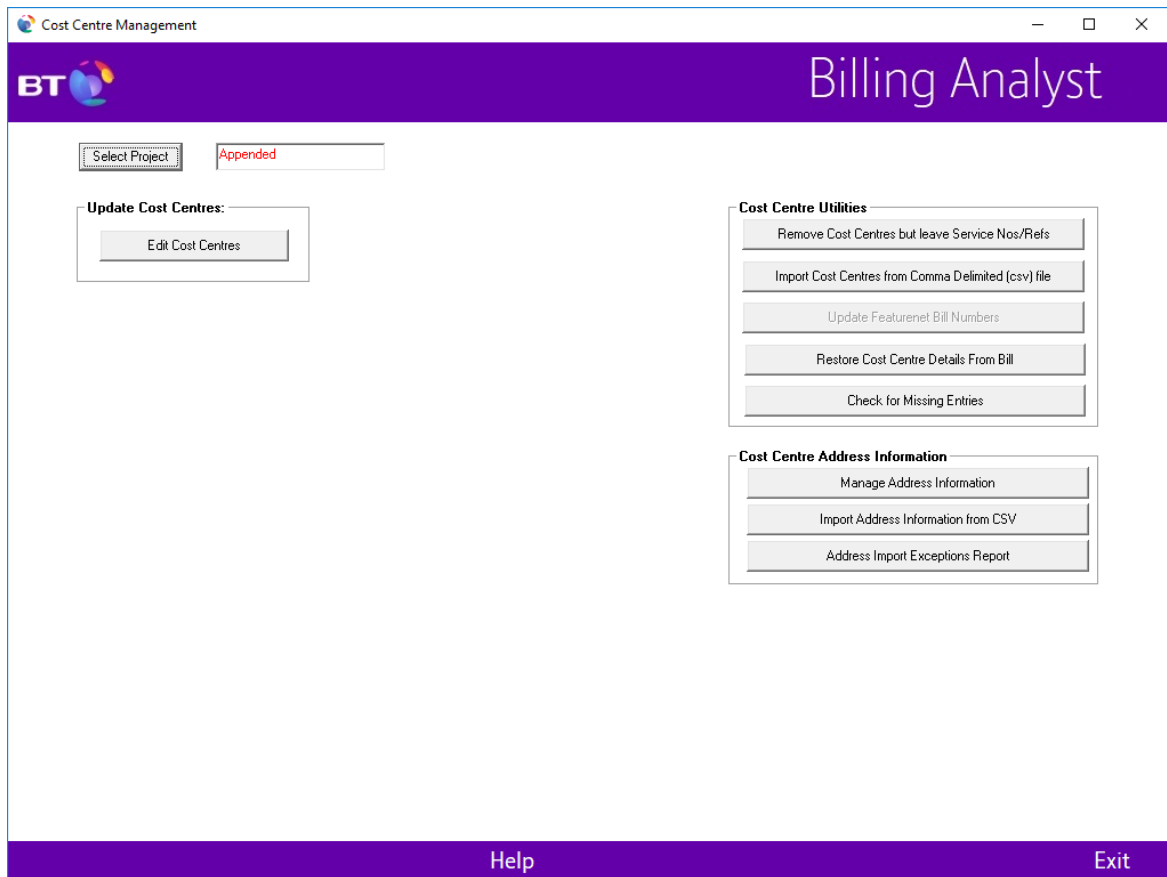
Cost Centre Management

BT Billing Analyst 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.

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:

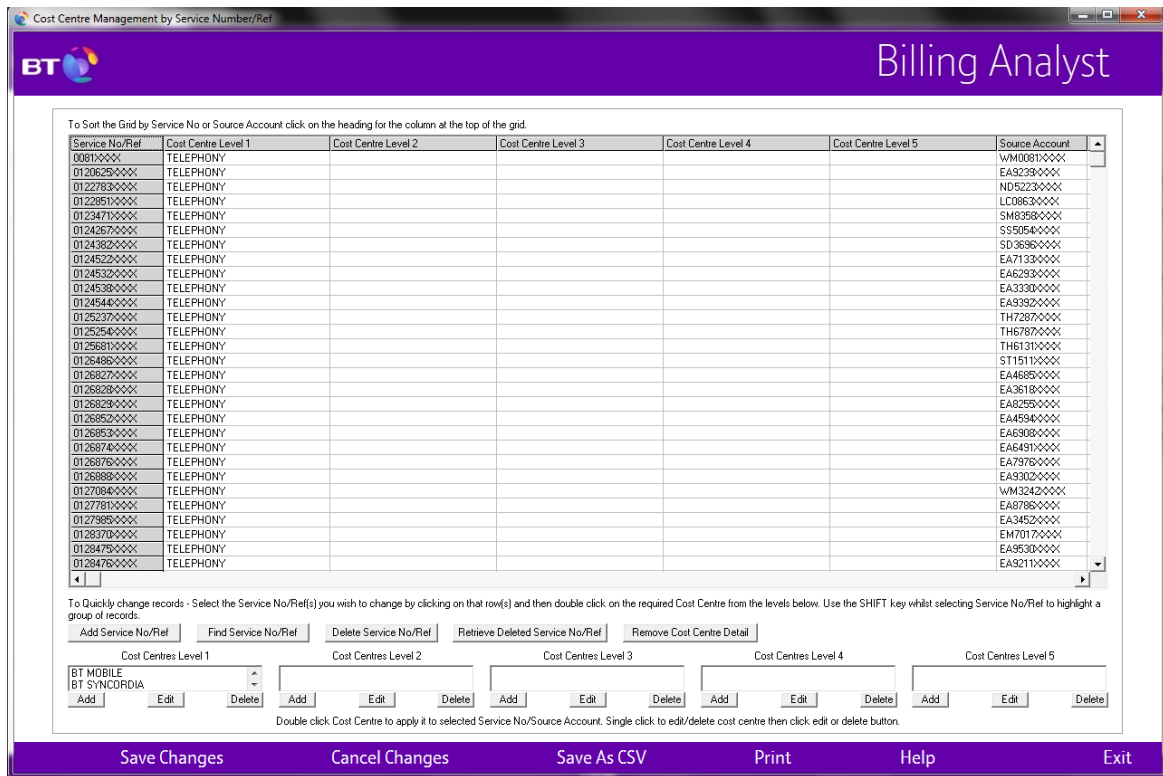


The options available on this screen are as follows:

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:



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.

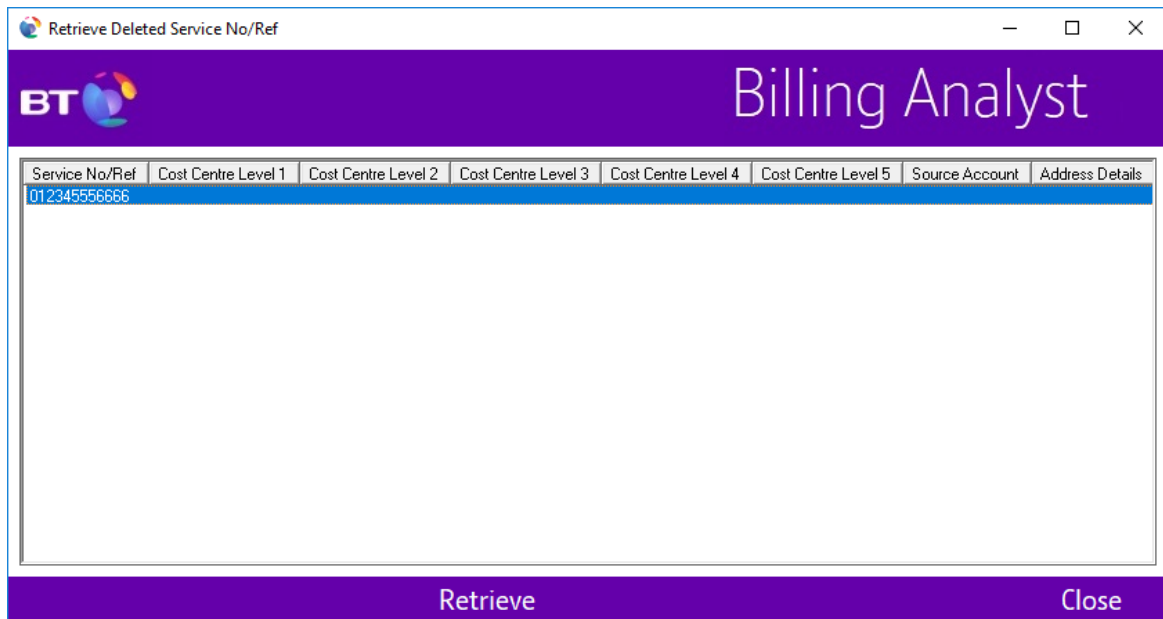
Where multiple service numbers must be selected, but they are not in one uninterrupted list, you may select each one by holding down the control key whilst clicking the numbers. All previously selected numbers will remain selected, and you may then allocate Cost Centre names as described above.

- 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. Deleted numbers may be restored at a later point by clicking on the “Retrieve Deleted Service No/Ref”. Previously deleted numbers will then be displayed as shown below:



Select the number/s you wish to retrieve, and then click “Retrieve”. The numbers selected will then be added to the grid again.

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.

You may also print the Cost Centre structure by clicking on the “Print” button.

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

Remove Cost Centres but leave Service Nos/Refs

If you wish to delete the whole Cost Centre structure for the project, click the “Remove Cost Centres but leave Service Nos/Refs” 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 BTBA 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

Service No/Ref	Service Number / Ref	Next
'0113328'xxxx	Cost Centre 1	Previous
'0115993'xxxx	Cost Centre 2	
'0115993'xxxx	Cost Centre 3	
'0115993'xxxx	Cost Centre 4	
'0115993'xxxx	Cost Centre 5	
'0121212'xxxx		

WARNING - Files must be of a consistent format to avoid errors arising as a result of this import.

- You must now select what data appears in which section of the CSV file. Files output from Billing Analyst 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 “Service Number/Ref” 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 green 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 Billing Analyst 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.

- Billing Analyst 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.

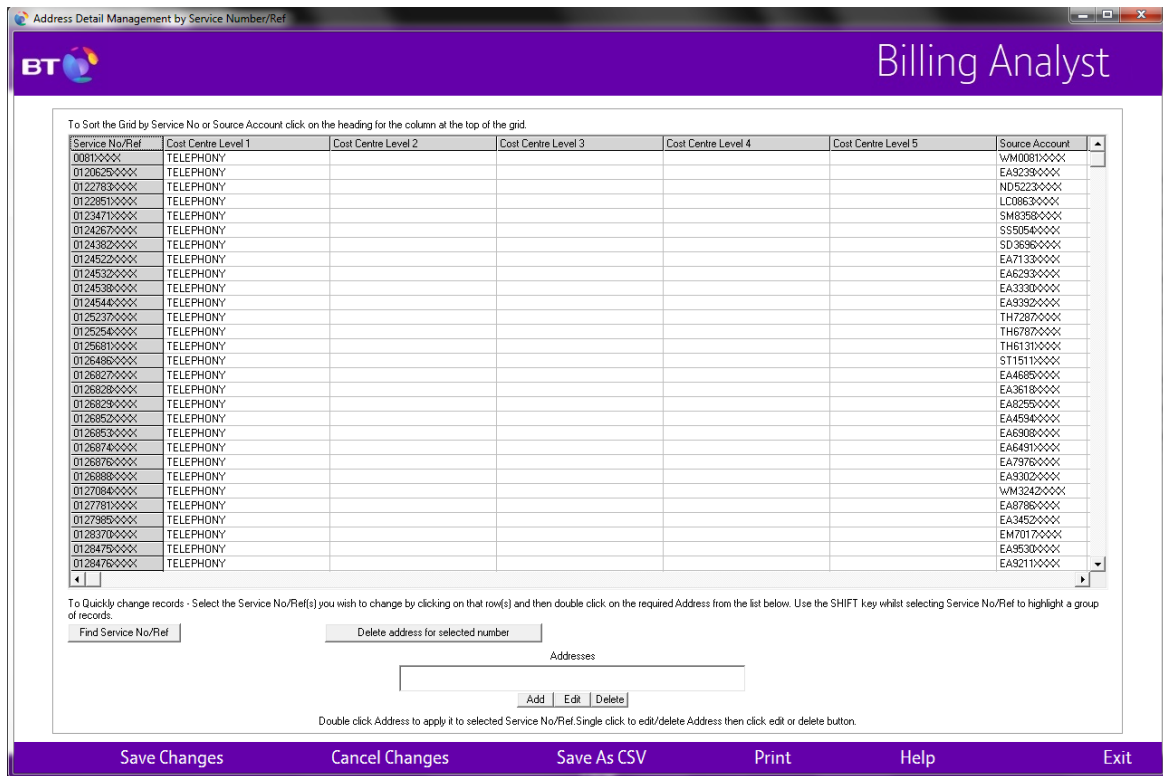
Check for Missing Entries

This facility checks the data within the project for service numbers which are missing from the Cost Centre structure. This would probably be as a result of being deleted manually on the “Edit Cost Centres” screen. If you click the “Check for Missing Entries” button, the bill data will be reviewed, and any service numbers contained in the bill, but missing from your Cost Centre Structure, will be added automatically. They will then, again, be visible when you go to the “Edit Cost Centres” screen.

Manage Address Information

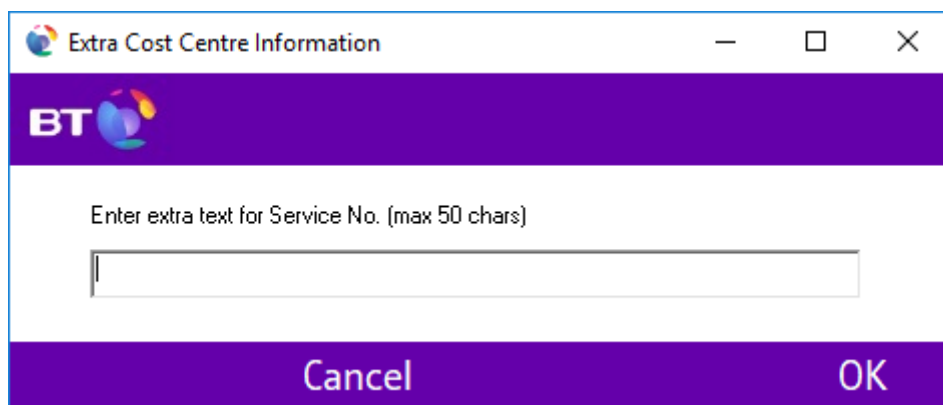
As part of Cost Centre Management, Billing Analyst provides the facility to record an address for each service number. Cost Centre address details are included in the Cost Centre Hierarchy report, to be found on the Summary Reports screen.

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



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.

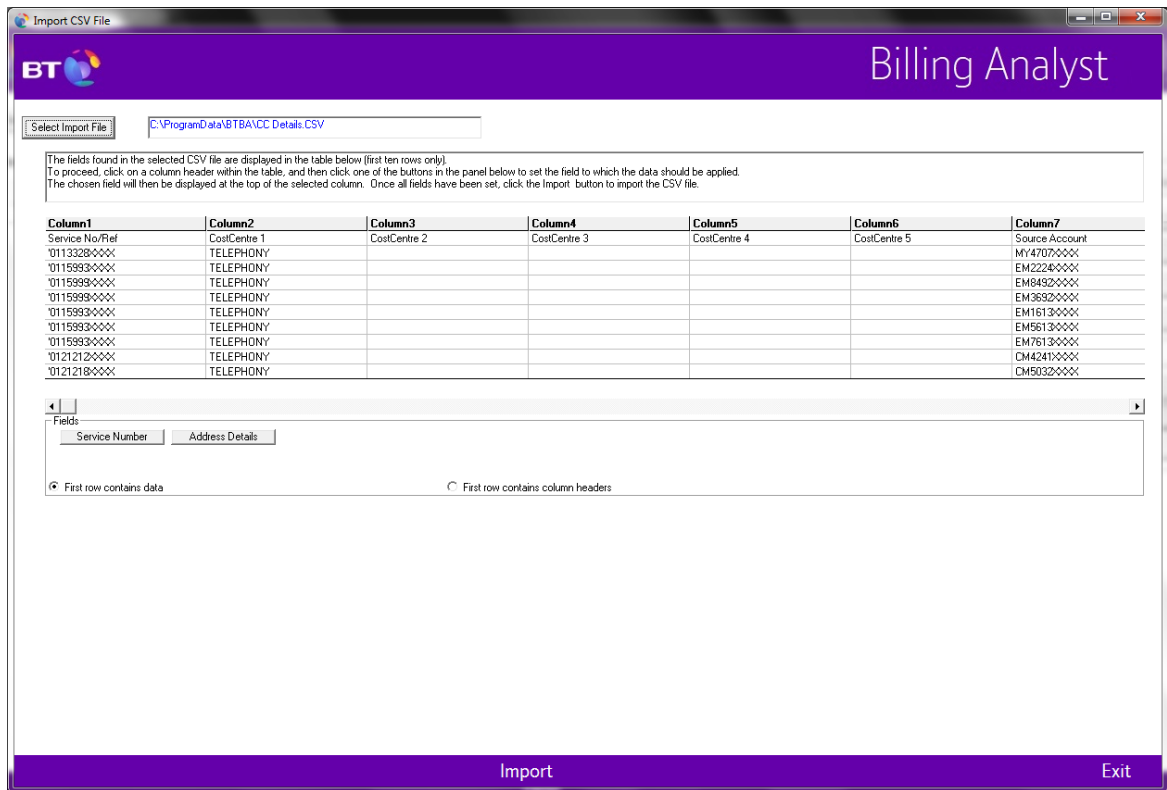
You may store your address information by clicking on the “Save as CSV” file. You may then specify a filename and folder into which you can save the addresses. This CSV file may then be used for mass-editing, or simply as backup. See “Import Address Information from CSV”, below, for more details on importing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

Address information may also be output to a printer, by clicking the “Print” button.

[Import Address Information from CSV](#)

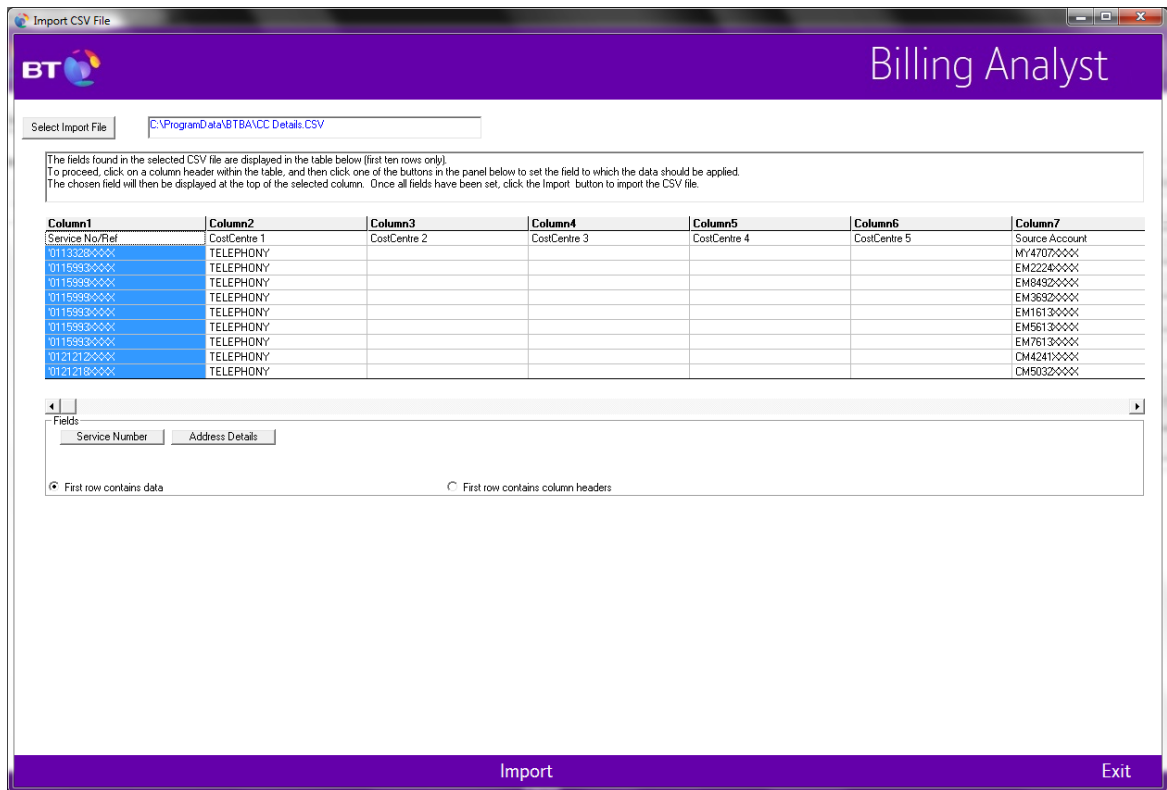
If you want to restore the address information from a backup file, or you have an updated address file you wish to load (see “Manage Address Information” section on page 54) click the “Import Address Information from CSV” button.

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

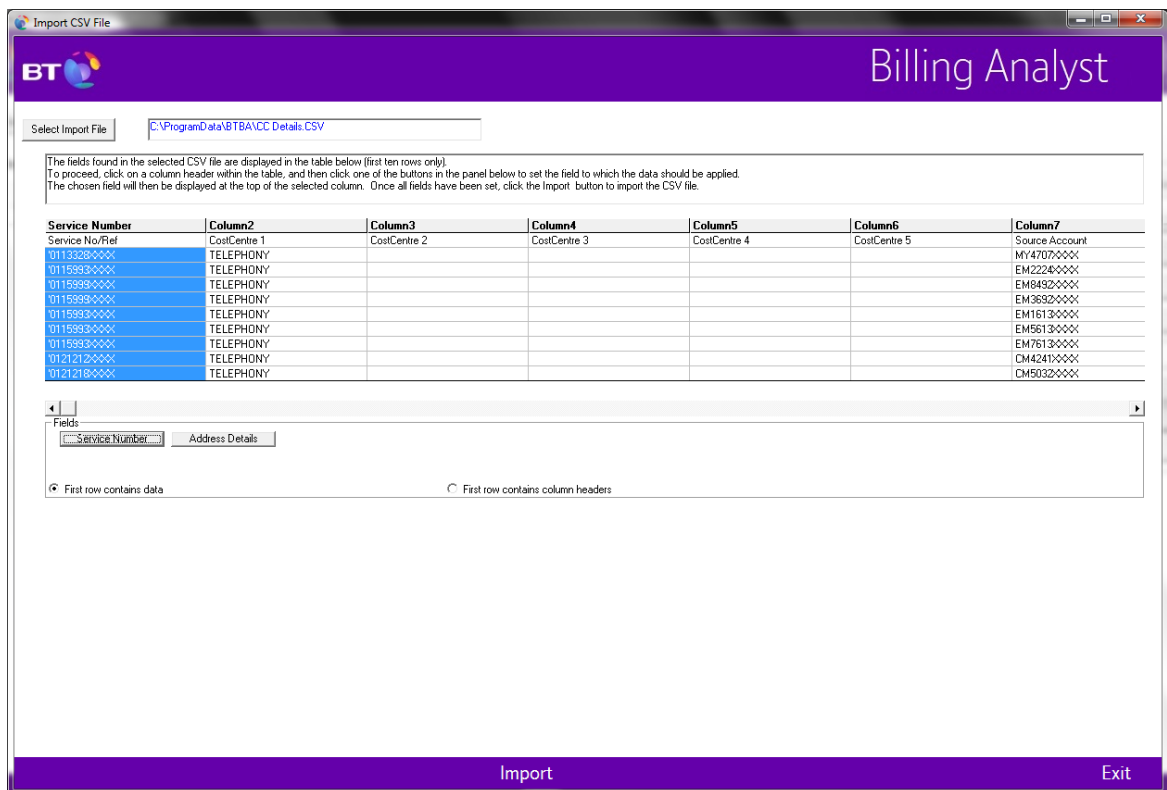


Each column found in the CSV is displayed in a grid. The fields required for the import are shown in a frame below it (in this case, Service Number and Address Details).

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:



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



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.

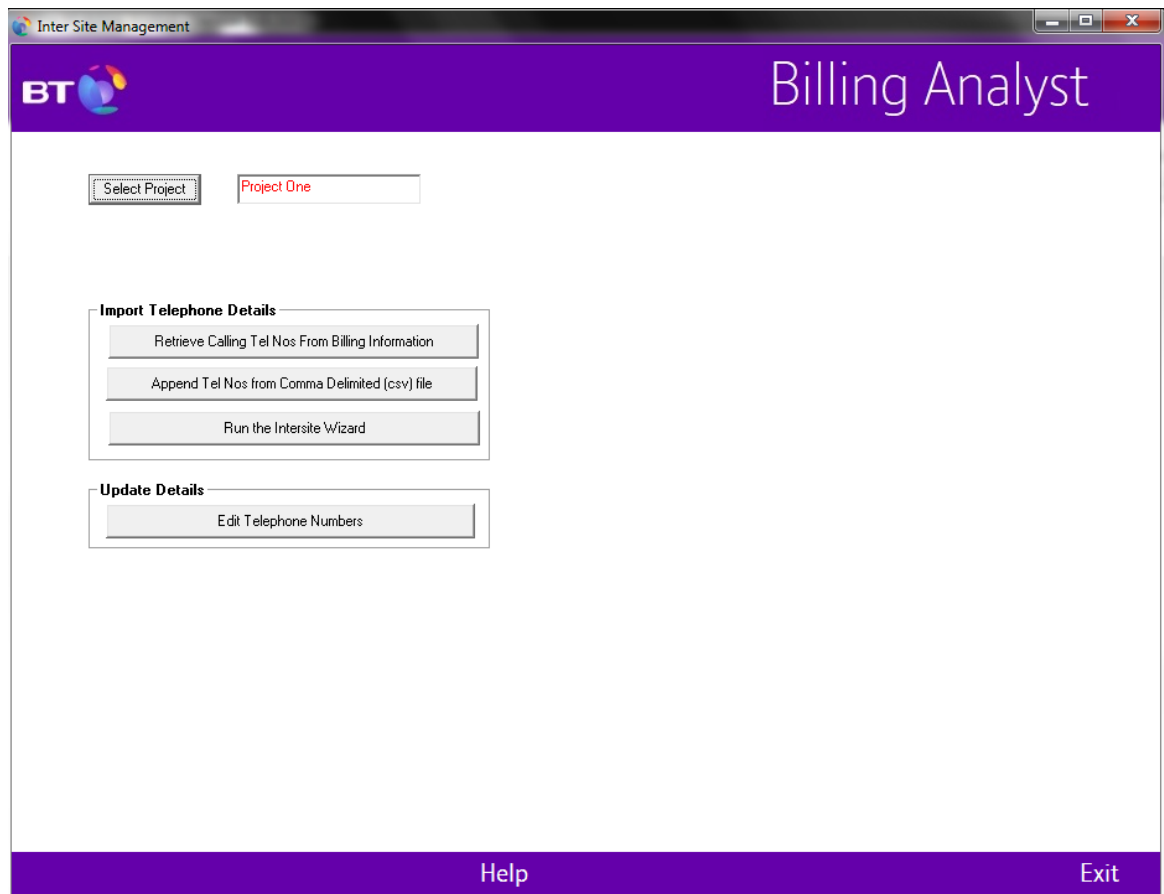
Address Import Exceptions

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

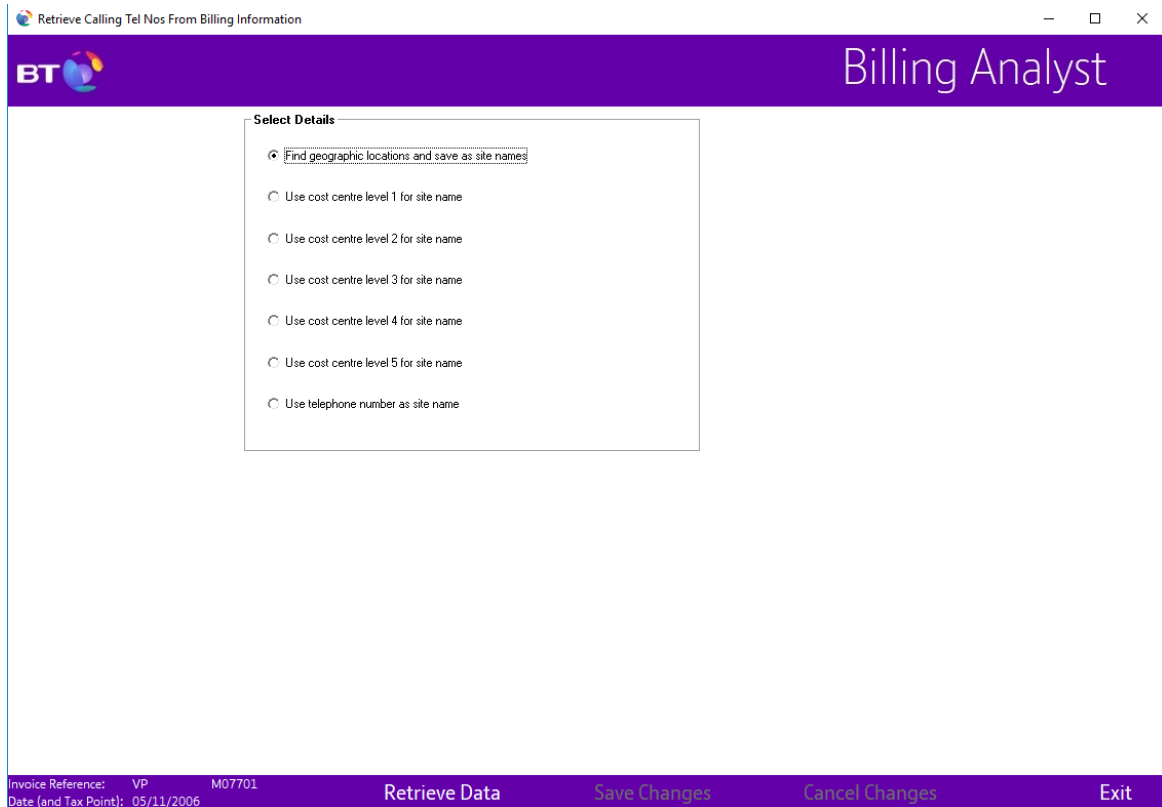
BT Billing Analyst offers the facility to report on calls between different parts of your organisation. Service numbers are imported from the bill data, and you may then apply site names to each number. Reports are then available on the Itemised Reports screen that identify calls between the sites you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

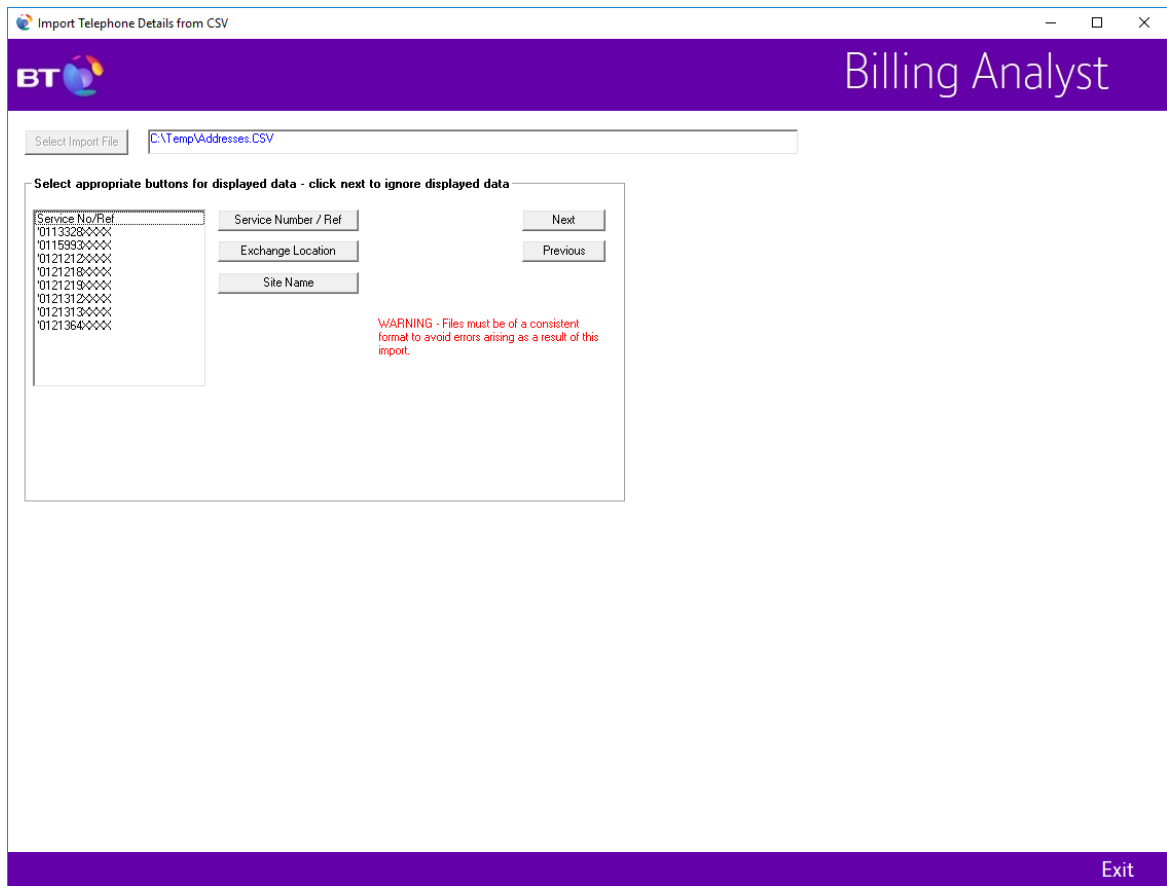
This is for initial setup of the site names. The names may be changed at will once the service numbers have been imported, via the “Edit Telephone Numbers” screen (please see “Edit Telephone Numbers” on page 59 for details).

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

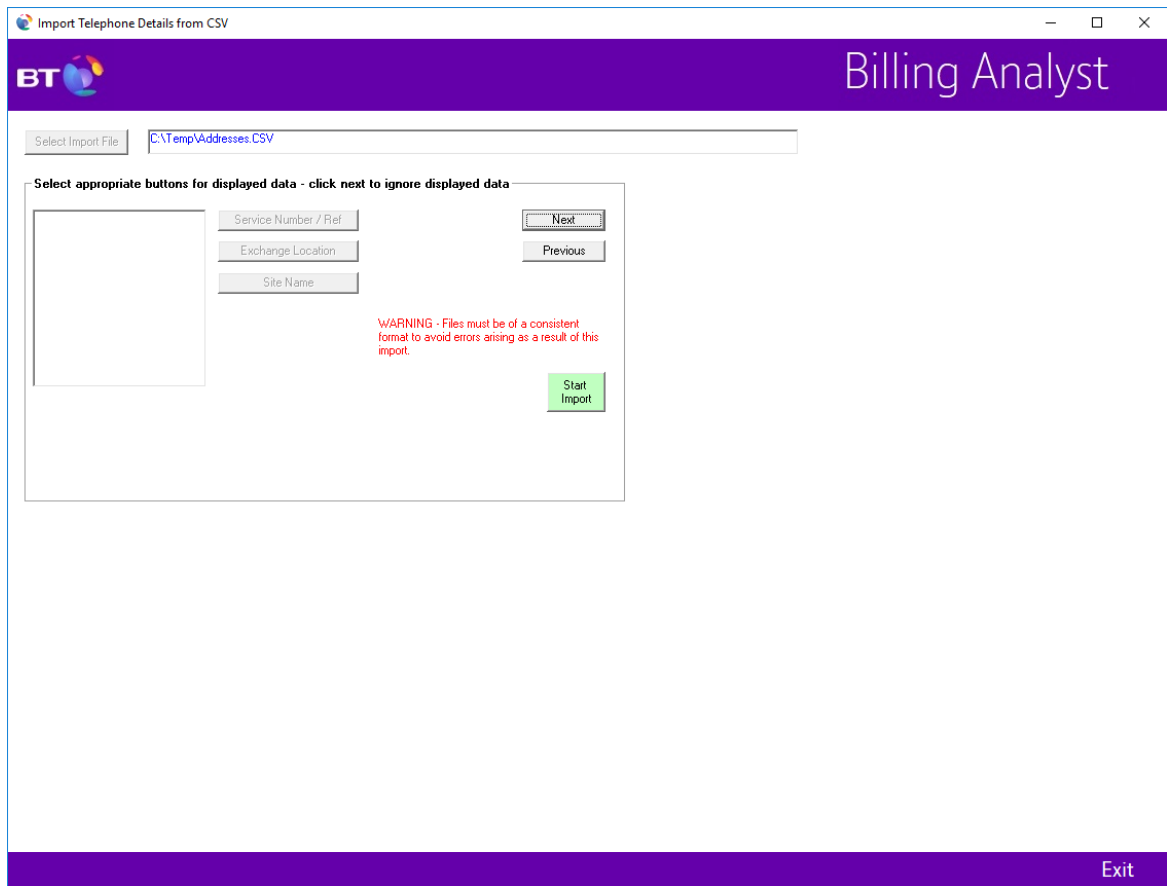
The initial setup for site management requires telephone numbers to be imported from the billing information. However, it is possible to add more telephone numbers via this facility.

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:

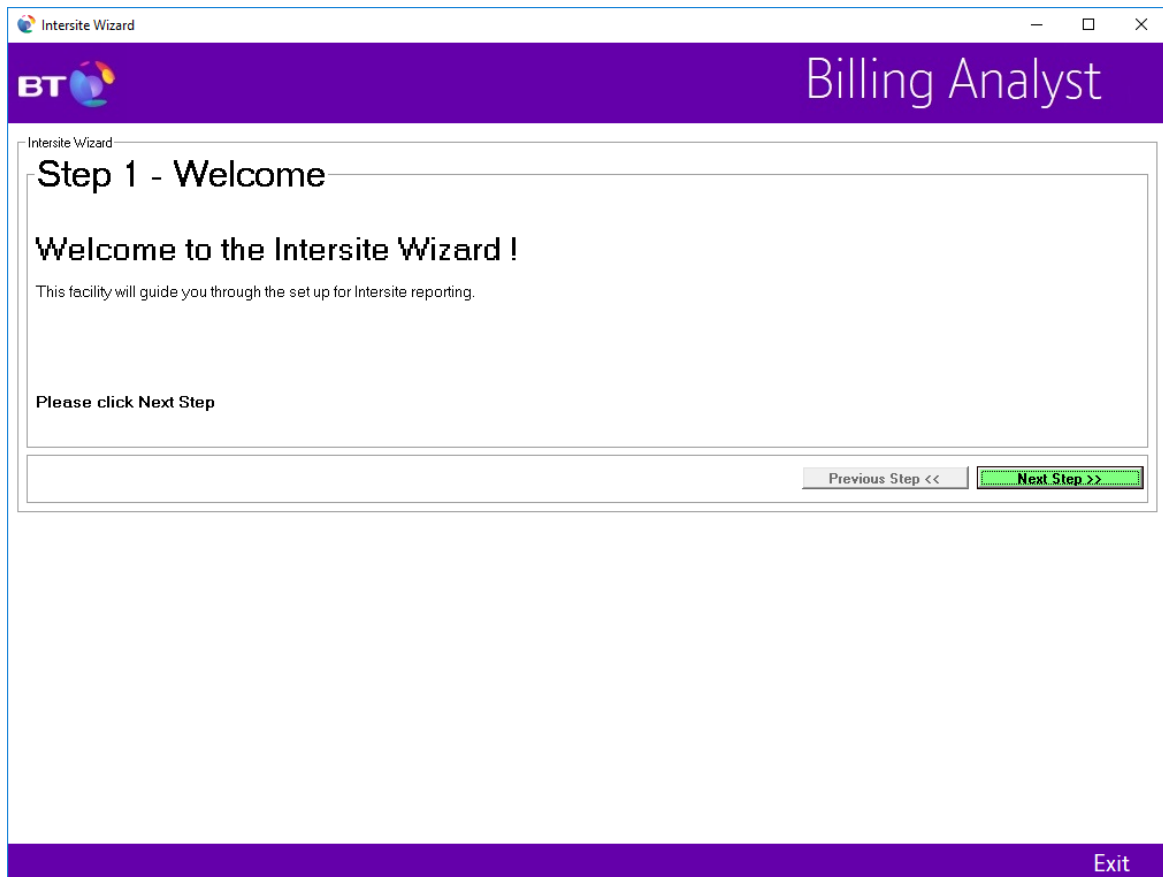


Click on the “Start Import” button to commence the import. Once the import has completed, buttons will be displayed allowing you to save or cancel your changes.

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



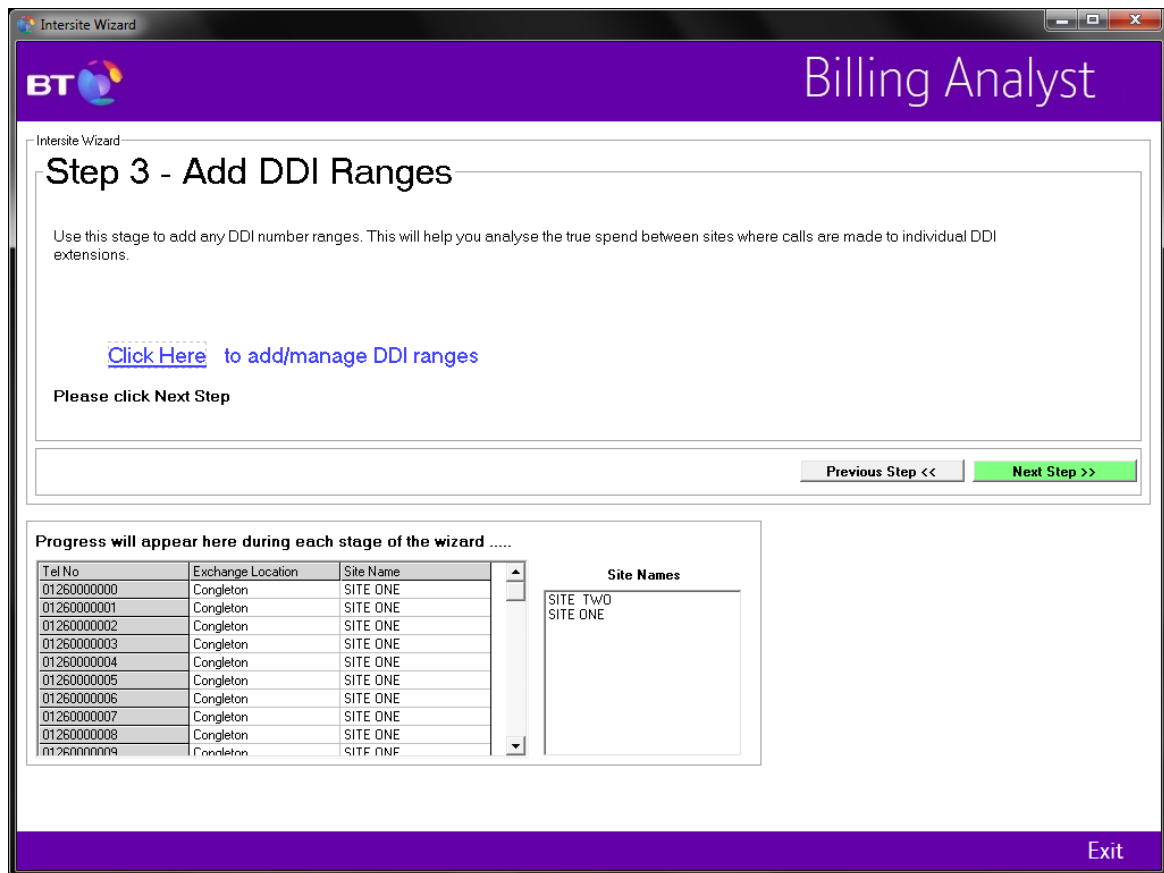
On clicking “Next Step”, the following window is displayed:

Step 2 – Retrieve Numbers

The screenshot shows a software window titled "Intersite Wizard" with a purple header bar containing the BT logo and the text "Billing Analyst". The main content area is titled "Step 2 - Retrieve Numbers" and contains the following text: "Choose how you want the Intersite locations to be identified from the retrieval options on the right." Below this text is a "Retrieval Options" section with a list of radio buttons: "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 options is the instruction "Please click Next Step". At the bottom right of the main content area are two buttons: "Previous Step <<" and "Next Step >>". The "Next Step >>" button is highlighted in green. At the bottom right of the window is an "Exit" button.

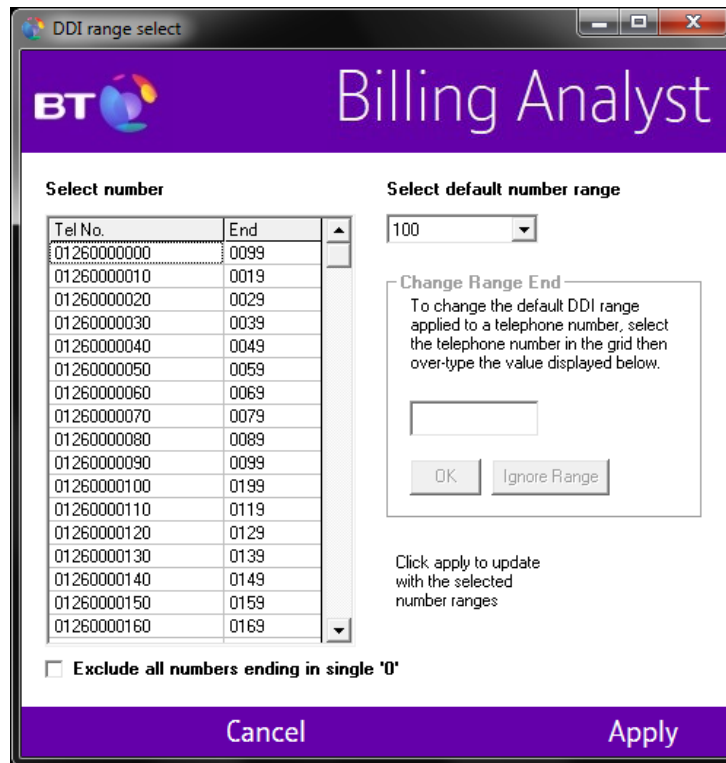
This window allows you to define how your sites will be named to begin with. You can change any of the names at a later point via the “Edit Telephone Numbers” facility on the Inter Site Management screen. Once you have made your choice of retrieval option, the following window is displayed:

Step 3 – Add DDI Ranges



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:



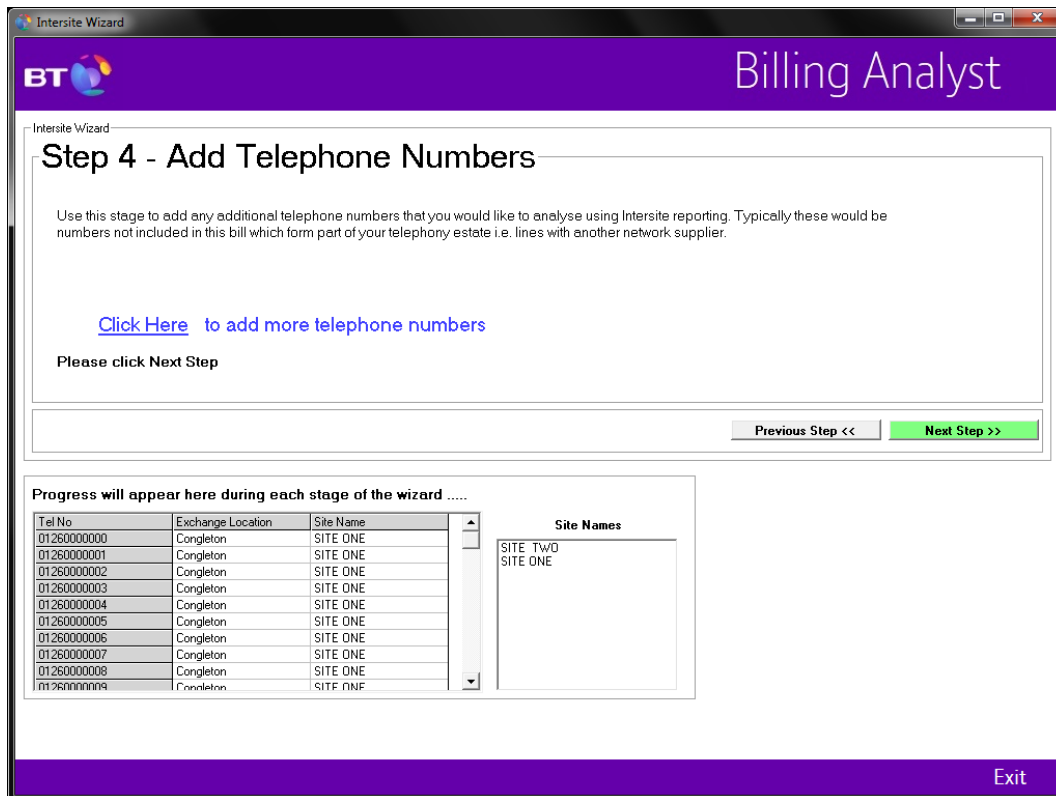
This window allows you to assign a number range to a billed number. In the example above, looking at the line with the telephone number 01142682260, the numbers 0114 268 2260 to 0114 268 2269 will all be added to the site list. Therefore, any calls to these numbers will be picked up in the Intersite 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.

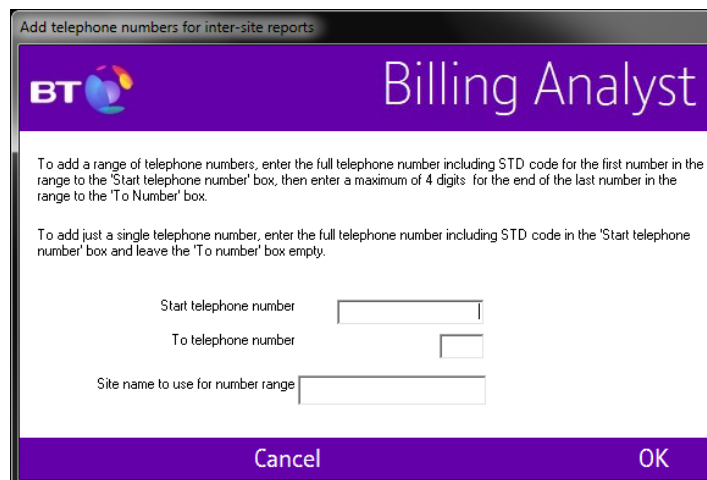
If you wish to alter the range of numbers applied to a given service number, select that telephone number from the list, and once the “End” number has been displayed in the textbox shown, enter your required number and click “OK”.

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

Step 4 – Add Telephone Numbers



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 “Click Here to add more telephone numbers” link, the following window is displayed:



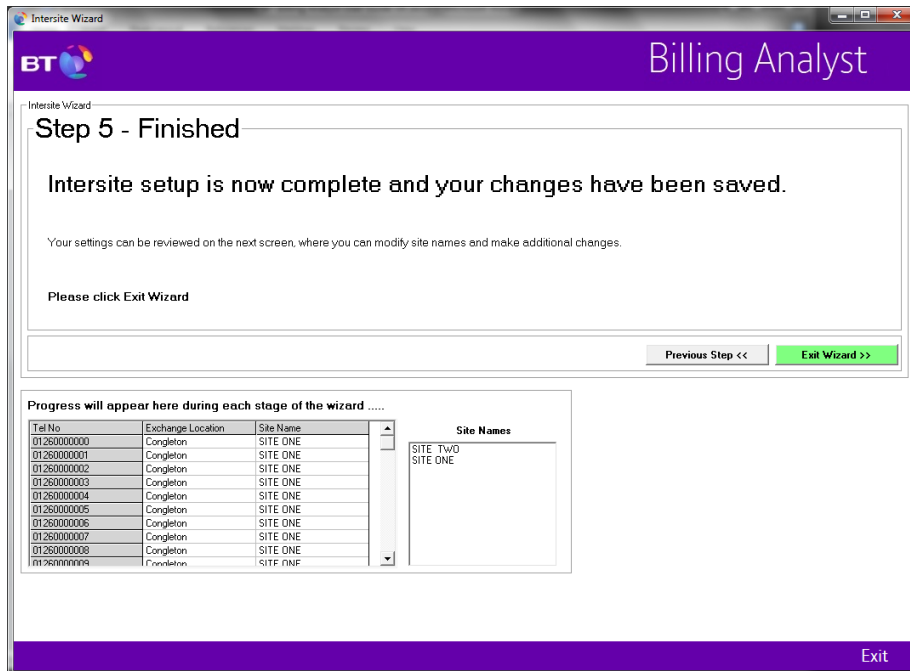
To add a single number, type that number in the “Start telephone number” box, enter a site name as required in the “Site name..” box, and click “OK”.

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:

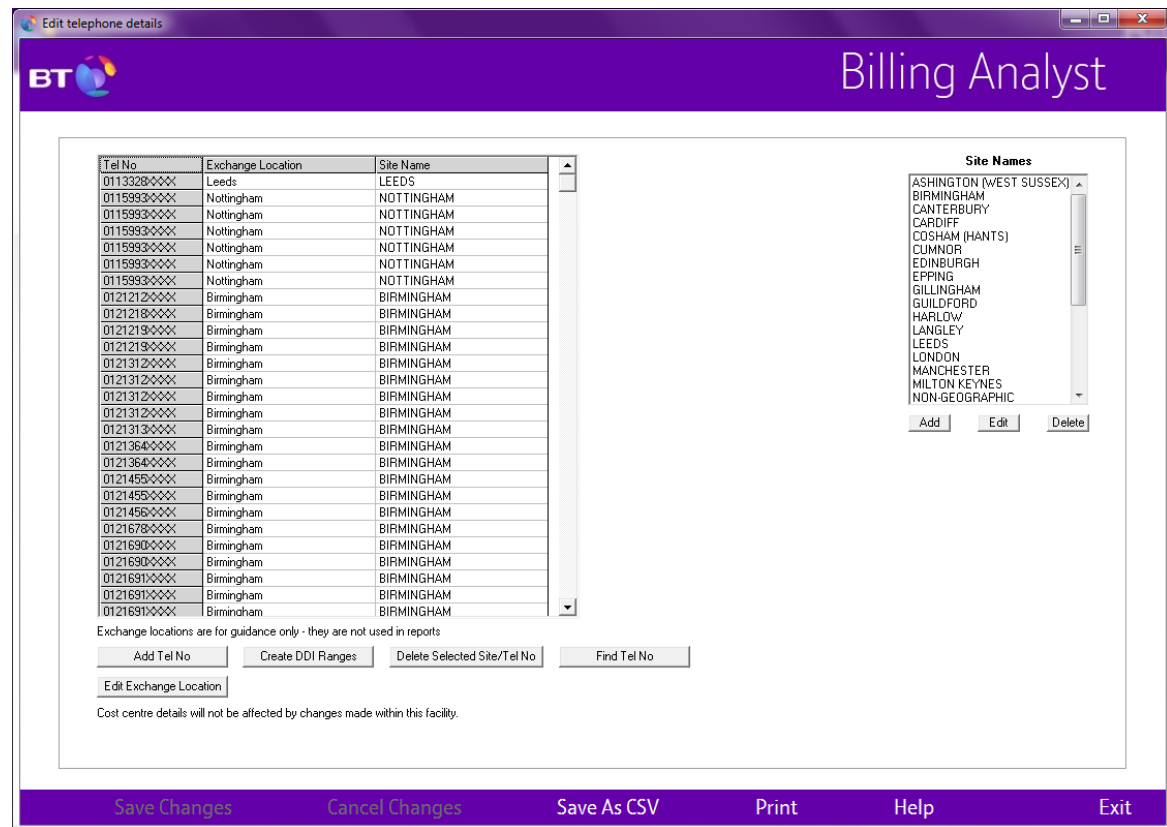
Step 5 - Finished



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:



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:

Add telephone numbers for inter-site reports

BT **Billing Analyst**

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

Cancel OK

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 BT Billing Analyst

Do you want to remove the site name only from the selected telephone number(s)?

Yes No

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”

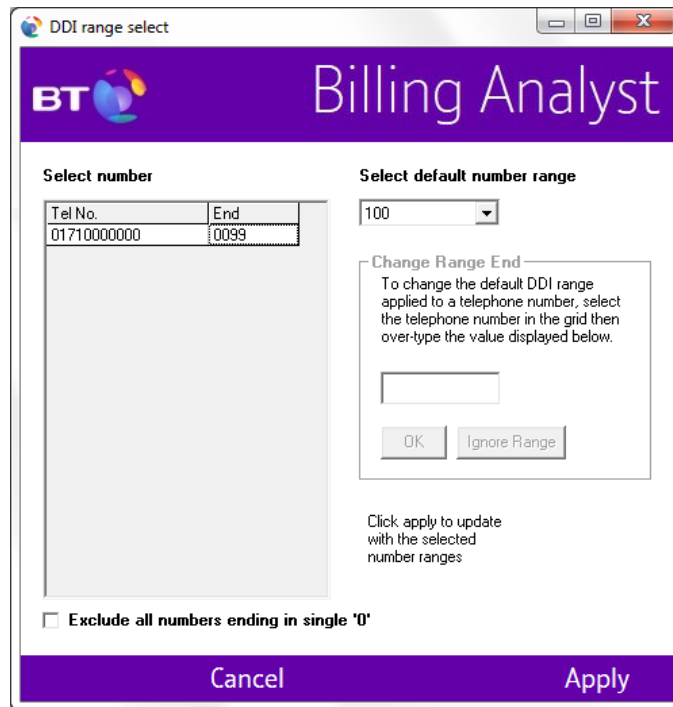
You may save your current Intersite setup, for backup purposes. This backup file may then be imported at any point via the “Append Tel Nos From Comma Delimited (csv) file” facility.

You may also print off your current Intersite setup by clicking the “Print” button.

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:



This window allows you to assign a number range to a billed number. In the example above, the numbers 0171 000 0000 to 0171 000 0999 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”.

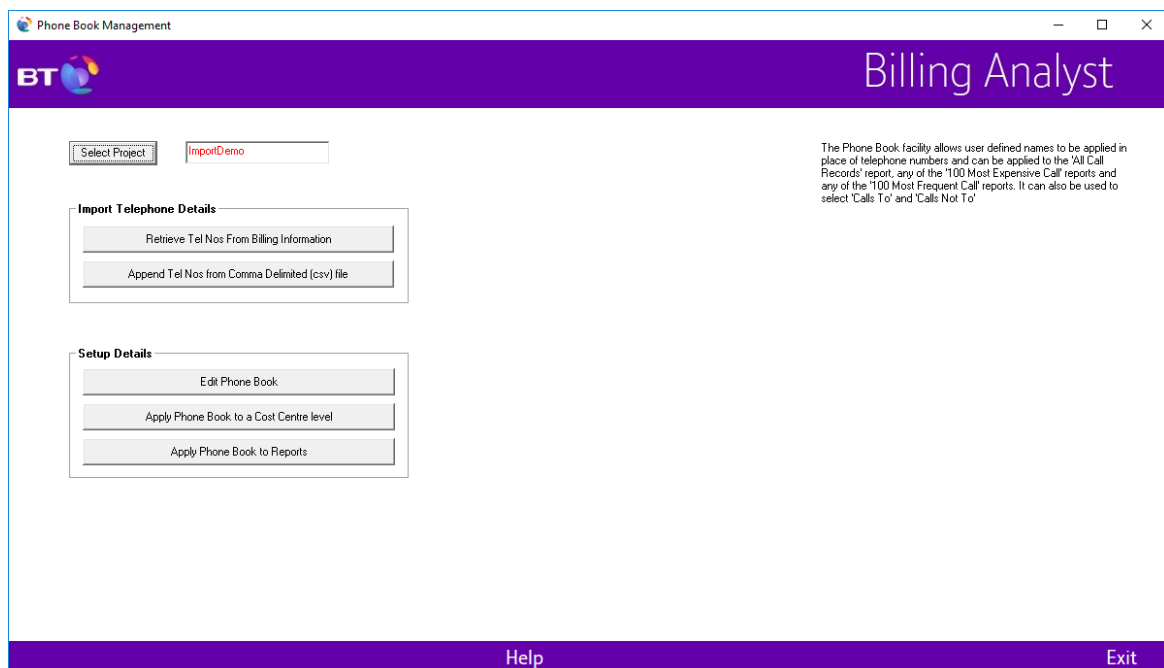
Click “Apply” to save the changes, or “Cancel” to exit back to the Edit Telephone Details screen.

Phone Book Management

Billing Analyst 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.

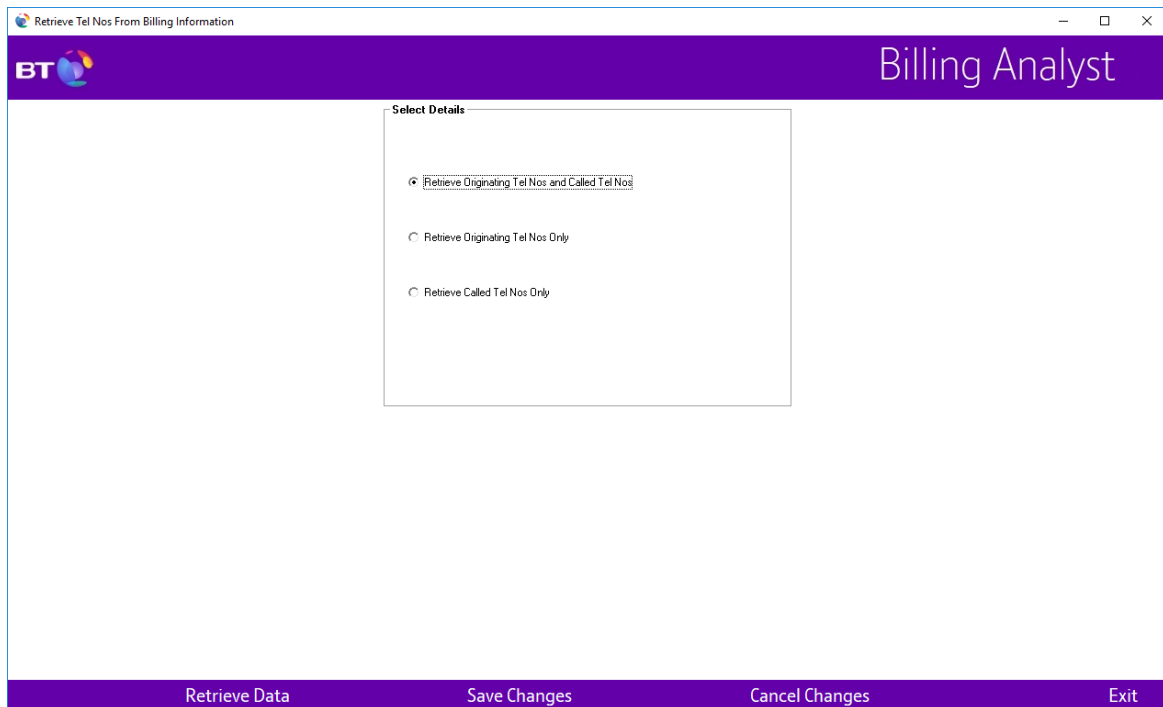
The phonebook names can then be applied to many reports with Billing Analyst - in some cases instead of the actual numbers, in other cases alongside those numbers. It is possible to show the phonebook entries for calling numbers only, called numbers only, or both. If required the phonebook can be disabled 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 28). 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:



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:



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, 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.

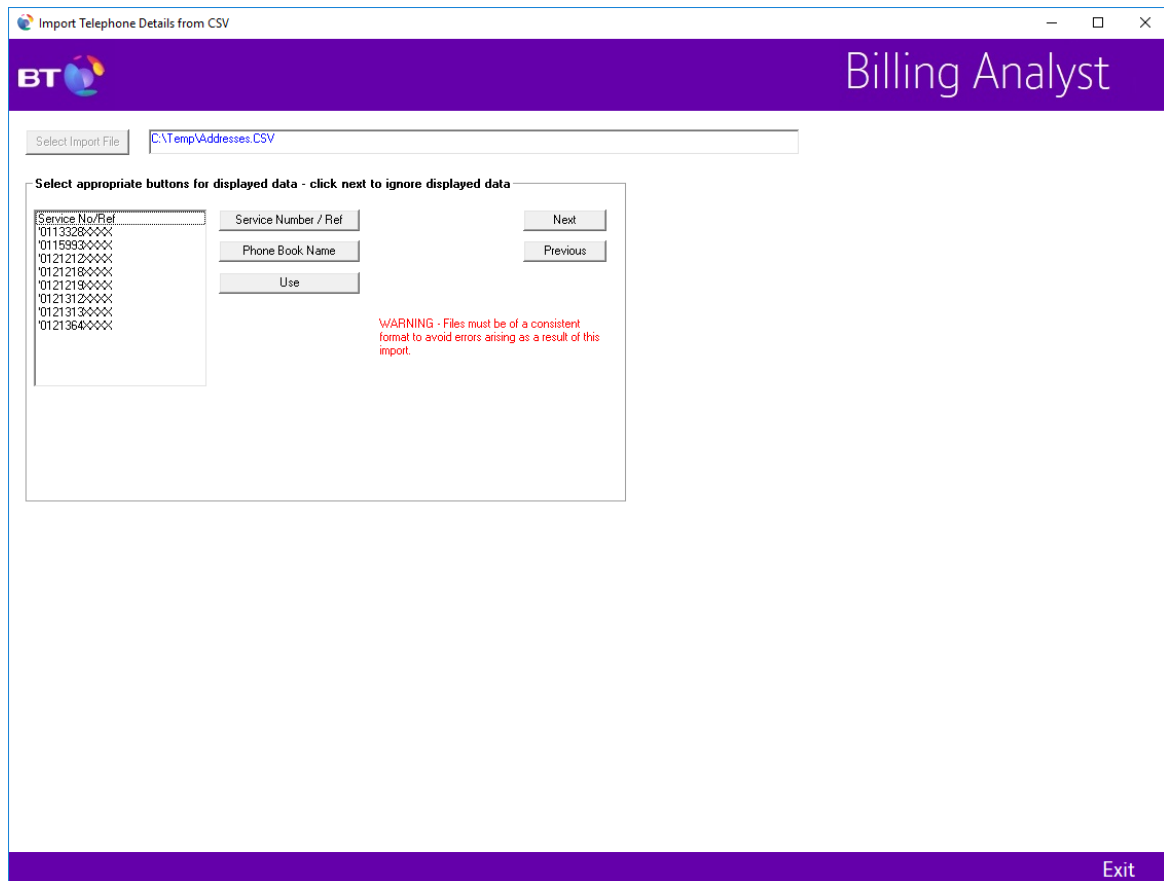
Once you have made your choices, click “Exit” to go back to the Phone Book Management screen.

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.

E.g. 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:



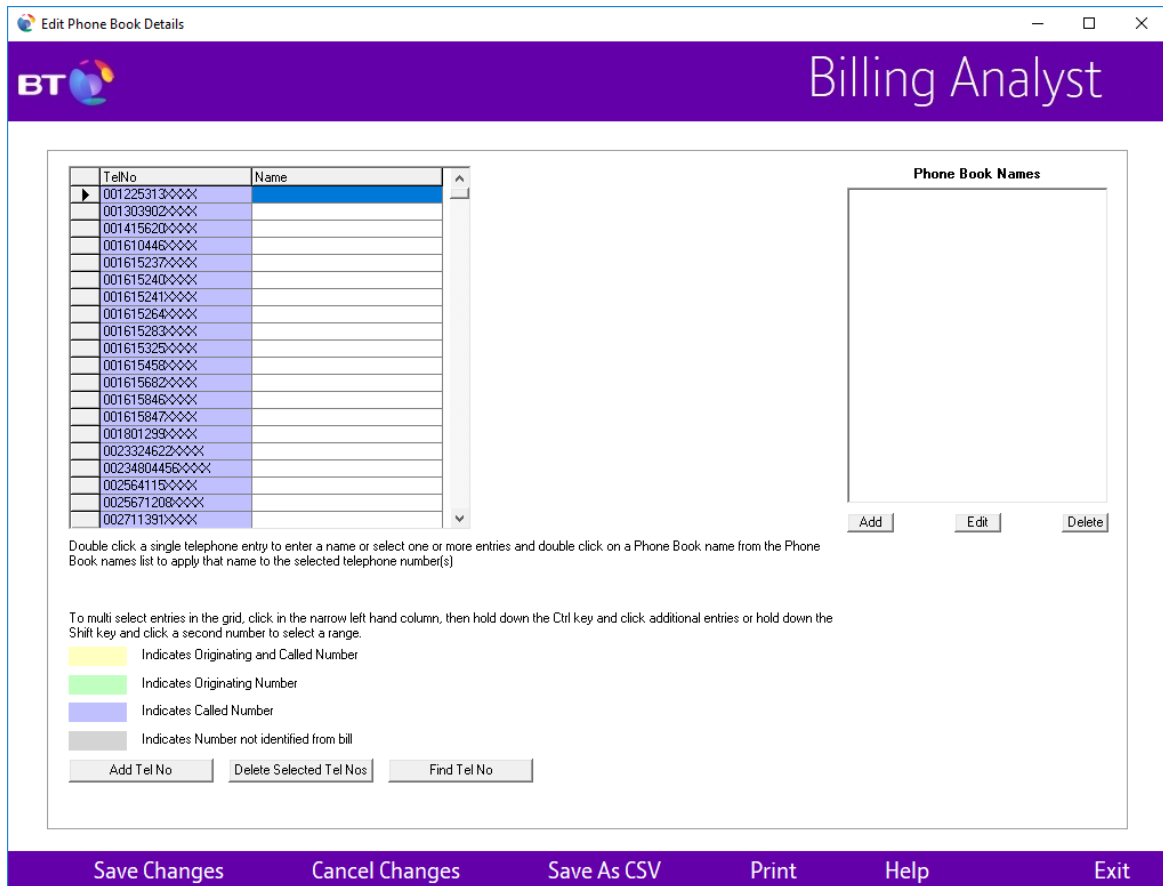
You must specify the location of each of the required fields (“Use” is optional), by clicking on the relevant button to the right of the list. In the example above, the first column is displayed, which is the telephone number, meaning you must click the “Service Number/Ref” button. If the column displayed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

Once you have specified the required fields, a green “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:



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



Billing Analyst

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

Cancel OK

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.

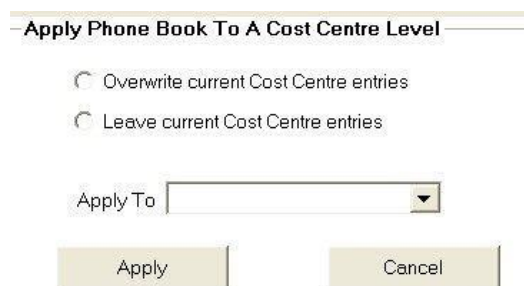
You can save the current Phonebook setup to a backup CSV file, by clicking the “Save As CSV” button. You may then specify a location and filename where the file may be saved.

You may also print off the current Phonebook setup by clicking the “Print” button.

Apply Phone Book to a Cost Centre level

Billing Analyst allows you to take the names you have saved in your Phonebook, and apply those names to a level in your Cost Centre structure. So for example if you have a telephone number 01234555777 with the Phonebook name “Head Office”, you can apply that name to the Cost Centre entry for the same number.

To do this, click the “Apply Phone Book to a Cost Centre Level” button on the Phone Book Management screen. The following frame will be displayed:



Apply Phone Book To A Cost Centre Level

Overwrite current Cost Centre entries

Leave current Cost Centre entries

Apply To

Apply Cancel

If you wish to overwrite the existing Cost Centre names with the Phonebook entries, click the “Overwrite current Cost Centre entries” option. If, however, you wish only to apply Phonebook names where the existing Cost Centre name is **blank**, click the “Leave current Cost Centre entries” option.

You must then select a Cost Centre level, down to which the names will be applied. So, if you select Cost Centre Level 1, Phonebook names will be applied only to Cost Centre Level 1. If you select Cost Centre Level 3, Phonebook names will be applied to Cost Centre Levels 1, 2, and 3.

Apply Phone Book to Reports

This setting allows you to define how the Phonebook will be used when viewing Billing Analyst 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:

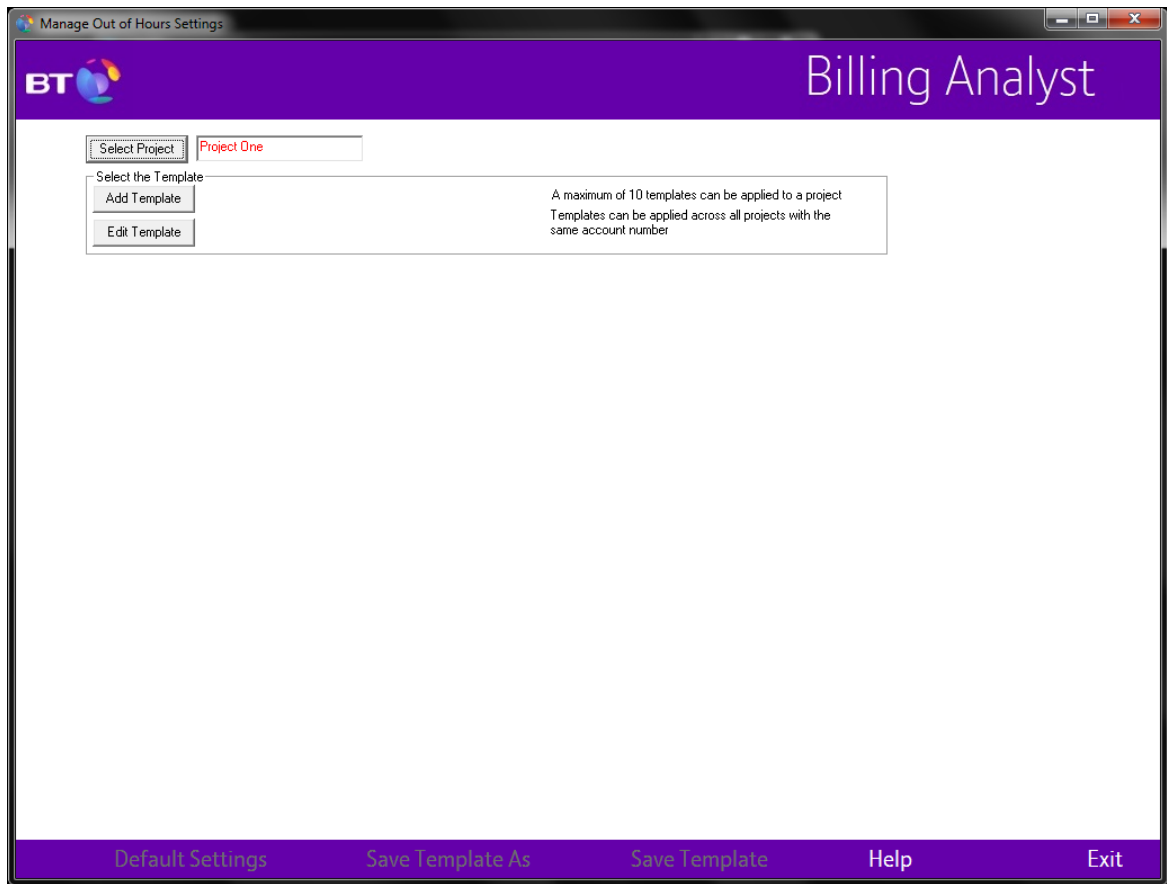
- **Replace Originating Nos and Called Nos with Phone Book entries** In reports using the phonebook, all numbers will be replaced with the names assigned to them in the Phonebook
- **Replace Originating Nos only with Phone Book entries**
All originating numbers displayed in reports will be replaced with 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.

Out of Hours Management

Billing Analyst provides a number of reports that allow you to monitor calls that were made outside normal business hours. Obviously, different organisations will have different business hours.

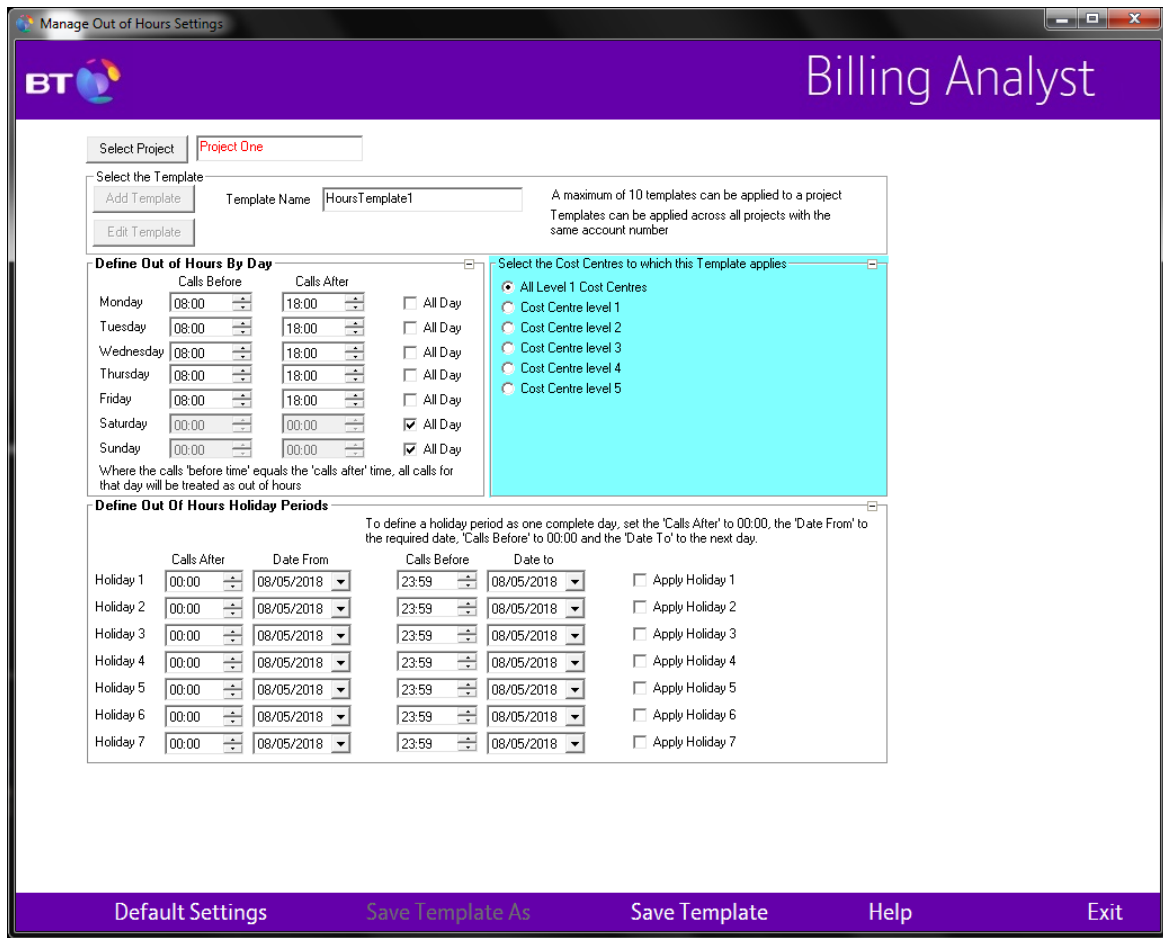
Billing Analyst therefore allows you to create Out of Hours templates that model your own business hours. Multiple templates may be created to cater different scenarios, such as periods involving national, or company-wide holidays.

If you click on the “Out of Hours Management” button on the Main Menu, the following window is displayed:



To add a new template, click the “Add Template” button. You will be prompted to provide a name for the template. Alternatively, if you wish to amend an existing template, click “Edit Template”, and select your chosen template from the dropdown box.

Once this is done, the following screen will be displayed:



There are three sections which must be completed to define your template.

Define Out of Hours by Day

For each day of the week, set the times before and after which calls will be considered to be “Out Of Hours”. For example, if your normal working day operates from 9:00am to 5:00pm, these are the times you should enter. If that particular day is not a working day (e.g. Saturdays and Sundays), just tick the “All Day” checkbox, and all calls on those days will be counted as Out of Hours.

Select the Cost Centres to which this Template applies

You may apply each template to a given Cost Centre. This means that you can set up templates unique to a number of different Cost Centres, allowing each one to have different template characteristics. To do this, click the options that match the level of your chosen Cost Centre. A listbox will then be provided from which you may select the required Cost Centre name.

Define Out of Hours Holiday Periods

If you want to define a range of dates to be “Holidays”, during which **all** calls will be considered Out of Hours, enter the dates and times in this frame. This will allow these specific dates to be treated as special cases, overriding the general settings you have made in the “Define Out of Hours by Day” frame. So if you have set Mondays to be a working day, but Monday January the 1st is a national holiday, you can add this date to the holiday period section, whereupon calls on that date will be treated as out of hours, despite the general “Monday” settings.

When you have made your required changes, you may save the template by clicking on “Save Template”.

To cancel any changes you have made, click the “Default Settings” button. Please note, all changes you have made to this point will be lost.

It is possible to create a new template, based on the settings of an existing template. To do this, when you enter the “Manage Out of Hours Settings” screen, click the “Edit Template” button, and select the template on which you wish to base your new one. Make your changes as required, then click the “Save Template As” button. When the “Save” dialog box appears, specify a name that is **different** to the original. A new template, bearing the new name will be created. The original template will remain unchanged.


For guidance on how to set up a template click the “Help” button.

Password Protection

If many people have access to the PC on which you have installed BT Billing Analyst, but you wish to restrict those who have access to the program, you may apply usernames and passwords.

To do this click the “Password Protection” button on the Main Menu. The following window will be displayed:

Password Protection



Name

Password

Verify Password

If the name entered already exists, the password for that name will be over-written by the new password.


Remove Password Control Cancel Save

If you wish to create a new user, enter the name and password, then verify the password. Finally, click the “Save” button. You may create as many users as you require in this way.

If you wish to change the password for an existing user, enter that username in the “Name” box, and enter the new password.

Once you have entered user details in this way, whenever Billing Analyst is opened, the following window will be displayed:

Password Protection



Name

Password

Cancel OK

One of the previously-created users must be entered, before the Main Menu is displayed.

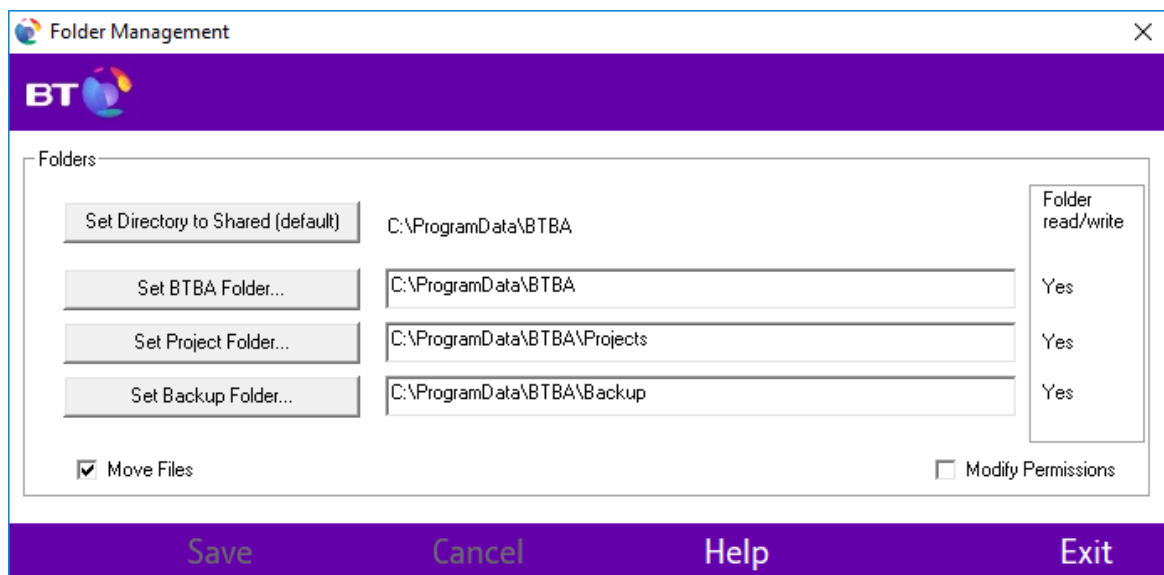
If you wish to stop using Password Protection, go to the Password Protection window, and click on “Remove Password Control”.

Folder Management

Similar to many applications, BT Billing Analyst has to save information to function. In the case of Billing Analyst, three types of data are saved: application data, project data, and backup data.

When you install Billing Analyst, default folders are set up to store this data. However, it is possible that it would be necessary to change the locations of this data. For example, if you wished to store the Billing Analyst data on a network location, so as to make the data available to multiple users.

To alter the locations of stored data, click the “Folder Management” button on the main menu. The following window will be displayed:



The folders currently used to store application data are displayed, next to a button that enables you to change the location:

- Set BTBA Folder...

This is the folder Billing Analyst uses, amongst other things, to store Cost Centre, Telephone Book, and Account information

- Set Project Folder...

This is the folder where Billing Analyst stores projects (unless you specify another location when you import a bill).

- Set Backup Folder...

This is the folder Billing Analyst uses to store files generated by the automatic backup facility (see “Backup / Restore Options” on page 85 for more details)

To change the location where this data is stored, click the button next to the folder you wish to change. A dialog box will be provided for you to select your new folder. Repeat this exercise for each folder you wish to change. In each case, the “Folder Read/Write” setting for that folder will be displayed on the right-hand side. Billing Analyst requires Read/Write access to all these folders.

It is recommended that you check the “Move Files” and “Modify Permissions” boxes when you change folders. This ensures that any files already stored in the old locations will be copied to the new ones, and that you are able to access those files as required. If you don’t check these boxes, Billing Analyst may be unable to read system files or projects. Please note, you **must** check the “Modify Permissions” box if **any** of the folders have a Read/Write status of “No”. Otherwise the file copying function will fail, and Billing Analyst may not be able to read the required data.

When you have made the changes required, click the “Save” button to store these changes, or “Cancel” to go back to the original settings.

If you save new folders, and check the “Move Files” option, all existing Billing Analyst files in the old locations will be moved to the new folders.

NB - Windows includes a folder structure that is recommended for storage of application data. Most applications, including Billing Analyst, will use this location by default. If you change your folder settings, but then wish to revert back to the Windows default location, click the button marked “Set Directory to Shared (default)”. This will set your data folders to be located within the default Windows data storage area. You must then check the option boxes, and click “Save” or “Cancel” as described above.

Number Monitor Management

BT Billing Analyst includes the facility assign descriptions to specific Called numbers. A report is then included in the Itemised Reports screen to view statistics on calls from each of your numbers to each called number, including the monitored number description.

To set up descriptions for Called Numbers, click the “Number Monitor Management” button on the main screen. The following window will be displayed:

Called Number	Monitor Description
09012930000	
09016090000	
09016160000	
09061100000	
09061590000	
09063020000	
09067390300	
*	

To add new numbers to the list of monitored numbers, click the “Add” button. A cursor will be placed in the top “Called Number” cell in the grid. Enter the number you wish to monitor, then press the “Tab” key to move the cursor to the “Monitor Description” column. Enter a description, and then click in the next blank row if you wish to enter more numbers.

To delete a specific number, select the row of the number you wish to delete, and click the “Delete” button. If you wish to delete multiple numbers, hold down the “Ctl” button when clicking on each row, then click the “Delete” button as before.

When you have entered the details you require, click the “Save” button to save your changes.

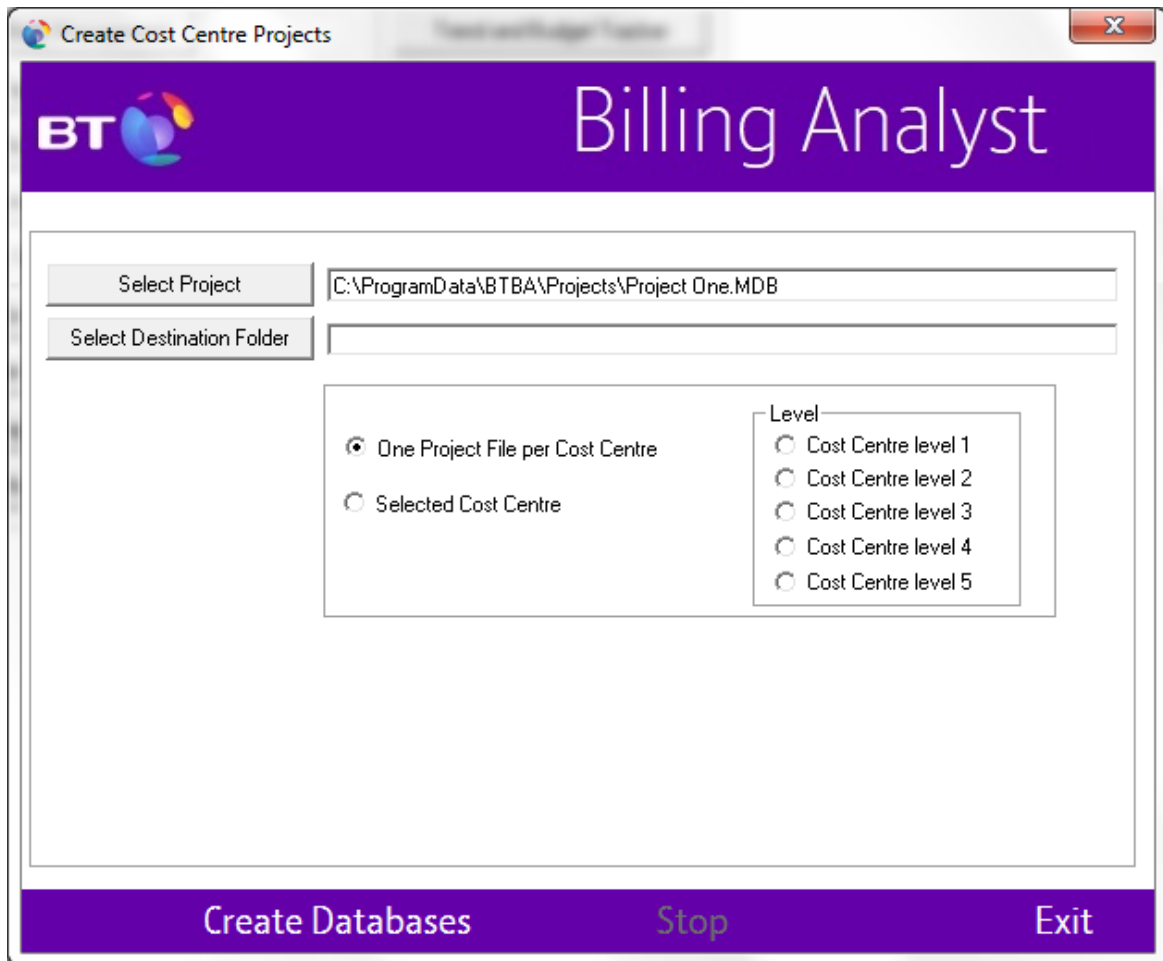
The numbers you have entered on this screen will now be included on the “Monitored Numbers” report on the Itemised Reports screen, where calls have been made to the chosen numbers.

Create Cost Centre Projects

Billing Analyst includes the facility to apply your organisational structure to the imported bill, to enable you to identify more easily which charges have been applied to different parts of your organisation.

In some cases it is useful to split the bill into separate projects for each Cost Centre. These Cost Centre Projects can then be used to make it even easier to identify the charges associated with each Cost Centre, or they can be distributed to the users responsible for each one. Those users may then view the Cost Centre Project on their own installation of BT Billing Analyst.

To create Cost Centre projects, click the “Create Cost Centre Projects” button on the Main Menu. The following window will be displayed:



If you have not already selected a project, you may do this by clicking the “Select Project” button. Otherwise, the currently selected project will be displayed.

The Create Cost Centre Projects facility creates new project files for each Cost Centre, and therefore needs a location into which to save these new files. Please select that location by clicking the “Select Destination Folder” button, and specifying the required folder.

You may then choose either to create a new project for all Cost Centres at a given level, or one specific Cost Centre – select as required from the options displayed.

You must then select at what level of your Cost Centre structure you wish to create the projects. Select from the levels displayed, then click the “Create Databases” button.

If you chose to create a project for a “Selected Cost Centre”, the following window will be displayed:



Please select your chosen Cost Centre from those displayed, and click the “Apply” button.

The creation process will now begin. The new projects will be created in the folder you have specified. They can be opened in your own Billing Analyst, or distributed to other BT Billing Analyst users.

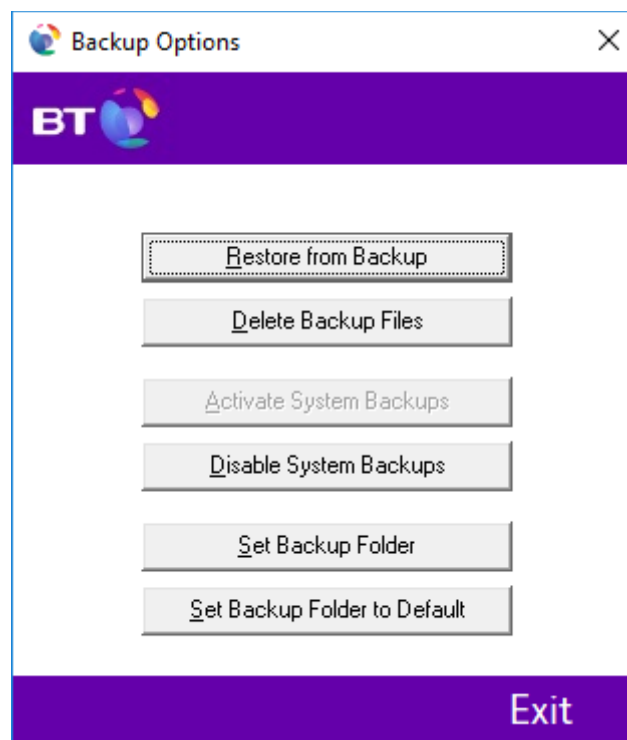
Backup / Restore Options

BT Billing Analyst offers a number of facilities to make it as easy as possible to view the charges within your bill, and to see where charges are applied, including Cost Centres and Phonebook settings.

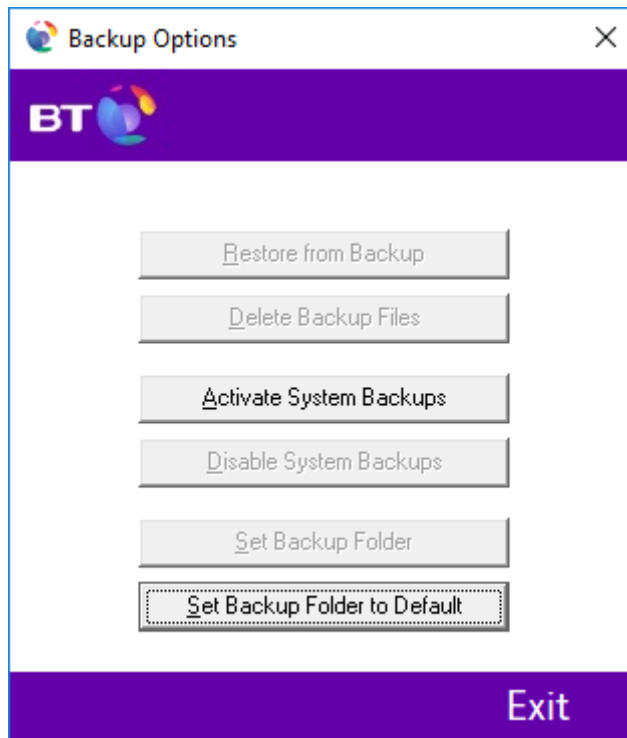
A further feature of Billing Analyst is the capability to automatically back up any changes you make to each of these facilities. Using the backup facility, it is possible to save settings in case you should wish to restore them at a later date. The settings included in the backup facility are as follows:

- Cost Centres
- Phonebook
- Out of Hours
- Intersite

The backup facility is first offered to you the first time you run Billing Analyst, but you may alter the settings at any time by clicking the “Backup / Restore Options” button on the main screen. The following window will be displayed:

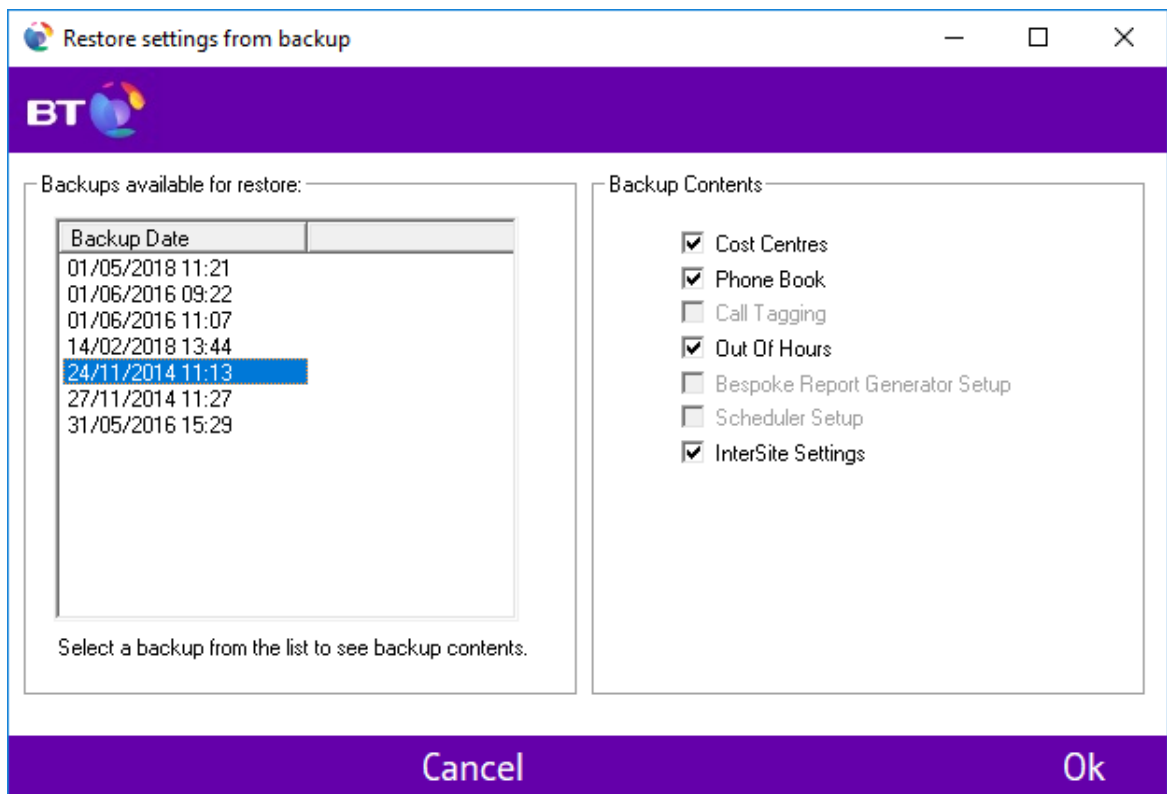


The buttons you see will depend on the current status of the backups. If backups are enabled, the buttons you see above will be enabled. If backups are currently disabled, the window will be displayed as below:



Restore from Backup

Click this button if you wish to restore the settings within an existing backup. The following window will be displayed:



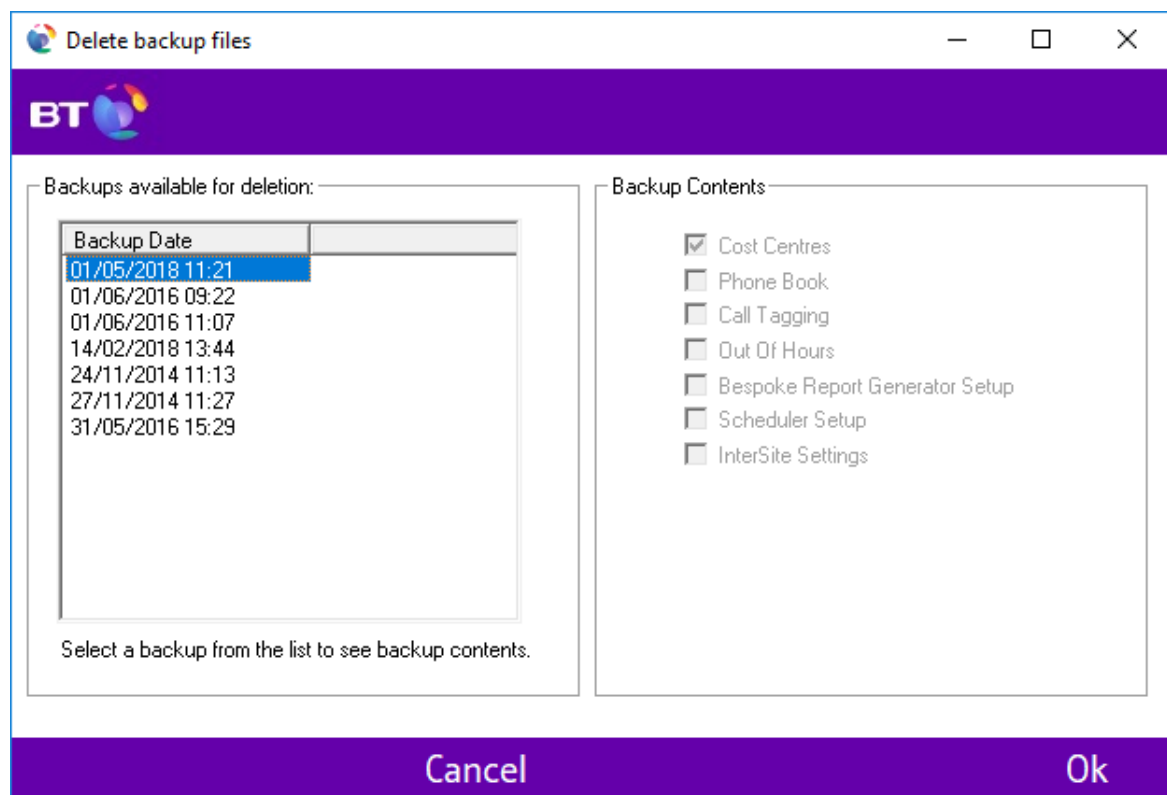
The available backups are displayed on the left-hand side, showing the date and time of the backup. If you select one of these backups from the list, the contents of that backup will be shown on the right-hand side. So in the example above, the backup from 06/09/2012 contains backups for Cost Centres, Phonebook, Out of Hours, and Intersite Settings.

You may restore any, or all, of the backup contents by ticking the relevant checkbox. In the example above, the user has chosen to restore Cost Centre, Phonebook and Intersite Settings, but has opted to leave their Out of Hours settings in their current state.

Once you have chosen your restore options, click the “Restore” button. Your chosen settings will then be restored from the backup.

Delete Backup Files

If you need to save space, or simply no longer need some or all of the backups saved by Billing Analyst, you may delete the files storing the backup. If you click the “Delete Backup Files” button, the following window is displayed:



The window will display all the backups currently in existence, and their contents. You may delete a backup file by selecting the entry in the list on the left-hand side,

and then clicking the “Delete” button. Please note, this will permanently remove the backup.

Activate System Backups

If backups are currently disabled, you may enable them by clicking this button. You must then specify a location where the backup files may be stored. It is recommended that you use the default location chosen by Billing Analyst

Disable System Backups

If you no longer wish to use the backup facility, click this button to disable the backup facility. You may enable it again at any point by clicking the “Activate System Backups” button.

Set Backup Folder

You may change the folder into which backup files are saved. Click this button, and then in the window provided, select your chosen folder. It is recommended that you keep backups in the default Billing Analyst location.

Set Backup Folder to Default

This button changes the folder into which Billing Analyst saves backup data, to the Billing Analyst default folder. You should only do this if you have previously changed the folder to another location.