



General

# My Account Widgets

Customer user guide

Author: My Account Customer Hub team

Issue: v1.0

Date: March 2025

## Contents

## Page

<b>1</b>	<b>Dashboard widgets</b>	<b>2</b>
1.1	Customisation	2
1.2	Global search	2
1.3	Critical cases	3
1.4	Action needed	4
1.5	Active cases	7
1.6	Active cases - Changes	10
1.7	Cases overview	11
1.8	Calendar widget	13
1.9	Site inventory	14
1.10	Watchlist	15
1.11	Summary widget	15
1.12	Favourites	15
1.13	Quick view panel	16

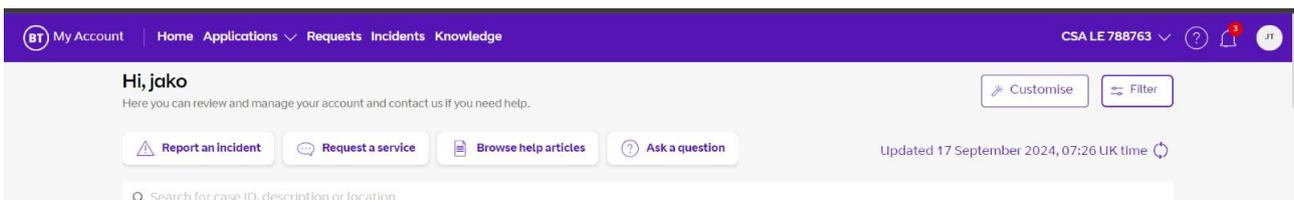
# 1 Dashboard widgets

Incorporated into the dashboard are customisable features called widgets which enable you to view data related to your managed service easily. This could be a list of open incidents, a snapshot of your site inventory, your pending actions or a summary of your service request progress.

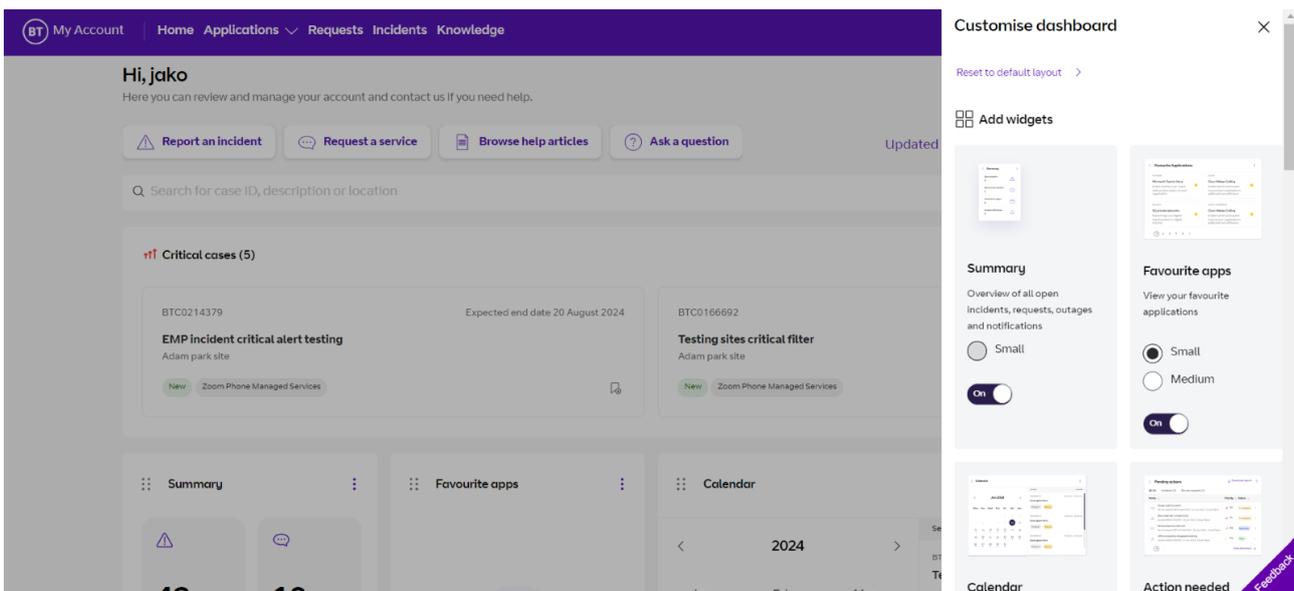
You can add, remove, resize or move widgets around on the dashboard to create a personalised view.

## 1.1 Customisation

My Account lets you customise your dashboard by letting you enable or disable any available widget. By selecting 'Customise' on the top right of the dashboard you'll be able to see the menu of widget options.



This menu gives you the option to add a widget to your dashboard, choose the size of your widget and preview what information would be visible. You can then slide the toggle on or off depending on whether you want the widget to be on your dashboard.

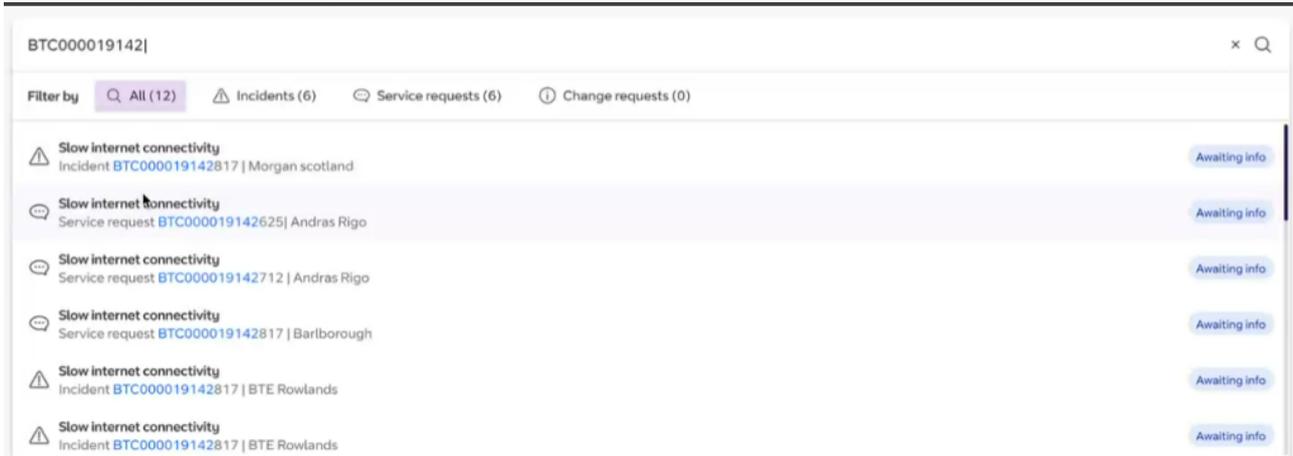


## 1.2 Global search

The global search tool on the My Account homepage lets you search cases by reference ID, site location or short description. You can even filter your search results based upon incidents, service requests and changes by clicking the quick filters provided in the search bar.



When you've entered characters into the search bar all cases matching the description will be show as a search result. Any matching characters will be highlighted in blue to easily identify the keywords that's retrieved a result.



If there are no matching cases found, the search would display 'No matching results'.

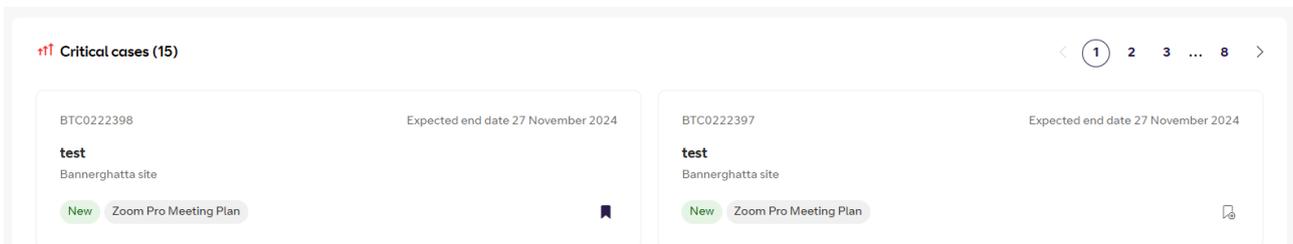


### 1.3 Critical cases

This widget provides information about your 'Critical (P1)' incidents raised and let's you easily view all your critical cases in one place.

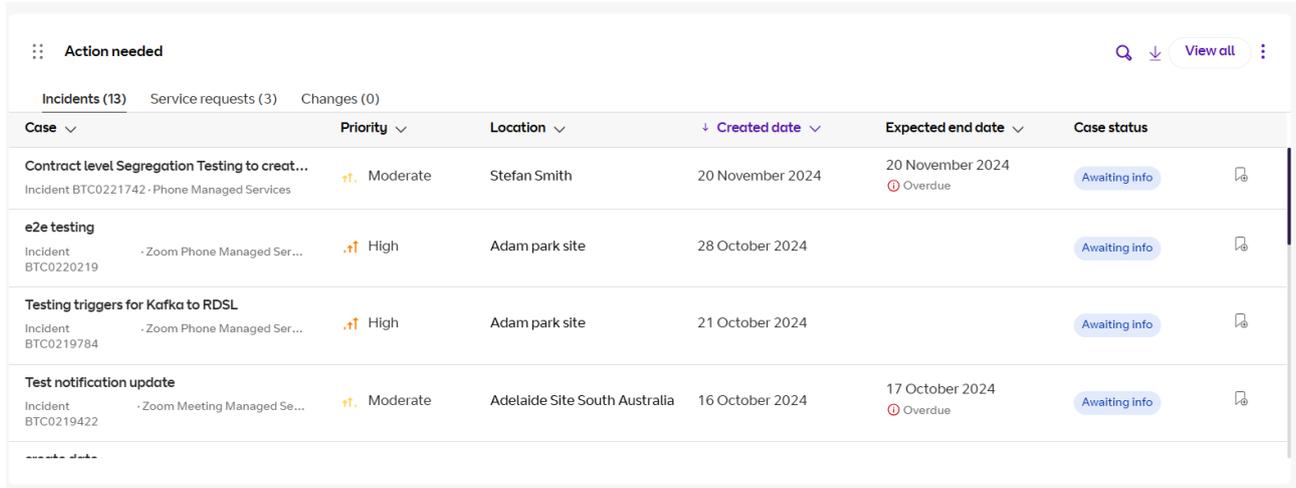
The widget contains the following information:

- Incident number
- Expected end date
- Short description
- Site/Location
- Status
- Product name
- If you've marked it on your watchlist



## 1.4 Action needed

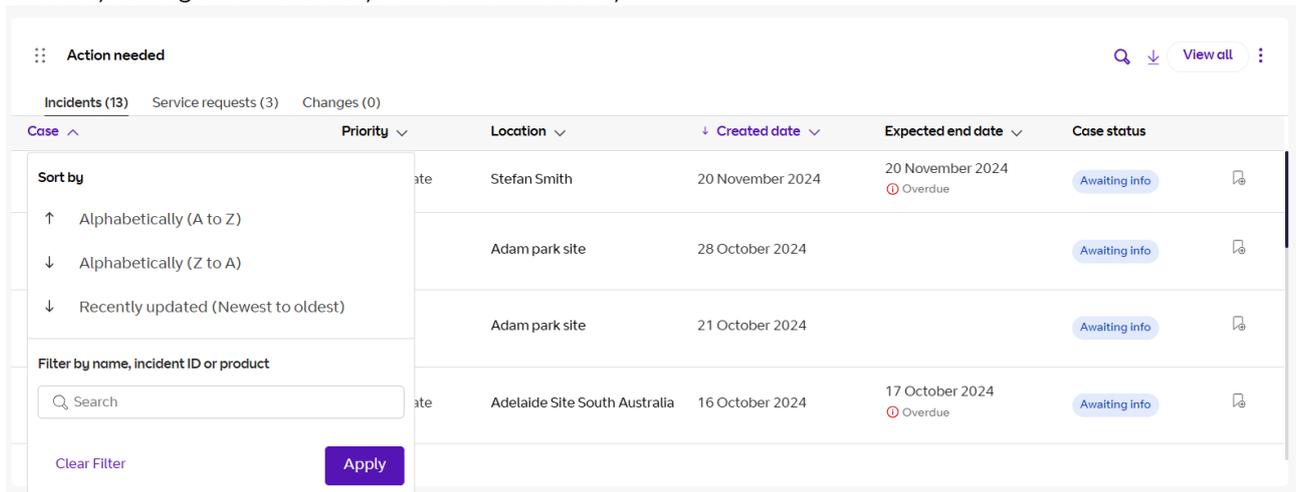
The action needed widget is to show all incidents, change and service requests that are awaiting information in one place.



The screenshot shows the 'Action needed' widget interface. At the top, there are tabs for 'Incidents (13)', 'Service requests (3)', and 'Changes (0)'. Below the tabs is a table with the following columns: Case, Priority, Location, Created date, Expected end date, and Case status. The table contains four rows of incident data.

Case	Priority	Location	Created date	Expected end date	Case status
Contract level Segregation Testing to creat... Incident BTC0221742 - Phone Managed Services	Moderate	Stefan Smith	20 November 2024	20 November 2024 Overdue	Awaiting info
e2e testing Incident BTC0220219 - Zoom Phone Managed Ser...	High	Adam park site	28 October 2024		Awaiting info
Testing triggers for Kafka to RDSL Incident BTC0219784 - Zoom Phone Managed Ser...	High	Adam park site	21 October 2024		Awaiting info
Test notification update Incident BTC0219422 - Zoom Meeting Managed Se...	Moderate	Adelaide Site South Australia	16 October 2024	17 October 2024 Overdue	Awaiting info

By selecting the case dropdown, you can filter the cases by alphabetical order, recently updated or search to enable you to get to the case you want to find easily.



The screenshot shows the 'Action needed' widget with the 'Case' dropdown menu open. The dropdown menu has two sections: 'Sort by' and 'Filter by name, incident ID or product'. The 'Sort by' section has three options: 'Alphabetically (A to Z)', 'Alphabetically (Z to A)', and 'Recently updated (Newest to oldest)'. The 'Filter by name, incident ID or product' section has a search input field with the placeholder text 'Search', a 'Clear Filter' button, and an 'Apply' button. The table below the dropdown menu shows the same four rows of incident data as in the previous screenshot.

Case	Priority	Location	Created date	Expected end date	Case status
Contract level Segregation Testing to creat... Incident BTC0221742 - Phone Managed Services	Moderate	Stefan Smith	20 November 2024	20 November 2024 Overdue	Awaiting info
e2e testing Incident BTC0220219 - Zoom Phone Managed Ser...	High	Adam park site	28 October 2024		Awaiting info
Testing triggers for Kafka to RDSL Incident BTC0219784 - Zoom Phone Managed Ser...	High	Adam park site	21 October 2024		Awaiting info
Test notification update Incident BTC0219422 - Zoom Meeting Managed Se...	Moderate	Adelaide Site South Australia	16 October 2024	17 October 2024 Overdue	Awaiting info

By selecting the priority dropdown, you can filter the cases by priority order or by selecting the priority status to filter the cases by status.

**Action needed** Q ↓ View all ⋮

Incidents (13) Service requests (3) Changes (0)

Case	Priority	Location	Created date	Expected end date	Case status
Contract level Segregation Testing to creat... Incident BTC0221742 - Phone Managed Services	Moderate		November 2024	20 November 2024 Overdue	Awaiting info
e2e testing Incident BTC0220219 - Zoom Phone Managed Ser...	High		October 2024		Awaiting info
Testing triggers for Kafka to RDSL Incident BTC0219784 - Zoom Phone Managed Ser...	High		October 2024		Awaiting info
Test notification update Incident BTC0219422 - Zoom Meeting Managed Se...	Moderate		October 2024	17 October 2024 Overdue	Awaiting info

**Sort by priority**

↑ Sort ascending (Lowest to highest)

↓ Sort descending (Highest to lowest)

**Filter by priority**

Critical (1)

High (2)

Moderate (7)

Low (3)

[Clear Filter](#) [Apply](#)

**Site inventory** ⋮

All Sites (23) ↑ Critical (6) ↑ High (6)

By selecting the location dropdown, you can sort cases by alphabetical order of location or filter by location.

**Action needed** Q ↓ View all ⋮

Incidents (13) Service requests (3) Changes (0)

Case	Priority	Location	Created date	Expected end date	Case status
Contract level Segregation Testing to creat... Incident BTC0221742 - Phone Managed Services	Moderate			20 November 2024 Overdue	Awaiting info
e2e testing Incident BTC0220219 - Zoom Phone Managed Ser...	High				Awaiting info
Testing triggers for Kafka to RDSL Incident BTC0219784 - Zoom Phone Managed Ser...	High				Awaiting info
Test notification update Incident BTC0219422 - Zoom Meeting Managed Se...	Moderate			17 October 2024 Overdue	Awaiting info

**Sort alphabetically**

↑ Sort ascending (A to Z)

↓ Sort descending (Z to A)

**Filter by location**

Singapore (2 cities)

Australia (1 cities)

[Clear Filter](#) [Apply](#)

**Site inventory** ⋮

All Sites (23) ↑ Critical (6) ↑ High (6) ↑ Moderate (7) ↑ Low (4)

By selecting the created data and expected end date dropdowns, you can sort by date in ascending or descending order as well as filter by pre-selected dates or through a custom date range.

⋮ Action needed 🔍 ⬇️ View all ⋮

Incidents (13) Service requests (3) Changes (0)

Case	Priority	Location	Created date	Expected end date	Case status
Contract level Segregation Testing to creat... Incident BTC0221742 · Phone Managed Services	Moderate	Stefan Smith			waiting info
e2e testing Incident BTC0220219 · Zoom Phone Managed Ser...	High	Adam park site			waiting info
Testing triggers for Kafka to RDSL Incident BTC0219784 · Zoom Phone Managed Ser...	High	Adam park site			waiting info
Test notification update Incident BTC0219422 · Zoom Meeting Managed Se...	Moderate	Adelaide Site South Australia			waiting info

**Sort by created date**

↑ Sort ascending (Oldest to newest)

↓ Sort descending (Newest to oldest) ✓

**Filter by created date**

Today (0)

Yesterday (0)

Last 7 days (0)

Custom range

From Date

To Date

Clear Filter Apply

⋮ Site inventory

All Sites (23) ↑ Critical (6) ↑ High (6) ↑ Moderate (7) ↑ Low (4)

1+ locations selected

⋮ Action needed 🔍 ⬇️ View all ⋮

Incidents (13) Service requests (3) Changes (0)

Case	Priority	Location	Created date	Expected end date	Case status
Contract level Segregation Testing to creat... Incident BTC0221742 · Phone Managed Services	Moderate	Stefan Smith	20 November 2024		
e2e testing Incident BTC0220219 · Zoom Phone Managed Ser...	High	Adam park site	28 October 2024		
Testing triggers for Kafka to RDSL Incident BTC0219784 · Zoom Phone Managed Ser...	High	Adam park site	21 October 2024		
Test notification update Incident BTC0219422 · Zoom Meeting Managed Se...	Moderate	Adelaide Site South Australia	16 October 2024		

**Sort by expected end date**

↑ Sort ascending (Oldest to newest)

↓ Sort descending (Newest to oldest)

**Filter by expected end date**

Overdue (11)

Today (0)

Tomorrow (0)

Next 7 days (0)

Custom range

From Date

To Date

Clear Filter Apply

⋮ Site inventory

All Sites (23) ↑ Critical (6) ↑ High (6) ↑ Moderate (7) ↑ Low (4)

1+ locations selected

By clicking on this icon,  you're able to add that specific case to your watchlist widget.

If you'd like to download your report, you can do this by clicking on this icon  and choosing whether you want to download your report as a PDF, Excel or CSV file. Each report will contain the case column details including short description, product and ID. Please note, if you've got a filter applied the downloaded report will show only the cases that is relating to that filter.

🔍 ⬇️ View all ⋮

nd date	er 2024	Awaiting info

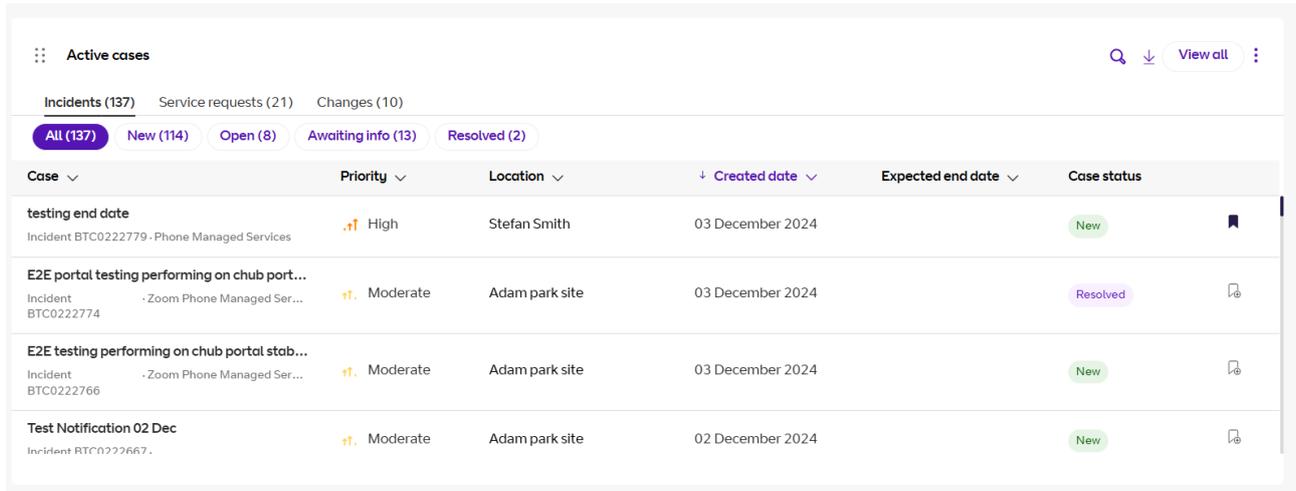
Export as PDF

Export as Excel

Export as CSV

## 1.5 Active cases

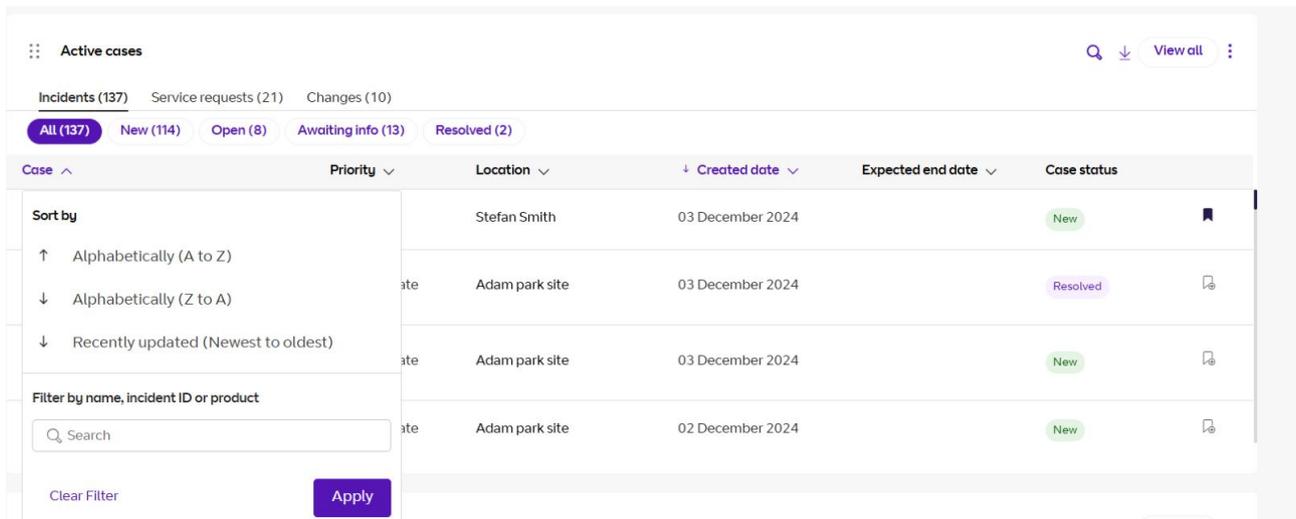
The active cases widget is designed to show a consolidated view of all incidents, change and service requests that are currently active and not closed.



The screenshot shows the 'Active cases' widget interface. At the top, there are tabs for 'Incidents (137)', 'Service requests (21)', and 'Changes (10)'. Below these are filter buttons: 'All (137)', 'New (114)', 'Open (8)', 'Awaiting info (13)', and 'Resolved (2)'. The main table has the following columns: 'Case', 'Priority', 'Location', 'Created date', 'Expected end date', and 'Case status'. The data rows are as follows:

Case	Priority	Location	Created date	Expected end date	Case status
testing end date Incident BTC0222779 - Phone Managed Services	High	Stefan Smith	03 December 2024		New
E2E portal testing performing on chub port... Incident - Zoom Phone Managed Ser... BTC0222774	Moderate	Adam park site	03 December 2024		Resolved
E2E testing performing on chub portal stab... Incident - Zoom Phone Managed Ser... BTC0222766	Moderate	Adam park site	03 December 2024		New
Test Notification 02 Dec Incident BTC0222667	Moderate	Adam park site	02 December 2024		New

By selecting the case dropdown, you can filter the cases by alphabetical order, recently updated or search to enable you to get to the case you want to find easily.



This screenshot shows the 'Active cases' widget with the 'Case' dropdown menu open. The menu provides options for sorting and filtering. The sorting options are: 'Alphabetically (A to Z)', 'Alphabetically (Z to A)', and 'Recently updated (Newest to oldest)'. The filtering section is titled 'Filter by name, incident ID or product' and includes a search input field with a magnifying glass icon, a 'Clear Filter' button, and an 'Apply' button. The background table is partially visible, showing the same data as the previous screenshot.

By selecting the priority dropdown, you can filter the cases by priority order or by selecting the priority status to filter the cases by status.

Active cases 🔍 ⬇️ View all ⋮

Incidents (137) Service requests (21) Changes (10)

**All (137)** New (114) Open (8) Awaiting info (13) Resolved (2)

Case	Priority	Location	Created date	Expected end date	Case status
testing end date Incident BTC0222779 - Phone Managed Services	<b>Sort by priority</b> ↑ Sort ascending (Lowest to highest) ↓ Sort descending (Highest to lowest)		December 2024		New
E2E portal testing performing on chub port... Incident BTC0222774 - Zoom Phone Managed Ser...			December 2024		Resolved
E2E testing performing on chub portal stab... Incident BTC0222766 - Zoom Phone Managed Ser...	<b>Filter by priority</b> <input type="checkbox"/> Critical (15) <input type="checkbox"/> High (37) <input type="checkbox"/> Moderate (76) <input type="checkbox"/> Low (9)		December 2024		New
Test Notification 02 Dec Incident BTC0222667 -			December 2024		New

⋮ Action needed 🔍 ⬇️ View all ⋮

Incidents (13) Service requests (3) Changes (0)

Case Priority Location Created date Expected end date Case status

**Apply**

By selecting the location dropdown, you can sort cases by alphabetical order of location or filter by location.

Active cases 🔍 ⬇️ View all ⋮

Incidents (137) Service requests (21) Changes (10)

**All (137)** New (114) Open (8) Awaiting info (13) Resolved (2)

Case	Priority	Location	Created date	Expected end date	Case status
testing end date Incident BTC0222779 - Phone Managed Services	High	<b>Sort alphabetically</b> ↑ Sort ascending (A to Z) ↓ Sort descending (Z to A)			New
E2E portal testing performing on chub port... Incident BTC0222774 - Zoom Phone Managed Ser...	Moderate				Resolved
E2E testing performing on chub portal stab... Incident BTC0222766 - Zoom Phone Managed Ser...	Moderate	<b>Filter by location</b> <input type="text" value="Search"/> <input type="checkbox"/> Singapore (2 cities) <input type="checkbox"/> Australia (1 cities) <input type="checkbox"/> United States (1 cities)			New
Test Notification 02 Dec Incident BTC0222667 -	Moderate				New

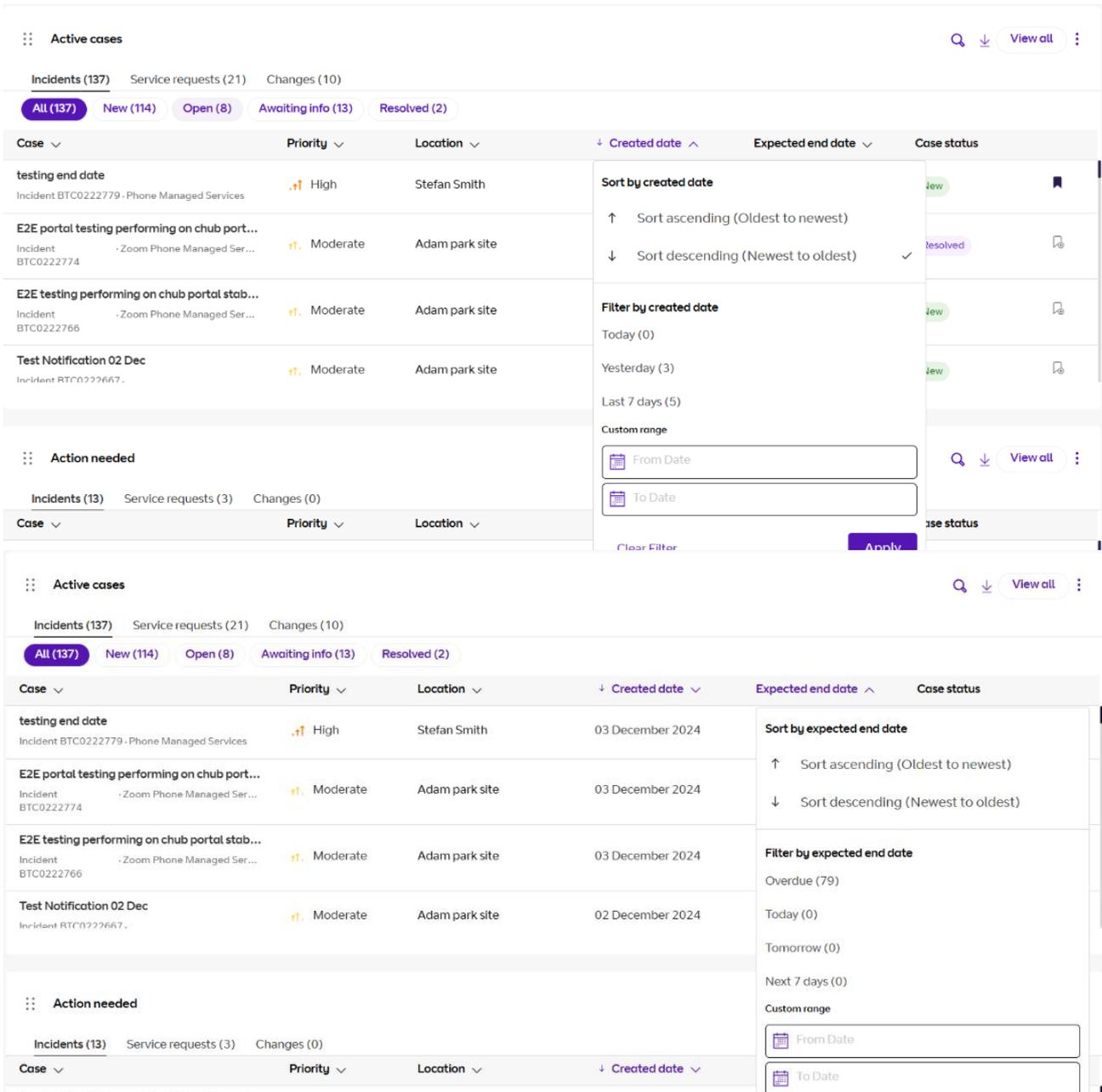
⋮ Action needed 🔍 ⬇️ View all ⋮

Incidents (13) Service requests (3) Changes (0)

Case Priority Location Created date Expected end date Case status

**Apply**

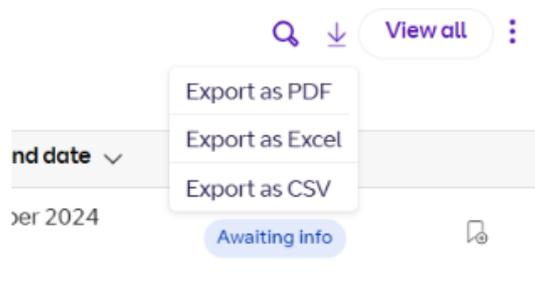
By selecting the created data and expected end date dropdowns, you can sort by date in ascending or descending order as well as filter by pre-selected dates or through a custom date range.



By clicking on this icon,  you're able to add that specific case to your watchlist widget.

If you'd like to download your report, you can do this by clicking on this icon  and choosing whether you want to download your report as a PDF, Excel or CSV file.

Each report will contain the case column details including short description, product and ID. Please note, if you've got a filter applied the downloaded report will show only the cases that is relating to that filter.



## 1.6 Active cases - Changes

Our active cases widget also allows you to filter your view by 'Changes'. Here you can see all your changes, change requests, customer planned works and BT planned works.

Active cases View all

Incidents (6) Service requests (2) **Changes (5)**

All (5) Change requests (2) Customer planned works (2) BT planned works (1)

Case	Location	Planned start date	Planned end date	Approval status	Change status
Short description goes here Change request BTC0016547845 · Type	BTE Rowlands	12 August 2024	27 August 2024	Approved	Authorize
Customer planned work change BTC0016541233 · Type	Allesandro La Bianca (AC)	26 August 2024	28 August 2024	Approved	New
BT Planned work change BTC003456778 · Type	Andras Rigo (AC)	19 September 2024	25 September 2024	Approved	Scheduled
Customer planned work change BTC001654124 · Type	Barlborough	21 September 2024	25 September 2024	Approved	Implement
Short description goes here Change request BTC0016547856 · Type	Belfast AWS Cloud (AC)	25 September 2024	28 September 2024	Approved	Assess

Active cases View all

Incidents (6) Service requests (2) **Changes (5)**

All (5) Change requests (2) Customer planned works (2) BT planned works (1)

Case	Location	Planned start date	Planned end date	Approval status	Change status
Short description goes here Change request BTC0016547845 · Type	BTE Rowlands	12 August 2024	27 August 2024	Approved	Authorize
Short description goes here Change request BTC0016547856 · Type	Belfast AWS Cloud (AC)	25 September 2024	28 September 2024	Approved	Assess

Active cases View all

Incidents (6) Service requests (2) **Changes (5)**

All (5) Change requests (2) Customer planned works (2) BT planned works (1)

Case	Location	Planned start date	Planned end date	Approval status	Change status
Customer planned work change BTC0016541233 · Type	Allesandro La Bianca (AC)	26 August 2024	28 August 2024	Approved	New
Customer planned work change BTC001654124 · Type	Barlborough	21 September 2024	25 September 2024	Approved	Implement

**Active cases** View all

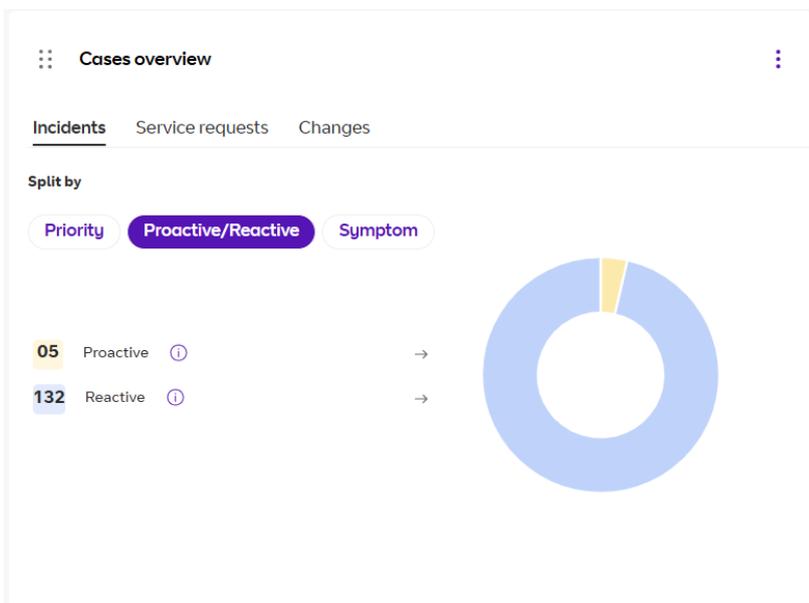
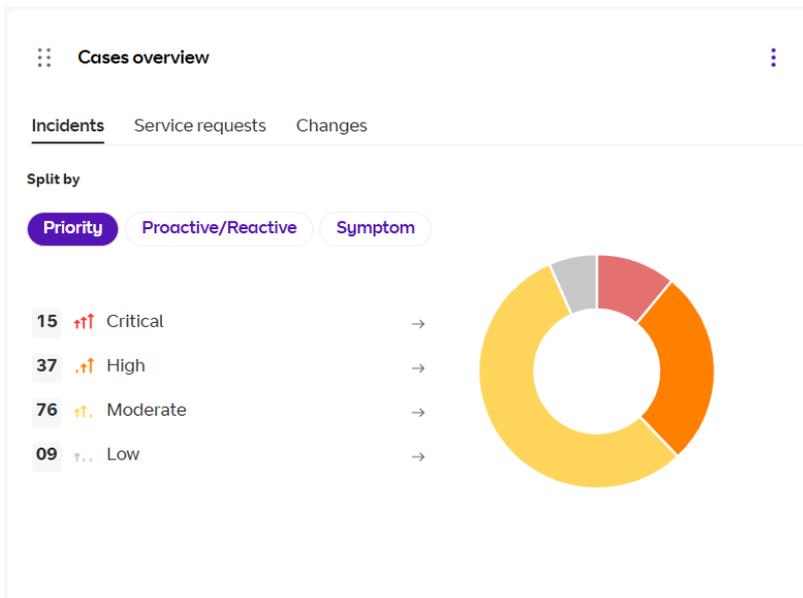
Incidents (6) Service requests (2) Changes (5)

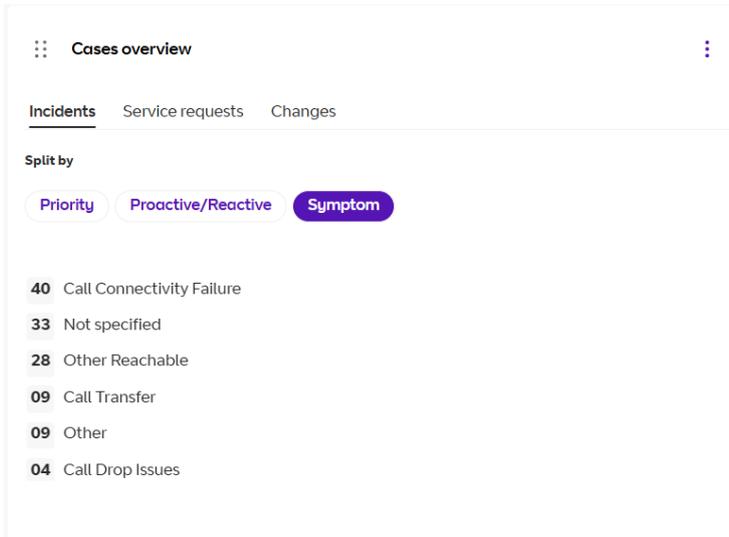
All (5) Change requests (2) Customer planned works (2) **BT planned works (1)**

Case	Location	Planned start date	Planned end date	Approval status	Change status
BT Planned work change BTC003456778 - Type	Andras Rigo (AC)	19 September 2024	25 September 2024	Approved	Scheduled

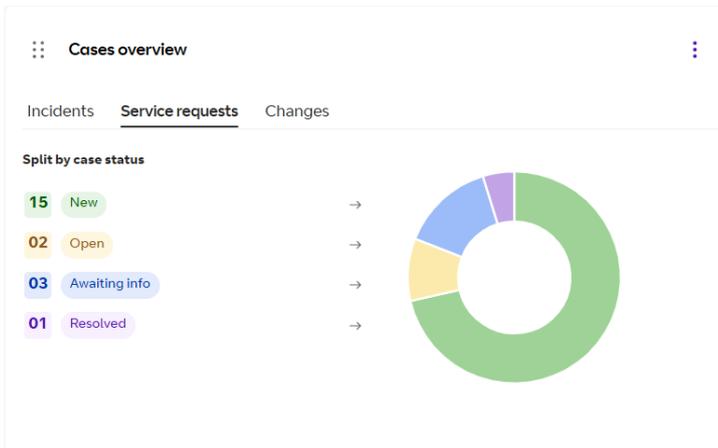
## 1.7 Cases overview

Our cases overview widget enables you to view all your incidents by priority, whether they're proactive/reactive or from the incident symptoms.

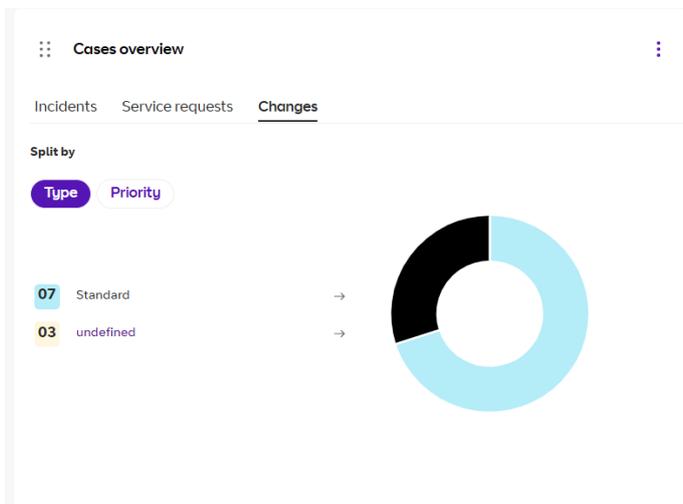


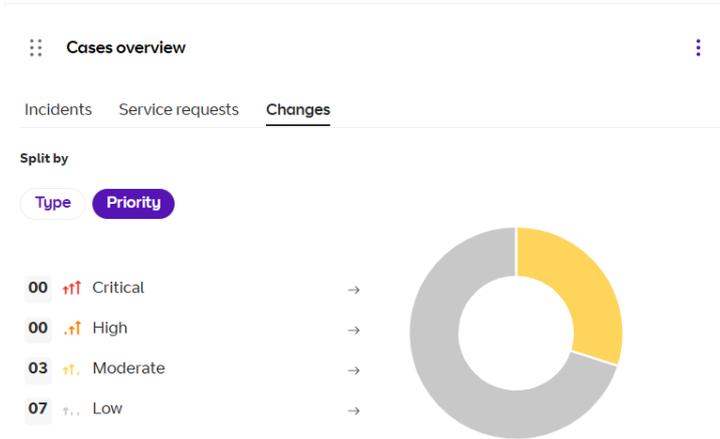


You can also view your service requests by status whether their new, open, awaiting information or resolved.



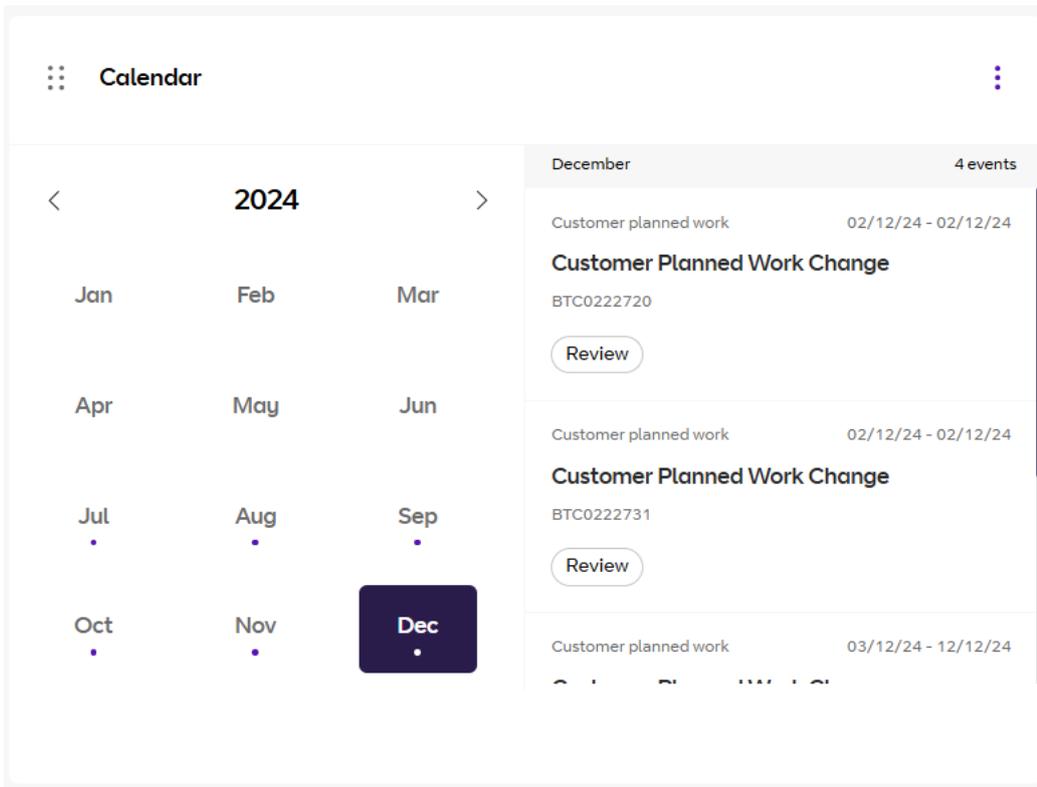
For changes, you can view these by type of change or the priority.



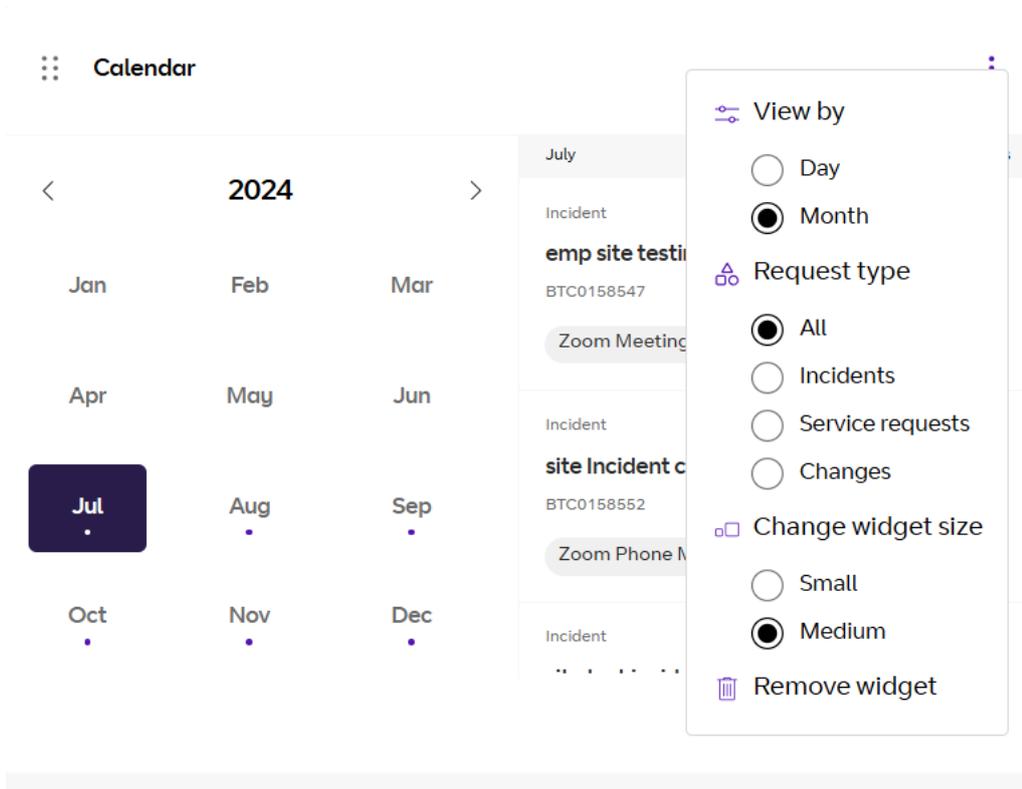


## 1.8 Calendar widget

The Calendar widget is designed to visualise changes, incidents or service requests in a detailed calendar view. The list of events for the selected calendar date is visible on the right side of the calendar.

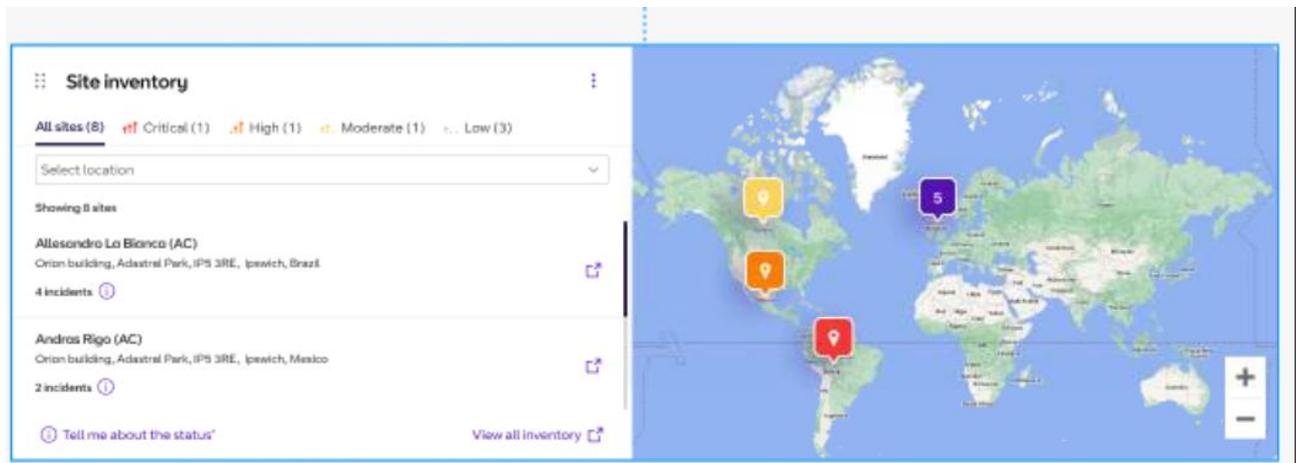


With this widget you can view any events on a certain day/month. When viewing the calendar, the dot on that date indicates that an event has been scheduled. If you want to filter the list to only view an incident, service request or change you can do this by using the 3 dots on the top right. This will let you filter by day or month, request type or change the size of the widget.



## 1.9 Site inventory

The site inventory is designed to show the number of sites that have critical, high, moderate and low incidents. This widget will allow you to view the site locations and filter incidents by priority.



**All sites** display the number of all sites in your business that has or doesn't have issues.

**Critical** displays the number of sites that has critical incidents.

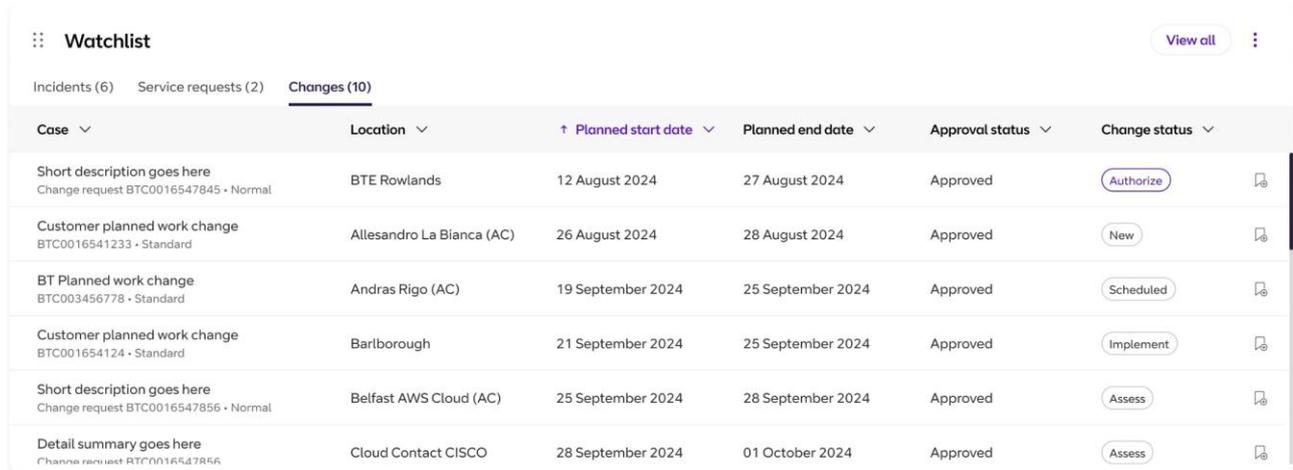
**High** displays the number of sites that has high priority incidents.

**Moderate** displays the number of sites that has moderate priority incidents.

**Low** displays the number of sites that has low priority incidents.

## 1.10 Watchlist

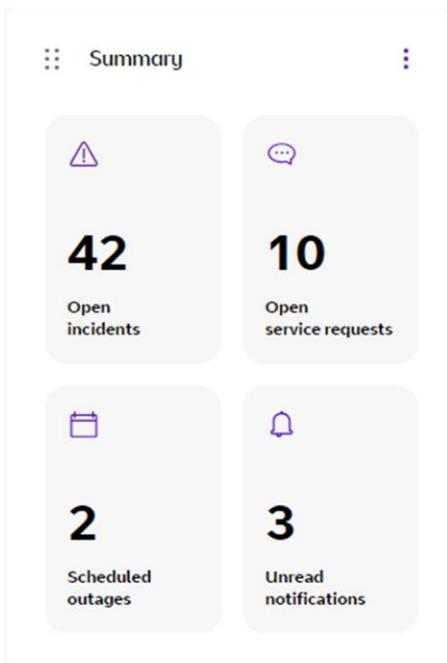
The watchlist lets you see all the incidents, service requests and changes you've highlighted. Here you can easily view further details on the case information, location, planned start and end dates, approval and change statuses.



Case	Location	Planned start date	Planned end date	Approval status	Change status
Short description goes here Change request BTC0016547845 • Normal	BTE Rowlands	12 August 2024	27 August 2024	Approved	Authorize
Customer planned work change BTC0016541233 • Standard	Allesandro La Bianca (AC)	26 August 2024	28 August 2024	Approved	New
BT Planned work change BTC003456778 • Standard	Andras Rigo (AC)	19 September 2024	25 September 2024	Approved	Scheduled
Customer planned work change BTC001654124 • Standard	Barlborough	21 September 2024	25 September 2024	Approved	Implement
Short description goes here Change request BTC0016547856 • Normal	Belfast AWS Cloud (AC)	25 September 2024	28 September 2024	Approved	Assess
Detail summary goes here Change request BTC0016547856	Cloud Contact CISCO	28 September 2024	01 October 2024	Approved	Assess

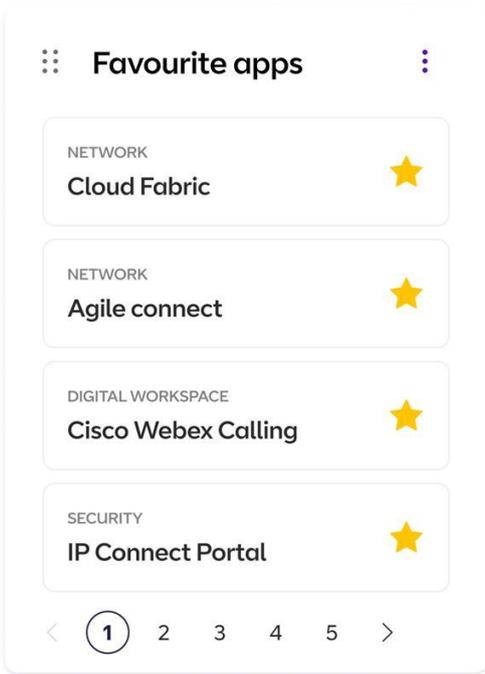
## 1.11 Summary widget

The summary widget shows you a summary view of your open incidents and service requests, scheduled outages and unread notifications.



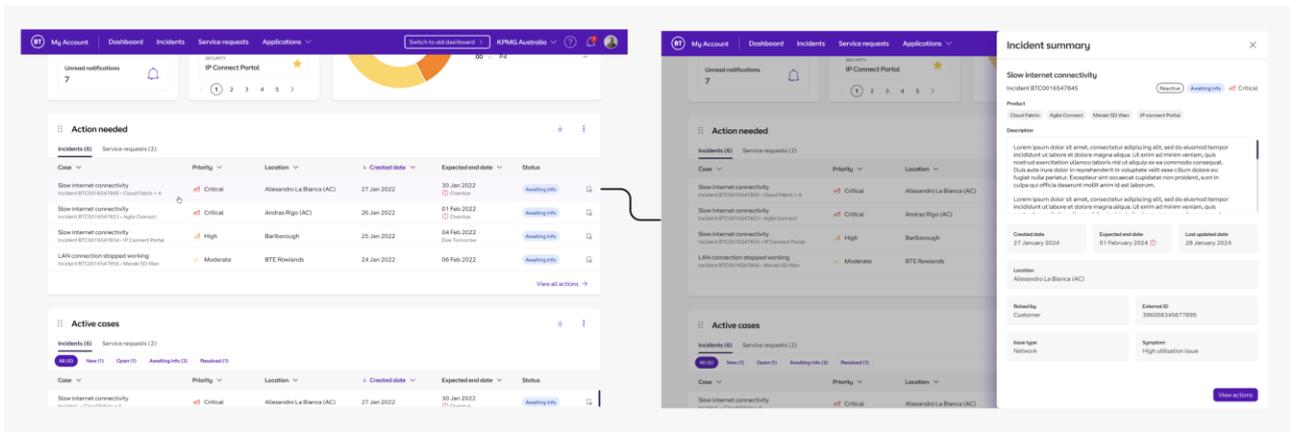
## 1.12 Favourites

The favourites widget allows you to favourite the apps most important to you so you can access them quicker, without the need to search for them.



## 1.13 Quick view panel

Our quick view panel (QVP) allows you to view more details on a specific incident without the need to navigate onto a new page. In order to do this, just click on the incident/case you'd like to view more information on and the quick view panel will appear with further details.



BT My Account Dashboard Incidents Service requests Applications

Unread notifications 7

SECURITY IP Connect Portal

1 2 3 4 5

### Action needed

Incidents (6) Service requests (2)

Case	Priority	Location
Slow internet connectivity Incident BTC0016547845 - Cloud Fabric + 4	Critical	Allesandro La Bianca (AC)
Slow internet connectivity Incident BTC0016547823 - Agile Connect	Critical	Andras Rigo (AC)
Slow internet connectivity Incident BTC0016547834 - IP Connect Portal	High	Barlborough
LAN connection stopped working Incident BTC0016547856 - Meraki SD Wan	Moderate	BTE Rowlands

### Active cases

Incidents (6) Service requests (2)

All (6) New (1) Open (1) Awaiting info (3) Resolved (1)

Case	Priority	Location
Slow internet connectivity Incident BTC0016547845 - Cloud Fabric + 4	Critical	Allesandro La Bianca (AC)

## Incident summary

### Slow internet connectivity

Incident BTC0016547845 Reactive Awaiting info Critical

Product  
Cloud Fabric Agile Connect Meraki SD Wan IP connect Portal

Description

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Created date: 27 January 2024  
Expected end date: 01 February 2024  
Last updated date: 28 January 2024

Location: Allesandro La Bianca (AC)

Raised by: Customer  
External ID: 396058345677895

Issue type: Network  
Symptom: High utilisation issue

[View actions](#)



March 2025

Find out more at [bt.com](https://www.bt.com)

Offices Worldwide

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

© British Telecommunications plc 2and No. 1800000.