MOBILE MANAGER

USER GUIDE – ADMIN SECTION

TABLE OF CONTENTS

INTRODUCTION

This guide will help you get started with Mobile Manager and provides an overview on the Admin section. You'll also find supporting information on each page within Mobile Manager via help hints.

Head to: Mobile Manager > Help Menu (on the top right-hand corner)

It's worth noting that this guide is only relevant to the main administrator.

OVERVIEW

Mobile Manager (www.mobilemanager.ee.co.uk) provides you with the ability to view and analyse your mobile billing information online. It also enables you to:

- Create and update a company structure to organise your phones
- Set up other users within your company to use the service
- Create reports based on billing information
- Change usernames
- Change Network Features (Simple Service)
- Change SIM cards
- Request PAC/STAC Codes
- Download Equipment and Airtime invoices
- Order online

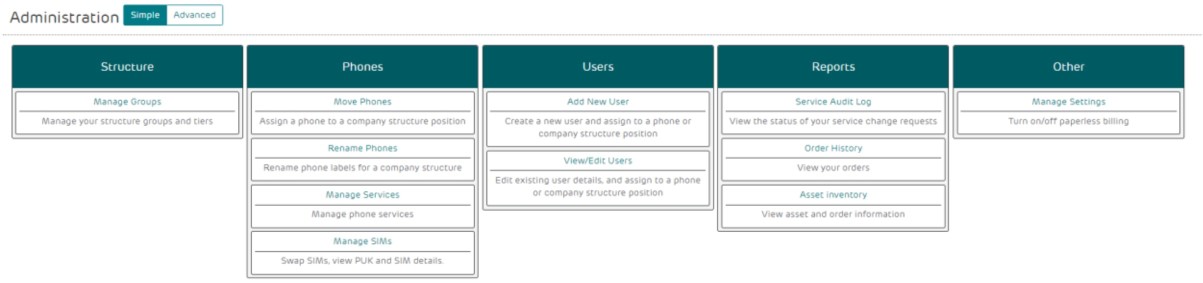
Full itemisation for every user is available, many reports and summaries are available to cover every aspect of usage and spend. Reports can be downloaded in a variety of formats including .csv and .pdf. Phone users can also easily tag their personal calls (if user access permits) and submit the results for recharging centrally.

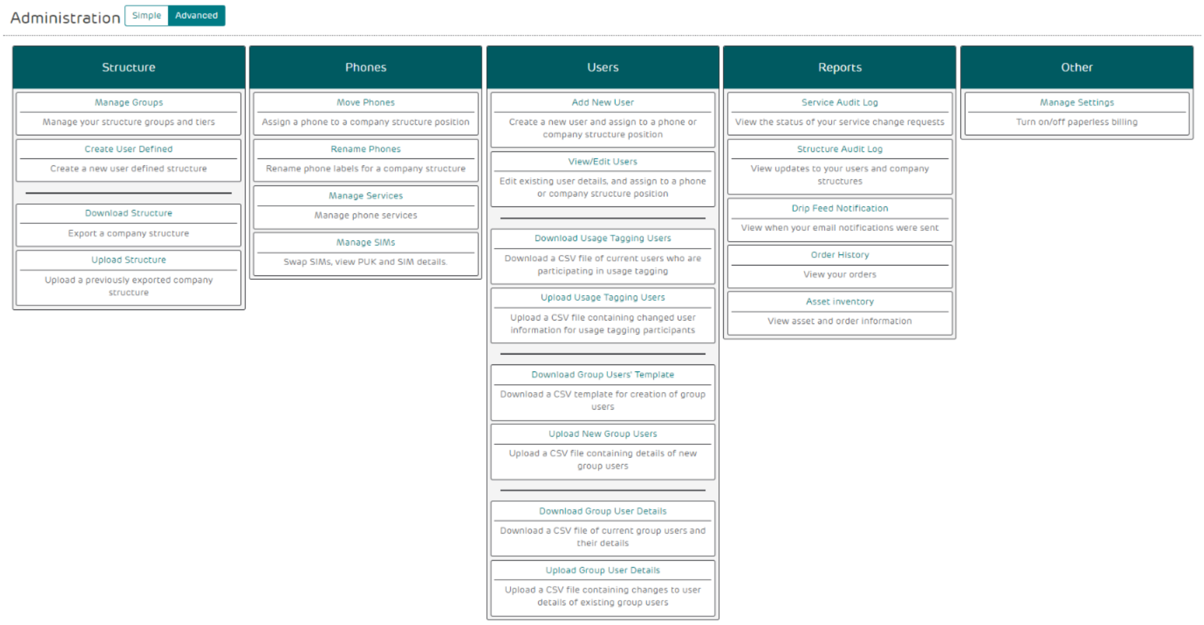
ADMINISTRATION

The Administration section is where you come to set up your company structure, add and remove users, and manage SIM settings. The four main sections are:

- Structure – Add, remove and edit company structures
- Phones – Move phones into their place in the company structure and manage SIM settings
- Users – Add, remove and edit privileges for users
- Reports – View a log of key activities

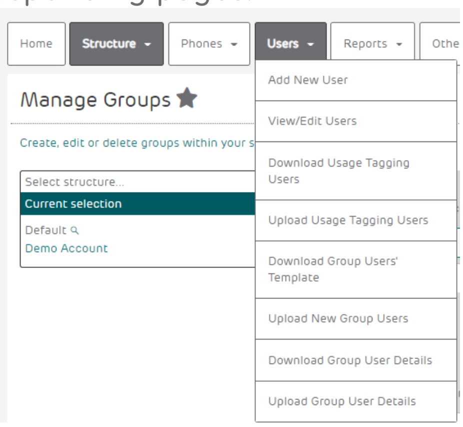
This section has two views - simple and advanced. This is to provide simpler navigation depending on your access rights/requirements.





It's worth noting that not everything in this guide is relevant to all types of administrators, due to different access permissions. If there's something here you think you need to use, but you don't have the correct user rights to access, please talk to your company's main administrator.

Also note that once you are within a page, the list of options that you see when you first entered the '**Admin**' section will remain at the top. Hover over a section to view the corresponding pages.



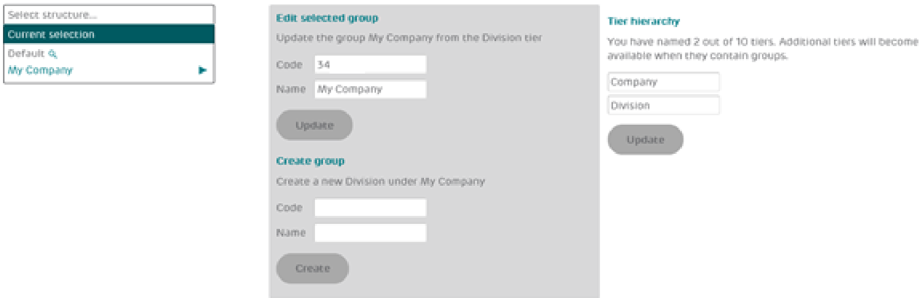
*The navigation pane at each page allows you to easily navigate within the '**Admin**' menu*

STRUCTURE

In this menu, you can view all available company structures, create new ones, and amend the Default and User Defined structures.

MANAGE GROUPS

From the '**Departments'** tab, you can view all available company structures, create new ones, and amend the group of those already existing in Mobile Manager.



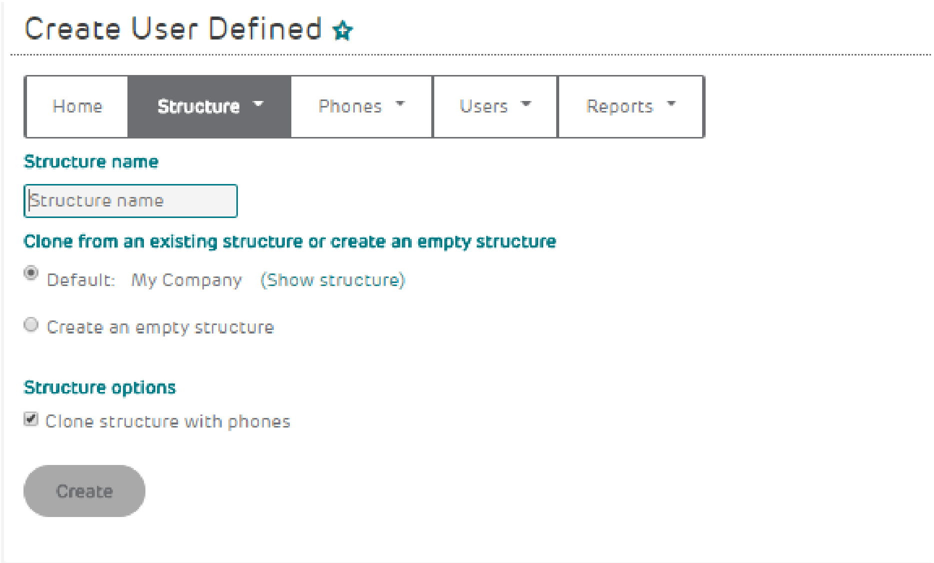
Select a structure from the left hand 'My Company' view to amend a group

EDIT USER DEFINED

This menu option lets you edit any user defined structures that already exist. To edit or delete an existing structure, navigate to the structure via the '**Select structure**' menu and click the relevant option once you have selected the structure.

CREATE USER DEFINED

Creates a brand new separate company structure. To create an empty structure, select the '**Create an empty structure**' option.

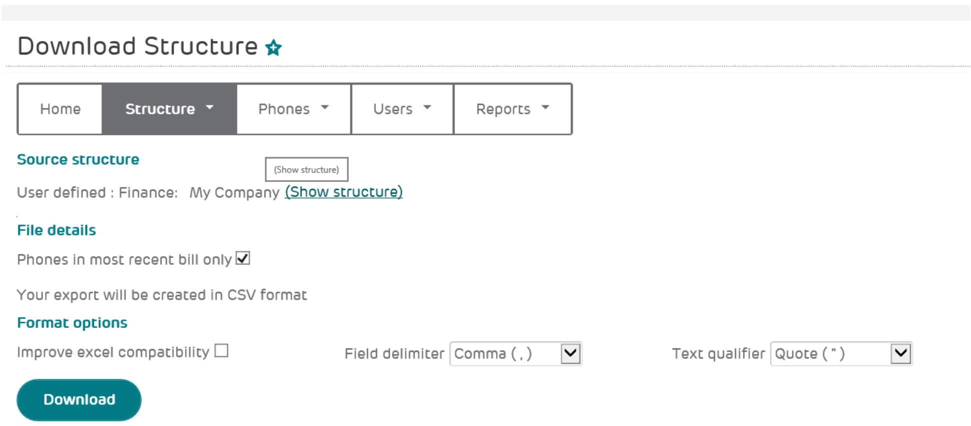


To add the new structure to an existing one, select the '**default**' option.

DOWNLOAD STRUCTURE

If you're a Hierarchy User with structure rights, you can export and import a company structure. The best way to do this is to download a copy of the existing structure as a .csv file, make the necessary changes, then re-upload.

The '**Download Structure**' menu provides you with the option to download a user defined structure.



To select a structure that you'd like to download, just select the '**Show structure**' option and navigate to the relevant structure. You can also view all historic structures, and you can also filter the phones that you see in the downloaded file via the '**File details**' section just below the '**Source structure**' option.

Click Download and open or save your file. The first row of your file will contain column headings and each group heading will be the tier name. Each line of the .CSV file will contain a single phone or an empty structure group:

	A	B	C	D	E	F	G
1	CLI label	CLI	Division	Department	Cost Centre	Region	TIER 5
2	Username32	08710175955	Demo Account	Business to Business	Corporate Marketing	Corporate Marketing||BM24	
3	Username36	08710175989	Demo Account	Business to Business	Corporate Marketing	Corporate Marketing||BM24	
4	Username30	08710175948	Demo Account	Business to Business	Corporate Marketing	VS&M||SN16	
5	Username33	08710175970	Demo Account	Business to Business	Corporate Marketing	VS&M||SN16	
6	Test	08710022157	Demo Account	Brand and Communications	Brand		
7	Test1	08710022169	Demo Account	Brand and Communications	Brand		

In this example, to move 08710175970 (highlighted in yellow) to the Brand cost centre from the line below it, you just need to edit cells D6, E6 and F6 to match the tiers below:

	A	B	C	D	E	F	G
1	CLI label	CLI	Division	Department	Cost Centre	Region	TIER 5
2	Username32	08710175955	Demo Account	Business to Business	Corporate Marketing	Corporate Marketing||BM24	
3	Username36	08710175989	Demo Account	Business to Business	Corporate Marketing	Corporate Marketing||BM24	
4	Username30	08710175948	Demo Account	Business to Business	Corporate Marketing	VS&M||SN16	
5	Username33	08710175970	Demo Account	Brand and Communications	Brand		
6	Test	08710022157	Demo Account	Brand and Communications	Brand		
7	Test1	08710022169	Demo Account	Brand and Communications	Brand		

Once you've made you your changes, save this to your PC as a .csv comma delimited file ready to upload the changes.

Column B should not be amended.
Column C is the company name and needs to be consistent through all the data/rows
Columns D onwards can be amended to reflect your company structure.
You can change the title of the structure positions by amending the titles in row 1, Columns D,E,F,G etc depending on how large you want your hierarchy to be.
The hierarchy can be a minimum of 1 level, i.e. column D up to a maximum of 10 levels of structure.

If any usernames are changed in column A these will be reflected in Mobile Manager and changed on your billing records. This method can be used to bulk change usernames when required.

The upload will only make changes to data that has been amended. Please remember to be consistent with your data to avoid multiple hierarchy levels, e.g. "Cost centre 1" and "cost-centre 1" would create two levels as the formatting is different.

NB. You can export the file in Excel format by selecting the 'Improve excel compatibility' option prior to the download. However, the report will need to be saved in CSV Comma delimited format to re-upload.

UPLOAD STRUCTURE

If you're a Hierarchy User with structure rights, you can export and import a company structure. The best way to do this is to download a copy of the existing structure as a .csv file, make the necessary changes, then re-upload. Download a copy from the '**Download Structure**' menu option within the '**Admin**' section. See above section for more information.

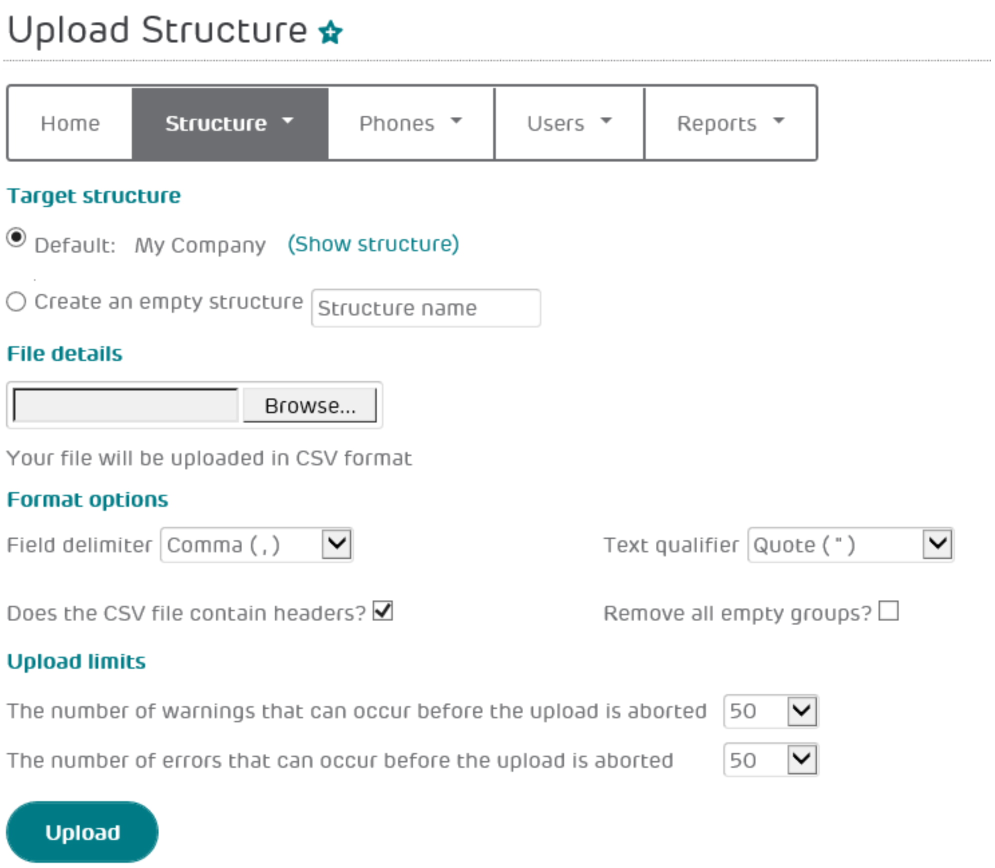
Once you've updated your file, you can upload the new structure to Mobile Manager within the 'Upload Structure' menu.

If you want to overwrite the current Default structure, select '**Default: My Company**'. To create a new User Defined structure instead, select '**Create an Empty Structure**', and give it a name. Click '**Browse'** to locate the new structure where you saved it.

If you've left the column headers in the .csv file (and you should, really) leave the tick box for that option checked. If you're amending a current structure and have removed all phones from any nodes/hierarchy levels, you can have them deleted by selecting '**Remove All Empty Groups?**'

If you left the field delimiter and text qualifier at their default options when exporting the structure, you can do the same here. If not, just set the options to match the file you exported. Click '**Upload'**, and the following will be imported:

- Tier names, using the group headers if there is a header within the CSV file.
- Phones and their labels.
- Nodes/Hierarchy that are associated with a phone.
- Nodes/Hierarchy that have no associations.



Once uploaded, you can see the new structure in 'Manage Groups' under 'User defined' (if uploaded as a separate structure).

The following conditions must be met in order for the import to be successful:

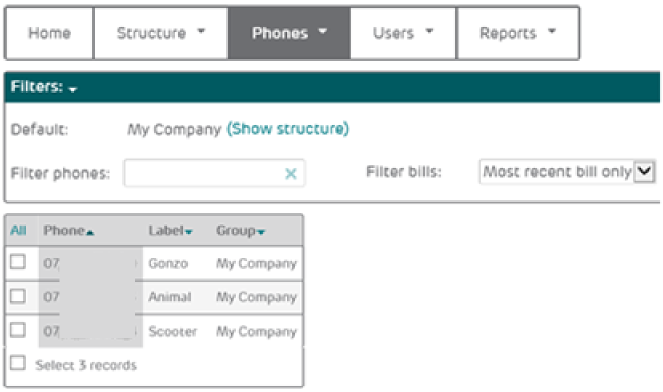
- The CSV file must contain more than three fields, with unique field names in each one.
- The phone numbers within the file must already exist within Mobile Manager.
- The phones numbers you are importing have to be available at your level of access and below.
- Phones numbers can only exist in the import once; if the phone appears twice in the import the first occurrence will be used, and the second will be ignored

PHONES

In this menu, you can manage phone assignments to a structure, in addition to renaming phone labels. These changes reflect in Mobile Manager and EE's internal systems once changed.

MOVE PHONES

To move a phone, all you have to do is click the tick box to the left of the number, click '**Move Selected**' at the bottom of the list, then navigate through your structure and click where you want it to go.



You can search for a specific phone by either the number or username (**Phone Label**) using the **Filter Phones** search box at the top of the list. This begins to return results as soon as you start typing, so if you need to move a group of phones that all begin with the same sequence of numbers (or include a specific cost centre code or department name in the username), you can use this to filter them out and select them all at once.

For printing, saving and scheduling options, use the icon on the top right next to the navigation pane.

RENAME PHONES

You can change the phone label with the '**Rename Phones**' tool. Simply update the label name and click the '**Update**' button.

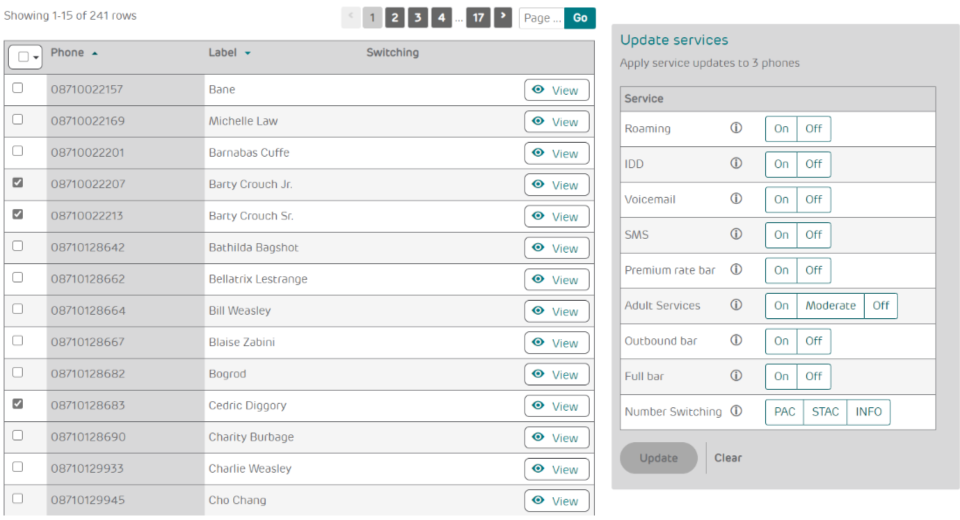
All Phone Labels are set by default to '**From Billing Data'**. This tells Mobile Manager to display the username as it appears on your account and invoices. To override this and set your own, untick the checkbox and enter your own text. Doing this will update the label on Mobile Manager and username on the account.

MANAGE SERVICES

You can manage phone settings using the ‘**Manage Services**’ tool. Prior to making any update to the settings on a phone, it is recommended that you first confirm the existing settings on the phone. You can do this by clicking the ‘**View**’ button against the corresponding phone number.

You can use the filters option available above the table to drill down into a specific phone number (by keying in the number), or by filtering the numbers displayed by your most recent bill, or all bills.

Once you have confirmed the phone number and the setting(s) you did like to update, simply click the checkbox against the phone number which will then allow you to update settings for the selected number(s) via the service options displayed in the right hand side.

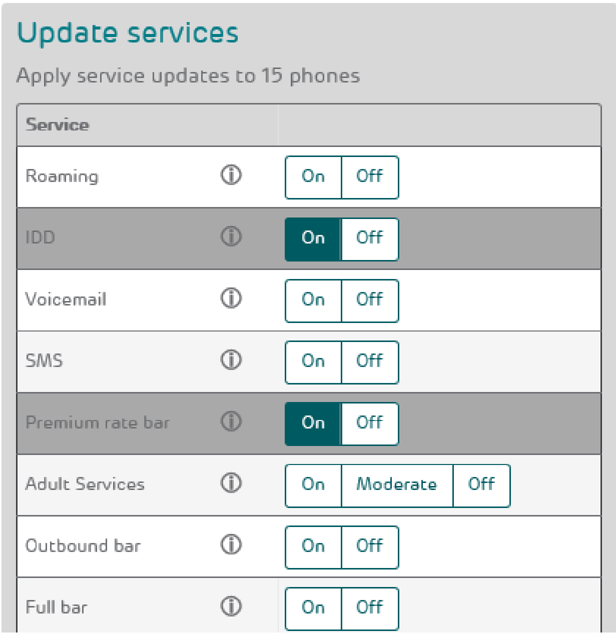


Please note that you can select up to 30 phones to update at a time, and the same settings update will be made to each phone. Use the help icons against each setting type for helpful information on what each setting means. Please note that selecting the ‘**On**’ option turns the corresponding setting on the phone.

Within the ‘**Adult Services**’ service setting, there are 3 levels of controls that you’ll find. An explanation of what these different states mean is provided below:

- On - prevents access to adult content/websites, user generated sites like YouTube or Google Videos and social networking sites such as Twitter. The user can continue to access Facebook, news etc in this setting
- Moderate - Moderate is the default level of control. The moderate setting allows access to some user generated content sites like YouTube, Google videos and social networking sites like Twitter.
- Off - allows complete access to the Internet. To switch phone number(s) to this setting, you’ll have to agree that your age is above 18.

Once you have made the relevant updates to the settings, the ‘**Update**’ button will activate giving you the option to progress with your changes. On clicking this button, you’ll be asked to confirm a few terms on the subsequent screen. Once you are ready to submit your changes, click the ‘**Yes**’ button in the next screen to submit your request.

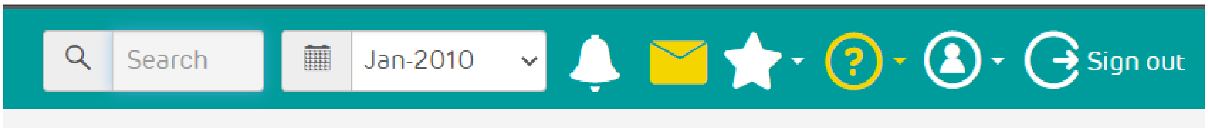


Please note that service updates can take up to 24 hours to complete. You can track latest status of requests that you have submitted via the ‘**Service Audit Log**’ also available within the ‘**Administration**’ menu.

You also have the ability within this menu to request a PAC code (porting to another network with your phone number), STAC code (porting to another network with a new number and ceasing the existing number/network or request INFO to obtain any early termination charges.

PAC/STAC/INFO have to be requested separately, i.e. you can't apply a bar and request a PAC code simultaneously. This would need to be put through with two requests.

After you have requested your PAC/STAC/ INFO you will get a notification that it has been sent. You will usually receive a response within 1 working day notifying you that the request has been updated and to log into the portal. When you log into the portal you will see a golden envelope advising that there is a new message in the top right of your screen.

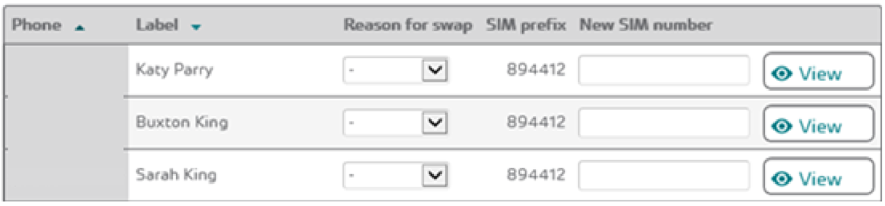


When you click into this you will see the message and the request from EE. This will contain the code, if applicable, and a document (if applicable) advising you of the charges if you do use the PAC/STAC code or relevant charges for early termination.

<u>By using the PAC code or STAC code you are agreeing proceed and accept the charges.</u>

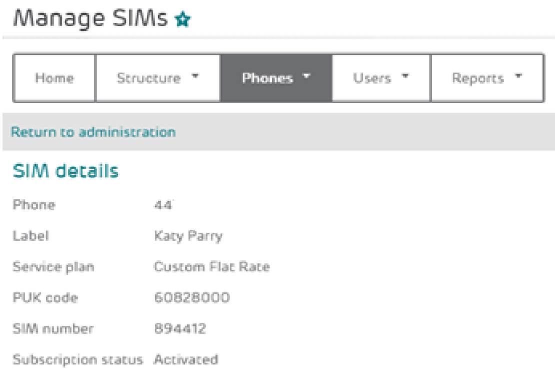
MANAGE SIMS

You can manage SIM swap and retrieve PUK code with the '**Manage SIMs**' tool. Prior to making any update to the SIM number of a phone, it is recommended that you first confirm the existing details. You can do this by clicking the '**View**' button against the corresponding phone number.



Phone	Label	Reason for swap	SIM prefix	New SIM number	
	Katy Parry	-	894412		View
	Buxton King	-	894412		View
	Sarah King	-	894412		View

Within the '**View SIM details**' page, you are also able to see the PUK code for the selected phone number.



Within the '**Manage SIMs**' screen you can use the filters option available above the table to drill down into a specific phone number (by keying in the number), or by filtering the numbers displayed by your most recent bill, or all bills.

Once you have confirmed the phone number(s) you did like to update with a new SIM number, simply select the appropriate '**Reason for swap**' and enter the '**New SIM number**' in the box label displayed. Please note that the SIM prefix has already been added, so you should only add the numbers following the prefix. Please note that you can update up to 15 phone numbers at a time as displayed within a page.

Once you have made the relevant updates, click the '**Update**' button available at bottom of the screen. Please note that SIM swap updates can take up to 24 hours to complete. You can track latest status of requests that you have submitted via the '**Service Audit Log**' also available within the '**Administration**' menu.

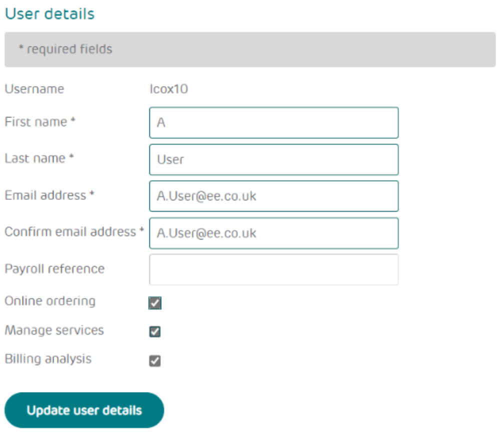
USERS

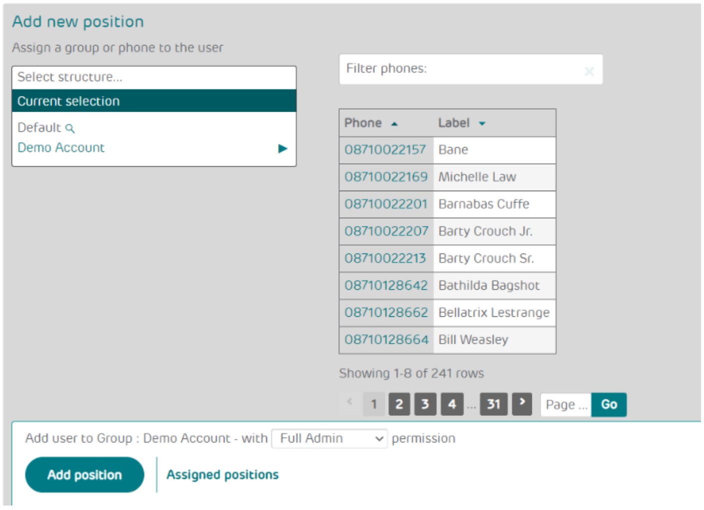
There are 3 main logins you can create for users, depending on the type of access they need:

- **Top level Admin –** Main point of contact for all users, has full access to the entire invoice, and the full suite of administration tools (adding, editing and removing users and structures).
- **Users with Groups –** Also referred to as Node Users, this gives users access to a complete node in the company structure to view all call and charge information. You can choose to give them access to the Administration tools or simply read-only access
- **Users with Phones –** Also known as Split-bill Users or Phone Users, this gives each phone user a login to view details for their phone use only, and declare any personal calls made if necessary.

ADD NEW USERS

To set another user up, click on '**Add New User**', and fill in their name and email address where prompted. The '**Payroll Reference**' field can be left blank if you wish.





If you'd like the user to have online ordering access, select the tick box. You can also select whether the user will get access to managing SIM services.

You can also select whether users need access to billing. If billing is not selected the user will not see any billing information. This is useful for users that just need to place orders or manage services/sims. Please note the following while selecting your options:

- Online ordering access can only be given if you are opted in for online ordering at Account level. We recommend contacting your Customer Services team to opt-in to online ordering if you are not already set up.
- Manage services is an option initially given to just top-level admins. However, an admin (with access to this feature) can create further users and enable this functionality for the user.
- Billing Analysis gives access to all billing reports and data for the areas of structure they have been provided access to.

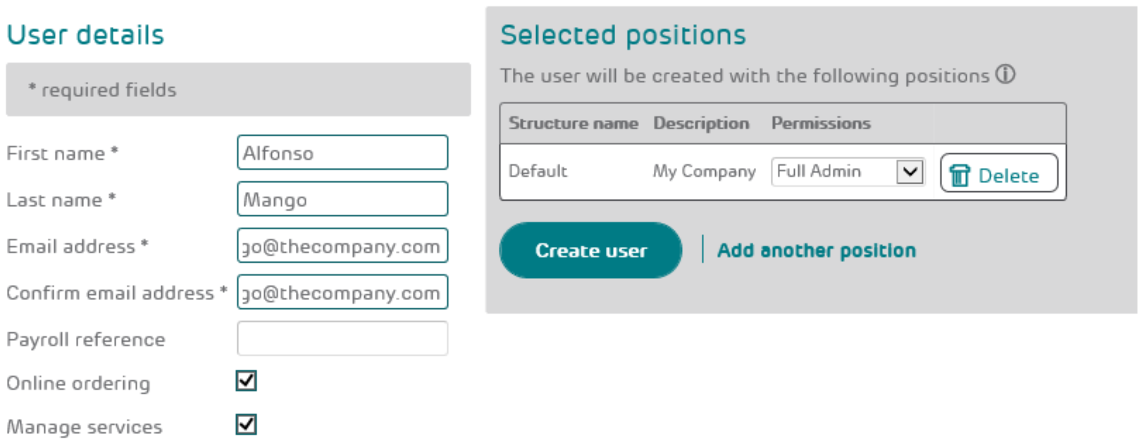
Click on the '**Add New Structure Position**' link. Once selected, you will then add the user to a group type.

- '**Full Admin**' **–** Able to view all data and full access to create, edit and delete structures and logins for their appointed node.
- '**Structure Only**' **-** As above, but only able to amend the company structure, not admin logins
- '**Users Only' -** As above, but only able to amend the admin logins, not company structure

- '**Read Only**' **–** Can view all usage data for their node, but unable to make any changes

You're able to select where in the structure the user needs access, i.e. top level or at lower levels. The site will allow you to drill into lower levels of structure or into user level if required.
You can also add an area and then click 'add another position' if a user needs access to 2 or 3 different levels of structure.

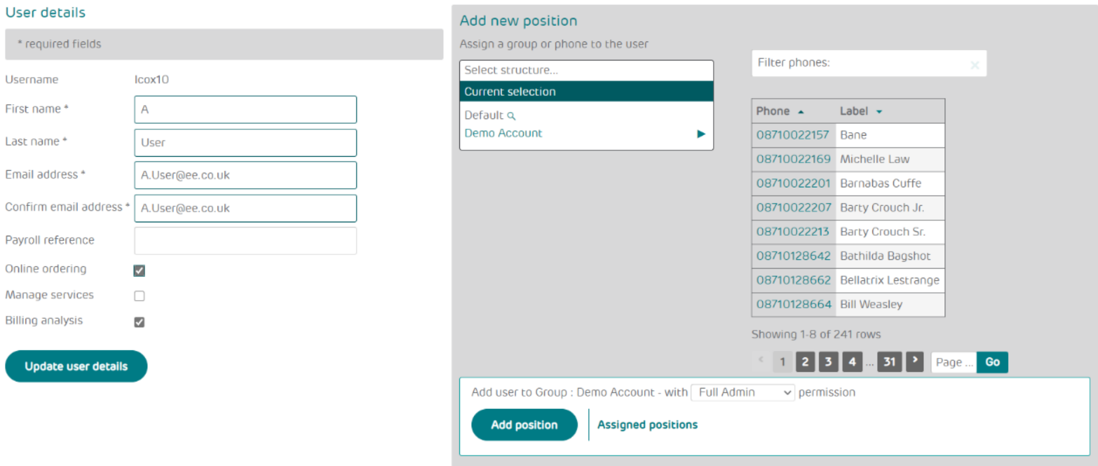
Once you've selected the right access level, click '**Add Position'**. Now you'll be able to click the '**Add New User'** button, which confirms your choices, sets the user up and sends them an email to let them know. This will also give them their username and a temporary password.



EDIT USERS

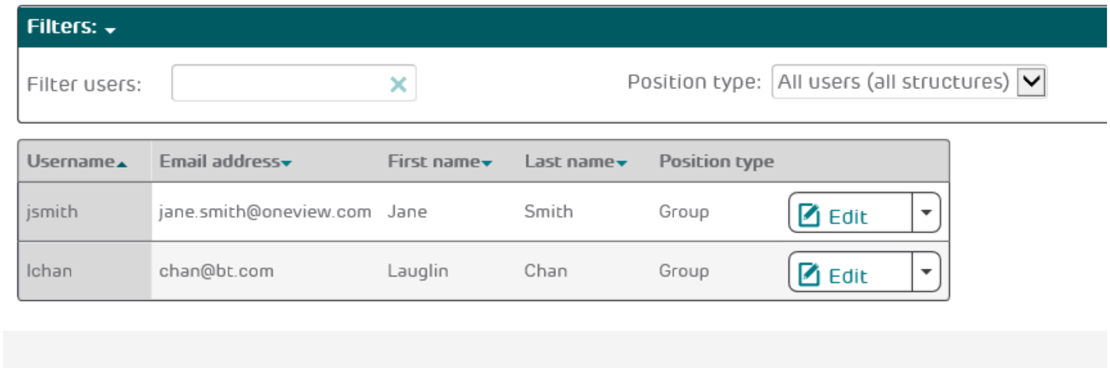
To edit an existing user, follow the steps below:

- Click on '**Edit**' next to the username
- From the '**Edit User'** screen, you can edit their existing structure position or delete it using the links to the right
- To add a new node position, click on the '**Add New Structure Position'** link and repeat the steps to assign a user to a hierarchy/node.
- To remove their access to online ordering or service management or billing access, untick the relevant checkbox.



*Once you have made the relevant updates against user details, click the '**Update user details'** to submit the change.*

To disable a login, simply click the '**Disable**' option when you click the downward pointing arrow next to the '**Edit**' link against a username within the main '**Edit Users**' page.



DOWNLOAD USAGE TAGGING USERS

Use this menu option to download those users that are tagging their personal calls. This is a useful option for you to collate the users to whom you need to send a tagging reminder. It's also useful if you'd like to set up new users that have tagging access, more information on this is outlined in the next section.

UPLOAD USAGE TAGGING USERS

If you have a lot of Phone Users to add or amend (those that tag their calls on Mobile Manager) you'll probably want to do this in bulk via a spreadsheet, rather than adding them one-by-one.

First, you need to download a list of your current mobile numbers who are set up for tagging – from the '**Download Usage Tagging Users**' menu option within the '**Admin**' section.

Within the downloaded file, all you need to do is fill in the details for each mobile number you want to assign a user to (Payroll Reference is again optional), enter “yes” (without the quotes) in the New Login Details Required field, then use the Upload The CSV File link to select your file and add the users.

If all you need to do is amend existing Phone Users’ email addresses or names and NOT generate a new login, make sure New Login Details Required is left as ‘no’.

DOWNLOAD GROUP USERS’ TEMPLATE

This download will provide a list of your structure and possible access rights. It will only show the levels of hierarchy structure available to detail what users could be assigned against., This provides you with the ability to use the information from here to upload in bulk new users/admins using the features available. However, it will only allow you to select one level of hierarchy per user.

You can add in the users’ details on the left (you can copy rows if more than one user requires access) and it provides the detail in such a way to bulk upload users. If you need any assistance with this, please contact the Mobile Manager team who will be able to assist you.

UPLOAD NEW GROUP USERS

This gives you the ability to bulk upload new users using the information from the ‘download group users’ template’.

DOWNLOAD GROUP USERS DETAILS

This will provide you with a list of all existing users in your estate and their permissions. You can use this list to make bulk changes and amendments by managing the list. For example, switching online ordering from ‘no’ to ‘yes’ for all users or a single user would enable online ordering upon upload. If you need any assistance with this, please contact the Mobile Manager team who will be able to assist you.

UPLOAD GROUP USERS DETAIL

This provides you with the ability to bulk upload new users using the information from the ‘Download Group Users Details’ template.

REPORTS

In this menu, you can view a log of changes that are made by administrators.

SERVICE AUDIT LOG

This log provides you with visibility of the services managed and SIM swaps requested via Mobile Manager. It also provides visibility of who requested the change, against which phone number, and the current status. Use the filters options at the top of the log table to drill down to a specific time period, username requester, or current status.

Please note this menu option is available only if you have 'manage services' enabled against your profile.

STRUCTURE AUDIT LOG

This log provides you with visibility of users created in Mobile Manager along with details of when they were created and under what structure. Use the filters options at the top of the log table to drill down to a specific time period or username.

DRIP FEED NOTIFICATION

A log report showing when new bill notifications were sent out. Helpful to ensure notifications are getting sent. Mobile Manager sends out notifications in one go, rather than in drips. Use the filters at the top of the table to drill down to a specific time period.

ORDER HISTORY

This log provides you with visibility of orders raised in Mobile Manager along with details of who raised the order and under what cost centre. Use the filter option at the top of the '**Order History**' table to drill down to a specific time period or order number.

Please note this menu option is available only if you have online ordering enabled.

Asset Inventory

This feature allows you to see equipment that has been ordered through your associated equipment account numbers. You will be able to view the IMEI and SAP order reference relating to your orders so that you see what has been despatched and sent, the correlating dates and IMEI/SIM numbers.

You can select the filters to search through these records and dates to obtain the information required.

Should you need a full estate of devices and which mobile numbers are associated you would need to contact your customer services team to request this. This will only show IMEI and details of orders that have been submitted for tracking inventory.

Filters:

01-May-2021 to 13-May-2021 | Search device | Search order

Showing 1-15 of 580 rows

1 2 3 4 ... 39 | Page ... | Go

Make	Model	IMEI number	SIM number	Status	Dispatch date	SAP order id	SAP order date
Samsung	Samsung A32 5G Ent Ed Black BS Sale	35	44	Dispatched	13-May-2021	54	13-May-2021
Orange	EE Corporate UPG Multi SIM		44	Dispatched	13-May-2021	54	13-May-2021
Samsung	Sam Active Pro Tablet Enterprise BS Sale	35	44	Dispatched	18-May-2021	54	13-May-2021
Samsung	Samsung X Cover Pro Enterprise� BS Sale	35	44	Dispatched	18-May-2021	54	13-May-2021
Samsung	Sam Active Pro Tablet Enterprise BS Sale	35	44	Dispatched	18-May-2021	54	13-May-2021
Samsung	Sam Active Pro Tablet Enterprise BS Sale	35	44	Dispatched	18-May-2021	54	13-May-2021
Samsung	Sam Active Pro Tablet Enterprise BS Sale	35	44	Dispatched	18-May-2021	54	13-May-2021
Samsung	Samsung X Cover Pro Enterprise� BS Sale	35	44	Dispatched	18-May-2021	54	13-May-2021
Samsung	Samsung X Cover Pro Enterprise� BS Sale	35	44	Dispatched	18-May-2021	54	13-May-2021
Samsung	Samsung X Cover Pro Enterprise� BS Sale	35	44	Dispatched	18-May-2021	54	13-May-2021
Samsung	Samsung X Cover Pro Enterprise� BS Sale	35	44	Dispatched	18-May-2021	54	13-May-2021
Samsung	Samsung X Cover Pro Enterprise� BS Sale	35	44	Dispatched	18-May-2021	54	13-May-2021
Samsung	Sam Active Pro Tablet Enterprise BS Sale	35	44	Dispatched	18-May-2021	54	13-May-2021
Samsung	Sam Active Pro Tablet Enterprise BS Sale	35	44	Dispatched	18-May-2021	54	13-May-2021
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