MOBILE MANAGER

EE

USER GUIDE – USAGE TAGGING

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INTRODUCTION

This guide will help you get started with Mobile Manager and provides an overview on usage tagging 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 not everything in this guide is relevant to all types of users, 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.

OVERVIEW

Mobile Manager (www.mobilemanager.ee.co.uk) provides you with the ability to view and analyse your mobile billing information online, and amongst other services, 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 user-names
- 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.

ADMIN USAGE TAGGING

Call tagging gives users an easy way to calculate and declare the cost of any personal calls they make on their company mobile and makes it easy for admins to collect the final results for internal recharging.

Tagging usage isn't mandatory. You can just use this functionality to give end users access to what they have used/spent without tagging any usage/calls.

Usage tagging home

Tagging	Maintenance	Report wizard
Tagging home	Send email reminders	Scheduled reports
Tagging state	Unlock completed users	Call reports - New
Tagging usage	Lock/unlock users not completed	
Phone users list	**Full tagging usage** ✉ Email ⬇ Save ➔ Schedule	

For printing, saving and scheduling options, use the icons on the top right of the report you're viewing.

The two icons next to the record type you're viewing control how you drill into the data further:

Drills into the company structure i.e., clicking **Select Groups** in a category will show you all usage per department

Takes you straight to the call itemisation view for the selected category within the tagging section

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

The navigation pane at each page allows you to move within the menu

We'll be looking at the Usage Tagging options for admins in this section.

TAGGING

Within the '**Tagging**' area you can view reports based on the business and personal usage split of your company mobiles

TAGGING HOME

The '**Tagging Home**' report shows a breakdown of business and personal usage for each section of the company structure.

'**One Line Per**': lets you change the report to display summaries grouped by any tier of your structure, or a full list of all phones in one go.

'**Show Tagging By**': changes the focus of the report between cost, duration, call volume, data volume and events volume.

'**Show Type**': switches between viewing both business and personal costs, or either one individually.

TAGGING STATE

The '**Tagging State**' report gives you a clear overview of your users' tagging activity so you can keep track of who has and hasn't submitted their tagging yet, and know when to begin processing the reports. The report separates your phones into the following categories:

- '**Made no calls**' – Phone Users with no usage in that billing period
- '**No user assigned**' – Phones that don't have a user assigned to them
- '**Not viewed**' - Phone Users that haven't logged in and viewed this month's calls
- '**Submitted**' - Phone Users that have submitted their tagging
- '**Viewed**' - Phone Users that have logged in but not submitted their tagging yet

Click '**Select Groups**' to drill down through the company structure or '**View Details**' to see an itemised list of calls.

Tagging state ☆

Home	Tagging ▾	Maintenance ▾	Report wizard ▾

Filters: ▾

Showing data for: My Company ▸ 98829983 (Show structure)

Totals		26	621	23.25 GB	449	38:59:31	£529.259	
Tagging state ▲		Phones ▾	Call vol ▾	Data vol ▾	Events ▾	Duration ▾	Cost ▾	
Made no calls 👥 📁		0	0	0 bytes	0	00:00:00	£0.000	➡
No user assigned 👥 📁		25	599	11.33 GB	449	37:13:12	£524.822	⬆
Not viewed 👥 📁		1	22	11.92 GB	0	01:46:19	£4.437	⬆
Submitted 👥 📁		0	0	0 bytes	0	00:00:00	£0.000	➡
Viewed 👥 📁		0	0	0 bytes	0	00:00:00	£0.000	➡

TAGGING USAGE

The '**Tagging Usage**' report shows a breakdown via company structure of the personal and business usage.

Click '**Select Groups**' to drill down through the company structure or '**View Details**' to see an itemised list of calls.

Tagging usage ☆

| Home | Tagging ▾ | Maintenance ▾ | Report wizard ▾ | | ⚙ ▾ |

Filters: ▾

Showing data for: **My Company** ▸ 98829983 (Show structure)

Totals	0	621	23.25 GB	449	38:59:31	£529.259	
Tagging status▴	Phones ▾	Call vol ▾	Data vol ▾	Events ▾	Duration ▾	Cost ▾	
Business 👥 🗋	0	621	23.25 GB	449	38:59:31	£529.259	⬆
Personal 👥 🗋	0	0	0 bytes	0	00:00:00	£0.000	➡

PHONE USERS LIST

This gives you a quick and easy way to see which phones you have with users assigned, and which don't.

'User Assignment': lets you switch between viewing all phones, or either all phones with users assigned or no users assigned individually.

This report can be viewed using any company structure you are assigned to.

In the downloaded report, the red and green dots are replaced by the text "User Assigned" or "No User Assigned".

TAGGING

Lock and unlock your users' submissions and send email reminders to users who haven't completed theirs.

SEND EMAIL REMINDERS

Useful to send an email reminder to those users who haven't yet completed their tagging.

 Just tick the box next to the users you want to remind (this list only shows users that haven't submitted yet), and click '**Send Reminder'**.

You can filter the report by the company structure, or by tagging state (all/not viewed/viewed), and search for specific numbers.

UNLOCK COMPLETED USERS

Once users have submitted their tagging, their tagging options are locked, so they can't make any further changes after that. If they realise they've made a mistake and need to amend their tagging though, users with admin access can unlock their tagging.

As with the '**Send Email Reminders'** tool, you just need to tick the boxes next to the users to unlock and click '**Unlock'**.

LOCK / UNLOCK USERS NOT COMPLETED

The ability to lock the tagging for phone users who have not yet submitted their call tagging is a useful tool if you decide to set your users a deadline for submitting their tagging.

This works in exactly the same way as the '**Unlock Completed Users'** tool above.

FULL TAGGING USAGE

This allows you to download in .csv or Excel format a one line per phone breakdown of personal and business spend and usage. Please note this report is company structure aware.

REPORT WIZARD

Create a bespoke report based on usage or charge information.

SCHEDULED REPORTS

In this section, you'll be able to view any reports that you have scheduled from Mobile Manager.

CALL REPORTS - NEW

This works in exactly the same way as the standard '**Report Wizard'** from the '**Reports'** menu, but with the added option of filtering by Tag Status (business or personal) and Tagging Status (all, viewed, not viewed, no user assigned, made no calls or submitted).

USER USAGE TAGGING

As a Phone User in Mobile Manager (also known as Splitbill User) you can view your usage data online, create reports and separate your business and personal calls and declare them to your company.

Usage tagging home

Tagging	Report wizard
Usage tagging	Scheduled reports
Tagging report	Call reports - New
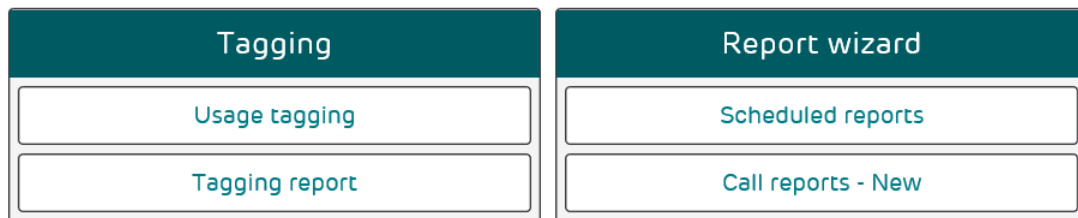
USAGE TAGGING

Usage tagging allows you to identify and tag any personal calls you have made in the previous month. This can then be submitted to your company for analysis and recharging, saving you pouring over a paper bill with a highlighter pen and calculator each month.

When you first click '**Usage Tagging**' you'll see all the numbers you've contacted that month. To tag all calls to that number as personal, just click the radio button to the left of it. The running total at the top of the list will update as you go.

Select a radio button to mark a call as personal. The running total at the top will update accordingly

If you have numbers to which only certain calls are personal, you can tag those specific calls by clicking '**Home**' icon next to that number, and tagging the individual calls.

	Call vol	Duration	Cost	Data vol	Events
Summary:	21	00:56:50	£0.000	51.70 MB	0
Personal:	0	00:00:00	£0.000	51.70 MB	0
Business:	21	00:56:50	£0.000	0 bytes	0

Key:
○ Business
⊘ Business & personal
⊗ Personal

Area code ▼	Dialled ▼	Description ▼	Call vol ▼	Data vol ▼	Events ▼	Duration ▼	Cost ▼
○ unk	📁 447973100123	🏠▼ Answerphone service	1	0 bytes	0	00:00:03	£0.000
⊗ unk	📁 mobile internet	🏠▼ mobile internet	0	51.70 MB	0	00:00:00	£0.000
○ 079532	📁 07953222222			0 bytes	0	00:00:02	£0.000
○ unk	📁 03000257307			0 bytes	0	00:16:55	£0.000
○ 01597	📁 01597824095			0 bytes	0	00:01:08	£0.000
○ 079040	📁 07904020659			0 bytes	0	00:01:05	£0.000
○ unk	📁 07481669876			0 bytes	0	00:09:55	£0.000

Description: mobile internet

🏠 🏢 🏨 ♥ 📞 👤

☐ Tag future usage as personal
☐ Delete this entry

Save

You can also change the text displayed in the '**Description**' column for any numbers you dial to something more memorable – just click the icon to the right of the number (highlighted here), and enter your text. '**Tag Future Usage As Personal**' will ensure that number is always tagged. You can also choose a different icon for that number from the selection available. If you have multiple pages of numbers, just click '**Next**' and repeat the process until you're done. To save all your changes, click '**Save All Tagging**', and to submit your tagging (and lock it against any further changes), click '**Finish**' at the bottom of the page.

TAGGING REPORT

Shows a combination of all business and personal usage.

SCHEDULED REPORTS

In this section, you'll be able to view any tagging related reports that you have scheduled from Mobile Manager.

CALL REPORTS - NEW

Create a bespoke report based on usage or charge information.

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