

Application Guide for Siebel Communications Billing Analytics

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Contents

1 Overview

Introduction to Communications Billing Analytics (CBA) 7 Application Overview 8 About Customer Self-Service and Siebel Tools 9 Browser Requirements 10

2 Business Processes and Application Logic

Hierarchy Basics 11 Hierarchy Types 12 Report Click-Through Basics 15 Reporting Period versus Billing Period 17 Versioned Hierarchy 21 Hierarchy Site Map 23

3 Site Web Flows

General Billing Manager Use Cases 24

Dashboard 24 View List of Standard Reports 27 View List of Custom Reports 29 View List of Batch Reports 31 Navigate Hierarchy 33 Change Selection Criteria 34 Customize a Report 36 Chart Unusual Values 42 Run Automatic Batch Report 43 Run Manual Batch Report 44 View Batch Reports 47 General User Interface Behavior 51

Cancel 51

Change Language 52

Display Error Message 53

Display No Data Message 54

Download 55

Paging with Caching 57

Printer-Friendly Version 59

Reset 60

Sort Data in a Table 61

Submit 61

4 Hierarchy Use Cases

General Hierarchy Management 63

Manage Interface 63

Create Group 71

Add Element 76

Remove (Delete) Element 82

Modify Element Attributes 92

Move Elements 96

Search Hierarchy 99

Hierarchy Admin 104

Create Hierarchy 104

Copy Hierarchy 107

Import Hierarchy 111

Publish Hierarchy 116

Download Hierarchy 119

Expire Hierarchy 122

Delete Hierarchy 126 Version Hierarchy 130 Version Billing Hierarchies 130 Manage Versioned Hierarchy 131 Compare Versioned Hierarchy 137

5 Report Use Cases

Billing Reports 141

Group Spending 141

Group Spending Trend 145

Account Billing Overview 148

Account Billing Details 152

Account Billing Trend 154

Invoice Billing Details 158

Contract Billing Overview 161

Contract Billing Trend 163

Contract Call Details 167

Total Cost by Plan 170

Top X Reports 173

Most Expensive Calls 173

Longest Calls 176

Most Frequently Called Numbers 179

Most Frequently Called Destinations 182

Most Frequently Called Countries 185

Highest Spender Report 187

Highest Spending Contracts by Usage Type 190

Find Calls 192

Cost and Budget Management Reports 196

Budget Reports 196 Group Budget Report 198 Contract Budget Report 201 Budget Report Settings 204 Budget Management 204 Cost Reallocation Setting 208 Markup / Re-Bill Setting 212

6 Appendix A

Glossary of Terms 216

1 Overview

Introduction to Communications Billing Analytics (CBA)

The Communications Billing Analytics (CBA) is the complete enterprise-class reporting solution of Siebel Self-Service for Communications Application Suite. Communications Billing Analytics allows business customers to analyze and understand their communication costs and usage by investigating trends and patterns across multiple views of their unique organizations.

This guide describes the use cases, user interface and architecture of Communications Billing Analytics and explains how Communications Billing Analytics meets the complex requirements and return on investment (ROI) goals of the world's largest communications providers.

Communications Billing Analytics Benefits

Communications business customers receive multiple invoices for many services that are managed, consumed, paid, budgeted, and approved by different individuals and organizations within large complex corporations.

Communications business customers typically receive unwieldy manual bills or bills on CDs which are difficult or impossible to manage. Communications service provider companies need to support hundreds of thousands of registered users making flexible queries against billions of transactions (CDRs) per month in a high-performance always-on environment.

Because of this:

- Internal CD or data warehouse services are expensive to maintain.
- Poor end customer relative satisfaction negatively impacts retention and new customer acquisition.
- Third party tools required to manage and analyze the data.
- Data is available in monthly silos rather than available over many billing periods.
- Business structure support is limited and often does not have historical versioning.

Siebel's Billing Analytics solution is optimized for Web based reporting and hierarchy structure management for telecommunications service provider's business customers to analyze and understand their communication costs and usage by investigating trends and patterns across multiple views of their unique organizations.

Billing Analytics delivers the following benefits to a telecommunications service provider:

- Reduce Costs
 - Eliminate the cost for preparation and distribution of custom CD's containing a business customer's billing summaries, details, and embedded analysis tools.

- Eliminate home grown or proprietary data warehousing solutions which may be extremely complex and expensive to build and maintain.
- Increase Customer Retention
 - Increase customer satisfaction through enhanced services.
 - Create a barrier to churn by providing customized business hierarchies that reflect their organizational structure and are loaded and maintained online. The easy-to-use web based UI allows access to a larger number of users to better manage usage and costs across an organization.
- Increase Revenue
 - Attract new customers with competitive differentiator. Online analytics are now typical expectations to acquire and maintain high-value business customers.
 - Incentive to acquire greater percentage of customer's telecommunications service purchases because the customer can use Communications Billing Analytics as their preferred tool for a consolidated view of al of their telecommunications service usage and costs.
 - Platform on which to up-sell new value added services by offering stepped pricing to a customer based on how much of Communications Billing Analytics functionality is being accessed.

The application delivers the following benefits to a telecommunication service provider's business customers:

Reduced Costs.

B2B customers will decrease the time it takes to distribute, review, and analyze their Communications service invoices.

More Robust Analysis Tools to Confirm Appropriateness of Services and Usage

B2B customers will be able to easily analyze how they are using telecommunications services by looking for exceptions and anomalies. In additions to giving them comfort against billing errors or personal use infractions, they will be able to consolidate and slice the data differently to assess whether they have the most cost-effective plans for their usage.

Book Cost Accounting Entries

Communications Billing Analytics allows you to perform complex cost allocations in order to book internal accounting entries.

Application Overview

Siebel's Communications Billing Analytics is the result of significant experience with our customers in deploying the largest and most complex telecommunications reporting applications in the industry.

Key differentiators are:

- Versioned Hierarchy: B2B reporting and analytics depends on a company's ability to make informed decisions over time. The hierarchy manager keeps historical versions of hierarchy such that all reports either for a single period, aggregated across periods, or trended over several periods are accurate based on the hierarchy structure for that period.
- Improved Scalability and Performance: Significant improvements have been made in the underlying data schema building upon the success of our first generation CBA product. These include improved data loading times, improved table partitioning, and improved management of aggregates and summarization points for better report performance with large data volumes.
- Adoption of an "Open Standards" Based Architecture: Prior versions of CBA relied upon complex XML templates for report definition, and did not offer optimal separation between business logic and presentation logic. The new release of CBA relies upon the open standards-based Apache Velocity template engine for report design, and Jakarta Struts and Tiles for the presentation layer architecture.
- **Faster Deployment Times:** The average time required to design, develop, and test custom reports has been reduced by a factor of 40% by virtue of utilizing a better defined report development approach, and improved separation between presentation, business logic, and data tiers.
- Improved Personal Report Customization: The ability for end users to create and save their own reports has been overhauled – streamlining the process and improving the available flexibility.
- Improved Internationalization: Support for multiple languages has been overhauled and further streamlined. CBA supports Unicode UFT-8 character encoding throughout the application. All language-specific code is bundled and can be easily translated without modifying the presentation layer. This feature dramatically reduces implementation times for multiple language deployments.

About Customer Self-Service and Siebel Tools

Siebel's Self-Service for Communications includes every application that communications service providers need to enable a complete online customer-Self-Service experience at their Web site. The suite includes software applications for:

- e-Billing and Payment
- Service and Order Management
- Point-of-Sale
- Reporting and Analytics
- Rate Plan Advice

Siebel's Self-Service applications for the telecommunications industry combine Siebel's unrivaled Customer Self-Service and e-Billing software suite with its extensive industry domain expertise. The packaged, out-of-the-box applications are tailored to solve communications service providers' distinct business problems and to meet communications industry-specific process requirements.

Siebel's Self-Service for Communications includes:

Communications Billing Manager

Communications Billing Manager is a complete e-billing application for communications service providers that gives business and consumer customers valuable and convenient access to their communications bills along with the ability to easily make online payments.

Communications Self-Service Manager

Communications Self-Service Manager enables customers of communications service providers to manage every aspect of their service relationship online. From a single convenient interface, customers can easily activate and manage subscriptions, change rate plans and features, and modify subscriber profile settings. Business customers are able to complete these activities for individual employees, as well as company departments and divisions, across their entire organization.

Communications Billing Analytics

Communications Billing Analytics is a reporting solution for business customers. It empowers both individual employees and business managers to analyze and understand their communications costs and usage by investigating and identifying trends and patterns across multiple views of their own unique organization.

Rate Plan Advisor

Rate Plan Advisor is a Web-based application that recommends the ideal rate plan for communications subscribers in real-time. Individual consumers as well as large businesses can analyze their actual historical voice/mobile/data usage, find the best-fit rate plans, and compare the features offered by those plans. With its intuitive wizard user interface, Rate Plan Advisor quickly guides end-customers or customer service representatives through the entire analysis process. In addition, a service provider's customer care and marketing groups can also use Rate Plan Advisor to identify pre-churn subscribers, simulate new rate plans, and run predictive analytics.

Browser Requirements

The CBA user interface is compatible with the following Windows-based browsers:

- IE 6.X and above
- Netscape 7.2 and above
- Firefox 0.9

2 Business Processes and Application Logic

Hierarchy Basics

Small to Medium Enterprise (SME) and Large Enterprise (LE) B2B customers typically receive multiple invoices from their service provider for the many services that are consumed, budgeted, paid, approved, and managed by different individuals throughout the organization.

Organizations are also very dynamic. Service contracts are added and removed each month and companies often reorganize for any number of reasons. Reports, especially those run against historical data or run as a trending report over several billing periods need to be sensitive to these changes to provide the most accurate reports possible.

In addition, B2B customers have traditionally received unwieldy stacks of printed bills or sent CDs containing the invoice summaries and usage record details which are often very difficult to manage using desktop software applications. Information provided to the customer in this form is also difficult to share or distribute throughout the organization in a timely manner. B2B customers in all verticals, but especially in Telecommunication companies, need to support hundreds of thousands of registered users with N-levels of hierarchy making flexible queries against billions call data records (CDRs) per month.

If an application fails to meet these requirements, it can result in:

- Internal hierarchy management, security and access control mechanisms, and data warehouse services are expensive to maintain.
- Inaccuracies in reports and structures may lead to unexpected results inhibiting effective decision support.
- Poor end customer user experience negatively impacts retention and new customer acquisition.

Siebel Self-Service develops an online hierarchy module that is seamlessly integrates across the company's billing, payment, analytics, and self service applications optimized for granting user access through a roles based access control security mechanism for managing and understanding the charges and usage information by modeling the complexity and tracking the changes to an organization's business structure and consolidating billing and payment information into an easy-to-use dashboard interface

This section provides a high level overview of hierarchy, defines how it impacts Billing Analytics, and delineates the hierarchy business requirements being fulfilled by Billing Analytics and by other systems (such as the Siebel hierarchy module or an external hierarchy system of record).

Overview

By creating different hierarchies, the user can define multiple views of the information in their invoices, such as by department, location, cost center, or any combination of different groupings the user wishes to assemble. These custom hierarchies are available to Communications Billing Analytics to enable a number of filter, subtotal, drilldown, and report access requirements described later in this document.

Within a named hierarchy, no node can have more than one parent within that named hierarchy. Also, the bottom leaves of the hierarchy must be unique within the hierarchy.

Hierarchy Types

Billing Hierarchies

Billing hierarchies are created automatically at the time the billing data is loaded. For instance, a simple billing hierarchy might include only three levels: company, account and service agreement (a service agreement is usually a contract or phone number in telecommunications). A complex billing hierarchy could contain an unlimited number of hierarchy objects above the account (such as divisions or corporate identifiers) or below the service agreements such as a charge types associated with a phone.

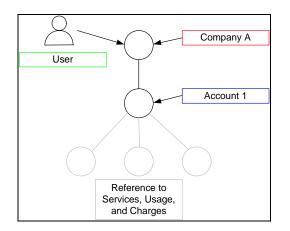


Figure 1 - Simple Billing Hierarchy

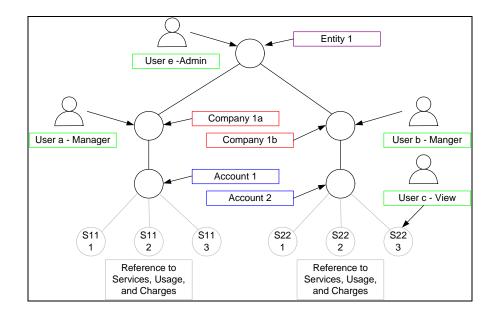


Figure 2 - Typical (Complex) Billing Hierarchy

Business Hierarchies

A user can create an unlimited number of Business Hierarchies in order to organize and view its usage and cost information differently (location, department, cost center, etc.). All bottom nodes of the Organization hierarchy must link to a node in a Billing hierarchy, such as service agreement, in order to contain any meaningful usage or cost information.

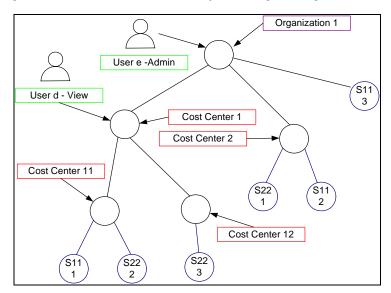


Figure 3 - Business (Organizational) Hierarchy

Enabled Functionality

The existence of these hierarchies enables the following Communications Billing Analytics functionality.

- **Report Scope**: The report scope is determined by the current hierarchy context. The context is specified by the Hierarchy Type (Billing or Business), the node within the named hierarchy selected and the reporting period to determine which version of the hierarchy to be reported on.
- Change Hierarchy Context: The hierarchy context may be changed by selecting a different hierarchy or different node within a hierarchy, or selecting a different period, or by drilling down through links in the report.
- Report List Filter: The user only sees reports in the report list that are relevant to both the selected hierarchy and the current position of the user within the hierarchy context. For example, if a user's current position is at the account level in the hierarchy, the user will not have the option to select a report whose rows are groups (for example, Group Spending Report), which would be a level above the for example, PS Department) that does not have an account level, the user will not see reports whose rows are accounts (Account Billing Detail Report).

- **Drilldown**: The user can interactively drill down from a parent node subtotal into the child nodes details. Knowing whether a particular child node level exists in the selected hierarchy dictates whether the drilldown is possible (e.g. a user should not be able to drilldown from a group report to an account report if the selected hierarchy links groups to sub-accounts bypassing the account level).
- Versioning: CBA reports that span multiple reporting periods (both trend and non-trend reports) use the hierarchy version which corresponds to the reporting periods selected to accurately represent the totals at that point in time.
- Reporting Attributes: If Communications Billing Analytics reports need to contain attribute values for different nodes within the hierarchy, CBA can include these values. The hierarchy module enables the creation of user defined attributes at different levels in the hierarchy and the creation and maintenance of values for these attributes, such as a budget value to be used in reports that just display exception budget variances.

Note: This same synchronization dependency may exist for any other data required in the XAD that is maintained in another systems (for example, Personal Address Book, Corporate Address Book, User Profile Information, etc.).

Hierarchy Actions – Within Communications Billing Analytics

Beyond reporting on the hierarchy data, the Communications Billing Analytics application provides the following hierarchy actions.

Synchronize Hierarchy Data: Whenever changes are made to any hierarchies, an interface is required to make those same changes within the CBA XAD OLAP (eXtensible Analytics Data mart) so that the CBA hierarchy data is always synchronized with those external OLTP systems (Siebel or others) that maintain it.

Hierarchy synchronizer maintains coherency between the OLTP and OLAP databases. The OLTP database (transaction processing) is where all of the modifications to hierarchy structures and object attributes are made. The OLAP database (analytics processing) database is where the reports are run based on the current hierarchy context. When changes to the hierarchy structure are made in the hierarchy management screens the data is written to the OLTP database. In the background these changes are updated in the OLAP database. This allows the user to change the hierarchy in one screen and then immediately in real-time see the changes in the analytics reports. The user never sees the synchronizer work but it is a powerful tool to create a seamless and flexible environment.

Note: This same synchronization dependency may exist for any other data required in the XAD that is maintained in another systems (for example, Personal Address Book, Corporate Address Book, User Profile Information, etc.).

Report Click-Through Basics

To create a flexible interactive experience for the end user many of the reports have been designed so that the user can click on the tabular report to run another report with the report query parameters set to those of the previous report plus a selection for what the user has clicked on. This experience creates an interactive experience allowing the user to "slice and dice" the data.

Any click-through experiences are listed as alternative paths on the report from which the user clicks through.

There are a number of different types of click-through actions described below:

Drilldown – Same Report

The user clicks on a hyperlink value on one of the rows of a report. The hierarchy context position is changed to the group on which the user clicks and the report is run again to show detail behind a summary number on a report.

Drilldown - Different Report

The user clicks on a hyperlink value on one of the rows of a report. The hierarchy context position is changed to that of the hierarchy object on which the user clicked and the relevant report with the detail just under the object is run.

This shows the detail behind a summary number on a report. If a row displayed on a report has no child objects of the same type below it (such as any level in the billing hierarchy or the lowest node in a group hierarchy before it is related to a billing hierarchy object), the user must run a different report in order to see the more detailed records behind the values on the row (such as clicking through a Service Summary Report to an Call Detail Report).

Trend - Drilldown

The user clicks on a hyperlink "T" at the end of a row on a report. The hierarchy context position is changed to the object of the row on which the user clicked and the relevant trend report is run with all the same report parameters from the report that just ran.

If a user identifies an anomalous value on a multi-period report, they can quickly run a trend report to see if the value was particularly high or low during one particular period or was trending in a manner they did not expect.

Trend – Same Level

The user clicks on a hyperlink "T" on the total at the bottom of a page. The relevant trend report is run with the same hierarchy position context and report parameters for the report just run.

If the user suspects an anomaly or unusual trend, a trend report can be run for total value of all rows without having to pick one of the rows to drilldown into more detail. With this approach the user could identify a period that was out of line and then drilldown into that period to determine where the anomaly existed.

More Detail

In the case of the Billing Account Overview Report, the user may wish to display a different report (Billing Account Detail Report) with all the same query parameters and hierarchy position context. This type of click-through is useful when the user wishes to see different columns for all the same rows.

The following diagram uses the department group hierarchy from the above hierarchy section (Key Concepts) and is intended to describe how the user can launch new reports by clicking on drilldown hyperlinks and trend icons. More importantly, it illustrates how the standard reports are related to each other and how changing the hierarchy position context is critical to creating this "slice and dice" experience.

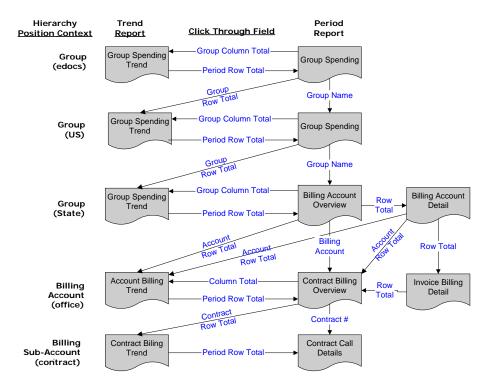


Figure 4 - Report Drilldown Illustration

Reporting Period versus Billing Period

Since many B2B customers have multiple billing accounts and the billing date is often different for each account the reporting period has been developed to allow the aggregation and reporting across billing accounts within a single reporting period context. In order to explain this statement, a couple terms and concepts need to be described:

Definitions:

Billing Period: The interval during which a telecommunications service provider accumulates a specific customer's account usage details and related charges, and presents them in an invoice or statement requesting payment.

Bill Period End Date: The last day of the billing period, typically the day prior to the cycle processing date.

Reporting Period: Defined by the telecommunications service provider as the interval during which cost and usage detail and summary information is accumulated for reporting purposes. The telecommunications service provider can choose any interval, however this is typically specified as calendar months, which is equivalent to the frequency with which the company prepares and sends out invoices. The service provider's implementation needs to include the creation of a table (or some mechanism) that defines for each reporting period a name (for example, Jan, Feb, Mar...) a start date and an end date.

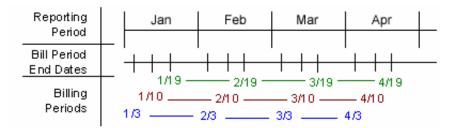


Figure 5 - Reporting Period Illustration

Application of Reporting Period

Selection Criteria and Customize: For any report that aggregates Call Detail Record information, the user can change the Period Range "From" and "To" query parameters to modify the scope of records that are returned to the report by selecting each reporting period name and year.

Example: if the user selected January 2005 to March 2005, the system would check the start date of the "From" reporting period and the end date of the "To" reporting period in order to determine which bills would be selected for the report. Only bills in which the Bill Period End Date falls between 1/1/05 and 3/31/05 would be selected to appear on the report. Note: The bill period start date does not impact the records returned to the report.

Rationale: By only querying against the Bill Period End Date, CBA eliminates the complexity of reporting on less than 100% of an invoice and having to prorate invoice level charges since those charges only apply to complete invoice statements. Fixed reporting periods also increases the implementation opportunities to quickly retrieve summary values.

For reports against the Call Detail Records, the applicable "From" / "To" ranges can be explicit calendar dates rather than Reporting Periods (typically seen in Find Calls Report). *Rationale:* Allows the user the ability to narrow the scope of a report to the specific date range of interest as in searching for a specific charge.

Trend Reports: When charting a trend report, the width of each bar (the interval of charted time based subtotals) will be the duration of each reporting period. *Rationale:* Simplicity of presentation and assumed performance improvement if subtotals are always across the same reporting period interval.

Example: B2B Multi-Account Customer

Each B2B customer has three accounts and is identified by a color: Purple, Rose, and Orange. These accounts are processed on different cycles: 6, 12, and 18 respectively. The 6th cycle always starts on the 8th of the month, the 12th starts on the 16th, and the 18th starts on the 24th. Billing data is grouped into a reporting period based on the billing period end date. The following table and calendar show three months of billing and maintenance activity.

Account	Billing Cycle	Bill Period Start	Bill Period End	Reporting Period
А	6	8-Jan	7-Feb	February
В	12	16-Jan	15-Feb	February
С	18	24-Jan	23-Feb	February
А	6	8-Feb	7-Mar	March
В	12	16-Feb	15-Mar	March
С	18	24-Feb	23-Mar	March
А	6	8-Mar	7-Apr	April
В	12	16-Mar	15-Apr	April
С	18	24-Mar	23-Apr	April

Table 1 - Billing Cycle Definition and Reporting Period

Each cell in the following calendar shows the date (black number), the customer billing cycle start (cell color and account letter below the date), and the day of the billing cycle for that month (red number) or maintenance (grey M).

Sune	day	Mon	day	Tue	sday	We	∋d	Thurs	sday	Fri	day	Satu	Irday
26		27		28		29		30		31		1	JAN 1
2		3		4	_	5		6		7		8	
	2		3		4		5		Μ		Μ	Α	
9		10		11		12		13		14		15	
	7		8		9		10		Μ		Μ		11
16		17	10	18		19	4.5	20		21	B. 4	22	4.0
B		04	13	05	14	00	15	07	Μ	00	M	00	16
23	17	24	18	25	19	26	20	27	M	28	М	29	Μ
30	17	<u>с</u> 31	10	1		2	20	3	IVI	4	IVI	5	IVI
30	Μ	51	Μ	•	FEB 1	2	2	3	3	4	4	5	5
6	IVI	7	IVI	8	-	9		10	0	11		12	
•	Μ	-	Μ	A	6	•	7		8	••	9		10
13		14		15		16		17		18		19	
	Μ		Μ		11	В			13		14		15
20		21		22		23		24		25		26	
	Μ		Μ		16		17	С	18		19		20
27		28		1	MAR	2		3		4		5	
	Μ		Μ		1	_	2		3		4		5
6		7		8		9	_	10		11		12	10
40	Μ		Μ	A	6	40	7	47	8	40	9	40	10
13	N.4	14	в.	15	11	16		17	10	18	1 /	19	15
20	Μ	21	Μ	22	11	В 23		24	13	25	14	26	15
20	Μ	21	M	22	16	23	17	24 C	18	23	19	20	20
27	IVI	28	IVI	29	10	30	17	31	10	1	APR	2	20
	Μ	20	Μ	20	Μ		Μ	•	Μ	•	1	_	2
3		4		5		6		7		8		9	
	3		4		5		Μ		Μ	Α			7
10		11		12		13		14		15		16	
	8		9		10		Μ		Μ		11	В	
17		18		19		20		21		22		23	
	13		14		15		Μ		Μ		16		17

 Table 2 - Calendar showing Date, Billing Cycle Number, and Maintenance Days

Application of Reporting Period

Selection Criteria and Customize: For any report that aggregates Call Detail Record information, the user can change the Period Range "From" and "To" query parameters (for example, Dec '03 to Feb '04) to modify the scope of records that are returned to the report by selecting each reporting period name and year.

Example: If the user selects 2003 Dec to 2004 Feb, the system checks the start date of the "From" reporting period and the end date of the "To" reporting period in order to determine which invoice data to select for the report. Only invoice data in which the Bill Period End Date falls between 12/1/03 and 2/29/04 are selected to appear on the report. Note: The bill period start date does not impact the records returned to the report.

Rationale: By only querying against the Bill Period End Date, Communications Billing Analytics eliminates the complexity of reporting on less than 100% of an invoice and having to prorate invoice level charges. Fixed reporting periods also increases the implementation opportunities to quickly retrieve summary values.

Trend Reports: When charting a trend report, the width of each bar (the interval of charted time based subtotals) will be the duration of each reporting period.

Versioned Hierarchy

The billing structure is constantly changing due to the addition or removal of services within an account. Business structures often change as a result of shifts in responsibility within an organization. These changes can create inaccuracies that may have been inadvertently introduced into the effective dated hierarchies.

The following complications may arise:

- 1 When running a report that includes historical billing data, a customer would expect the report to use the hierarchy that was effective at that time.
- 2 When running a trend report containing the totals from several reporting periods, each reporting period should reflect the charges and the hierarchical structure that was effective at each point in time.
- **3** Customers expect to see their report results with a minimal amount of latency which creates implementation challenges to achieving this objective.

These complications can result in:

- 1 Customers become confused, spend time reconciling reports to hierarchy changes, and doubt the integrity of the application.
- 2 Long report result latency resulting in constant batch reporting.
- 3 All reports must be run as stored online or downloaded to preserve their integrity over time creating a storage and file management burden.

Siebel provides a solution by using versioned Hierarchies that maintain multiple instances of each hierarchy within the system including all billing and non-billing hierarchies. Each instance of the hierarchy corresponds to an effective dated reporting period. Each effective dated hierarchy is a snapshot of the structures in the billing data or a snapshot of organizational structures over time.

Each month's series of bill file loads, import updates, and manual modifications are collected into an effective dated hierarchy for the current month. On the first of each month the current month's hierarchy is stored and a copied for the next month's changes. This provides a hierarchical history on a monthly basis. A user may specify a previous month's hierarchy to make changes to historical effective dated hierarchies. The most recent version of the hierarchy for the current reporting period is used as a default.

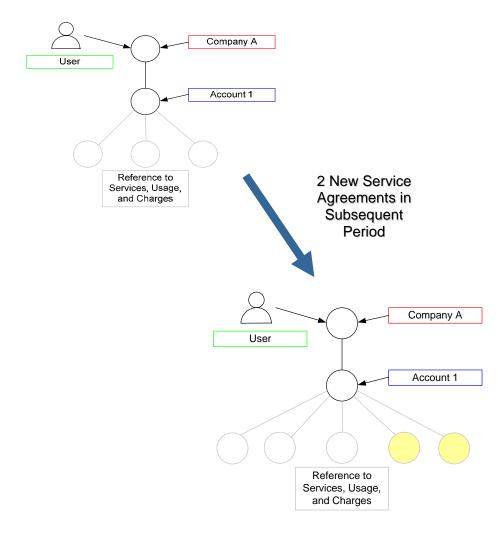
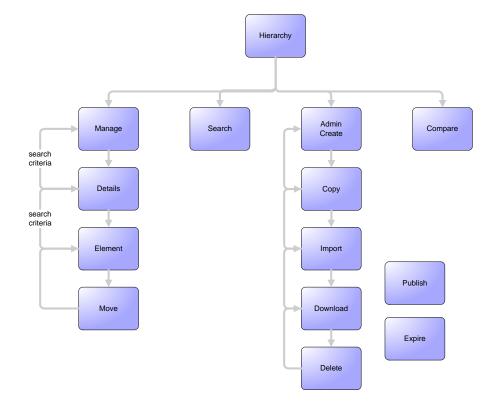
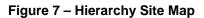


Figure 6 - Versioned Hierarchy Illustration

Hierarchy Site Map

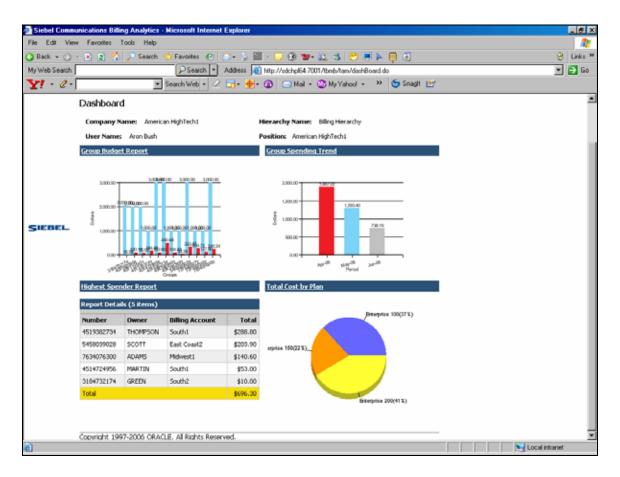






General Billing Manager Use Cases

Dashboard



Dashboard

Name:	View Dashboard
Brief Description:	This is a high-level view of the company's health. The Dashboard displays summary-level information in the following areas:
	1. Total Budget vs. Total Spend by Group
	2. Budget vs. Spend Trend
	3. Top Spenders List
	4. Total Cost by Plan
Entry Points:	This is the first page the user will see after logging in under the Analytics Tab under the Overview Sub Tab. You can also get to the Dashboard after you set your position in the Hierarchy or Billing tabs.
Primary Actor:	All Users. The type of content varies depending on the Hierarchy Position and Role. Admin User has the maximum access. (see below)
Query Parameters:	Depending on the User Context, such as user role and hierarchy position, a different set of reports would be shown. The user can also select a period from the drop down, such as quarter or year.
	 a. If the User is in a Billing Root the Dashboard would show a set of charts pertaining to the Accounts in this Billing Hierarchy
	 b. If the User is in a Billing Hierarchy-Account, then the Dashboard would show a set of charts pertaining to the Services (contracts) of that Account
	 If a User is in a Billing Hierarchy-Service, then the Dashboard would show a set of charts pertaining to the Service
	 If a User is in a Business Hierarchy Root (Group), then the Dashboard would show a set of charts pertaining to the Services or Sub Groups of that Root Group
	 e. If a User is in a Business Hierarchy Sub Group, then the Dashboard would show a set of charts pertaining to the Services of this Sub Group
	 If a User is in a Business Hierarchy-Service, then the Dashboard would show a set of charts pertaining to the Service
Report Content:	The Dashboard Report has four subsections. The user can select the period for which to show the content.
	1) Total Budget vs. Total Spend
	2) Budget vs. Spend Trend
	3) Top Spenders List
	4) Total Cost By Plan
Charts:	a) Budget vs. Spend Trend Chart
	b) Total Budget vs. Total Spend Chart
	c) Total Cost By Plan

Main Path:	 User runs the View Dashboard operation by selecting the Analytics Tab and then the Overview sub tab.
	2. System Displays the Dashboard with the following six components:
	a) Total Spend vs. Total Budget
	This report displays the Total Spend vs. Budget for each particular Sub Group (if you are in a Business Hierarchy) and Contract (If you are in a Billing Hierarchy) depending on the hierarchy context. If a User drills down into this report user will be taken to another more detailed report that shows more information at a sub group level.
	Group Budget Tracking (7000)
	Contract Budget Tracking (8000)
	b) Budget vs. Spend Trend.
	This report will display the Cumulative Budget and Spend for each month in a particular Quarter or Year (selected by user) for that particular Hierarchy Context.
	c) Top Spender List
	This report shows the top 10 Groups or Contracts in terms of Spend for the current period selected by the user sorted in descending order. User may click on this chart to go to a more detailed report. Depending on the user position in the hierarchy, this report will take you to the:
	Top Spender Groups OR
	Top Spender Accounts OR
	Top Spender Contracts
	d) Total Cost By Plan
	This report is an existing report. This report shows the breakdown of the plan types we have for this Hierarchy Position. This report can also be viewed by going directly to the Billing Tab.
	3. Use Case ends
Alternate Paths:	
Exception Paths:	User encounters a system error:
	System invokes <u>Error Message</u> use case if a user requests data for a period that does not exist
Business Rules:	Depending on the User Context (such as user role and hierarchy position), a different set of reports would be shown. The user can also select a reporting period from the drop down, such as quarter or year.
	 If the User is in a Billing Root the Dashboard would show a set of charts pertaining to the Accounts in this Billing Hierarchy
	b. If the User is in a Billing Hierarchy-Account, then the

	Dashboard would show a set of charts pertaining to the Services (contracts) of that Account
	c. If a User is in a Billing Hierarchy-Service, then the Dashboard would show a set of charts pertaining to the Service
	 If a User is in a Business Hierarchy Root (Group), then the Dashboard would show a set of charts pertaining to the Services or Sub Groups of that Root Group
	 e. If a User is in a Business Hierarchy Sub Group, then the Dashboard would show a set of charts pertaining to the Services of this Sub Group
	f. If a User is in a Business Hierarchy-Service, then the Dashboard would show a set of charts pertaining to the Service
Notes:	

View List of Standard Reports

Name:	List of Reports	
Brief Description:	User views a list of standard and custom reports.	
	<u>Rationale:</u> Screen for viewing only those standard reports relevant to the user's hierarchy position, to modify common query parameters before launching a report, and to edit and delete custom reports.	
Entry Points:	1. Analytics Tab [Default: Billing Reports"]	
	a. Billing Reports Tab	
	b. Top X Reports	
Query Parameters	Report Tab	
	1. Hierarchy Name & Position [Default: "Current Context"]	
Report Content	List of Custom Reports	
	[User defined custom reports listed in alphabetical order]	
	<u>Fields</u>	
	1. Description	
	2. Last Modified (Custom Reports only)	
	3. Actions (Custom Reports only)	
Chart	None	

Name:	List of Reports
Main Path:	 User selects Billing Reports or Top X Reports tab. System returns List of Reports including: List of Standard Reports that are valid for the current context. List of [user defined] Custom Reports. User selects a standard report name. System determines query parameters based on report context or defaults and generates report and displays the result to the user. Use case ends
Alternate Paths:	 [A1] User selects the custom report sub-tab: System displays the report customization page for the current report (see customize report use case). [A2] User selects the batch report sub-tab: [A3] System displays the batch report management page (see batch report use case).
Exception Paths:	[E1] User encounters a system error: 1. System invokes <u>Error Message</u> use case.
Business Rules:	 [B1] The List of Reports displayed dependent upon which tab is selected, Billing Reports or Top X Reports, [B2] The user should only see reports in the report list that are relevant to both the selected hierarchy and the current position of the user within the hierarchy context. For example (using hierarchy examples from the Key Concepts section), if a user's current position is at the account level in the hierarchy, the user should not have the option to select a report whose rows are groups (e.g. Group Spending Report), which would be a level above the account. Also if the user's position is at the group level for a selected hierarchy (e.g. PS Department) that does not have an account level, the user would not see reports whose rows are accounts (Account Billing Detail Report).
Notes:	None

telcomanager			Help Contact Us Change Language Log Out
	My Account Statements	Payments Analytics	Self Service
	Overview Hierarchy Billing	Top X Usage	
	Billing Reports		
	Company Name: EDOCS		Hierarchy Name: Billing Hierarchy
	User Name: John Smith		Position: EDOCS
	Report List Batch Repo	rt List	
	Standard Reports		
	Description		
	Account Billing Overview		
	Account Billing Details		
	Account Billing Trend		
	Invoice Billing Details		
	Group Spending		
	Group Spending Trend		
	Contract Billing Overview		
	Contract Billing Trend		
	<u>Contract Call Details</u>		
	<u>Total Cost by Plan</u>		
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Sample Format of List of Reports

View List of Custom Reports

Name:	List of Custom Reports	
Brief Description:	User views a list of standard and custom reports.	
	<u>Rationale:</u> Screen in which to view only those standard reports relevant to the user's hierarchy position, to modify common query parameters before launching a report, and to edit and delete custom reports.	
Entry Points:	a. Analytics Tab [Default: Billing Reports]	
	b. Billing Reports Tab	
	c. Top X Reports	
Query Parameters	Report Tab	
	1. Hierarchy Name & Position [Default: "Current Context"]	
	2. Period Range [Default: "current context"]	
	User selects a start and end reporting period from two dropdown boxes.	

Name:	List of Custom Reports
Report Content	List of Custom Reports [User defined custom reports listed in alphabetical order] Fields 1. Description 2. Last Modified (Custom Reports only) 3. Actions (Custom Reports only)
Chart	None
Main Path:	 User selects Billing Reports or Top X Reports tab. System returns List of Standard Reports including: a. List of Standard Reports that are valid for the current context b. User selects the custom report sub-tab. System returns a List of Custom Reports saved by the user. User selects a custom report from the list. System determines query parameters based on report context or defaults and generates report and displays the result to the user. Use case ends
Alternate Paths:	 [A1] User selects Edit action on a custom report: System displays the saved report parameters. User modifies the report parameters and saves the report. System saves the updated parameters and returns to the List of Reports page. [A2] User selects Delete action on a custom report: System displays a confirmation page for the delete action. User confirms the action by selecting the Delete action. System deletes the custom report and returns to the List of Reports page. [A3] Reports Suppressed from the list: The user should only see reports in the report list that are relevant to both the selected hierarchy and the current position of the user within the hierarchy context. For example (using hierarchy examples from the Key Concepts section), if a user's current position is at the account level in the hierarchy, the user should not have the option to select a report whose rows are groups (e.g. Group Spending Report), which would be a level above the account.

Name:	List of Custom Reports
Exception Paths:	 [E1] User encounters a system error: 1. System invokes <u>Error Message</u> use case.
Business Rules:	[E1] The List of Reports displayed and content are dependent upon which tab is selected: Billing Reports or Top X Reports.
Notes:	None

View List of Batch Reports

Name:	List of Batch Reports	
Brief Description:	User views a list of batch reports.	
	Rationale: Screen in which to view only those standard and custom reports relevant to the user's hierarchy position, to modify common query parameters before launching a report, and to edit and delete custom reports.	
Entry Points:	a. Analytics Tab [Default: Billing Reports]b. Billing Reports Tabc. Top X Reports	
Query Parameters	None.	
Report Content	List of Standard Batch Reports	
	1. Reports Completed	
	2. Reports Pending	
Chart	None	
Main Path:	1. User selects Billing Reports or Top X Reports tab.	
	2. System returns List of Reports including:	
	a. List of Standard Reports that are valid for the current context	
	3. User selects a standard report name.	
	4. System determines query parameters based on report context or defaults and generates report and displays the result to the user.	
	5. Use case ends	

Name:	List of Batch Reports
Alternate Paths:	[A1] User selects a custom report name:1. System displays the details of the report using the report parameters saved for the report.
	 [A2] User selects Edit action on a custom report: 1. System displays the saved report parameters. 2. User modifies the report parameters and saves the report. 3. System saves the updated parameters and returns to the List of Reports page.
	 [A3] User selects Delete action on a custom report: 1. System displays a confirmation page for the delete action. User confirms the action by selecting the Delete action. System deletes the custom report and returns to the List of Reports page.
	[A4] Reports Suppressed from the list.1. The user should only see reports in the report list that are relevant to both the selected hierarchy and the current position of the user within the hierarchy context.
	For example (using hierarchy examples from the Key Concepts section), if a user's current position is at the account level in the hierarchy, the user should not have the option to select a report whose rows are groups (e.g. Group Spending Report), which would be a level above the account.
	Also if the user's position is at the group level for a selected hierarchy (e.g. PS Department) that does not have an account level, the user would not see reports whose rows are accounts (Account Billing Detail Report).
Exception Paths:	 [E1] User encounters a system error: 1. System invokes <u>Error Message</u> use case.
Business Rules:	[B1] The List of Reports displayed and content are dependent upon which tab is selected: Billing Reports or Top X Reports.
	[E2] If there are no user defined custom reports, the module will not be displayed.
	[E3] If the last custom report on the list is deleted, the Custom Reports module will be suppressed. System will suppress the display of UI modules where no data exists.
Notes:	None

Navigate Hierarchy

Name:	Navigate Hierarchy		
Brief Description:	User selects the name of the hierarchy, navigates its nodes, and selects a new position to be used on all subsequent reports.		
	<i>Rationale</i> : Change the scope of the records returned on a report and the names of the available reports displayed on a report list.		
Main Path:	1. User selects the Hierarchy sub tab.		
	2. System invokes the hierarchy module		
	3. User lands on the manage hierarchy screen with the default or current hierarchy and position displayed		
	4. User selects a new hierarchy context by selecting a new position in the current hierarchy, changes the current hierarchy, or edits the current hierarchy.		
	 System automatically sets and persists the new hierarchy context in the session for use by Analytics or other Communications Suite Applications. 		
	 User selects one of the report category sub tabs such as Billing, Top X, or Usage 		
	7. System invokes the appropriate report list use case.		
	8. Use Case Ends.		
Alternate Paths:	None.		
Exception Paths:	 [E1] User encounters a system error: 1. System invokes Error Message use case. 		
Business Rules:	None.		
Notes:	None		

Change Selection Criteria

Name:	Change Selection Criteria
Brief Description:	User changes the query parameters in the Report tab to alter a report and update the report context for all reports.
Entry Points	 Any Report Any Report List
Query Parameters	 Period Range Date Range Number of Results [Default: 10] Dropdown box of values [10, 25, 50, 100] Call Type Usage Type Report (see the Customize a Report use case for definitions of the above fields)
Report Content	N/A
Chart	N/A
Main Path:	 User selects Report Tab from any report Values for the report context for all reports are displayed. The user changes one of the values. User selects display button to create report with the new values. Report context is updated with the most recently selected values.
Alternate Paths:	 [A1] Click from Report List The entry point of the use case is a Report List screen rather than a Report screen. Identical path except there is no display button. The display action from the basic path is initiated when the user clicks on a report in the list. [A2] User selects a different report from the Report dropdown box <u>Rationale</u>: User can quickly run another report without having to go to the Report List 1. User selects the "Report" dropdown field which displays the list standard and custom reports that display on the Report List page for this section of the menu (e.g. Billing Reports, Top X Reports, etc.) User selects a report and the Display action. The same report is run as if the user selected the report list screen and then selected the same report.
Exception Paths:	None
Business Rules:	

Name:	Change Selection Criteria
Notes:	None

telcomanage	r 🖊		Help	o Contact Us	Change Lar	nguage Log Out	
_				_			
	My Account			rvice			
	Overview I	Hierarchy Billing Top X	Usage				
	Contract Billing Overview						
	Company M	Name: EDOCS	Hierar	Hierarchy Name: Billing Hierarchy			
	User Name: John Smith		Positio	Position: EDOCS			
	Report	Customize Batch R	equest	DC	WNLOAD	PRINTER FRIENDLY	
	incport in	ous connect () Battern to	cquest				
	Period Rang	ge: From: Ap	r 2004 💌 🛛 To: Apr 200	4 -			
	Billing Repo	Contract I	Billing Overview 💌				
						SUBMIT	
						Page 1 of 4 ▶₩	
	Report Deta	nils (69 items)				Page II 01 4 PM	
	Number	Owner	Billing Account	Charges	Taxes	Total	
	3212981610	JOEY JENNE	Los Angeles	\$14.50	\$3.68	\$18.18 <u>T</u>	
	3212981640	MIKE NICKEL	Los Angeles	\$11.00	\$3.10	\$14.10 <u>T</u>	
SIEBEL.	3212981880	BOBBY LAWLESS	Los Angeles	\$30.25	\$7.35	\$37.60 <u>T</u>	
SIEDEL.	<u>3214801725</u>	SEAN MURPHY	Los Angeles	\$11.50	\$2.43	\$13.93 <u>T</u>	
	3214801773	BILL STRAHLO	Los Angeles	\$19.00	\$5.12	\$24.12 <u>T</u>	
	3214802869	JEFF HARDY	Los Angeles	\$1.50	\$2.05	\$3.55 <u>T</u>	
	3214803014	FRANK TOWN	EDOCS Malaysia	\$23.55	\$7.31	\$30.86 <u>T</u>	
	<u>3214803175</u>	JERRY HOLLAND	Los Angeles	\$1.75	\$2.17	\$3.92 <u>T</u>	
	3214804037	TERRY FORSTON	Los Angeles	\$15.10	\$2.19	\$17.29 <u>T</u>	
	<u>3214804975</u>	TERRY BROPHY	Los Angeles	\$19.31	\$4.10	\$23.41 <u>T</u>	
	3214808225	JAMES POWERS	San Francisco	\$22.23	\$6.53	\$28.76 <u>T</u>	
	<u>3215012888</u>	ERT TEAM	Los Angeles	\$44.63	\$5.37	\$50.00 <u>T</u>	
	3215360329	CLYDE COMBS	Los Angeles	\$43.41	\$7.94	\$51.35 <u>T</u>	
	<u>3215364559</u>	CINDY DRAPCHO	Los Angeles	\$0.00	\$4.55	\$4.55 <u>T</u>	
	3215366179	WES HICKS	Los Angeles	\$0.50	\$1.86	\$2.36 <u>T</u>	
	<u>3215367226</u>	NICK VANVONNO	Los Angeles	\$21.27	\$2.53	\$23.80 <u>T</u>	
	<u>3215369089</u>	MADELYN D PAPINEAU	MADELYN D PAPINEAU	\$31.80	\$4.51	\$36.31 <u> </u>	
	<u>3215369729</u>	REGAN STRADTMANN	Los Angeles	\$0.00	\$2.01	\$2.01 <u>T</u>	
	<u>3215370114</u>	OLGA ODEIDE	Los Angeles	\$9.00	\$1.62	\$10.62 <u>T</u>	
	<u>3215370115</u>	JEFF BATTISTI	Los Angeles	\$26.63	\$2.03	\$28.66 <u>T</u>	
	Total			\$965.04	\$267.70	\$1,232.74 <u>T</u>	
						Page 1 of 4 ▶ ₩	
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Sample Report

Customize a Report

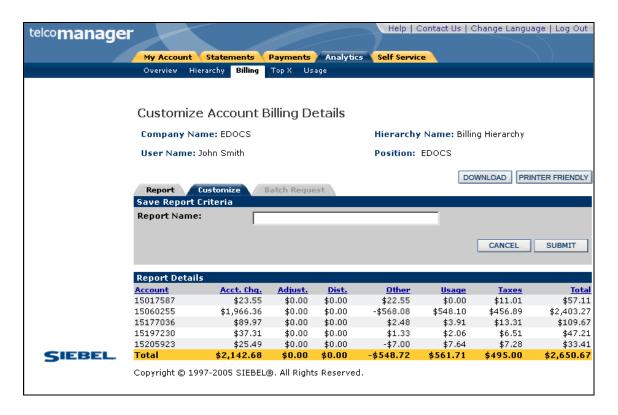
Name:	Customize a Report	
Brief Description:	User creates and saves a custom report and selects the report content.	
	<u>Note:</u> For tracking purposes, this generalized use case is considered complete when one custom report is completed. See each report's alternate path for whether customize functionality has been implemented for that report.	
Entry Points	1. Any Report	
Query Parameters	Report Selection Criteria Common Among Reports	
	 Hierarchy Name & Position [Default: "Current Context" or user's "Default Hierarchy" for start of a session] 	
	<i>Hierarchy Name Rollover Help:</i> "Change the selected hierarchy on which to report." <i>Hierarchy Position Rollover Help:</i> "Change the node location within the selected hierarchy."	
	 Period Range [Default "From": Current context or current reporting period if context not yet set] [Default "To": Current context or current reporting period if context not yet set] 	
	For all reports except Contract Call Details, this dropdown field displays the names and years from the reporting period table maintained by the service provider. See Key Concepts, Reporting Period section.	
	<i>Rollover Help: "</i> Select a beginning and ending reporting period to have the report return invoice information whose bill period end date is within the selected reporting period range."	
	3. Relative Period Range [Default: "none"]	
	This option enables the user to save a custom report that always includes a range of periods ending with the current period.	
	4. Report [Default: Report currently being displayed] This query parameter allows users to select a different report from a dropdown box.	
	Maximum field lengths: Billing Reports: 25, Top X Reports: 40	
	 Usage Type [Default: all] This query parameter is only available on Contract Call Details. 	
	6. <u>Specific Reports</u> All possible fields have been defined here in one place even though a subset of them is included in each report. See the report use case "Query Parameters" for the fields included in that report.	
	Report specific customizable fields based upon defaults or user specified report fields.	

Name:	Customize a Report		
	 Account Charges [Default: All] Adjustments [Default: All] Billing Account [Default: All] Called Number [Default: All] Charges [Default: All] Charges [Default: All] Countries [Default: All] Countries [Default: All] Destination [Default: All] Discounts [Default: All] Discounts [Default: All] Discounts [Default: All] Duration [Default: All] Group [Default: All] Group [Default: All] Invoice [Default: All] Invoice [Default: All] Number of Calls [Default: All] Number of Calls [Default: All] Other Charges/Credits [Default: All] Owner [Default: All] Taxes [Default: all] Taxes [Default: all] 		
Report Content	20. Total [Default: all] Fields		
	Report specific.		
Chart	N/A		
Main Path:	 User selects the Customize tab. System returns a page allowing User to build a custom report by specifying any or all of the current report's parameters. User specifies report parameters and selects Create action. System displays Customize Report results page containing details for the customized report. User optionally enters a report name and selects Save action to save the customized report. System displays confirmation page. User selects Save action to confirm. System saves the report parameters and displays the saved report name on appropriate List of Reports page. Report page is displayed with the current custom report Use Case Ends 		

Name:	Customize a Report	
Alternate Paths:	[A1] User selects the Cancel action:	
	1. System invokes <u>Cancel</u> use case.	
	[A2] User Adds Column to Report	
	 User highlights a field (or multiple fields with the control key) from the Available Fields box and selects the Add action: 	
	System checks to make sure there is available width on the report and if there is not warns the user that the action can not be initiated until a field is first removed.	
	 System adds the selected field to the list of Display Fields and removes it from the Available Fields box. 	
	 When the create action is selected, the new field is displayed on the report. 	
	Rationale: User is provided a mechanism to customize report display fields.	
	[A3] User Removes Column from Report	
	 User highlights a field (or multiple fields with the control key) from the Display Fields box and selects the Remove action: 	
	 System removes the selected field from the list of Display Fields and adds it to the Available Fields box. 	
	 When the create action is selected, the new field is not be displayed on the report. 	
Exception Paths:	[E1] User encounters a system error:	
	1. System invokes <u>Error Message</u> use case.	
Business Rules:	[B1] Custom report parameters are based upon some or all of the available columns on the current report and bill period.	
Notes:	None	

telcoman	ager	Help Contact Us Change Language Log Out
	MY ACCOUNT STATMENT	S PAYMENT ANALYTICS SELF SERVICE
	OVERVIEW HIERARCHY	BILLING TOP X COST MANAGEMENT FIND CALLS
	Customize Account B	illing Dotaile
	Customize Account b	lining Details
	Company Name: Dutch Hor	me Insurance Hierarchy Name: Billing Hierarchy
	User Name: Frank Town	Position: Dutch Home Insurance
	REPORT CUSTOMIZE B	ATCH REQUEST
	Please enter criteria for you	r custom report.
	Period Range:	● From: Oct-06 ▼ To: Oct-06 ▼
	Relative Period Range:	O Previous 1 V Reporting Periods
	Account Charges:	Greater Than 💙 10.00 and
SIEBEL.	Usage Charges:	All and and
	Adjustments:	Greater Than
	Discounts:	Equal To
		All v and
	Other Charges / Credits:	Between v and
	Taxes:	All v and
	Total:	All v and
	Please select columns to d	isplay in a custom report.
	Available Fields	Current Display Fields
	Disc.	Add > Account
	Other	Acct. Chg. Adjust.
		Usage
		Total
	p	
		Submit Cancel
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Customize Account Billing Details Page



Save a Customized Report

telcomanage	r		Help Contact Us Change Language Log Out
	My Account Statemen	ts Payments Analytics	Self Service
		ling Top X Usage	
	Customize Accou	nt Billing Details	
	Company Name: EDOC	s	Hierarchy Name: Billing Hierarchy
	User Name: John Smith		Position: EDOCS
	Report Customize	Batch Request	
	Please enter criteria fo	or creating your custom re	eport.
	Period Range:	Feb 2004 •	Apr 2004 💌
	Relative Period Range:	0 1.	
	Account Charges:	All	
	Usage Charges:	All	
	Adjustments:	All	
	Discounts:	All	
	Other Charges / Credits:	All	
SIEBEL.	Taxes:	All	
	Total:	All	
	Available Fields		Display Fields
		Account Acct. Chg	I
		Adjust. Dist.	
		Other Usage	
		ADD> Taxes Total	
	,	,	
			CANCEL SAVE
	Copyright © 1997-2005 SI	EBEL®. All Rights Reserved.	

Confirm Save of a Customized Report

Chart Unusual Values

Name:	Chart Unusual Values	
Brief Description:	The objective of this use case is to generalize how charts perform in all reports. The main path describes charting negative and zero values and the alternate paths describe other requirements.	
Entry Points:	1. Any report with a chart.	
Query Parameters:	None.	
Report Content:	N/A	
Chart:	N/A	
Main Path:	 User displays any chart with an x and y axis (e.g. bar, line) where the negative and value needs to be plotted on the y-axis. The x-axis is always drawn with a y-axis value of zero. Negative values are charted below the x axis 	
	4. Zero values retain their label on the x-axis but show now bar.	
Alternate Paths:	[A3] Cancel If the user selects the 'cancel' prompt instead of the 'batch' prompt, the user is returned to the previous screen in which they requested to run the report.	
Exception Paths:	None.	
Business Rules:	None.	
Notes:		

Run Automatic Batch Report

Name:	Run Automatic Batch Report		
	When a user launches a report that will take longer than a user defined latency threshold to complete, the report is run in batch mode.		
	 Report List Report Screen Customize Report 		
Query Parameters:	N/A		
Report Content:	N/A		
Chart:	N/A		
Main Path:	 User launches a report from one of the above Entry Points After a system configurable threshold is exceeded based on a number of service agreements and number of reporting periods that will take longer than a prescribed amount of time, the system determines that the report must be run in batch mode to be completed. 		
	 User receives prompt to run the report in batch mode or to cancel it. a. Prompt: "This report will take a long time to run. Select Batch to have it run at a later time in batch mode or Cancel to return to the report screen to change the report selection criteria. When later viewing the completed batch report, you will have the option to download all records in a CSV file or display the first X records in a formatted browser view" b. The "X" referenced in the above comment is replaced with a number from the report XML file User enters a name for the report (Default: "standard report name"_"from date"_"to date") User selects the Batch action Report is run queued to process asynchronously (see system wide configuration parameters, Concurrent Queued Batch Reports) Report output is saved in two outputs: a. CSV file of all records b. HTML file similar to reports run online (only contains the first X records, where X is configured in the report XML file). 		
Alternate Paths:	[A1] Cancel If the user selects the 'cancel' prompt instead of the 'batch' prompt, the user is returned to the previous screen in which they requested to run the report.		
Exception Paths:	 [E1] User encounters a system error: 1. System invokes Error Message use case. 		

Name:	Run Automatic Batch Report	
Business Rules:		
Pre-Conditions	1. Configurable (by Communications provider) latency threshold entered [UC 0230]	
	 Batch Run Rules Batch run rules established as to when batch reports run by either configuring the command center for batch reports to run in a fixed window or setting the "Concurrent Queued Batch Reports" setting in UC 0230 – System Wide Configuration Parameters. 	
	<u>Rationale:</u> Enable client to defer system resource intensive reports to run during off-peak hours.	
Notes:		

Run Manual Batch Report

Name:	Run Manual Batch Report	
Brief Description:	A user may choose to run any report in batch mode.	
Entry Points:	1. Report List	
	2. Report Screen	
	3. Customize Report	
Query Parameters:	N/A	
Report Content:	N/A	
Chart:	N/A	

Name:	Run Manual Batch Report	
Main Path:	1. User selects the Batch action	
	 User enters a name for the report (Default: "standard report name"_"from date"_"to date") 	
	3. Report is run queued to process asynchronously	
	4. Report output is saved in two outputs:	
	a. CSV file of all records	
	b. HTML file similar to reports run online	
	5. User selects the Batch action	
	6. User requesting the batch report receives an email notification that the report is available. The email should contain the following information	
	a. Date/Time stamp of request and completion time	
	b. Report Name	
	c. Request date/time	
	 Hyperlink to view the report (or the report list of the archived report if a hyperlink to the actual report is significantly more difficult to implement). 	
Alternate Paths:	[A1] Cancel	
	If the user selects the 'cancel' prompt instead of the 'batch' prompt, the user is returned to the previous screen in which they requested to run the report.	
Exception Paths:	[E1] User encounters a system error:	
	1. System invokes <u>Error Message</u> use case.	
Business Rules:		
Pre-Conditions	1. Batch Run Rules	
	Batch run rules established as to when batch reports run by configuring the command center for batch reports to run in a fixed window.	
	<u><i>Rationale:</i></u> Enables the client to defer system resource intensive reports to run during off-peak hours.	
Notes:		

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Confirm Batch Report

View Batch Reports

Name:	View Batch Reports
Brief Description:	The user views the list of saved batch report output and selects one to view.
Entry Points:	Report List
Query Parameters:	
Report Content:	 COLUMN HEADINGS Name [secondary sort] (name user assigned the batch report) Hierarchy [3rd Sort] (Hierarchy name/position) Request Date Run Date Shared [Primary Sort, descending] ("Private", "Shared", "Shared *") (where "Shared *" indicates the user is the owner of the shared report) Actions SECTION HEADINGS Batch Reports - Complete Batch Reports - Pending Batch Reports - Failed
Chart:	
Main Path:	 User selects one of the report tabs (Billing, Top X, Usage) User selects the "Batch Reports" tab from the report list screen. All betch reports mus from the selected report list (Billing, Tap X, Users)
	 All batch reports run from the selected report list (Billing, Top X, Usage) are displayed
	 User clicks on column heading to sort on the values in that column User selects a report to display its results in a format similar to how the report would display if run online.
Alternate Paths:	 [A1] Download CSV File If a user selects the download action, the user receives a windows dialog box to save the CSV file. See 5.0.1 PRD use case # 0040. [A2] View Pending Batch Reports List This is identical to the main path, except "Run Date" are "Request Date" and the report is not hyperlinked. Also "shared" pending batch reports are only visible to the users who requested them. [A3] View Failed Batch Reports List This is identical to the main path, except "Run Date" is "Request Date", the report is not hyperlinked (because it can not yet be launched), and the share action is not available. Also "shared" failed batch reports are only visible to the users who requested them. [A4] View Report Query Parameters

Name:	View Batch Reports	
	User clicks on Query Parameters action (currently a magnifying glass) to view another screen with the report query parameters (and/or context) displayed. From this screen the user can select an action to view the saved batch report or return back to the batch report list screen.	
	[A5] Report Name Exceeds Space Limit	
	If the report name is longer than the space provided it word wraps to the next line.	
	[A6] API to Failed Reason	
	Make API available to retrieve the reason why a batch report failed.	
	<u>Rationale</u> : Make reason for report failure available to PS team to modify UI to display this information.	
	[A7] Records Exceed Browser Threshold	
	If the number of records in a batch report exceed the threshold limit defined in the report XML file, than only the first X records are display in the HTML report. In this case, a red warning message is displayed at the top of the screen stating "The number of records in this report exceeds the number that can be displayed in your browser. To view all results, select the download action."	
	[A8] Auto-Delete Batch Reports	
	Completed batch reports and failed batch reports are deleted from the batch report list x days after their completion date, where x is the auto- delete parameter entered in the system wide configuration (uc0230).	
Exception Paths:		
Business Rules:		
Notes:	None	

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View Batch Reports

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View Batch Report Parameters

General User Interface Behavior

The following use cases show general user interface behavior across Communications Billing Analytics.

Cancel

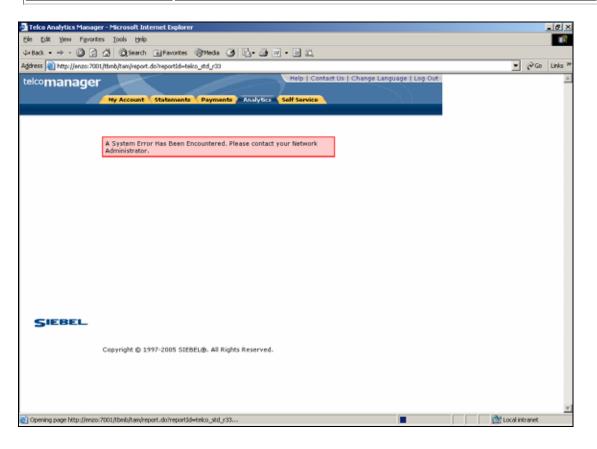
Name:	Cancel
Brief Description:	Describes the navigational experience when a Cancel action is selected.
Main Path:	 User selects a Cancel action. System returns User to previous screen. (Returning to the previous screen restores the report context settings to those of the previous screen so that the user can perform any action previously possible when the user was in the screen).
	 System clears any data or selections made by the User. Use Case Ender
	4. Use Case Ends.
Alternate Paths:	None
Exception Paths:	User encounters a system error:
	System invokes Error Message use case.
Business Rules:	None
Notes:	Note that all the use cases defined in this release are two step use cases so selecting cancel has the same effect as clearing the data and selecting the browser back button.

Change Language

Name:	Change Language
Brief Description:	Communications Billing Analytics is certified in English.
	The change language feature enables the user to change the language of the application that is displayed on each screen. Currently the application can support any Unicode UTF8 character set.
Entry Points:	From Any Report
Query Parameters:	
Report Content:	N/A
Chart:	Not applicable
Main Path:	 User Clicks on the Top Nav Button called "Change Language" Use then selects a language from the drop down System will change the language in all the underlying reports to this language Use Case Ends
Alternate Paths:	[A1]
Exception Paths:	[E1] User encounters an application error: Application invokes <u>Error Message</u> use case.
Business Rules:	[B1] None
Configuration:	The customer must supply the specific language translations for their application deployment.

Display Error Message

Display Error Message
System redisplays page with an error message.
1. User performs an action that cannot be completed.
2. System determines required error actions.
3. System reads error message text from a configuration file.
4. System re-displays page with error message (displayed in Red) below navigational bars.
5. Use Case Ends.
None
None
None
None



Error Message Page

Display No Data Message

Name:	Display No Data Message
Brief Description:	System displays no data message when the report or UI module contains no data set.
Main Path:	 User selects a report. System determines report has no available data. System displays the page with message stating that No data is available (displayed in Red) below the Report Name module.
	4. Use Case Ends.
Alternate Paths:	None
Exception Paths:	None
Business Rules:	[B1] System suppresses the display of UI modules where no data exists.
Notes:	None

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Display No Data Message

Download

Name:	Download
Brief Description:	User downloads the current report.
Entry Points	 Any Billing or Top X Reports Find Calls
Query Parameters	Download Type [DEFAULT: CSV]
Report Content	<u>Fields</u> Downloaded Report Fields
Chart	None
Main Path: Alternate Paths: Exception Paths:	 User selects download action. User's browser displays a dialog box with the options for download. User selects browser Save function. User's browser returns a dialog box for Save function. User enters a name for the file and selects Save to complete download function. System returns User to the page that download was selected from. [E1] User encounters a system error: System invokes Error Message use case.
Business Rules:	 [B1] The data format in the CSV file exactly mirrors the report details and includes the report name and column headers. [B2] The Period Range, Hierarchy Name, and Hierarchy Position are not included in the download.
Notes:	Uses standard browser download function. The CSV format supported in the current release is in de facto format, which is not recognized by Microsoft Excel. Generating the Excel format can be supported by Siebel Professional Services. Additional formats will be supported in future releases. Download functionality is available on all reports.

File Down	nload X
?	Some files can harm your computer. If the file information below looks suspicious, or you do not fully trust the source, do not open or save this file.
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	File type: Microsoft Office Excel Comma Separated Values Fil
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	Would you like to open the file or save it to your computer?
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Browser Download Options

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Browser Download Save Function

Paging with Caching

Name:	Page through a very large data set in a table.
Brief Description:	Large amounts of data are divided into page sets and each page set is presented on a single view.
Main Path:	1. User selects a page number.
	2. System returns the selected page of data.
	3. User selects single right arrow.
	4. System returns the next set of pages of data.
	5. User selects single left arrow.
	6. System returns the previous set of pages of data.
	7. Use Case Ends.
Alternate Paths:	None.
Exception Paths:	[E1] User encounters a system error:
	System invokes Error Message use case.
Business Rules:	1. For a data set that is divided into two or more pages, the page must display the total number of pages, e.g. 52, and the page numbers for the pages in the current cached set, e.g. 1, 2, 3. If the data set results in multiple sets, the right arrow and left arrow navigation is shown.
	2. Report Total line is always displayed at the bottom of the table on each page and is the total for the entire report (not just for the displayed page or group of cached pages).
	3. The number of lines displayed on each page is configurable and will be set initially to 20.
	4. The number of pages in each cached set of pages is configurable and will be set initially to 3.
Notes:	None

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04/04/2005	18:07	7045372813	Unknown	Voice	00:00:10	\$1.00
04/04/2005	15:52	7043344085	Unknown	Voice	00:00:01	\$0.10
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Paging with Caching Function

Printer-Friendly Version

Name:	Printer-Friendly Version
Brief Description:	A version of the page that is printer-friendly is generated.
Entry Points	 Any Billing or Top X Reports Find Calls
Query Parameters	None
Report Content	Fields Fields for the report where printer-friendly is invoked
Chart	Report specific
Main Path:	 User selects Printer-Friendly action in the application. System redisplays the report as follows: Without HTML header or navigational elements except for Back to Application action on the top right hand corner. Below the Back to Application link, the following text is added: "If you experience any difficulty printing this page, please adjust your printer margin settings or set your layout setting to landscape." Period Range, Hierarchy Name, Hierarchy Position, and Report Details are to be included in the printer-friendly version. User selects File>Print to print the report. User selects the Print action. System prints the report without Back to Application action. User selects the Back to Application action on the top. System displays the report with HTML header and navigational elements. Use Case Ends.
Alternate Paths:	None
Exception Paths:	[E1] User encounters a system error: System invokes <u>Error Message</u> use case.
Business Rules:	[B1] If the data set is large, which causes paging to be enabled on the HTML view, the printer-friendly version displays the entire data set without paging.
	[B2] When printing a printer-friendly page, the system removes the Back to Application action on the top right hand corner.
	[B3] When a user sorts a page and then selects the printer-friendly action, the printer-friendly version returned is sorted.
Notes:	

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Printer-Friendly Version

Reset

Name:	Reset
Brief Description:	Describes the navigational experience when a Reset action is selected.
Main Path:	User selects a Reset action. System clears any data or selections made by the User. Use Case Ends.
Alternate Paths:	None
Exception Paths:	[E1] User encounters a system error:1. System invokes Error Message use case.
Business Rules:	None

Sort Data in a Table

Name:	Sort data in a table
Brief Description:	User sorts the data in a specific table.
Main Path:	 User selects a sorting link (a column header that supports sorting). System sorts the data in the table by the selected column in ascending order. User selects the same sorting link. System sorts the data in the table by the selected column in descending order. User selects a different sorting link. System sorts the data in the table by the newly selected column in ascending order. User selects a different sorting link. System sorts the data in the table by the newly selected column in ascending order. User selects a different sorting link. System sorts the data in the table by the newly selected column in ascending order. Use Case Ends.
Alternate Paths:	None
Exception Paths:	 [E1] User encounters a system error: System iinvokes Error Message use case.
Business Rules:	 [B1] If the data set is large, which causes paging to be enabled, the sort occurs over the entire data set. [B2] When a column on the second page or beyond of a report with multiple pages is sorted, the sorted report returned will always be on the first page, regardless of what page the sorting was invoked on by the user.
Notes:	All tables that display details have ability to sort on column headings.

Submit

Name:	Submit				
Brief Description:	Describes the navigational experience when a Submit action is selected.				
Main Path:	 User selects a Submit action. System executes the desired action. System clears any data or selections made by the User. 				
	4. Use Case Ends.				
Alternate Paths:	None				
Exception Paths:	 [E2] User encounters a system error: 1. System invokes <u>Error Message</u> use case. 				
Business Rules:	None				

4 Hierarchy Use Cases

General Hierarchy Management

Manage Interface

Name:	Manage Interface				
Brief Description:	Describes the user interface for managing hierarchy and behavior of associated actions.				
Actors:	CSR, Admin, Manager				
Entry Points	 My Account Tab: Hierarchy Sub-Tab Manage Tab 				
Form Elements:	Top Pane: Hierarchy Search Criteria				
	If there is no user specified default hierarchy type and hierarchy name, the system uses the first billing hierarchy in the hit list as the default				
	 Hierarchy Type [Required: Default: Current Context or user's Default Hierarchy for start of session – if no default is specified then the dropdown is populated with 'Billing'] Dropdown Options: 				
	a. Billing [DEFAULT]				
	b. Organization				
	 Hierarchy Name [Required: Default: Current Context or user's Default Hierarchy for start of session – if no default is specified then the dropdown is populated with 'Select'] 				
	 Dropdown populated with hierarchy names stored in the system 				
	3. Period [Required: Default: Current Context Default: Current Month				
	 Dropdown Options: [monthly, up to 12 periods, configurable for more or fewer periods] 				
	 Unpublished is displayed in the period dropdown for unpublished hierarchies. 				
	 Element: [Optional: Default: Select] Types of elements that can be assigned to the hierarchy. Dropdown Options: 				
	a. When Billing Hierarchy Type is selected: Accounts, Services, Users, Company, Group.				
	 When Organization Type is selected: Groups (including optional groups), Services, and Users 				

 Status: [Optional: Default: Select – Required if Element type is specified] Status of elements that can be assigned to the hierarchy. Dropdown Options:
a. When Groups Element is selected: Assigned only
 When Users Element is selected: Assigned, Unassigned, Authorized, and Unauthorized
 When Accounts/Services Element are selected: Assigned, Unassigned
 Attribute: [Optional: Default: Select] Selections in this dropdown will be repopulated dependent upon what attributes are available to Element chosen. Dropdown Options:
 When Element is specified the list of Attributes is updated to display all attributes both standard and custom to be used in filtering the hierarchy search values
 Keyword: [Optional: Default: Blank] Freeform text field that enable further filtering of search results. The list is queried with a "starts with" action.
8. Search Radio buttons: [Default: From Current Location] Specifies the scope of the search, entire hierarchy or from the current position and below. Options:
a. Entire Hierarchy
b. From Current Location
9. Instructional text: "Please select hierarchy criteria"
Bottom Left Pane
1. Hierarchy Info
a. Modified Date: [the date last modified]
b. Modified By: [the username that made the last modification]
 Position: [displays current position link focus] Set Position Button.
2. New [Default: Select]
a. Dropdown Options: [Default: Group]
 i. [OPTIONAL; Cost Center. Others as required by the customer and defined in OMF and defined for use in the current hierarchy type. Each new group type will also be available in the Elements search criteria dropdown list.
Bottom Right Pane: Details Sub-Tab * All fields are pre-populated with previously stored information.
1. List of Attributes and values that correspond to the selected link target object. The attributes contain both default and custom fields.
2. The Attribute Labels included in the list contain both standard and custom attributes
a. If the labels for the attributes are fixed then the default attribute label will be 'Custom 1', 'Custom 2', etc.

	 b. If the labels are customizable then the customer specified label will be displayed in place of the default labels.
	3. Attribute values may be displayed as [The editing method is configurable on an individual link target object and attribute level]:
	a. Text – the value is fixed and may not be changed by the user
	 Text entry box – the value may be changed by the user by erasing and entering a new value or editing the current value. Submit action writes the changes to the database.
	 Dropdown list – the value may only contain predefined values that are displayed as a dropdown list
	Bottom Right Pane: Elements Sub-Tab
	1. Checkbox [header row] Selects all rows
	2. Checkbox [row value] Selects the individual row
	3. Results [number] Number of search results returned
	Bottom Right Pane: Move Sub-Tab
	1. Checkbox [node] Selects all rows
	2. Checkbox [child branch] Selects all the nodes from that node to the bottom the individual branch
Report Content:	Results Fields Element Sub-tab
	1. Name (Display name of element type)
	2. Position (The name of the hierarchy node one level above)
Main Path:	1. User selects Manage tab.
	2. System returns a page displaying:
	a. Top Pane: current context or defaults.
	b. Bottom Left Pane: Graphical view of current hierarchy tree opened to current position context if applicable and expanded to show one level below the current position. Otherwise blank with a message prompting the user to specify a hierarchy and select Submit action to display a hierarchy
	c. Bottom Right Pane: Details tab containing the node details for current hierarchy context. Otherwise blank with a message prompting the user to specify a hierarchy and select the Submit action to display details
	3. User specifies search criteria and selects the Submit action.
	4. System checks to make sure that the required fields are specified as a search parameter.
	5. System validation passes.
	6. System determines query parameters based upon the specified

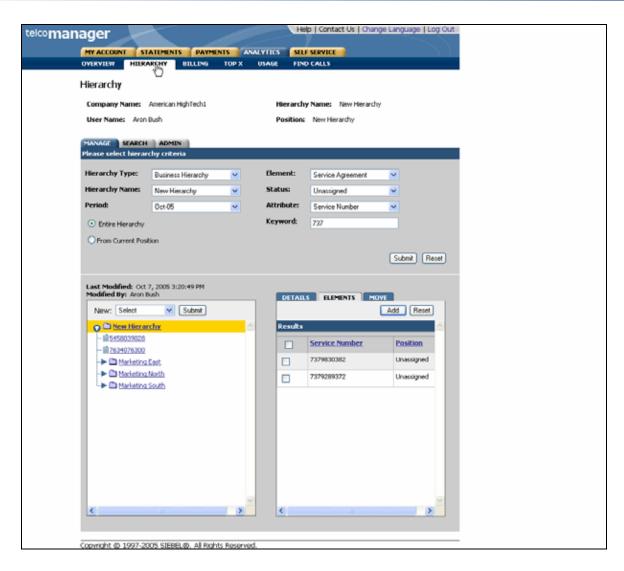
	a. Top Pane: context updated by specified search criteria.
	 Bottom Left Pane: Graphical view of current hierarchy tree opened to current position context.
	 Bottom Right Pane: Elements tab containing the fields for specified element and status with the total count for the search result set. (For field information, see Report Content section of this use case.)
	7. Use Case Ends.
Alternate Paths:	User enters search parameters for Attribute, and/or Keyword and selects the Submit action to refine search criteria and filter down the results: System searches the hierarchy tree returning a list of all nodes in the
	Elements sub-tab on the lower right pane that matches the search criteria showing the fields for specified element and status.
	User selects link of the display name in the Elements sub-tab:
	System returns the user to the Details sub-tab displaying attributes and values for the selected link target or user.
	User selects link of a position in the Elements sub-tab:
	System highlights the position of the selected item in the graphical view of the hierarchy and sets the node as the current hierarchy focus. If the position is Unassigned and the Display Unassigned in Hierarchy checkbox is not checked, the "Unassigned" position is not linkable.
	User expands and collapses the hierarchy branch by selecting on the arrow in the graphical view of the current hierarchy:
	System invokes Collapse and Expand Hierarchy use case.
	User selects New Group and the Submit action:
	System invokes <u>Create Group</u> use case.
	User selects Details sub tab:
	System returns the user to the Details sub-tab displaying attributes for the link target or user that is the current hierarchy focus
	User selects Delete or Remove action in the Details or Element sub-tabs:
	System invokes <u>Remove Element</u> use case.
	User modifies attributes in the Details sub-tab:
	System invokes Modify Element Attributes use case.
	User selects Add action in the Element sub -tab:
	System invokes <u>Add Element</u> use case.
	User selects column header links in the Element sub-tab: System invokes <u>Sorting</u> use case.
	User selects Move sub-tab:
	System invokes <u>Move Group</u> use case.
	User selects Reset action:
	System invokes Reset use case.
Exception Paths:	User encounters a validation error:
	System invokes Validation Error Message use case.

User encounters a system error:	
System invokes <u>Error Message</u> use case.	

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Business Rules:	General The current Position including the Hierarchy Type, Hierarchy Name, Period, and Position are carried throughout the session and is accessible by other applications after the user selects the set position action. The Position is automatically updated each time a new position is selected by the user.
	Hierarchy Access Control: Users can only view hierarchies to which they have been assigned and positions at or below the positions to which they have been assigned. User can not view hierarchy nodes to which they have not been granted view access privileges
	Any unassigned users, accounts, and services are displayed as if they are assigned to a group called "Unassigned" linked to the root node of the hierarchy. Unassigned Users do not get displayed as linked into the "Unassigned" folder.
	If user enters the Manage Tab with the hierarchy as the current position, the graphical view of the hierarchy contains the hierarchy as the top node and its nodes one level below it.
	Bottom Left Pane: Graphical View of Hierarchy
	If the hierarchy is modified, the fields "Last Modified" and "Modified By" are updated.
	If a position is selected, the position is highlighted and set to the current hierarchy focus for actions. The bottom right pane is updated to show that element's details
	If the expand or collapse icon is selected, the position is highlighted and set to the current hierarchy focus and the group expands or collapses opposite action to the status when selected
	If a node is empty, there will be no expand or collapse arrow next to the node.
	Bottom Right Pane: Details/Element/Move Sub-Tabs
	If user selects the checkbox in the row of the column headers of the search results, all items of the search results become selected.
	If user selects the checkbox next to a node in the Move sub-tab, all elements below it are selected.
	If Element is unassigned, it can be added to the hierarchy.
	If element is assigned, it can be removed from the hierarchy.
	 If Element is a Group type [created using the create function in hierarchy] the Delete action is available. For all other elements, Remove action is available since billing elements may not be deleted from the system only removed from the current organizational hierarchy.
	If text field box exists (or a dropdown presented), the attribute is editable otherwise the field is fixed and can only be update through billing data or attribute data load files.
	[E2] Results field for the search criteria specified is updated according to action performed.
Notes:	A Cost Center, Location, and Region are optional link-target types similar to the default Group element.

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Manage User Interface Step 1: Specify Hierarchy Search Parameters



Manage User Interface Step 2: Specify Filters

Create Group

Name:	Create Group
Brief Description:	Describes the mechanism whereby Groups are created.
Actors:	CSR, Admin, Manager
Entry Points	1. Manage Tab
Form Elements:	Hierarchy Search Criteria If there is no user specified default hierarchy type and hierarchy name, the system uses the first billing hierarchy in the hit list as the default
	1. Hierarchy Type
	2. Hierarchy Name
	3. Period
	4. Element
	5. Status
	6. Attribute
	7. Filter [future]
	8. Keyword
	9. Radio buttons: entire hierarchy or only the current position down.
	10. Instructional text: "Please select hierarchy criteria"
	*For more information regarding fields and their defaults, refer to Manage User Interface Use Case.
	Create New Group
	1. Name [Required]
	2. Description [Optional]
Main Path:	1. User selects New Group and submits action.
	2. System page displaying:
	 Top Pane: Hierarchy Search Criteria Form with current search criteria context.
	 Bottom Left Pane: Graphical view of current hierarchy as the top node.
	 Bottom Right Pane: Details sub-tab with the Create New Group Form.
	 User inputs data to create the group and selects the Submit action. The group id has to be unique.
	4. System validation passes.
	5. System redisplays the page as follows:
	 Top Pane: Hierarchy Search Criteria Form with current search criteria context.

	b. Bottom Left Pane: Graphical view of the current hierarchy with the new Group created as a node under the hierarchy.
	c. Bottom Right Pane: Details sub-tab with the attributes for the newly created Group.
	6. Use case ends.
Alternate Paths:	User modifies Group details in the Details sub-tab and selects the Submit action:
	System invokes Modify Element Attributes use case.
	User selects Reset action:
	System invokes <u>Reset</u> use case.
	User specifies a search criteria before performing the Submit action for the creation of the new group:
	System returns the result for the specified search criteria.
Exception Paths:	User encounters a validation error:
	System invokes Validation Error Message use case.
	User encounters a system error:
	System invokes <u>Error Message</u> use case.
	User selects Cancel action:
	System invokes <u>Cancel</u> use case.
Business Rules:	None
Notes:	A Cost Center, Location, and Region are optional link-target types similar to the default Group element.

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Create Group Step 1: Select New Group

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Create Group Step 2: Specify Parameters

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Hierarchy			
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User Name: Aron 8	iush	Position:	Sales
MANAGE SEARCH Please select hierard			
Hierarchy Type:	Business Hierarchy	Element:	Select
Hierarchy Name:	New Hierarchy	Status:	Select
Period		Attribute:	
	Jul 05		Select
 Entire Hierarchy 		Keyword:	
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Create Group Step 3: Group Created

Add Element

Brief Description: Describes the mechanism of adding users, a	ccounts, and services.			
Actors: Admin, CSR, Manager				
Entry Points Manage Tab: Element Sub-Tab	Manage Tab: Element Sub-Tab			
	Hierarchy Search Criteria If there is no user specified default hierarchy type and hierarchy name, the system uses the first billing hierarchy in the hit list as the default			
1. Hierarchy Type				
2. Hierarchy Name				
3. Period				
4. Element Types of elements that can be assigned Dropdown Options: [[When Billing Hierar [When Organization Type is selected: Us	rchy Type is selected: Users]			
Dropdown Options: [When Users Element is selected: Assign	Status of elements that can be assigned to the hierarchy. Dropdown Options: [When Users Element is selected: Assigned, Unassigned, All] [When Accounts/Services Element are selected: Assigned,			
6. Attribute	6. Attribute			
7. Keyword	7. Keyword			
8. Radio buttons: entire hierarchy or only the	8. Radio buttons: entire hierarchy or only the current position down.			
9. Instructional text: "Please select hierarch	9. Instructional text: "Please select hierarchy criteria"			
*For more information regarding fields and th User Interface Use Case.	*For more information regarding fields and their defaults, refer to Manage User Interface Use Case.			
Bottom Right Pane: Elements Sub-Tab	Bottom Right Pane: Elements Sub-Tab			
1. Checkbox [header row] Selects all rows				
2. Checkbox [row value] Selects the individual row				
3. Results [number] Number of search results returned				
Report Content: Results For Element Sub-tab				
1. Name (Display name of element type)				
2. Position (The name of the hierarchy nod	le one level above)			
Main Path: 1. User navigates to the position in the hier is to be added to specify the focus for the				
2. User specifies a type of Element [A1]				

 User selects the "Unassigned" status in the Hierarchy Search Criteria User selects Submit action. 			
4. User selects Submit action.			
 System returns a list of Elements that are not assigned to any node within the current hierarchy in the Element sub-tab displaying the Name and Position in hierarchy. 			
6. User selects the checkbox or checkboxes next to desired item or items to be added to the hierarchy.			
7. User selects Add action			
8. System adds selected element to the hierarchy below the current focus.			
9. System redisplays page showing:			
 Top Pane: Hierarchy Search Criteria Form with current search criteria context. 			
 Bottom Left Pane: Graphical view of the current hierarchy with the new elements added to the hierarchy. 			
 Bottom Right Pane: Updated list of elements with the Elements added to the hierarchy removed from the list in the Element sub- tab and Number of Results field updated 			
10. Use case ends.			
The number of results exceeds a threshold amount for the number of rows in the Elements window [Default = 1000]			
System displays an error message "too many results – refine the search criteria and select submit to filter the list"			
User encounters a validation error:			
System invokes Validation Error Message use case.			
User encounters a system error:			
System invokes Error Message use case.			
The Add action assigns Elements into the current version of the hierarchy specified by the Hierarchy Period only.			
User can only add Users when a Billing Hierarchy Type is selected.			
User can only add Users and Service Agreements when an Organization Hierarchy Type is selected.			
User can only add Users and Companies when a Consolidation Hierarchy Type is selected.			
Companies, Accounts and Service agreements can only be added to the same hierarchy once.			
Users can be added to multiple locations within the same hierarchy and can only be added to the same node once.			
Element Display Name links to Details sub tab for the view.			
Element Position in hierarchy link highlights the position in the graphical			

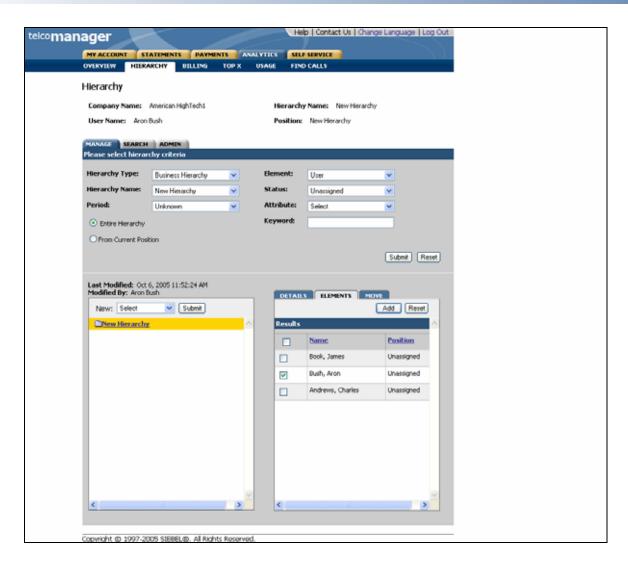
When elements are assigned to the hierarchy, the fields "Last Modified" and "Modified By" are updated.
The only option when Groups element is selected in the Hierarchy Search Criteria is "Assigned". Groups are never unassigned.
If user selects the radio button for "Entire Hierarchy", the scope of the search is all the nodes in the hierarchy.
If user selects the radio button for "From Current Position", the scope of the search is relative to and limited by the nodes below the current position.

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User Name: Aron	Bush	Positio	n: New Herarchy	
MANAGE SEARCH Please select hierar				
Hierarchy Type:	Business Hierarchy	Element:	Service Agreement	~
Hierarchy Name:	New Hierarchy	-	Unassigned	~
Period:	Unknown	Attribute:		×
Entire Hierarchy		Keyword:		
O From Current Posit	tion			
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Add [Services] Element Step 1: Select Items to Add

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- 18 <u>451 472 4956</u>			Service Number	Position		
- 10 5458039028 10 7634076300			7379030302	Unassigned		
			7379289372	Unassigned		
			3184732174	Unassigned		
			4513783743	Unassigned		
			4519382734	Unassigned		
			4943942093	Unassigned		
			4070620806	Unassigned		
			4943929463	Unassigned		
	2		4071135451	Unassigned	~	
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Add [Services] Element Step 2: Added Services



Add [Unassigned Users] Elements Step 1: Select Items to Add

telcomanager		He	p Contact Us Char	nge Language Log Out	
			SERVICE		
OVERVIEW HILE			CALLS		
Hierarchy					
-					
Company Name:			Name: New Hierarch	hy	
User Name: Aron	Bush	Position:	New Herarchy		
MANAGE SEARCH Please select hiera					
Hierarchy Type:	Business Hierarchy	Element:	User	~	
Hierarchy Name:	New Hierarchy	Status:	Unassigned	~	
Period:	Unknown 💌	Attribute:	Select	~	
Entire Herarchy		Keyword:			
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				Submit Reset	
	6, 2005 11:55:31 AM				
Modified Dy: Aron		DETAIL	S ELEMENTS M		
Now: Select	V Submit	Results		Add Reset	
► <u>8 Bush, Aron</u>					
			Name	Position	
			Book, James	Unassigned	
			Andrews, Charles	Unassigned	
				~	
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Add [Unassigned Users] Element Step 2: Added Unassigned Users

Remove (Delete) Element

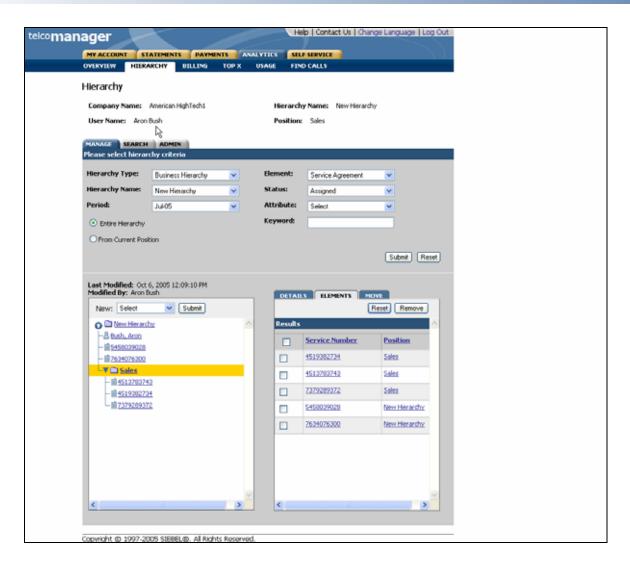
Name:	Remove or Delete Element
Brief Description:	Describes the mechanism of removing users, accounts, and services or deleting groups.
Actors:	Admin, CSR, Manager
Entry Points	1. Manage Tab: Element Sub-Tab
	2. Manage Tab: Details Sub-Tab
Form Elements:	Hierarchy Search Criteria If there is no user specified default hierarchy type and hierarchy name, the system uses the first billing hierarchy in the hit list as the default 1. Hierarchy Type 2. Hierarchy Name 3. Period 4. Element Types of elements that can be assigned to the hierarchy. Dropdown Options: [[When Billing Hierarchy Type is selected: Users] [When Organization Type is selected: Groups, Users and Accounts] 5. Status Status of elements that can be assigned to the hierarchy. Dropdown Options: [When Groups Element is selected: Assigned] [When Users Element is selected: Assigned, Unassigned, Authorized, and Unauthorized [When Accounts/Services Element are selected: Assigned, Unassigned] 6. Attribute 7. Keyword 8. Radio buttons: entire hierarchy or only the current position down. 9. Instructional text: "Please select hierarchy criteria" *For more information regarding fields and their defaults, refer to Manage User Interface Use Case. Bottom Right Pane: Elements Sub-Tab 1. Checkbox [header row]
	Selects all rows 2. Checkbox [row value]
	Selects the individual row
	3. Results [number] Number of search results returned
Report Content:	 <u>Results Fields For Element Groups Element Sub-tab</u> 1. Name (Display name of element type Groups) 2. Position (The name of the hierarchy node one level above)

	Re	sults Fields For Element Accounts Element Sub-tab					
	Account No. (Display name of element type Accounts)						
	1.	Position (The name of the hierarchy node one level above)					
	Re	sults Fields For Element Services Element Sub-tab					
	1. Number (Display name of element type Services)						
	2.	2. Position (The name of the hierarchy node one level above)					
	Re	Results Fields For Element Users in Element Sub-tab					
	1.	Name (Display name of element type User)					
	2.	Position (The name of the hierarchy node one level above)					
Main Path:	1.	 User specifies a type of Element and "Assigned" status in the Hierarchy Search Criteria and selects Submit action. 					
	2.	System returns Element sub-tab displaying:					
		 Top Pane: Hierarchy Search Criteria Form with current search criteria context. 					
		 Bottom Left Pane: Graphical view of the current hierarchy and position. 					
		c. Bottom Right Pane: the Display Name and Position in hierarchy for the specified Element type and "Assigned" status.					
	3.	User selects the checkbox next to desired item to be removed from the hierarchy and selects Remove action.					
	4.	System displays the following confirmation message on the right pane:					
		 For all element types except Group: "Performing this operation will permanently remove the item(s)from this location in the hierarchy. The item(s) will be unassigned. Do you want to continue?" 					
		b. For Group element: "Performing this operation will permanently delete the group(s) and cannot be reversed. Items contained within the group will be unassigned. Do you want to continue?"					
		c. User clicks submit					
	5.	System redisplays page showing:					
		 Top Pane: Hierarchy Search Criteria Form with current search criteria context. 					
		b. Bottom Left Pane: Graphical view of the current hierarchy with the elements removed from the hierarchy. After removal, the next element below is highlighted. If the element removed is the last one, the highlight jumps up to the next element.					
		c. Bottom Right Pane: Updated list of elements with removed or deleted elements removed from the list in the Element sub-tab and Results field updated as elements are removed from the list.					
	6.	Use case ends.					
Alternate Paths:	No	าย.					
Exception Paths:	Us	er encounters a validation error: System invokes <u>Validation Error Message</u> use case.					
		Cystem invorces validation Enor wicessaye use lase.					

	User encounters a system error: System invokes <u>Error Message</u> use case.
Business Rules:	The Remove action and the Delete action applies to Elements in the current version of the hierarchy specified by the Hierarchy Period only
	Users assigned to removed group(s) are unassigned from group and will still appear elsewhere if assigned and will not be unassigned from accounts or services contained in the group.
	Accounts that are unassigned from a removed group are moved to unassigned status but maintain any user settings.
	Services that are unassigned from a removed group are moved to unassigned status but maintain any user settings.
	Element Display Name links to Details sub tab for the view. Position in hierarchy highlights the position in the graphical view of the hierarchy.
	Element dropdown toggles between the choices user (Billing) OR user and services (Organization) OR user and accounts (Consolidation) depending upon type of hierarchy selected.
	When elements are unassigned from the hierarchy, the fields "Last Modified" and "Modified By" are updated.
	If user selects the checkbox in the row of the column headers of the search results, all items of the search results become selected.
	Results field for the search criteria specified is updated according to action performed.
	The only option when Groups element is selected in the Hierarchy Search Criteria is "Assigned". Groups are never unassigned.
	If user selects the radio button for "Entire Hierarchy", the scope of the search is all the nodes in the hierarchy.
	If user selects the radio button for "From Current Position", the scope of the search is relative to and limited by the nodes below the current position.

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	ATEMENTS PAYMENTS	ANALYTE	S SRI	SERVICE		
OVERVIEW HIERA		OP X USAC		CALLS		
						_
Hierarchy						
Company Name:	American HighTech1		Hierarchy	Name: New Hierard	hy	
User Name: Aron 8	Bush		Position:	Sales		
MANAGE SEARCH Please select hierard						
						-
Hierarchy Type:	Business Hierarchy	<u>×</u> В	ement:	Service Agreement	×	
Hierarchy Name:	New Hierarchy	🖌 કા	atus:	Assigned	×	
Period:	Jul-05	<u> </u>	tribute:	Select	~	
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O From Current Posit	ion					
					Submit Reset	
Last Modified: Oct 0 Modified By: Aron B	2005 12:05:47 PM ush		DETAIL		IOVE	
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-& Bush, Aron	-			Service Number	Position	
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- 1 2634026300				4513703743	Sales	
- 1010473217	1			3184732174	Sales	
at an annual of				7379209372	Sales	
- 1 451378374			_			
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	<u>±</u>					
-10451938273	<u>±</u>			5450029020	New Hierarchy	
-10451938273	<u>±</u>					
-10451938273	<u>±</u>			5450029020	New Hierarchy	
-10451938273	<u>±</u>			5450029020	New Hierarchy	
-10451938273	<u>±</u>	×		5450029020	New Hierarchy	

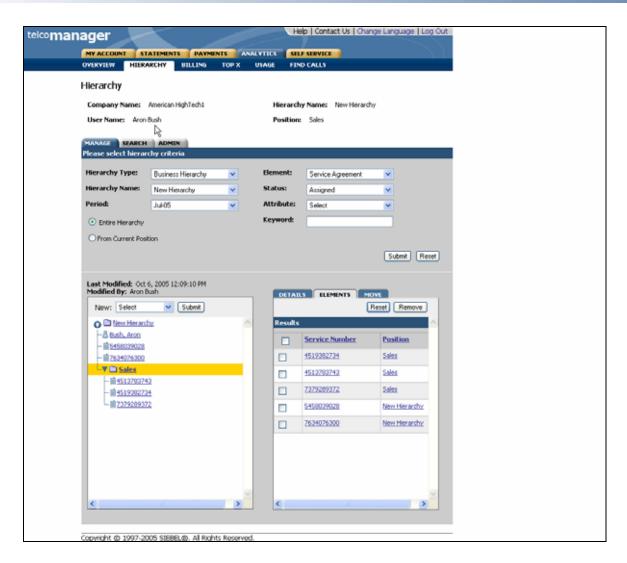
Remove (Services) Element Step 2: Remove Confirm Page



Remove (Services) Element Step 3: Remove Success

elcoman	ager			Help Contact Us Change	Language Log Out
		ATEMENTS PAYMENTS		ELF SERVICE	
	OVERVIEW HIERA			IND CALLS	
	Hierarchy				
5	Company Name:	Imerican HighTech1	Hierar	chy Name: New Hierarchy	
	User Name: Aron 8			n: Sales	
	oper namer mont		1 0 3 1 1 0		
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	Last Modified: Oct 6 Modified By: Aron B	sh	DETA		
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	- <u>8 Bush, Aron</u> - <u>104514724956</u>		Unass		y. The item will be
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	- 11 <u>Sales</u>	1			
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	L ■ 737928937	2			
			×		<u>×</u>
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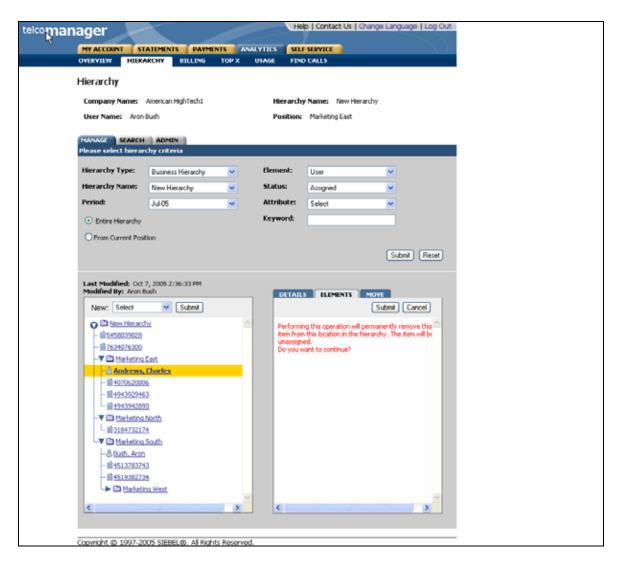
Remove (Service) Element Step 2 (Details Tab): Remove Confirm Page



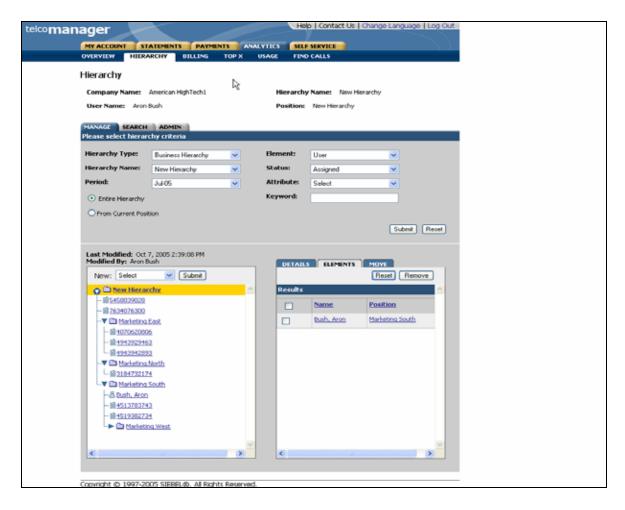
Remove (Service) Element Step 3 (Details Tab): Remove Success

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Help Contact Us Change Language Lop Out					
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Contrainer Provi			1 domain	Prathousing Loans	
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Hierarchy Type:	Business Hierarchy	~	Element:	User	~
Hierarchy Names	New Hierarchy	~	Status:	Assigned	v
Period:			Attribute:		
	Jul-05	~		Select	×
 Entire Hierarchy 			Keyword:		
Last Modified: Oct Modified By: Aron B New: Select Oct New Hierard	ush 🔽 Submit		DETAIL	ELEMENTS	Submit Reset
- 11 5458039028 - 11 7634076300				Name	Position
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- 10 407062010 - 10 407062010 - 10 494392946	<u>6</u> 3			Bush, Aron	Marketing South
-₩ <u>194394289</u> -₩ <u>10</u> <u>Marketina</u> L <u>11318473217</u>	North 4				
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Remove (User) Element Step 1 (Details Tab): Select Position



Remove (User) Element Step 2 (Details Tab): Remove Confirm Page

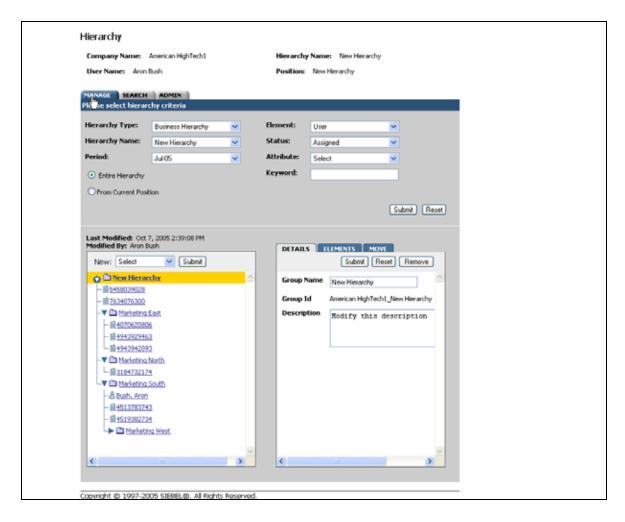


Remove (User) Element Step 3 (Details Tab): Remove Success

Modify Element Attributes

Name:	Modify Element Attributes			
Brief Description:	Describes the mechanism of modifying element attributes.			
Actor:	CSR, Admin, Manager			
Entry Points	Manage Tab: Details Sub-Tab			
Form Elements:	Hierarchy Search Criteria If there is no user specified default hierarchy type and hierarchy name, the system uses the first billing hierarchy in the hit list as the default			
	1. Hierarchy Type			
	2. Hierarchy Name			
	3. Period			
	4. Element			
	5. Status			
	6. Attribute			
	7. Keyword			
	8. Radio buttons: entire hierarchy or only the current position down.			
	9. Instructional text: "Please select hierarchy criteria"			
	*For more information regarding fields and their defaults, refer to Manage User Interface Use Case.			
	Bottom Right Pane: Details Sub-Tab * All fields are pre-populated with previously stored information.			
	1. Attributes for a Hierarchy: Hierarchy Name [Editable] Description [Editable]			
	2. Attributes for Groups: Hierarchy Name [Editable] Description [Editable]			
	3. Attributes for Accounts: Account No [Hard coded] Position [Hard coded] Contact [Editable] Address [Editable] City [Editable] State [Editable] Zip [Editable]			
	4. Attributes for Services: Number [Hard coded] Position [Hard coded] Subscriber [Editable] Rate Plan [Hard coded] Device [Hard coded]			
	5. Attributes for Users: Name [Editable]			

	Position [Hard coded] Role [Hard coded] Username [Hard coded] Number [Editable]					
Main Path:	1. User selects Manage Tab.					
	2. System returns a page displaying:					
	a. Top Pane: Hierarchy Search Criteria Form with current context and defaults.					
	b. Bottom Left Pane: Graphical view of current hierarchy tree opened to current position context.					
	c. Bottom Right Pane: Details tab containing the details for current hierarchy context.					
	3. User modifies attributes of current hierarchy context in the Details tab and selects the Submit action:					
	4. System updates the Details with the new information entered by the user.					
	5. Use case ends.					
Alternate Paths:	User selects Reset action:					
	System invokes <u>Reset</u> use case.					
Exception Paths:	User encounters a validation error:					
	System invokes Validation Error Message use case.					
	User encounters a system error:					
	System invokes Error Message use case.					
Business Rules:	Not all attributes can be modified. Refer Form Elements section of this use case for more information.					
	Attributes from other sources (i.e. billing system) are display only and cannot be modified.					



Modify Element Attributes Step 1: Select Position to Modify

MY ACCOUNT STATEMENTS PAYMENTS ANALYTICS SEE SERVICE OVERVIEW HIERARCHY BILLING TOP X USAGE FIND CALLS								
PY ACCOUNT STATUPENTS PAYPENTS AVALUTICS SLUB SUPPLYE OVERVIEW NEERARCHY DELING TOP X VAMAGE PRO CALLS Hierarchy Company Name: American HighTech1 Hierarchy Name: New Hierarchy MANAGE SEARCH Addent Position: New Hierarchy Provide SEARCH Addent Position: New Hierarchy Periode: Jud 05 Attribute: Select Image: Annice New Hierarchy Period: Jud 05 Attribute: Select Image: Annice New Hierarchy Period: Jud 05 Attribute: Select Image: Annice New Hierarchy Period: Jud 05 Attribute: Select Image: Annice New Hierarchy Period: Jud 05 Keyword: Submit: Reset Femore Image: New: Select Submit: Select Image: Remove Submit: Reset Femore Image: New: Select Submit: Select Image: Remove Submit: Reset Femore Femore Image: New: Select Submit: Select Submit: New: Hierarchy Submit: New Hierarchy Submit: New: Hie	nager			He	p Contac	t Us Cha	nge Languag	e Log Out
OVERVIEW HERRARCHY DILLING YOP X USAGE PINO CALLS								
Hierarchy Company Name: American HighTech: Berrichy Name: New Hierarchy Cervan Buck ADMIN Please select hierarchy IV Cervan Buck Period: 0405 V Cervan Buck Period:								
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Hierarchy Type: Business Hierarchy Element: User Hierarchy Name: New Hierarchy Status: Assigned Period: Jul 05 Attribute: Select Image: Composition © Endre Herarchy Keyword: Image: Composition Submit: Reset Last Modified: Oct 7, 2005 3:20:49 PM Modified By: Aron Bush Image: Composition Submit: Submit: New: Select Submit: Submit: Submit: Submit: Group Name: New Hierarchy Image: Select Submit: Submit: <td< td=""><th></th><td>ADMIN</td><td></td><td></td><td></td><td></td><td></td><td></td></td<>		ADMIN						
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Modify Element Attributes Step 2: Successfully Modified

Move Elements

Name:	Move Elements				
Brief Description:	Describes the mechanism of moving a group from one node to another within the same hierarchy.				
Actors:	CSR, Admin, Manager				
Entry Points	Manage Tab: Move Sub-tab				
Form Elements:	Hierarchy Search Criteria If there is no user specified default hierarchy type and hierarchy name, the system uses the first billing hierarchy in the hit list as the default				
	1. Hierarchy Type				
	2. Hierarchy Name				
	3. Period				
	4. Element				
	5. Status				
	6. Attribute				
	7. Keyword				
	8. Radio buttons: entire hierarchy or only the current position down.				
	9. Instructional text: "Please select hierarchy criteria"				
	*For more information regarding fields and their defaults, refer to Manage User Interface Use Case.				
	Bottom Right Pane: Move Sub-Tab				
	1. Checkbox [node] Selects all rows				
	2. Checkbox [child branch] Selects the individual branch				
Main Path:	 In the Manage tab, User navigates to the parent node of the structure where the desired group(s) to be moved are. 				
	2. User selects Move sub-tab.				
	3. System displays a screen showing:				
	a. Left pane: Graphical hierarchy display of the current hierarchy				
	 Right pane: Graphical hierarchy display of the current hierarchy with checkbox next to each node to permit specifying the nodes to be moved 				
	4. User selects the focus Node in the left pane where the selected nodes are to be moved				
	 User selects the checkbox next to all desired nodes to be moved to the focus node 				
	a. If the focus node is a group then any type of node or user may be selected in the right move pane				

	b. If the focus node is not a group then only Users may be selected in the right move pane					
	6. User selects the Move action.					
	7. System moves all selected nodes under the focus node in hierarchy.					
	8. System redisplays page displayed a screen showing:					
	 Left pane: Updated hierarchy structure with parent mode where move was executed. 					
	b. Right pane: updated graphical display of all the groups in the current hierarchy.					
	9. Use case ends.					
Alternate Paths:	User selects Reset action:					
	System invokes <u>Reset</u> use case					
Exception Paths:	User encounters a validation error:					
	System invokes Validation Error Message use case.					
	User encounters a system error:					
	System invokes <u>Error Message</u> use case.					
Business Rules:	The Move action changes the structure of the current version of the hierarchy specified by the Hierarchy Period only					
	If user selects the checkbox next to a Group node, all elements below it are also selected.					
	When elements are moved within the hierarchy, the fields "Last Modified" and "Modified By" are updated.					
	Move Action can only take place within an Organization Hierarchy. Move cannot happen in a billing hierarchy.					

telcomanager		He	p Contact Us Change Langua	ge Log Out	
	STATEMENTS PAYMENTS ANA		SERVICE		
OVERVIEW	ERARCHY BILLING TOP X	USAGE FINE	CALLS		
Hierarchy					
Company Name	: American HighTech1	Hierarch	Name: New Hierarchy		
User Name: A	ron Bush	Position:	Marketing		
MANAGE SEAR Please select hie					
Hierarchy Type:		Element:	and a		
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Move Group Specify Items to Move (right pane) and Location (highlighted in yellow in left pane)

Search Hierarchy

Name:	Search Hierarchy
Brief Description:	User finds a particular group, account, services, and/or attributes for any node or leaf within a hierarchy.
Actors:	CSR, Admin, Manager
Entry Points	1. Search Tab
Form Elements:	Hierarchy Search Criteria If there is no user specified default hierarchy type and hierarchy name, the system uses the first billing hierarchy in the hit list as the default
	1. Hierarchy Type
	2. Hierarchy Name
	3. Period
	4. Element
	5. Status
	6. Attribute
	7. Keyword
	8. Radio buttons: entire hierarchy or only the current position down.
	9. Instructional text: "Please select hierarchy criteria"
	*For more information regarding fields and their defaults, refer to Manage User Interface Use Case.
Report Content:	Search Results Fields For Element Groups
	1. Name (Display name of element type Groups)
	2. Position (The name of the hierarchy node one level above)
	3. Display Name
	4. Description
	Search Results Fields For Element Accounts
	1. Account No. (Display name of element type Accounts)
	2. Position (The name of the hierarchy node one level above)
	3. Account Name
	4. Contact Name
	5. Address
	6. City
	7. State
	8. Country
	9. Zip
	Search Results Fields For Element Services

	1. Service Number (Display name of element type Services)
	2. Position (The name of the hierarchy node one level above)
	3. Account Number
	4. Address
	5. Subscriber Name
	6. City
	7. State
	8. Country
	Search Results Fields For Element Users
	1. Name (Display name of element type User)
	2. Position (The name of the hierarchy node one level above)
	3. Role (in future release)
	4. Number
	5. Email
Main Path:	1. User selects Search Tab.
	2. System displays Hierarchy Search Criteria form with current context and defaults.
	 User inputs search criteria by selecting an Attribute from the Attribute drop down and entering a key word OR by specifying other criteria such as Period, Status or Element and selects the Submit action.
	4. System checks to make sure that the required fields are specified as a search parameter.
	5. System validation passes.
	 System displays a tabular search results report with the total count for the search result set and all attributes for the selected element type [A1]
	7. Use case ends.
Alternate Paths:	[A1] After the search results have been displayed, the User selects one or more checkboxes and selects the Submit action:
	1. System returns the user to the Manage tab displaying:
	 Top pane: Hierarchy Search Criteria with specified search criteria context.
	Bottom Left Pane: Graphical view of current hierarchy tree opened to current position context.
	iii. Bottom Right Pane: Elements tab containing the display name and position of the selected elements.
	[A2] User selects link of the display name of the specified element type for the search criteria:
	1. System returns the user to the Manage tab displaying:
	i. Top pane: Hierarchy Search Criteria with specified search criteria context.
P	

	 Bottom Left Pane: Graphical view of current hierarchy tree opened to where the element selected is located in the tree in the bottom left pane.
	Bottom Right Pane: Details tab containing the details for the selected element.
	[A3] User selects Sorting action:
	1. System invokes <u>Sorting</u> use case.
	[A4] User selects Paging action:
	1. System invokes Paging use case.
Exception Paths:	User encounters a validation error:
	System invokes Validation Error Message use case.
	User encounters a system error:
	System invokes <u>Error Message</u> use case.
Business Rules:	Checkbox selections are persisted when paging. Selections are aggregated across pages.
	If user selects the radio button for "Entire Hierarchy", the scope of the search is all the nodes in the hierarchy.
	If user selects the radio button for "From Current Position", the scope of the search is relative to and limited by the nodes below the current position.

nager			He	p Contact Us C	hange Language Log Out				
MY ACCOUNT OVERVIEW		PAYMENTS AN		SERVICE					
Hierarchy									
Company Na	Company Names British Footware Hierarchy Names Billing Herarchy								
User Name:	Tim Burr		Position:	Position: British Footware					
MANAGE	MANAGE SEARCH COMPARE ADMIN								
Please select	hierarchy criteria								
Hierarchy Ty	Dilling Hierard	hy 💌	Element:	User	×				
Hierarchy Na	ime: Billing Hierard	hy 💌	Status:	Unassigned	×				
Period:	Jul-05	×	Attribute:	Select	<u>×</u>				
 Entire Her 	rarchy		Keyword:						
O From Curre	O From Current Position								
					Submit Reset				
Results									
	Name	Position	Numbe	r lo	had				
	Brown, Tom	Unassigned		te	st@edocs.com				
	Law, Micheal	Unassigned		te	sbilledocs.com				
				ter	test@edocs.com				
Submit Copyright @ 1997-2005 SIEBEL(8), All Rights Reserved.									

Search (Users) Step 1: Specify Parameters and Search Results

OVERVIEW HIE		PAYMENTS A	USAGE	SELF SERVICE				
Hierarchy								
Company Names	British Foot		Hier	archy Names Billing H	terarchu			
User Name: Tim				tion: British Footware				
Carl Control Inter			1000					
MANAGE	_							
Please select hiera	erchy criteri	a						
Hierarchy Type:	Billing Hie	rarchy 💌	Elemen	t: Service Agreeme	ank	*		
Hierarchy Name:	Billing Hie	rarchy 💌	Status:	Assigned		*		
Period:	Jul-05	×	Attribu			~		
 Entire Hierarchy 			Keywor	dt .		-		
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	sition							
	sition					Submit Page 1	Reset of5 ► H	
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O From Current Po		Account Number 3286008	Address	Subscriber Name MOORE	<u>ORy</u>			
O From Current Po Results (45 items) Service Number	Position		Address		GRY	Page 1	ofs ≯ H	
O From Current Po Results (45 items) Service Number 8473494103	Position 3286008	3286008	Address	MOORE	<u>Cây</u>	Page 1	ofs ≯ H	
O From Current Po Results (45 items) Service Number 0472494109 0472494109	Position 3286008 3286008	3286008 3286008	Address	MOORE HARRIS	Gity	Page 1	ofs ≯ H	
C From Current Po Results (45 items) Service Number 0472494102 0472494115	Position 3286008 3286008 3286008	3286008 3286008 3286008	Address	MOORE HARRIS WHETE		Page 1	ofs ≯ H	
O From Current Po Results (15 items) Service Number 0173494102 0473494115 0473494115 0473494114	Position 3286008 3286008 3286008 3286008 3286008	3286008 3286008 3286008 3286008	Address	MOORE HARRIS WHITE JACKSON	CRY	Page 1	ofs ≯ H	
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O From Current Po Results (45 items) Service Number 0473494102 0472494115 0472494115 0472494113 0472494112	Position 3266008 3266008 3266008 3266008 3266008 3266008 3266008	3286008 3286008 3286008 3286008 3286008 3286008 3206000	Address	MOORE MARRIS WHETE JACKSON THOMAS ANDERSON	City	Page 1	ofs ≯ H	
O From Current Po Results (15 Rems) Service Number 6473494102 8473494102 8473494115 8473494115 8473494113 8473494112 8473494112	Position 3286008 3286008 3286008 3286008 3286008 3286008 3286009	3286008 3286008 3286008 3286008 3286008 3286008 3206000 3286000	Address	MOORE MARRIS WHITE JACKSON THOMAS ANDERSON TAVLOR	City	Page 1	ofs ≯ H	
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Search (Services) Step 1: Specify Parameters and Search Results

Hierarchy Admin

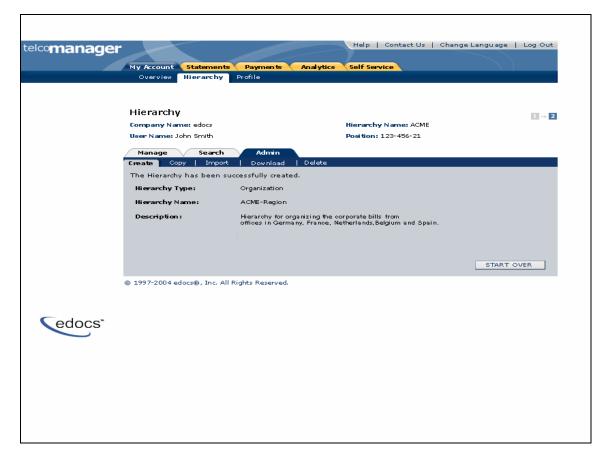
Create Hierarchy

Name:	Create Hierarchy
Brief Description:	Describes the mechanism whereby a user can create a non-billing hierarchy (Organization or Consolidation).
Actors:	CSR, Admin, Manager
Entry Points	Admin Tab: Create Sub-tab
Form Elements:	 <u>Create Hierarchy Form</u> 1. Hierarchy Type [Required: Default: Current Context] Dropdown: Default: Organization 2. Hierarchy Name [Required, Default: None, Length of field limit: 20] 3. Description [Optional, Default: None, Length of field limit: 80].
Main Path:	 User selects Admin tab User selects the Create sub-tab System displays a create hierarchy form User inputs data to create the hierarchy and selects the Submit action. System checks to confirm that the entered hierarchy name does not already exist. System validation passes. System returns a message indicating the Hierarchy was Successfully created Use case ends.
Alternate Paths:	 A billing hierarchy is automatically created when invoice data is loaded into the system with a status of Published. User selects Reset action: System invokes <u>Reset</u> use case User selects Submit action: System displays message: Please enter Hierarchy Name to create hierarchy.
Exception Paths:	User encounters a validation error: System invokes <u>Validation Error Message</u> use case. User or CSR encounters a system error: System invokes <u>Error Message</u> use case.

Business Rules:	Only Organizational and Consolidation hierarchies can be created by a User
	Consolidation hierarchies group together multiple billing hierarchies into a single hierarchy. The structures within the billing hierarchies are completely preserved.

nager	Help Contact Us Change Language Log Out
	TEMENTS PAYMENTS ANALYTICS SELF SERVICE
	CHY BILLING TOP X USAGE FIND CALLS
Hierarchy	43
Company Name: A	merican HighTech1 Hierarchy Name: Billing Hierarchy
User Name: Aron B	ush Position: American HighTech1
MANAGE SEARCH CREATE C * Hierarchy Type: * Hierarchy Name: Description:	COMPARE ADMIN OPY IMPORT PUBLISH DOWINLOAD EXPIRE DELETE Business Hierarchy Image: Construction of American HighTech. Image: Construction of American HighTech. Image: Construction of American HighTech.
* Denotes a required fiel	d. (Submit) (Reset)
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	-

Create Hierarchy Step 1: Specify Non-Billing Hierarchy Parameters



Create Hierarchy Step 2: Non-Billing Hierarchy Created

Copy Hierarchy

Name:	Copy Hierarchy
Brief Description:	Describes the mechanism whereby a user can copy an entire hierarchy to create a new hierarchy.
Actors:	CSR, Admin, Manager
Entry Points	Admin Tab: Copy Sub-tab
Form Elements:	Hierarchy Search Criteria
	1. Hierarchy Type
	Dropdown: [Organization, Consolidation]
	2. Hierarchy Name
	3. Period: [Current Period]
	Dropdown: up to 12 months, configurable
	*For more information regarding fields and their defaults, refer to Manage User Interface Use Case.
	Copy Hierarchy Form (Details Sub-tab)
	1. Hierarchy Type [Default: Current Context, Hard coded]
	2. Hierarchy Name [Required: Default: Blank]
	3. Description [Optional, Default: Blank]
	4. Instructional Text: "Please select the Hierarchy or Group you want to copy to a new Hierarchy"
Main Path:	1. User selects Admin tab
	2. User select Copy sub-tab
	3. User selects a hierarchy to be copied from the Hierarchy Drop down.
	4. User selects Submit Button [A1]
	 User specifies new name for the hierarchy to be copied and selects the Submit action.
	6. System checks to confirm that the entered hierarchy name does not already exist. [A4]
	7. System validation passes.
	8. System creates a new hierarchy with a status of Unpublished
	 System returns the success page displaying "The Hierarchy has been successfully created" and the following information:
	 Top pane: [Hierarchy Search Criteria pre-populated with copied hierarchy information]
	b. Left pane: [Graphical view with copied hierarchy as the top node]
	c. Right pane: [Details tab hard-coded with information entered by user for the copied hierarchy]

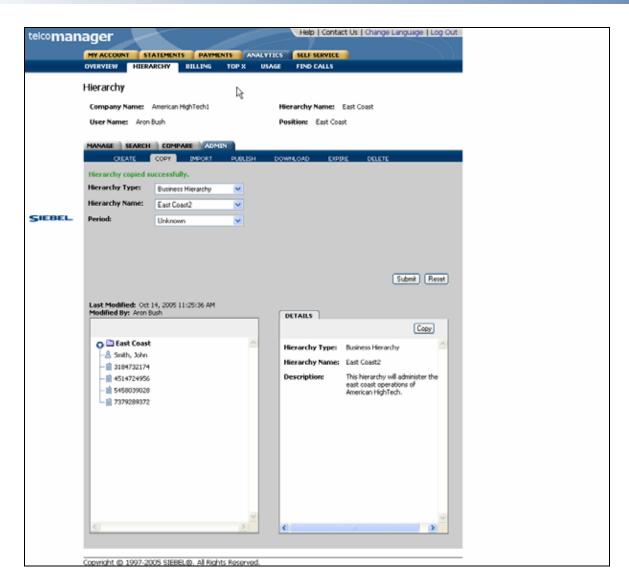
	10. Use case ends.
Alternate Paths:	System invokes <u>Reset</u> use case. System displays message: Hierarchy Name already exists.
Exception Paths:	User encounters a validation error: 1. System invokes <u>Validation Error Message</u> use case.
	User encounters a system error: 1. System invokes <u>Error Message</u> use case.
Business Rules:	Only non-billing hierarchies or groups can be copied and can only be copied into a new hierarchy.
	A Hierarchy need not be published in order to use the Copy function

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				VTICS SELF SE			
	OVERVIEW HIER	ARCHY DILLING	TOP X U	ISAGE FIND C	ALLS		
	Hierarchy						
	Company Names	American HighTech1		Hierarchy N	ame: East	Coast	
	User Name: Aron	Bush		Position: E	ast Coast		
	MANAGE SEARCH	COMPARE ADM	IN				
	CREATE	COPY IMPORT	PUBLISH	DOWNLOAD	EXPIRE	DELETE	
	Hierarchy Type:	Business Hierarchy	×				
	Hierarchy Name:	East Coast	×				
SIEBEL	Period:	A405	×				
						5	ubmit Reset
	Copyright © 1997-2	005 SIEBEL®. All Righ	ts Reserved.				

Copy Hierarchy Step 1: Select Hierarchy to Copy

elcoman	ader			Help Conta	ct Us Change Language Log Out
		ATEMENTS PAYME	NTS ANALYT	ICS SELF SERVICE	
	OVERVIEW HIER		TOP X US/		
	Hierarchy	12			
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	User Name: Aron			Position: test	105
		COMPARE ADM			
	CREATE	COPY IMPORT	PUBLISH	DOWNLOAD EXP	IRE DELETE
	Hierarchy Type:	Business Hierarchy	×		
	Hierarchy Name:	East Coast	×		
EBEL.	Period:	Jul-05	×		
					Submit Reset
	Last Modified: Oct Modified By: Aron E	14, 2005 11:02:15 AM			
	(DETAILS	Submit Reset
	👩 🖿 East Coast				
	-& Smith, John			Hierarchy Type:	Business Hierarchy
	- 1 3184732174			Hierarchy Names	East Coast2
	- 1 4514724956			Description:	This hierarchy will ac
	7379289372				east coast operations HighTech.
	<		>	<	× ×
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Copy Hierarchy Step 2: Specify Parameters for Hierarchy to be copied



Copy Hierarchy Step 3: Hierarchy Copied

Import Hierarchy

Name:	Import Hierarchy							
Brief Description:	Describes the mechanism whereby a user can import a hierarchy.							
Actors:	CSR, Admin, Manager							
Entry Points	Admin Tab: Import Sub-tab							
Form Elements:	Import Non-Billing Hierarchy Form 1. Select File [Required: XML file type only]							
Main Path:	 User selects Admin tab User selects Import sub-tab System displays Import Hierarchy Form. User specifies file to be imported and selects the periods from the drop down box and selects Submit action. System reads hierarchy meta data including hierarchy type, hierarchy name, and description data (if available) contained in the specified file a. System checks to confirm that the hierarchy name does not already exist [A1] b. System hierarchy validation passes c. System refreshes page with the graphical view of the hierarchy on the left pane and the hierarchy attributes on the right pane with the confirmation message stating "Performing this operation will import the Hierarchy User confirms the import by selecting the Submit action System refreshes the Import page with the success page stating "The Hierarchy has been successfully imported" and the following information: a. [Hierarchy Import Criteria pre-populated with information read in or entered by user to create the imported hierarchy] with Start and End Periods b. Import Status: Displays the new name of the Imported Hierarchy along with the folder information and service agreements To re-confirm the imported Hierarchy, go to the Manage Tab. Use case ends. 							
Alternate Paths:	User Imports a hierarchy that already exists in the system System displays a message "A hierarchy of the same name already exists. Select submit to update the hierarchy" User selects Submit action System updates and saves the hierarchy							

System invokes Cancel use case and does not save the imported hierarchy.							
User selects Reset action:							
System invokes Reset use case.							
User selects Start Over action:							
User encounters a validation error:							
System invokes Validation Error Message use case.							
User or CSR encounters a system error:							
System invokes <u>Error Message</u> use case.							
Only non-billing hierarchies can be imported. This includes both organization and consolidation hierarchy types.							
Only XML file types can be imported that comply with the hierarchy load data format specification.							
Name, Type, and Description of the hierarchy information must be contained with the file being imported.							
Validation of the XML source compliance with the definition of the hierarchy type specified within the file.							
The user who initiates the hierarchy import is automatically assigned to the root node of the hierarchy if user's role is not Admin.							

nager	Hel	p Contact Us Cha	nge Language Log Out
		SERVICE	
OVERVIEW HIERARCHY BILLI	G TOP X USAGE FIND	CALLS	
Hierarchy			
Company Names American HighTec	1 Hierarchy	Names New Test -I	shani
User Name: Aron Bush	Position:	New Test -Ishani	
MANAGE SEARCH COMPARE	ADMEN		
CREATE COPY IMP	T PUBLISH DOWINLOAD	EXPIRE DEL	LETE
*Select file:	Browse	R	
Start Period: Select	*	45	
End Period: Select	×		
* Denotes a required field.			Submit Reset
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Import Hierarchy Step 1: Import Form

MY ACCOUNT STATEMENTS PAYMENTS AVAL YTICS SELF SERVICE OVERVIEW Choose file Image: Second	nanager			Help	Contact Us Change	Language Log	Out	
Choose file Image: Conspany of the set of		STATEMENT		NALYTICS SELF	ERVICE			
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User Name Wy Computer My Rocent My Rocent My Rocent My Computer My Rocent My Rocent My Documents My Rocent My Computer Node Fles <th>Hierarchy</th> <th>Look in:</th> <th>🚱 Desktop</th> <th></th> <th>• + B 🖻</th> <th></th> <th></th>	Hierarchy	Look in:	🚱 Desktop		• + B 🖻			
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Copyright ©	Consider 10	riaces	Files of type: All	Files (".")	*	Cancel		

Import Hierarchy Step 1: Browse for File to Import

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	MY ACCOUNT	STATEMEN	TS PAYME	NTS AN		SERVICE		
	OVERVIEW	TERARCHY	BILLING	тор х	USAGE FIND	CALLS		
5	Hierarchy							
	Company Nam		HighTech1		-	Name: New		
	User Name: /	Aron Bush			Position:	New Test -Ish	ani	
	MANAGE SEA		DARE ADM	IN PUOLISH	DOWNLOAD	COPIPE	DELETE	
	*Select file:	C:\Docum	ents and Setting	ps Vikulahil ^a 🖪	rowse			
	Start Period:	Apr-05		~				
	End Period:	Jul-05		~				
	* Denotes a requir	red field.					Su	mit Reset
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Import Hierarchy Step1: Specify Parameters

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MY ACCOUNT		ANALYTICS SELF SE	RVICE	
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Hierarchy	R			
Company Name	American HighTech1	Hierarchy Na	nne: New Test-Ishaniwa	3
User Name: Ar	on Bush	Position: N	ew Test -Ishani	
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Start Period:	Select 💙			
End Period:	Select 💌			
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Import Hierarchy Step 2: Imported Hierarchy Confirm Page

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			TS ANAL		SERVICE						
	OVERVIEW HIERA	RCHY BILLING	торх и	ISAGE FINE	CALLS						
	Hierarchy										
	Company Name:	American HighTech1		Hierarchy	Name: New Test	-Ishani2					
	User Names Aroo	-			New Test -Ishani	12112112					
	User Hames Arong	Julis Fi		Posicion	New Test -Ishani						
	MANAGE SEARCH	COMPARE ADMIN	60								
	Please select hierard	chy criteria									
	Hierarchy Type:	Business Hierarchy	~	Element:	Select	~					
	Hierarchy Names	New Test-Ishani2	~	Status:	Select						
	Period:			Attribute:							
IEBEL		Unknown	×		Select	<u> </u>					
	 Entire Hierarchy 			Keyword:	L						
	O From Current Posit	ion									
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Import Hierarchy Step 3: Imported Hierarchy Success

Publish Hierarchy

Name:	Publish Hierarchy
Brief Description:	Describes the mechanism whereby a user can publish a hierarchy.
Actors:	CSR, Admin, Manager
Entry Points	Admin Tab: Publish Sub-tab
Form Elements:	Publish Hierarchy Form
	 Hierarchy Type [Required: Default: Current Context] Dropdown: [Billing, Consolidation, Organization]
	 Hierarchy Name [Required: Default: Current Context] Dropdown: [{Hierarchy Names stored in the system]
	3. Period Start [Required: Default: Current Context]
	4. Period End [Required: Default: Current Context]
Main Path:	1. User selects Admin Tab and Publish sub-tab
	2. System displays Publish Hierarchy Form.
	3. User selects the Hierarchy name from the drop-down that needs to be published and the appropriate dates from the drop down and press Submit action.
	 System displays a status message of "Hierarchy Successfully Published"
	5. User selects the submit action
	6. Use case ends.
Alternate Paths:	User selects Reset action:
	System invokes <u>Reset</u> use case.
Exception Paths:	User encounters a system error:
	System invokes Error Message use case.
Business Rules:	[B1] Any Organization hierarchy that is created should be publishable. The user will have to ensure there is data for the period that the hierarchy is published.
	[B2] If a Hierarchy is already published it will not show up in the drop down.
	[B3] The End Period has to be greater than the Start Period
	[B4] A Hierarchy cannot be published after it expires and can only be published once.
Notes:	

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OVERVIEW	HIERARCHY	BILLING	TOP X	USAGE	FIND C	ALLS		
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User Name:	Aron Bush			Po	sition	Sales		
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CREA	TE COPY	DAPORT	PUBLIS	004	UNLOAD	EXPORE	DELETE	
* Hierarchy	Type: Dus	ness Hierarchy	×					
* Hierarchy	Name: Ead	Coast Business	~					
* Start Perio	d: Jan	05	×					
* End Period	i Jan	05						
* Denotes a re	quired field.						Subm	Reset
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Publish Hierarchy Form

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OVERVIEW HIERAN	SCHY DILLING	торх и	SAGE FIND C	ALLS	
Hierarchy					
Company Name: A	merican HighTech1		Hierarchy N	ame: East (Joast Business
User Name: Aron D	ush		Position: 3	ales	
	COMPARE ADMIN	PUBLISH	DOWNLOAD	EXPIRE	DELETE
* Hierarchy Type:	Business Hierarchy	×			
* Hierarchy Names	East Coast Business	~			
* Start Period:	May-05	~			
* End Period:	1405	×			
* Denotes a required fiel	d.				Submit Reset
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Publish Hierarchy Step 1: Specify parameters

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Hierarchy	5					
Company Name:	American HighTech1		Hierarchy N	ame: East	Coast Business	
User Name: Aron	Dush		Position:	East Coast Dus	iness	
MANAGE SEARCH	COMPARE ADA	PUBLISH	DOWINGOAD	EXPIRE	DELETE	
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* Hierarchy Type:	Business Hierarchy	~				
* Hierarchy Name	Not available-	~				
* Start Period:	Jan 05	×				
* End Period:	Jan-05	×				
* Denotes a required	field.				Submit Re	lac
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Publish Hierarchy Step 2: Success

Download Hierarchy

Name:	Download Hierarchy						
Brief Description:	Describes the mechanism whereby a user can download a hierarchy.						
Actors:	CSR, Admin, Manager						
Entry Points	Admin Tab: Download Sub-tab						
Form Elements:	Download Hierarchy Form						
	 Hierarchy Type [Required: Default: Current Context] Dropdown: [Billing, Consolidation, Organization] 						
	 Hierarchy Name [Required: Default: Current Context] Dropdown: [{Hierarchy Names stored in the system] 						
	3. Period [Required: Default: Current Context]						
	4. New Name [Required: New name for the file]						
Main Path:	1. User selects Admin Tab and Download sub-tab						
	2. System displays Download Hierarchy Form.						
	3. User specifies the data for the download and selects the Submit action.						
	4. User browser displays a dialog box with the options for download.						
	5. User selects browser Save function.						
	6. User browser returns a dialog box for Save function.						
	 User enters a name for the file and selects Save to complete download function. 						
	8. System returns the user to the download hierarchy form defaulted to the current context.						
	9. Use case ends.						
Alternate Paths:	User selects Reset action: System invoked Reset use case.						
Exception Paths:	User encounters a system error:						
	System invokes <u>Error Message</u> use case.						
Business Rules:	[B1] Any type of hierarchy can be downloaded.						
	[B2] Download is only available in XML format.						
Notes:	Uses standard browser download function.						
	XML format supported in the current implementation. The Download format is equivalent to the Import format. Other formats will be supported in future releases.						

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Download Step 1: Specify Parameters

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User Name:	Type: XML Document, 1.70 KB
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* Format:	3ML 💌
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Download Step 2: Select Save As Option

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Download Step 3: Specify Location

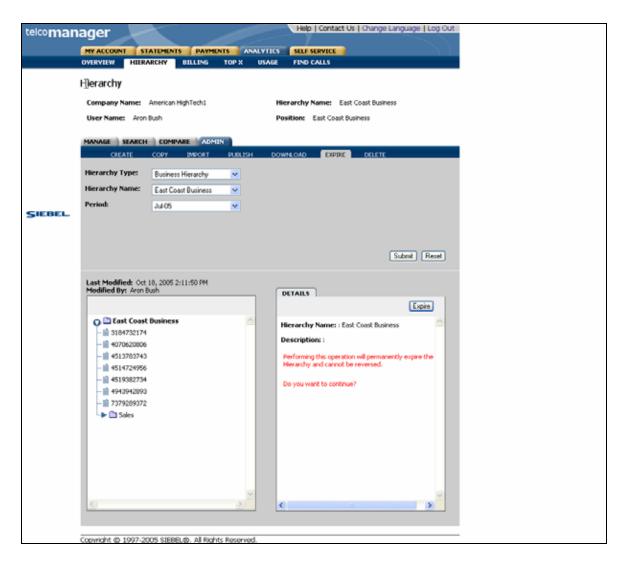
Expire Hierarchy

Name:	Expire Hierarchy						
Brief Description:	Describes the mechanism whereby a user expires (stops version replication) of a non-billing hierarchy.						
Actors:	CSR, Admin, Manager						
Entry Points	Admin Tab: Expire Sub-tab						
Form Elements:	 <u>Expire Hierarchy Form</u> 1. Hierarchy Type [Required: Default: Current Context] Dropdown: [Consolidation, Organization] 2. Hierarchy Name [Required: Default: Current Context] 						
	Dropdown: [Hierarchy Names stored in the system]3. Period [Required: Default: latest period in hierarchy]						
Main Path:	 User selects Admin tab and Expire sub-tab System displays Expire Hierarchy Form. User specifies the hierarchy and the period for the hierarchy to be expired and selects the Submit action. System validation passes. System returns a page displaying: a. Top pane: Hierarchy Name and Period of the Hierarchy to be expired b. Left pane: [Graphical view of the hierarchy to be expired] c. Right pane: [Details tab pre-populated with information for the hierarchy about to be expired] System displays the following confirmation message on the right pane: "Performing this operation will permanently expire the hierarchy and cannot be reversed. Do you want to continue?" User selects Expire action. System returns a success page stating: "The Hierarchy has been successfully expired." 						
Alternate Paths:	User selects Reset action:						
Exception Paths:	System invokes the <u>Reset</u> use case. User encounters a validation error: System invokes <u>Validation Error Message</u> use case. User or CSR encounters a system error: System invokes <u>Error Message</u> use case.						

Business Rules:	Only non-billing hierarchies can be expired. Users assigned to expired hierarchies remain assigned.
	Services are unassigned from hierarchy expired and are moved to unassigned status but maintain any user settings (in consolidation only).
	Managers [only if they create the hierarchy], admin [regardless of who created the hierarchy] but Subscribers cannot Expire Hierarchies
Notes:	None

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	User Name: Aron	Bush			Pos	ition: 1	ast Coast Bu	siness		
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Expire Hierarchy Form



Expire Hierarchy Step 1: Select Hierarchy and Period to Expire

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	Company Name:	American HighTech1		Hierarchy N	ame: East	Coast Business	
	User Name: Aron	Dush		Position: E	ast Coast Bu	siness	
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Expire Hierarchy Step 2: Success Page

Delete Hierarchy

Name:	Delete Hierarchy
Brief Description:	Describes the mechanism whereby a user deletes a non-billing hierarchy.
Actors:	CSR, Admin, Manager
Entry Points	Admin Tab: Delete Sub-tab
Form Elements:	1. Delete Hierarchy Form
	Hierarchy Type [Required: Default: Current Context] Dropdown: [Consolidation, Organization]
	Hierarchy Name [Required: Default: Current Context] Dropdown: [Hierarchy Names stored in the system]
Main Path:	User selects Admin tab and Delete sub-tab
	System displays Delete Hierarchy Form. User specifies data for the hierarchy to be deleted and selects the Submit action.
	System returns a dialog box with the message: "Performing this Operation will permanently delete this hierarchy. Do you want to continue?"
	User selects the "OK" action.
	System deletes selected hierarchy and all nodes below it.
	System returns a success page stating: "The Hierarchy has been successfully deleted."
	Use case ends.
Alternate Paths:	User selects Cancel action:
	System invokes <u>Cancel</u> use case.
	User selects Start Over action:
	System invokes <u>Start Over</u> use case.
Exception Paths:	User encounters a validation error:
	System invokes Validation Error Message use case.
	User or CSR encounters a system error:
	System invokes <u>Error Message</u> use case.
Business Rules:	Only non-billing hierarchies can be deleted.
	Users assigned to deleted hierarchies are unassigned and will still appear elsewhere if assigned and will not be unassigned from accounts or services contained in the group.

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Delete Hierarchy Step 1: Specify Parameters

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OVERVIEW HIERA	RCHY BILLING TOP X USAGE FIND CALLS
Hierarchy	R
Company Names /	Inerican HighTech1 Hierarchy Names East Coast Hierarchy
User Name: Aron E	ush Position: East Coast Herarchy
	Correct Internet Explorer Microsoft Internet Explorer Performing this operation will permanently delete the Hierarchy and cannot be reversed. Do you want to continue? Correct OK Cancel
	Submit (Reset)
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Delete Hierarchy Step 2: Confirm Page

manager		Help Contact Us Change	Language Log Out
	My Account Statements Payments Analytic Overview Hierarchy Profile	s Self Service	
	Overview Hierarchy Profile		
	Hierarchy		1 → 2 → 3
	Company Name: edocs	Hierarchy Name: ACME-USA	
	User Name: John Smith	Position: ACME-USA	
	Manage Search Admin		
	Manage Search Admin Create Copy Import Download Delete		
	The Hierarchy has been successfully deleted.		
	The Hierarchy has been successfully deleted.		
			START OVER
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Delete Hierarchy Step 3: Delete Page

Version Hierarchy

Version Billing Hierarchies

Name:	Version Billing Hierarchies
Brief Description:	System saves the current form of the billing hierarchy. Business Requirement: Provide a way to generate accurate trending reports.
Actors:	System
Main Path:	 System stores the current version and effective date of all billing hierarchies on the first day of the month at 12:00 AM.
	2. System carries over the current version of all billing hierarchies to the new month.
Alternate Paths:	[A1] Versioned hierarchy is purged: System invokes Purge use case.
Exception Paths:	System encounters an error during versioning: System logs the error in the log file.
Business Rules:	Effective date is based upon the provider's reporting period. Reporting period is defaulted to one month. <i>Rationale: Service providers bill monthly.</i> In rare cases the bills are cut on a frequency other than monthly, the reporting period and effective dated hierarchies may be configured to match the provider's billing frequency.
	Effective date is 12:00 AM from the first of the month until 12:00 AM on the first of the next month.

Manage Versioned Hierarchy

Name:	Manage Versioned Hierarchy
Brief Description:	Describes the user interface for managing an effective dated hierarchy and behavior of associated actions.
Actors:	CSR, Admin, Manager
Entry Points	1. My Account Tab: Hierarchy Sub-Tab
	2. Manage Tab
Form Elements:	Top Pane: Hierarchy Search Criteria
	If there is no user specified default hierarchy type and hierarchy name, the system uses the first billing hierarchy in the hit list as the default
	1. Hierarchy Type
	2. Hierarchy Name
	 Period [Required: Default: Current Context or Current Month for start of session] Reporting period that corresponds 1:1 with billing cycles. Dropdown Options: [monthly, up to 12 months, configurable]
	4. Status
	5. Attribute
	6. Keyword
	 Radio buttons: [Default: From Current Location] Specifies the scope of the search, entire hierarchy or from the current position and below. Options: [Entire Hierarchy or From Current Location]
	8. Instructional text: "Please select hierarchy criteria"
	*For more information regarding fields and their defaults, refer to Manage User Interface Use Case.
	Bottom Left Pane
	1. New [Default: Select] Dropdown Options: [Groups]
	Bottom Right Pane: Details Sub-Tab * All fields are pre-populated with previously stored information.
	Bottom Right Pane: Elements Sub-Tab
	1. Checkbox [header row] Selects all rows
	2. Checkbox [row value] Selects the individual row
	3. Results [number] Number of search results returned
	Bottom Right Pane: Move Sub-Tab

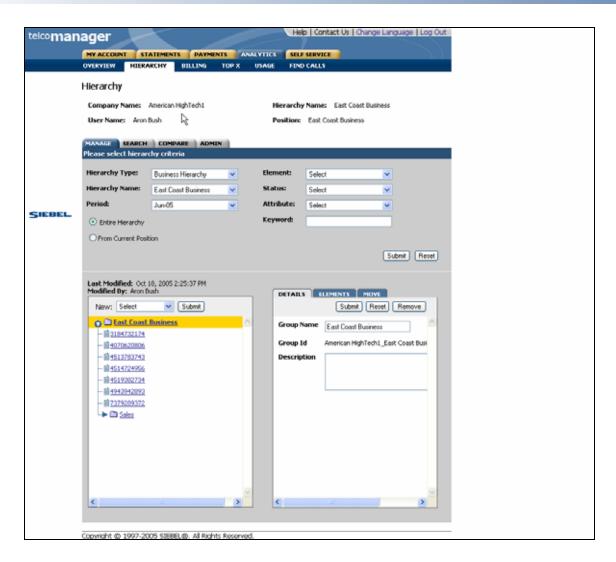
	1. Checkbox [node] Selects all rows
	2. Checkbox [child branch] Selects the individual branch
	*For more information regarding fields and their defaults, refer to Manage User Interface Use Case.
Report Content:	Results Fields For Element Groups Element Sub-tab
	1. Name (Display name of element type Groups)
	2. Position (The name of the hierarchy node one level above)
	Results Fields For Element Accounts Element Sub-tab
	1. Account No. (Display name of element type Accounts)
	2. Position (The name of the hierarchy node one level above)
	Results Fields For Element Services Element Sub-tab
	1. Number (Display name of element type Services)
	2. Position (The name of the hierarchy node one level above)
	Results Fields For Element Users in Element Sub-tab
	1. Name (Display name of element type User)
	2. Position (The name of the hierarchy node one level above)
Main Path:	1. User selects Manage tab.
	2. System returns a page displaying:
	d. Top Pane: Hierarchy Search Criteria Form with current context and defaults.
	e. Bottom Left Pane: Graphical view of current hierarchy tree opened to current position context.
	f. Bottom Right Pane: Details tab containing the details for current hierarchy context.
	3. User specifies an alternate Period from the current period from the Period drop down box [B1]
	4. System determines query parameters based upon the specified hierarchy search criteria and redisplays page as follows:
	d. Top Pane: Hierarchy Search Criteria Form with context updated by specified search criteria.
	e. Bottom Left Pane: Graphical view of current hierarchy tree opened to current position context.
	 f. Bottom Right Pane: Elements tab containing the fields for specified element and status with the total count for the search result set. (For field information, see Report Content section of this use case.)
	5. Use Case Ends.

Alternate Paths:	 User enters search parameters for Attribute, and/or Keyword and selects the Submit action to refine search criteria and filter down the results: Rationale: Enable user to refine search by providing filters for the search and quickly select a position in the hierarchy. System searches the hierarchy tree returning a list of all nodes in the Elements sub-tab on the lower right pane that matches the search criteria showing the fields for specified element and status. User selects link of the display name in the Elements sub-tab: System returns the user to the Details sub-tab displaying attributes for the specified element type.
	User selects link of a position in the Elements sub-tab: System highlights the position of the selected item in the graphical view of the hierarchy.
	User expands and collapses the hierarchy branch by selecting on the arrow in the graphical view of the current hierarchy: System invokes <u>Collapse and Expand Hierarchy</u> use case.
	User selects New Group and the Submit action: System invokes Create Group use case.
	User selects Details sub tab: System returns the user to the Details sub-tab displaying attributes for the specified element type.
	User selects Delete or Remove action in the Details or Element sub-tabs:
	System invokes <u>Remove Element</u> use case.
	User modifies attributes in the Details sub-tab: System invokes Modify Element Attributes use case.
	User selects Add action in the Element sub -tab: System invokes <u>Add Element</u> use case.
	User selects column header links in the Element sub-tab: System invokes <u>Sorting</u> use case.
	User selects Move sub-tab: System invokes <u>Move Group</u> use case.
	User selects Reset action: System invokes <u>Reset</u> use case.
Exception Paths:	User encounters a validation error: System invokes Validation Error Message use case.
	User encounters a system error: System invokes <u>Error Message</u> use case.

Business Rules:	<u>General</u>
	The manage hierarchy behavior is the same for a historical versioned hierarchy as it is for the current hierarchy. However any changes made to a historical hierarchy will only affect the specified current version of the hierarch.
	System persists the Hierarchy Type, Hierarchy Name, Period, and Position throughout the user's session until user otherwise changes it.
	Hierarchy Access Control: Users can only view hierarchies to which they have been assigned and positions at or below the positions to which they have been assigned. User can not view hierarchy nodes to which they have not been granted view access privileges
	If user enters the Manage Tab with the hierarchy as the current position, the graphical view of the hierarchy contains the hierarchy as the top node and its nodes one level below it.
	Top Pane: Hierarchy Search Criteria
	If user selects the radio button for "Entire Hierarchy", the scope of the search is all the nodes in the hierarchy.
	If user selects the radio button for "From Current Position", the scope of the search is relative to and limited by the nodes below the current position.
	Bottom Left Pane: Graphical View of Hierarchy
	If the hierarchy is modified, the fields "Last Modified" and "Modified By" are updated.
	If a position is selected, the position is highlighted. Unless the arrow for the position is selected, the node will not expand or collapse.
	If a node is empty, there will be no arrow next to the node.
	Bottom Right Pane: Details/Element/Move Sub-Tabs
	If user selects the checkbox in the row of the column headers of the search results, all items of the search results become selected.
	If Element is unassigned, it can be added to the hierarchy. If element is assigned, it can be removed or deleted from the hierarchy.
	If Element is Group, Delete action is available. For all other elements, Remove action is available.
	If text field box exists, the attribute is editable.
	Results field for the search criteria specified is updated according to action performed.
Notes:	

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	Company Names	American HighTech1		Hierarchy	Name: East Coar	t Business	
	User Name: Aron	Bush		Position:	East Coast Busines	6	
		COMPARE ADMIN	<u> </u>				
	Please select hierar	chy criteria					-
	Hierarchy Type:	Business Hierarchy	×	Element:	Select	*	
	Hierarchy Name:	East Coast Business		Status:	Select		
			×			×	
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Current Period Manage Hierarchy



Previous Period [Historical Version] Manage Hierarchy

Compare Versioned Hierarchy

Name:	Compare Versioned Hierarchy
Brief Description:	User finds a particular group, account, services, and/or attributes for any node or leaf within a hierarchy.
Actors:	CSR, Admin, Manager
Entry Points	1. Compare Tab
Form Elements:	Hierarchy Search Criteria If there is no user specified default hierarchy type and hierarchy name, the system uses the first billing hierarchy in the hit list as the default
	1. Hierarchy Type
	2. Hierarchy Name
	3. Period 1: [Specifies hierarchy version to be displayed in lower left pane] [Default: Current Period]
	 Period 2: [Specifies hierarchy version to be displayed in lower right pane] [Default: Current Period]
	5. Element [Inactive]
	6. Status [Inactive]
	7. Attribute [Inactive]
	8. Keyword [Inactive]
	9. Radio buttons: [Inactive]
	*For more information regarding fields and their defaults, refer to Manage User Interface Use Case.
Report Content:	Search Results Fields For Element Groups
	*For more information regarding fields and their defaults, refer to Manage User Interface Use Case.
	Search Results Fields For Element Accounts
	*For more information regarding fields and their defaults, refer to Manage User Interface Use Case.
	Search Results Fields For Element Services
	*For more information regarding fields and their defaults, refer to Manage User Interface Use Case.
	Search Results Fields For Element Users
	1. *For more information regarding fields and their defaults, refer to Manage User Interface Use Case.
Main Path:	User selects Compare tab.
	System returns a page displaying:
	Display with Hierarchy Type, Hierarchy Name and Period
	User specifies a Hierarchy Name and an alternate for Period 1 and/or for Period 2 from the current period from the Period drop down box [B1]

	n determines query parameters based upon the specified hierarchy search criteria and redisplays page as follows:
a	Top Pane: Hierarchy Search Criteria Form with context updated by specified search criteria.
b	 Bottom Left Pane: Graphical view of current hierarchy tree opened to Period 1 context.
c	Bottom Right Pane: Graphical view of current hierarchy tree opened to Period 2 context.
Use C	ase Ends.

Alternate Paths:	[A1] User selects one or more checkboxes and selects the Submit action:
	1. System returns the user to the Manage tab displaying:
	i. Top pane: Hierarchy Search Criteria with specified search criteria context.
	Bottom Left Pane: Graphical view of current hierarchy tree opened to current position context.
	Bottom Right Pane: Elements tab containing the display name and position of the selected element.
	[A2] User selects link of the display name of the specified element type for the search criteria:
	1. System returns the user to the Manage tab displaying:
	i. Top pane: Hierarchy Search Criteria with specified search criteria context.
	Bottom Left Pane: Graphical view of current hierarchy tree opened to where the element selected is located in the tree in the bottom left pane.
	iii. Bottom Right Pane: Details tab containing the details for the selected element.
Exception Paths:	User encounters a validation error:
	System invokes Validation Error Message use case.
	User encounters a system error:
	System invokes <u>Error Message</u> use case.
Business Rules:	General
	The manage hierarchy behavior is the same for a historical versioned hierarchy as it is for the current hierarchy. However any changes made to a historical hierarchy will also affect all versions of the hierarchy forward up to and including the current hierarchy.
	System persists the Hierarchy Type, Hierarchy Name, Period, and Position throughout the user's session until user otherwise changes it.
	Hierarchy Access Control: Users can only view hierarchies to which they have been assigned and positions at or below the positions to which they have been assigned. User can not view hierarchy nodes to which they have not been granted view access privileges
	Any unassigned users, accounts, and services are attached on the top of the hierarchy.
	If user enters the Manage Tab with the hierarchy as the current position, the graphical view of the hierarchy contains the hierarchy as the top node and its nodes one level below it.
	Top Pane: Hierarchy Search Criteria
	"Entire Hierarchy", is inactive
	"From Current Position", is inactive
	Bottom Left Pane: Graphical View of Hierarchy Period 1
	If the hierarchy is modified, the fields "Last Modified" and "Modified By" are

updated.
If a position is selected, the position is highlighted. Unless the arrow for the position is selected, the node will not expand or collapse.
If a node is empty, there will be no arrow next to the node.
Bottom Right Pane: Graphical View of Hierarchy Period 2
If the hierarchy is modified, the fields "Last Modified" and "Modified By" are updated.
If a position is selected, the position is highlighted. Unless the arrow for the position is selected, the node will not expand or collapse.
If a node is empty, there will be no arrow next to the node.

Image: Contact Us: Change Language Log Out MY ACCOUNT STATCHINTS PAYHINTS Status OVERVIEW HERARCHY BLL ING TOP X UKAGE FIND CALLS Hierarchy Name: Anon Dash Image: Cost Business Positions: East Coast Business MANAGE SEARCH COMPARY Market: East Coast Business Positions: East Coast Business MANAGE SEARCH COMPARY Market: East Coast Business Positions: East Coast Business MANAGE SEARCH COMPARY Market: East Coast Business Positions: East Coast Business Hierarchy Type: Business Image: East Coast Business Positions: East Coast Business Period 1: Aun 05 Image: East Coast Business Image: East Coast Business Image: East Coast Business Image: East Coast Business Image: East Coast Business Image: East Coast Business Image: East Coast Business Image: East Coast Business Image: East Coast Business Image: East Coast Business Image: East Coast Business Image: East Coast Business Image: East Coast Business Image: East Coast Business Image: East Coast Business Image: East Coast Business Image: East Coast Business
OVERVIEW HERARCHY BILLING TOP X USAGE FIND CALLS Hierarchy Company Name: American HighTech1 Image: State Coast Business Hierarchy Name: East Coast Business User Name: Aron Dush Image: State Coast Business Position: East Coast Business Hierarchy Type: Business Admin Image: State Coast Business Position: East Coast Business Hierarchy Type: Business Image: State Coast Business Image: State Coast Business Image: State Coast Business Hierarchy Name: East Coast Business Image: State Coast Business Image: State Coast Business Image: State Coast Business Period 1: Jun 05 Image: State Coast Business Image: State Coast Business Image: State Coast Business Image: Period 1: Jun 05 Image: State Coast Business Im
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Compare Effective Dated Hierarchies

5 Report Use Cases

Billing Reports

Group Spending

Name:	Group Spending						
Brief Description:	User views total fees for the current cost center.						
Entry Points:	 Billing Reports List Report Dropdown 						
Query Parameters:	Report Selection Criteria & Custom Tab 1. Hierarchy Name & Position 2. Period Range Report Selection Criteria Only 1. Report Custom Tab Only 1. Relative Period Range 2. Group 3. Number of Contracts 4. Number of Calls 5. Total Value						
Report Content:	Case. Fields 1. Group (Hierarchical node) 2. Number of Contracts 3. Number of Calls 4. Total Value (Total charges and taxes) Footer For all but the first column, totals for all pages (including those not displayed) are displayed at the bottom of each page.						

Name:	Group Spending							
Chart:	Chart Type: Bar ◆ X axis: Group							
	Y axis: Total Value							
Main Path:	1. User selects the Group Spending report from the List of Billing Reports.							
	2. System determines query parameters based on report context or defaults and returns:							
	a. Tabular Report							
	b. Chart							
	3. Use case ends.							
Alternate Paths:	[A1] User modifies the query parameters:							
	 User changes any of the query parameters on the "Report" tab or t hierarchy context position and selects Display to execute report 							
	 System regenerates the report for the scope of selected reporting period and hierarchy context position. 							
	[A2] Drilldown: User selects the link for a group.							
	System invokes Highest Spender Reports use case for the selected group.							
	[A3] Drilldown: User selects the hyperlink "T" at the end of a row:							
	The Group Spending Trend report is generated where the hierarchy context position is changed to the object of the row on which the user selected and the report is run with all the same parameters from the report previously ran.							
	[A4] Drilldown: User selects the hyperlink "T" on the total at the bottom of the page:							
	The Group Spending Trend report is generated where the report uses the hierarchy position context and report parameters for the report previously ran.							
	[A5] Result set returns more than 20 Chart Bars							
	User receives a message that the chart was suppressed because of this condition.							
	[A6] User selects the Printer-Friendly action:							
	System invokes Printer-Friendly use case.							
	User selects the Download action:							
	System invokes <u>Download</u> use case.							
	[A8] No data set is available for the report:							
	System invokes <u>No Data</u> use case.							
Exception Paths:	[E1] User encounters a system error:							
	System invokes Error Message use case.							

Name:	Group Spending		
Business Rules:	[B1] If there are more than 20 Cost Centers in the result set the chart is suppressed.		
Notes:	This report was named as Spending by Cost Center in Release 1.		

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	Marketing				4		1,519	\$608.28 <u>T</u>				
	<u>Sales</u>				2		2,439	\$770.11 <u> </u>				
	Total				9		5,286	\$1,895.28 <u>T</u>				
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Group Spending

Group Spending Trend

Name:	Group Spending Trend Report
Brief Description:	This report tracks monthly summary charge information over a user defined reporting period range for a selected group in a group hierarchy. <u><i>Rationale</i></u> : 1) Analyze trends, 2) Identify anomalies
Entry Points	1. Report List
	 Drilldown: Group Spending Trend Report (from a higher level in the hierarchy)
	3. Drilldown: Group Spending Report
	4. Report Dropdown
Query Parameters	Report Selection Criteria & Custom Tab
	1. Hierarchy Name & Position
	2. Period Range
	Report Selection Criteria Only
	1. Report
Report Content	Fields
	1. Reporting Period [Sort: Ascending]
	2. Number of Contracts
	3. Number of Calls
	 Total Value (Total charges and taxes)
	Footer
	Display column totals (for all pages) for Number of Calls and Total Value.
Chart	Chart Type: Bar
	X axis: Reporting Period
	Y axis: User defined value
Main Path:	1. User selects the report from the List of Billing Reports.
	 System determines query parameters based on report context or defaults.
	 System returns: a. Bar Chart b. Summary tabular report

Name:	Group Spending Trend Report				
Alternate Paths:	[A1] User Modifies Query Parameters				
	User changes any of the query parameters on the "Report Tab" or their hierarchy context position and clicks display to execute report.				
	[A2] Drilldown To Billing Account Overview Report				
	Preconditions:				
	Drilling down to this report is valid only if the current hierarchy position context is the bottom group level linked directly to a billing account object in the current hierarchy.				
	<u><i>Rationale</i></u> : An exception condition means there are no child billing accounts to display as report rows.				
	Note: See note in [A3]				
	User clicks on the period name or total value in the tabular report to run the Account Billing Overview report for the reporting period on which the user clicked.				
	[A3] Result set returns more than 20 Chart Bars				
	User receives a message that the chart was suppressed because of this condition.				
	[A4] User selects the Printer-Friendly action				
	System invokes Printer-Friendly use case.				
	[A5] User selects the Download action				
	System invokes <u>Download</u> use case.				
	[A6] No data set is available for the report				
	System invokes <u>No Data</u> use case.				
	[A7] Change Column to Chart				
	1. User selects a new value from the Column to Chart query parameter.				
	New chart is displayed with the selected column.				
Exception Paths:	[E1] Drilldown Unavailable: If the current hierarchy context position is directly related to both a child group hierarchy object and a child billing hierarchy object, it is not be possible to drilldown to either report. <i>Rationale:</i> The total on the report would not tie to value from which the user drilled down.				
Business Rules:	[B1] Maximum Period Ranges: If the date range spans more than 20 reporting periods, the chart display is suppressed.				
Notes:	None				

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	Sep-06				8		1,663	\$740.54
	Oct-06				8		1,725	\$777.02
	Total						4,892	\$2,175.41
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Group Spending Trend

Account Billing Overview

Name:	Account Billing Overview Report
Brief Description:	User views an overview of all billing accounts associated with the user
Entry Points:	 Billing Reports List Report Dropdown
Query Parameters:	Report Selection Criteria & Custom Tab 1. Hierarchy Name & Position 2. Period Range Report Selection Criteria Only 1. Report Custom Tab Only 1. Relative Period Range 2. Charges 3. Taxes 4. Total Value
Report Content:	Displayed Fields [Default] 1. Billing Account 2. Charges 3. Taxes 4. Total Value Available Fields Not Displayed 1. Account Charges 2. Usage Charges 3. Adjustments 4. Discounts 5. Other Charges/Credits 6. Taxes Footer For all but the first column, totals for all pages (including those not displayed) are displayed at the bottom of each page
Chart:	Chart Type: Bar • X axis: Billing Account • Y axis: Total Value

Name:	Account Billing Overview Report
Main Path:	 User selects the Account Billing Overview report from the List of Billing Reports.
	2. System determines query parameters based on report context or defaults and returns:
	a. Tabular Report
	b. Chart
	3. Use case ends.

Name:	account Billing Overview Report
Alternate Paths:	A1] User modifies the query parameters:
	 User changes any of the query parameters on the "Report" tab or their hierarchy context position and selects Display to execute report.
	System regenerates the report for the scope of selected reporting period and hierarchy context position.
	A2] Drilldowns: User selects link to get additional details.
	 A Billing Account: system invokes <u>Contract Billing Overview</u> use case for the selected Billing Account.
	2. A Row Total: system invokes <u>Account Billing Details</u> use case for the selected number.
	A3] Drilldown: User selects the hyperlink "T" at the end of a row:
	The <u>Account Billing Trend</u> report is generated where the hierarchy context position is changed to the object of the row on which the user selected and the report is run with all the same parameters from the report previously ran.
	A4] Drilldown: User selects the hyperlink "T" on the total at the bottom of the page:
	The <u>Group Spending Trend</u> report is generated where the report uses the hierarchy position context and report parameters for the report previously ran.
	A5] Result set returns more than 20 Chart Bars User receives a message that the chart was suppressed because of this condition.
	A6] User selects the Printer-Friendly action:
	System invokes Printer-Friendly use case.
	A7] User selects the Download action:
	System invokes <u>Download</u> use case.
	A8] No data set is available for the report:
	System invokes <u>No Data</u> use case.
	A9] User changes the displayed columns in the Customize tab
	System invokes Customize a Report use case and alternate paths.
	A10] User selects Change Language action
	System updates the report with the "Switch Language Report Template".
	Rationale: To test that the reporting module supports the switch language functionality.
Exception Paths:	E2] User encounters a system error:
	System invokes Error Message use case.
Business Rules:	B1] If there are more than 20 Billing Accounts in the result set, the chart is suppressed.

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	15197230		\$40.70	\$6.51	\$47.21 T
	15205923		\$26.13	\$7.28	\$33.41 T
	Total		\$965.04	\$267.70	\$1,232.74 <u>T</u>
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Account Billing Overview

Account Billing Details

Name:	Account Billing Details
Brief Description:	User views the charge types for all billing accounts associated with the user
Entry Points	 Billing Reports List Report Dropdown
Query Parameters:	Report Selection Criteria & Custom Tab
	1. Hierarchy Name & Position
	2. Period Range
	Report Selection Criteria Only
	1. Report
	Custom Tab Only
	 Relative Period Range Account Charges
	3. Usage Charges
	4. Adjustments
	5. Discounts
	6. Other Charges/Credits
	7. Taxes
 	8. Total Value
Report Content:	Fields
	1. Billing Account
	2. Account Charges
	3. Usage Charges
	4. Adjustments
	5. Discounts
	6. Other Charges/Credits
	7. Taxes
	8. Total Value
	Footer
	For all but the first column, totals for all pages (including those not displayed) are displayed at the bottom of each page
Chart:	None

Name:	Account Billing Details
Main Path:	 User selects the Account Billing Details report from the List of Billing Reports.
	2. System determines query parameters based on report context or defaults and returns a tabular report.
	3. Use case ends.
Alternate Paths:	[A1] User modifies the query parameters
	 User changes any of the query parameters on the "Report" tab or their hierarchy context position and selects Display to execute report.
	System regenerates the report for the scope of selected reporting period and hierarchy context position.
	[A2] Drilldowns: User selects link to get additional details.
	 A Billing Account: system invokes <u>Contract Billing Overview</u> use case for the selected account.
	 A Row Total: system invokes <u>Invoice Billing Details</u> use case for the selected number.
	[A3] Drilldown: User selects the hyperlink "T" at the end of a row:
	The Account Billing Trend report is generated where the hierarchy context position is changed to the object of the row on which the user selected and the report is run with all the same parameters from the report previously ran.
	[A4] Drilldown: User selects the hyperlink "T" on the total at the bottom of the page:
	The Group Spending Trend report is generated where the report uses the hierarchy position context and report parameters for the report previously ran.
	[A5] User selects the Printer-Friendly action
	System invokes Printer-Friendly use case.
	[A6] User selects the Download action
	System invokes <u>Download</u> use case.
	[A7] No data set is available for the report:
	System invokes <u>No Data</u> use case.
Exception Paths:	[E1] User encounters a system error:
	System invokes Error Message use case.
Business Rules:	None
Notes:	None

	Overview Hierar	chy <mark>Billing</mark> Top	X Usage					
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Account Billing Details

Account Billing Trend

Name:	Account Billing Trend Report				
Brief Description:	This report tracks monthly summary charge information over a user defined reporting period range for a selected billing account in a billing or group hierarchy. <u>Rationale</u> : 1) Analyze trends, 2) Identify anomalies				
Entry Points	1. Report List				
	2. Drilldown: Account Billing Overview Report				
	3. Drilldown: Account Billing Detail Report				
	4. Drilldown: Contract Billing Overview Report				
	5. Report Dropdown				

Name:	Account Billing Trend Report
Query Parameters	Report Selection Criteria & Custom Tab
	1. Hierarchy Name & Position
	2. Period Range
	User selects a start and end reporting period from two drop down boxes.
	Report Selection Criteria Only
	1. Report
Report Content	Fields
	1. Reporting Period [Sort: Ascending]
	2. Account Charges
	3. Usage Charges
	4. Adjustments
	5. Discounts
	 Other Charges / Credits Taxes
	8. Total Value
	Footer
	For all but the first column, totals for all pages (including those not displayed) are displayed at the bottom of each page
Chart	Chart Type: Bar
	X axis: Reporting Period
	Y axis: User defined value
Main Path:	1. User selects the report from the List of Billing Reports.
	 System determines query parameters based on report context or defaults.
	 System returns: a. Bar Chart b. Summary tabular report

Name:	Account Billing Trend Report
Alternate Paths:	[A1] User modifies query parameters
	User changes any of the query parameters on the "Report Tab" or their hierarchy context position and clicks display to execute the report.
	[A2] Drilldown To Contract Billing Overview Report
	User clicks on a value in the tabular report to run the report for the reporting period on which the user clicked.
	[A3] Result set returns more than 20 Chart Bars
	User receives a message that the chart was suppressed because of this condition.
	[A4] User selects the Printer-Friendly action
	System invokes Printer-Friendly use case.
	[A5] User selects the Download action
	System invokes <u>Download</u> use case.
	[A6] No data set is available for the report:
	System invokes <u>No Data</u> use case.
	[A7] Change Column to Chart
	1. User selects a new value from the Column to Chart query parameter.
	New chart is displayed with the selected column.
Exception Paths:	[E1] User encounters a system error:
	1. System invokes Error Message use case.
Business Rules:	[B1] Maximum Period Ranges: If the date range spans more than 20 reporting periods, the chart display is suppressed.
Notes:	None

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					D : 1		le la	c 1	-	
	<u>Period</u>	<u>Account</u> <u>Charges</u>	<u>Usage</u> <u>Charges</u>	<u>Adjust.</u>	Discounts	Others	s/Credits	Subscription Charges	<u>Taxes</u>	<u>Total</u>
	August	\$482.70	\$0.00	\$0.00	\$0.00		\$0.00	\$168.14	\$57.93	<u>\$708.77</u>
	September	\$548.30	\$0.00	\$0.00	\$0.00		\$0.00	\$172.77	\$65.80	<u>\$786.87</u>
	October Total	\$526.10 \$1,557.10	\$0.00 \$0.00	\$0.00 \$0.00	\$0.00 \$0.00		\$0.00 \$0.00	\$149.50 \$490.41	\$63.13 \$186.86	\$738.73 \$2,234.37
					90.00			Ş 190, TI	9100.00	<i><i><i><i><i></i></i></i></i></i>
	Copyright 199	7-2006 ORACI	.E. All Rights R	eserved.						

Account Billing Trend

Invoice Billing Details

Nores	
Name:	Invoice Billing Details
Brief Description:	User views the charge types summarized by invoice
Entry Points	1. Billing Reports List
	2. Report Dropdown
	3. Account Billing Details
Query Parameters:	Report Selection Criteria & Custom Tab
	1. Hierarchy Name & Position
	2. Period Range
	Report Selection Criteria Only
	3. Report
Report Content:	Fields
	1. Invoice
	2. Invoice Charges
	3. Usage Charges
	4. Adjustments
	5. Discounts
	6. Other Charges/Credits
	7. Taxes
	8. Total Value
	Footer
	For all but the first column, totals for all pages (including those not displayed) are displayed at the bottom of each page
Chart:	None
Main Path:	 User selects the Invoice Billing Details report from the List of Billing Reports.
	2. System determines query parameters based on report context or defaults and returns a tabular report.
	3. Use case ends.

Name:	Invoice Billing Details
Alternate Paths:	[A1] User modifies the query parameters
	 User changes any of the query parameters on the "Report" tab or their hierarchy context position and selects Display to execute report.
	 System regenerates the report for the scope of selected reporting period and hierarchy context position.
	[A2] Drilldowns: User selects Invoice
	System invokes Contract Billing Overview use case for the selected invoice number.
	[A3] User selects the Printer-Friendly action
	System invokes Printer-Friendly use case.
	[A4] User selects the Download action
	System invokes Download use case.
	[A5] No data set is available for the report:
	System invokes <u>No Data</u> use case.
Exception Paths:	[E1] User encounters a system error:1. System invokes <u>Error Message</u> use case.
Business Rules:	None
Notes:	This is the same report spec as the old "Account Billing Details" report before that one was changed so that each row summarized an account rather than an invoice.

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	Overview	Hierarchy Billi	ng Top X L	sage				
	Invoice	Billing Det	ails					
	Company	Name: EDOCS			Hierarchy	Name: Billing Hiera	rchy	
	User Nam	e: John Smith			Position:	EDOCS		
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								SUBMIT
	Report Det	tails						
	Invoice Inv	oice Charges <u>Us</u>	<u>age Charges /</u>	djustments D	iscounts Ott	ner Charges/Credits	<u>Taxes</u>	Total
	<u>124189</u>	\$25.49	\$7.64	\$0.00	\$0.00	-\$7.00	\$7.28	\$33.41
	<u>124289</u>	\$23.55	\$0.00	\$0.00	\$0.00	\$22.55	\$11.01	\$57.11
	<u>124389</u>	\$37.31	\$2.06	\$0.00	\$0.00	\$1.33	\$6.51	\$47.21
	<u>124489</u>	\$29.99	\$1.81	\$0.00	\$0.00	\$0.00	\$4.51	\$36.31
SIEBEL.	<u>124589</u>	\$7.96	\$100.22	\$0.00	\$0.00			\$1,058.70
	Total	\$124.30	\$111.73	\$0.00	\$0.00	\$729.01	\$267.70	\$1,232.74
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	Copyrightee	T221-2003 SIL	DELIGI, All KIUI	ILS RESERVED.				

Invoice Billing Details

Contract Billing Overview

Name:	Contract Billing Overview
Brief Description:	User views an invoice overview of all contracts associated with the user
Entry Points:	1. Billing Reports List
	2. Account Billing Overview
	3. Account Billing Details
	4. Report Dropdown
Query Parameters:	Report Selection Criteria & Custom Tab
	1. Hierarchy Name & Position
	2. Period Range
	Report Selection Criteria Only
	1. Report
Report Content:	Fields
	1. Number
	2. Owner
	3. Billing Account
	4. Charges
	5. Taxes
	6. Total Value
	Footer
	For all but the first column, totals for all pages (including those not displayed) are displayed at the bottom of each page
Chart:	None
Main Path:	 User selects the Contract Billing Overview report from the List of Billing Reports.
	2. System determines query parameters based on report context or defaults and returns a tabular report.
	3. Use case ends.

Name:	Contr	act Billing Overview
Alternate Paths:	[A1]	User modifies the query parameters
	1	. User changes any of the query parameters on the "Report" tab or their hierarchy context position and selects Display to execute report.
	2	 System regenerates the report for the scope of selected reporting period and hierarchy context position.
	[A2]	Drilldown: User selects a number to get additional details.
		System invokes Contract Call Details use case for the selected number.
	[A3]	Drilldown: User selects the hyperlink "T" at the end of a row:
		The Contract Billing Trend report is generated where the hierarchy context position is changed to the object of the row on which the user selected and the report is run with all the same parameters from the report previously ran.
	[A4]	Drilldown: User selects the hyperlink "T" on the total at the bottom of the page:
		The Account Billing Trend report is generated where the report uses the hierarchy position context and report parameters for the report previously ran.
	[A5]	User selects the Printer-Friendly action
		System invokes Printer-Friendly use case.
	[A6]	User selects the Download action
		System invokes Download use case.
	[A7]	No data set is available for the report:
		System invokes <u>No Data</u> use case.
Exception Paths:	[E1] 1	User encounters a system error: . System invokes <u>Error Message</u> use case.
Business Rules:	None.	
Notes:	None.	

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	Contract					
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	User Name	: John Smith	Positi	on: EDOCS		
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	Report Deta	ails (69 items)				Page I of 4 M
	Number	Owner	Billing Account	Charges	Taxes	Total
	3212981610	JOEY JENNE	Los Angeles	\$14.50	\$3.68	\$18.18 <u>T</u>
	3212981640	MIKE NICKEL	Los Angeles	\$11.00	\$3.10	\$14.10 <u>T</u>
	3212981880	BOBBY LAWLESS	Los Angeles	\$30.25	\$7.35	\$37.60 T
SIEBEL.	3214801725	SEAN MURPHY	Los Angeles	\$11.50	\$2.43	\$13.93 <u>T</u>
	3214801773	BILL STRAHLO	Los Angeles	\$19.00	\$5.12	\$24.12 T
	3214802869	JEFF HARDY	Los Angeles	\$1.50	\$2.05	\$3.55 <u>T</u>
	3214803014	FRANK TOWN	EDOCS Malaysia	\$23.55	\$7.31	\$30.86 <u>T</u>
	3214803175	JERRY HOLLAND	Los Angeles	\$1.75	\$2.17	\$3.92 T
	3214804037	TERRY FORSTON	Los Angeles	\$15.10	\$2.19	\$17.29 T
	3214804975	TERRY BROPHY	Los Angeles	\$19.31	\$4.10	\$23.41 <u>T</u>
	3214808225	JAMES POWERS	San Francisco	\$22.23	\$6.53	\$28.76 <u>T</u>
	3215012888	ERT TEAM	Los Angeles	\$44.63	\$5.37	\$50.00 <u>T</u>
	3215360329	CLYDE COMBS	Los Angeles	\$43.41	\$7.94	\$51.35 <u>T</u>
	3215364559	CINDY DRAPCHO	Los Angeles	\$0.00	\$4.55	\$4.55 <u>T</u>
	3215366179	WES HICKS	Los Angeles	\$0.50	\$1.86	\$2.36 <u>T</u>
	3215367226	NICK VANVONNO	Los Angeles	\$21.27	\$2.53	\$23.80 <u>T</u>
	3215369089	MADELYN D PAPINEAU	MADELYN D PAPINEAU	J \$31.80	\$4.51	\$36.31 <u>T</u>
	3215369729	REGAN STRADTMANN	Los Angeles	\$0.00	\$2.01	\$2.01 <u>T</u>
	3215370114	OLGA ODEIDE	Los Angeles	\$9.00	\$1.62	\$10.62 <u>T</u>
	3215370115	JEFF BATTISTI	Los Angeles	\$26.63	\$2.03	\$28.66 <u>T</u>
	Total			\$965.04	\$267.70	\$1,232.74 <u>T</u>
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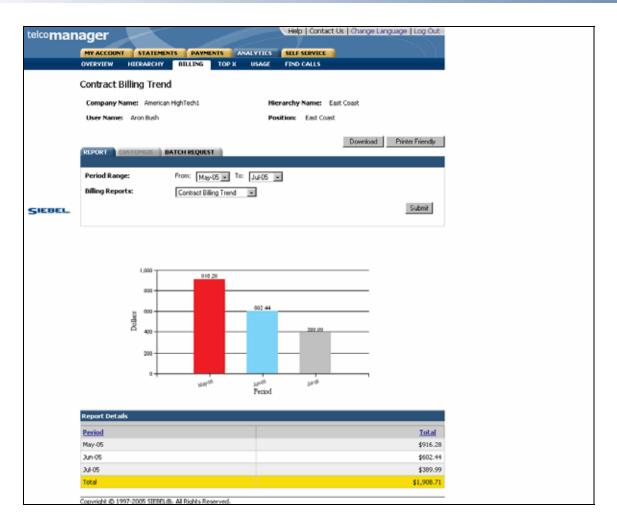
Contract Billing Overview

Contract Billing Trend

Name:	Contract Billing Trend Report
	This report tracks monthly summary charge information over a user defined reporting period range for a selected billing contract in a billing or group hierarchy. <u><i>Rationale:</i></u> 1) Analyze trends, 2) Identify anomalies

Name:	Contract Billing Trend Report
Entry Points	1. Report List
	2. Drilldown: Contract Billing Overview Report
	3. Report Dropdown
Query Parameters	Report Selection Criteria & Custom Tab
	1. Hierarchy Name & Position
	2. Period Range
	Report Selection Criteria Only
	1. Report
Report Content	Fields
	1. Reporting Period [Sort: Ascending]
	2. Total Value
	<u>Footer</u>
	For all but the first column totals for all pages (including those not displayed) are displayed at the bottom of each page
Chart	Chart Type: Bar
	Y axis: User defined value
	Y axis: Total Value
Main Path:	1. User selects the report from the List of Billing Reports.
	 System determines query parameters based on report context or defaults.
	 System returns: a. Bar Chart b. Summary tabular report

Name:	Contr	ract Billing Trend Report
Alternate Paths:	[A1]	Change Report Selection Criteria
		User changes any of the query parameters on the "Report Tab" or their hierarchy context position and clicks display to execute the report.
	[A2]	Create Custom Report
	U	ser selects the customize action.
		vstem Invokes the Customize use case enabling the user to change user parameters defined above.
	[A3]	Result set returns more than 20 Chart Bars
		User receives a message that the chart was suppressed because of this condition.
	[A4]	User selects the Printer-Friendly action
		System invokes Printer-Friendly use case.
	[A5]	User selects the Download action
		System invokes Download use case.
	[A6]	No data set is available for the report:
		System invokes <u>No Data</u> use case.
	[A7]	Change Column to Chart
		1. User selects a new value from the Column to Chart query parameter.
		New chart is displayed with the selected column.
Exception Paths:	[E1] (Jser encounters a system error:
	S	System invokes Error Message use case.
Business Rules:	[B1]	Maximum Period Ranges: If the date range spans more than 20 reporting periods, the chart display is suppressed.
Notes:	None	



Contract Billing Trend Report

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Contract Call Details

Name:	Contract Call Details
Brief Description:	User views contract call detail information
Entry Points:	 Billing Reports List Contract Billing Overview Report Dropdown
Query Parameters:	 <u>Report Selection Criteria & Custom Tab</u> 1. Hierarchy Name & Position 2. Date Range 3. Call Type 4. Usage Type
	Report Selection Criteria Only 1. Report Custom Tab Only 1. Called Number 2. Call Type 3. Usage Type 4. Duration 5. Toll Charges 6. Total Value
Report Content:	Fields 1. Date 2. Time 3. Called Number 4. Call Type 5. Usage Type 6. Duration 7. Toll Charges 8. Total Value Footer For all but the first column, totals for all pages (including those not displayed) are displayed at the bottom of each page
Chart:	None

Name:	Contract Call Details
Main Path:	 User selects the Contract Billing Overview report from the List of Billing Reports.
	2. System determines query parameters based on report context or defaults and returns a tabular report.
	3. Use case ends.
Alternate Paths:	[A1] User modifies the query parameters
	 User changes any of the query parameters on the "Report" tab or their hierarchy context position and selects Display to execute report.
	 System regenerates the report for the scope of selected reporting period and hierarchy context position.
	[A2] User selects the Printer-Friendly action:
	System invokes Printer-Friendly use case.
	[A3] User selects the Download action
	System invokes <u>Download</u> use case.
	[A4] No data set is available for the report:
	System invokes <u>No Data</u> use case.
Exception Paths:	[E1] User encounters a system error:
	System invokes <u>Error Message</u> use case.
Business Rules:	None
Notes:	None

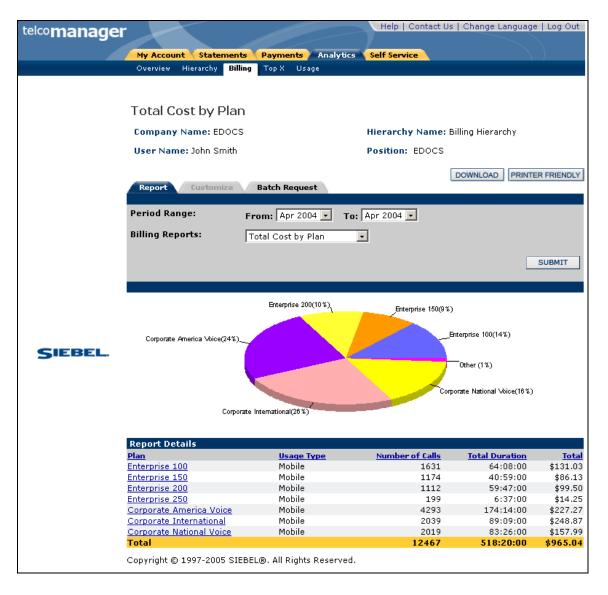
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	Report Deta)0 items) ; being displaye					
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BEL.	04/09/2004	19:02	3212531189	Speech	Voice	0:01:00	\$0.00	\$0.00
	04/15/2004	21:36	3217573212	Speech	Voice	0:01:00	\$0.00	\$0.00
	04/16/2004	08:17	3217573212	Speech	Voice	0:01:00	\$0.00	\$0.00
	04/02/2004	11:30	3215449637	Speech	Voice	0:01:00	\$0.00	\$0.00
	04/09/2004	09:35	3214465102	Speech	Voice	0:01:00	\$0.00	\$0.00
	04/09/2004	09:50	3216399827	Speech	Voice	0:01:00	\$0.00	\$0.00
	04/09/2004	09:51	3219601888	Speech	Voice	0:01:00	\$0.00	\$0.00
	04/09/2004	10:19	3214316605	Speech	Voice	0:01:00	\$0.00	\$0.00
	04/09/2004	18:45	3212439595	Speech	Voice	0:02:00	\$0.00	\$0.00
	04/09/2004	19:03	3214316605	Speech	Voice	0:02:00	\$0.00	\$0.00
	04/15/2004	21:19	3214465102	Speech	Voice	0:01:00	\$0.00	\$0.00
	04/16/2004	08:19	3212982597	Speech	Voice	0:03:00	\$0.00	\$0.00
	0 4 /04 /000 4	14:46	3212982597	Speech	Voice	0:01:00	\$0.00	\$0.00
	04/21/2004	14.40			Voice	0:01:00	\$0.00	\$0.00
	04/21/2004	14:48	3212982597	Speech				
	04/21/2004 04/21/2004	14:48 14:49	3214034262	Speech	Voice	0:01:00	\$0.00	\$0.00
	04/21/2004 04/21/2004 04/21/2004	14:48 14:49 15:52	3214034262 3214465102	Speech Speech	Voice Voice	0:01:00 0:01:00	\$0.00	\$0.00
	04/21/2004 04/21/2004 04/21/2004 04/21/2004	14:48 14:49 15:52 16:12	3214034262 3214465102 3214465102	Speech Speech Speech	Voice Voice Voice	0:01:00 0:01:00 0:01:00	\$0.00 \$0.00	\$0.00 \$0.00
	04/21/2004 04/21/2004 04/21/2004 04/21/2004 04/21/2004	14:48 14:49 15:52 16:12 19:53	3214034262 3214465102 3214465102 3212982597	Speech Speech	Voice Voice Voice Voice	0:01:00 0:01:00 0:01:00 0:02:00	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00
	04/21/2004 04/21/2004 04/21/2004 04/21/2004 04/02/2004 04/02/2004	14:48 14:49 15:52 16:12	3214034262 3214465102 3214465102	Speech Speech Speech	Voice Voice Voice	0:01:00 0:01:00 0:01:00	\$0.00 \$0.00 \$0.00 \$0.00	\$0.00 \$0.00
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	04/21/2004 04/21/2004 04/21/2004 04/21/2004 04/02/2004 04/02/2004	14:48 14:49 15:52 16:12 19:53 10:56	3214034262 3214465102 3214465102 3212982597 7278089719	Speech Speech Speech Speech Speech	Voice Voice Voice Voice Voice	0:01:00 0:01:00 0:02:00 0:02:00 0:01:00	\$0.00 \$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00 \$0.00
	04/21/2004 04/21/2004 04/21/2004 04/02/2004 04/02/2004 04/02/2004 04/09/2004	14:48 14:49 15:52 16:12 19:53 10:56	3214034262 3214465102 3214465102 3212982597 7278089719	Speech Speech Speech Speech Speech	Voice Voice Voice Voice Voice	0:01:00 0:01:00 0:02:00 0:02:00 0:01:00	\$0.00 \$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00

Contract Call Details

Total Cost by Plan

Name:	Total Cost by Plan
Brief Description:	User views the total cost of all plans for all billing accounts associated with the user
Entry Points:	1. List of Billing Reports
	2. Report Dropdown
Query Parameters:	Report Selection Criteria & Custom Tab
	1. Hierarchy Name & Position
	2. Period Range
	Report Selection Criteria Only
	1. Report
Report Content:	Fields
	1. Plan
	2. Usage Type
	3. Number of Calls
	4. Duration
	 Total Value (Total charges and taxes)
	Footer
	For all but the first column, totals for all pages (including those not displayed) are displayed at the bottom of each page.
Chart:	Chart Type: Pie
	Slices: Plan
Main Path:	1. User selects the Total Cost by Plan report from the List of Billing Reports.
	2. System determines query parameters based on report context or defaults and returns.
	a. Tabular Report
	b. Chart
	3. Use case ends.

Name:	Total Cost by Plan
Alternate Paths:	[A1] User modifies the query parameters
	 User changes any of the query parameters on the "Report" tab or their hierarchy context position and selects Display to execute report.
	 System regenerates the report for the scope of selected reporting period and hierarchy context position.
	[A2] Drilldowns: User selects link to get additional details:
	 From A Plan: system invokes <u>Contract Billing Overview</u> use case for the selected plan.
	 From A Number from Contract Billing Overview: system invokes <u>Contract Call Details</u> use case for the selected number.
	[A3] User selects the Printer-Friendly action
	System invokes Printer-Friendly use case.
	[A4] User selects the Download action
	System invokes <u>Download</u> use case.
	[A5] No data set is available for the report:
	System invokes <u>No Data</u> use case.
Exception Paths:	[E1] User encounters a system error:
	System invokes <u>Error Message</u> use case.
Business Rules:	[B1] If the grand Total for the report is equal to 0, the chart is suppressed.
Notes:	The slices on the pie chart denotes Plan
	If any chart slice is less than 1% the data is aggregated together to make a bigger slice labeled "Other" (need to confirm this rule)



Total Cost by Plan

Top X Reports

Most Expensive Calls

Name:	Most Expensive Calls
Brief Description:	User views the Top X Most Expensive Calls.
Entry Points:	 List of Top X Reports Report Dropdown
Query Parameters:	Report Selection Criteria & Custom Tab 1. Hierarchy Name & Position 2. Period Range Report Selection Criteria Only 1. Number of Results
Report Content:	 Report Fields Number Date Time Called Number Duration Toll Charges Total Value [Sort, descending] Footer For all but the first column, totals for all pages (including those not displayed) are displayed at the bottom of each page.
Chart:	None
Main Path:	 User selects Most Expensive Calls report from the List of Top X Reports. System determines query parameters based on report context or defaults and returns a tabular report. Use case ends.

Name:	Most Expensive Calls
Alternate Paths:	[A1] User modifies the query parameters
	 User changes any of the query parameters on the "Report" tab or their hierarchy context position and selects Display to execute report.
	 System regenerates the report for the scope of selected reporting period and hierarchy context position.
	[A2] User selects the Printer-Friendly action
	System invokes Printer-Friendly use case.
	[A3] User selects the Download action:
	System invokes Download use case
	[A4] No data set is available for the report:
	System invokes <u>No Data</u> use case.
Exception Paths:	[E1] User encounters a system error:
	System invokes <u>Error Message</u> use case.
Business Rules:	[B1] The current reporting period and hierarchical position context are persisted from previous action.
Notes:	In cases where the result set is less than the Number of Results specified, the available data set is displayed.

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	Number	Date	Time	Called Number	Duration	Toll Charges	Total		
	3217592597	04/19/2004	15:20	0779539476	0:46:00	\$11.50 \$7.50	\$11.50 \$7.50		
	3214001773	04/21/2004	10:24	3210535006 5052643229	0:30:00	\$7.50	\$7.50		
CIEBEI	2242224000	04017/2004		9095049554		\$7.00			
SIEBEL	3212901000	04/17/2004		3217498321	0-25-00	吉花 沙漠	46.2%		
SIEBEL	3217498321	04/16/2004	18:12	3217498321	0:25:00	\$6.25	\$6.25		
SIEBEL	3217498321 3215370117	04/16/2004 04/20/2004	18:12 10:21	3214549652	0:21:00	\$5.25	\$5.25		
SIEBEL	3217498321 3215370117 3217201138	04/16/2004 04/20/2004 04/17/2004	18:12 10:21 14:32	3214549652 3217201138	0:21:00 0:21:00	\$5.25 \$5.25	\$5.25 \$5.25		
SIEBEL.	3217498321 3215370117 3217201138 3212981880	04/16/2004 04/20/2004 04/17/2004 04/16/2004	18:12 10:21 14:32 22:04	3214549652 3217201138 5058985172	0:21:00 0:21:00 0:21:00	\$5.25 \$5.25 \$5.25	\$5.25 \$5.25 \$5.25		
SIEBEL	3217498321 3215370117 3217201138 3212981880 3215012888	04/16/2004 04/20/2004 04/17/2004 04/16/2004 04/18/2004	18:12 10:21 14:32 22:04 09:47	3214549652 3217201138 5058985172 3217830409	0:21:00 0:21:00 0:21:00 0:19:00	\$5.25 \$5.25 \$5.25 \$4.75	\$5.25 \$5.25 \$5.25 \$4.75		
SIEBEL	3217498321 3215370117 3217201138 3212981880 3215012888 3212981880	04/16/2004 04/20/2004 04/17/2004 04/16/2004 04/18/2004 04/18/2004	18:12 10:21 14:32 22:04 09:47 19:16	3214549652 3217201138 5058985172 3217830409 7046042704	0:21:00 0:21:00 0:21:00 0:19:00 0:18:00	\$5.25 \$5.25 \$5.25 \$4.75 \$4.50	\$5.25 \$5.25 \$5.25 \$4.75 \$4.50		
SIEBEL	3217498321 3215370117 3217201138 3212981880 3215012888	04/16/2004 04/20/2004 04/17/2004 04/16/2004 04/18/2004	18:12 10:21 14:32 22:04 09:47	3214549652 3217201138 5058985172 3217830409	0:21:00 0:21:00 0:21:00 0:19:00 0:18:00 0:17:00	\$5.25 \$5.25 \$5.25 \$4.75 \$4.50 \$4.25	\$5.25 \$5.25 \$4.75 \$4.50 \$4.25		
SIEBEL	3217498321 3215370117 3217201138 3212981880 3215012888 3212981880 3217498324 Total	04/16/2004 04/20/2004 04/17/2004 04/16/2004 04/18/2004 04/18/2004 04/17/2004	18:12 10:21 14:32 22:04 09:47 19:16 15:38	3214549652 3217201138 5058985172 3217830409 7046042704 3217684426	0:21:00 0:21:00 0:21:00 0:19:00 0:18:00	\$5.25 \$5.25 \$5.25 \$4.75 \$4.50	\$5.25 \$5.25 \$5.25 \$4.75 \$4.50		
SIEBEL	3217498321 3215370117 3217201138 3212981880 3215012888 3212981880 3217498324 Total	04/16/2004 04/20/2004 04/17/2004 04/16/2004 04/18/2004 04/18/2004	18:12 10:21 14:32 22:04 09:47 19:16 15:38	3214549652 3217201138 5058985172 3217830409 7046042704 3217684426	0:21:00 0:21:00 0:21:00 0:19:00 0:18:00 0:17:00	\$5.25 \$5.25 \$5.25 \$4.75 \$4.50 \$4.25	\$5.25 \$5.25 \$4.75 \$4.50 \$4.25		

Most Expensive Calls

Longest Calls

Name:	Longest Calls
Brief Description:	User views the Top X Longest Calls.
Entry Points:	 List of Top X Reports Report Dropdown
Query Parameters:	Report Selection Criteria & Custom Tab 1. Hierarchy Name & Position 2. Period Range Report Selection Criteria Only 1. Number of Results 2. Report
Report Content:	Fields 1. Number 2. Date 3. Time 4. Called Number 5. Duration 6. Total Value [Sort, descending] Footer For all but the first column, totals for all pages (including those not displayed) are displayed at the bottom of each page.
Chart:	None
Main Path:	 User selects Longest Calls report from the List of Top X Reports. System determines query parameters based on report context or defaults and returns a tabular report. Use case ends.

Name:	Longest Calls
Alternate Paths:	[A1] User modifies the query parameters
	 User changes any of the query parameters on the "Report" tab or their hierarchy context position and selects Display to execute report.
	 System regenerates the report for the scope of selected reporting period and hierarchy context position.
	[A2] User selects the Printer-Friendly action
	System invokes Printer-Friendly use case.
	[A3] User selects the Download action
	System invokes <u>Download</u> use case.
	[A4] No data set is available for the report:
	System invokes <u>No Data</u> use case.
Exception Paths:	[E1] User encounters a system error:
	System invokes <u>Error Message</u> use case.
Business Rules:	[B1] The current bill period range and hierarchical position context are persisted from previous action.
Notes:	In cases where the result set is less than the Number of Results specified, the available data set is displayed.

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	Longest Ca	alls							
	Company Nan	ne: EDOCS		Hierarchy Name	Billing Hierarchy				
	User Name: Jo	hn Smith		Position: EDOCS					
					DOWNLOAD PRINT	ER FRIENOLY			
	Report	estomize Batch I	Request		Connectio	EN PROPRIOR 1			
	Period Range: From: Apr 2004 💌 To: Apr 2004 💌								
	Number of results: 10 -								
	Top X Reports:	Longest	Calls						
		(and) and (
						SUBMIT			
	Report Details								
	Number	Date	Time	Called Number	Duration	Total			
	3217592597	04/19/2004	15:20	0779539476	0:46:00	\$11.50			
SIEBEL	3214001773	04/21/2004	10:24	3210535006	0:30:00	\$7.50			
State State	3212901000 3217498321	04/17/2004 04/16/2004	10:40 18:12	5052643229 3217498321	0:30:00 0:25:00	\$7.50 \$6.25			
	3215370117	04/20/2004	10:12	3214549652	0:25:00	\$5.25			
	3212981880	04/16/2004	22:04	5058985172	0:21:00	\$5.25			
	3217201138	04/17/2004	14:32	3217201138	0:21:00	\$5.25			
	3215012888	04/18/2004	09:47	3217830409	0:19:00	\$4.75			
	3212981880	04/17/2004	19:16	7046042704	0:18:00	\$4.50			
	3217498324	04/19/2004	15:38	3217684426	0:17:00	\$4.25			
	Total				4:08:00	\$62.00			
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Longest Calls

Most Frequently Called Numbers

Name:	Most Frequently Called Numbers
Brief Description:	User views the Top X Most Frequently Called Numbers.
Entry Points:	 List of Top X Reports Report Dropdown
Query Parameters:	Report Selection Criteria & Custom Tab 1. Hierarchy Name & Position
	 Period Range <u>Report Selection Criteria Only</u> Number of Results
	2. Report
Report Content:	Fields 1. Number 2. Called Number
	 Number of Calls (Formula: Aggregation of all calls for the called number)
	 Duration (Formula: Aggregation of duration for the called number)
	5. Total Value [Sort, descending]
	Footer
	For all but the first column, totals for all pages (including those not displayed) are displayed at the bottom of each page.
Chart:	None
Main Path:	 User selects the Most Frequently Called Numbers report from the List of Top X Reports.
	2. System determines query parameters based on report context or defaults and returns a tabular report.
	3. Use case ends.

Name:	Most Frequently Called Numbers
Alternate Paths:	[A1] User modifies the query parameters
	 User changes any of the query parameters on the "Report" tab or their hierarchy context position and selects Display to execute report.
	 System regenerates the report for the scope of selected reporting period and hierarchy context position.
	[A2] User selects Printer-Friendly the action
	System invokes Printer-Friendly use case.
	[A3] User selects the Download action
	System invokes <u>Download</u> use case.
	[A4] No data set is available for the report:
	System invokes <u>No Data</u> use case.
Exception Paths:	[E1] User encounters a system error:
	System invokes <u>Error Message</u> use case.
Business Rules:	[B1] The current bill period range and hierarchical position context are persisted from previous action.
Notes:	In cases where the result set is less than the Number of Results specified, the available data set is displayed.

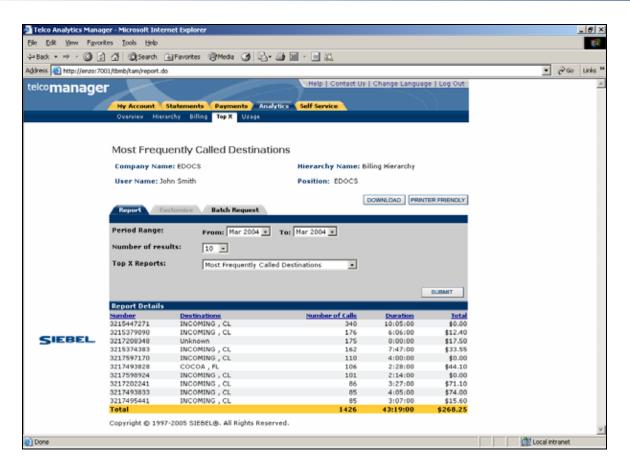
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	Company Nam	ne: EDOCS	Hierarchy Name: Bil	ling Hierarchy				
	User Name: Jo	ohn Smith	Position: EDOCS					
			L.	OWNLOAD PRIM	TER FRIENDLY			
	Report Customize Batch Request							
	Period Range: From: Mar 2004 V To: Mar 2004 V							
	Period Range:	From: Mar 2004	• Te: Mar 2004 •					
	Number of results: 10 💌							
	Top X Reports:	Most Frequently C	alled Numbers					
				(SUBMIT			
	Report Details			(
	Number	Called Number	Number of Calls	Duration	Total			
	Number 3215447271	Called Number 3215447271	340	10:05:00	Total \$0.00			
SIEBEL	Number 3215447271 3215379090	Called Number			Total \$0.00 \$12.40			
SIEBEL	Number 3215447271	Called Number 3215447271	340 176	10:05:00 6:06:00	Total \$0.00			
SIEBEL	Number 3215447271 3215379090 3217208348	Called Namber 3215447271 3215379090	340 176 175	10:05:00 6:06:00 0:00:00	\$0.00 \$12.40 \$17.50			
SIEBEL	Number 3215447271 3215379090 3217208348 3215374303	Called Number 3215447271 3215379090 3215374303	340 176 175 162	10:05:00 6:06:00 0:00:00 7:47:00	Total \$0,00 \$12,40 \$17,50 \$33,55			
SIEBEL	Number 3215447271 3215379090 3217208348 3215374383 3217597170	Called Number 3215447271 3215379090 3215374303 3215374303 3217597170	340 176 175 162 110	10:05:00 6:06:00 0:00:00 7:47:00 4:00:00	Total \$0,00 \$12,40 \$17,50 \$33,55 \$0,00			
SIEBEL	Number 3215447271 3215379090 3217208348 3215374303 3217597170 3217597170	Called Number 321547271 3215379090 3215374303 3217597170 3217598924	340 176 175 162 110 101	10:05:00 6:06:00 0:00:00 7:47:00 4:00:00 2:14:00	Total \$0,00 \$12,40 \$37,50 \$33,55 \$0,00 \$0,00			
SIEBEL	Number 3215447271 3215379090 3217208348 3215374303 3237597170 3227597170 3217596924 3217202241	Colled Number 3215447271 3215379090 3215374303 3217597170 3217598924 3217202241	340 176 175 162 110 101 86	10:05:00 6:06:00 0:00:00 7:47:00 4:00:00 2:14:00 3:27:00	Total \$0.00 \$12.40 \$33.55 \$0.00 \$0.00 \$71.10			
SIEBEL	Number 3215442271 3215379090 3217208348 3215374383 3227597170 3217598924 3217299241 3217495441	Called Number 3215447271 3215379090 3215374303 3217597170 3217597170 3217599124 3217292241 3217495441	340 176 175 162 110 101 86 85	10:05:00 6:06:00 7:47:00 4:00:00 2:14:00 3:27:00 3:07:00	Total \$0.00 \$12.40 \$17.50 \$33.55 \$0.00 \$0.00 \$71.10 \$15.60			
SIEBEL	Number 3215447271 321537900348 3217208348 3215374303 3217597170 3217598924 32177202241 3217492033	Called Number 3215447271 3215379090 3215374303 3217597170 3217598924 3217202241 3217495441 3217493033	340 176 175 162 110 101 85 05	10:05:00 6:06:00 7:47:00 4:00:00 2:14:00 3:27:00 3:07:00 4:05:00	Total \$0.00 \$12.40 \$17.50 \$33.55 \$0.00 \$0.00 \$71.10 \$15.60 \$74.00			
SIEBEL	Number 3215447271 3215379090 3217208348 321537403 3217599170 3217599924 321720241 3217495441 3217493033 321749659 Total	Called Number 3215447271 3215379090 3215374303 3217597170 3217598924 3217202241 3217495441 3217493033	340 176 175 162 110 101 101 86 85 85 84 1404	10:05:00 6:06:00 7:47:00 4:00:00 2:14:00 3:27:00 3:07:00 4:05:00 6:32:00	Extal \$0.00 \$12.40 \$33.55 \$0.00 \$0.00 \$71.10 \$15.60 \$74.00 \$74.00			

Most Frequently Called Numbers

Most Frequently Called Destinations

Name:	Most Frequently Called Destinations	
Brief Description:	User views the Top X Most Frequently Called Destinations.	
Entry Points:	 List of Top X Reports Report Dropdown 	
Query Parameters:	Report Selection Criteria & Custom Tab 1. Hierarchy Name & Position 2. Period Range Report Selection Criteria Only 1. Number of Results 2. Report	
Report Content	Fields 1. Number 2. Destination 3. Number of Calls (Formula: Aggregation of all calls for the called number) 4. Duration (Formula: Aggregation of duration for the called number) 5. Total Value [Sort, descending] Footer For all but the first column, totals for all pages (including those not displayed) are displayed at the bottom of each page.	
Chart	None	
Main Path:	 User selects the Most Frequently Called Destinations report from the List of Top X Reports. System determines query parameters based on report context or defaults and returns a tabular report. Use case ends. 	

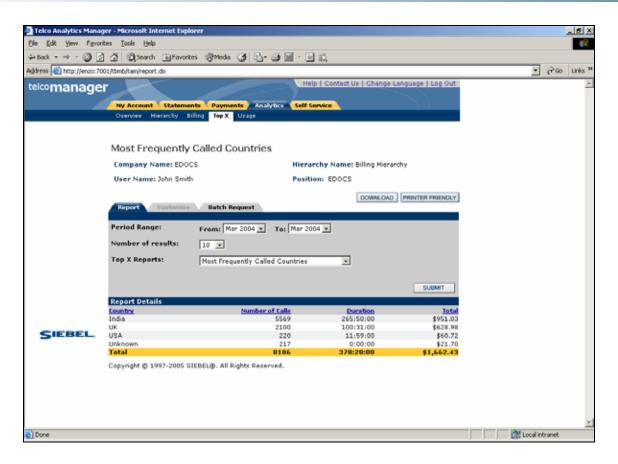
Name:	Most Frequently Called Destinations
Alternate Paths:	[A1] User modifies the query parameters:
	 User changes any of the query parameters on the "Report" tab or their hierarchy context position and selects Display to execute report.
	 System regenerates the report for the scope of selected reporting period and hierarchy context position.
	[A2] User selects Printer-Friendly the action:
	System invokes Printer-Friendly use case.
	[A3] User selects the Download action:
	System invokes <u>Download</u> use case.
	[A4] No data set is available for the report:
	System invokes <u>No Data</u> use case.
Exception Paths:	[E1] User encounters a system error:
	System invokes <u>Error Message</u> use case.
Business Rules:	[B1] The current bill period range and hierarchical position context are persisted from previous action.
Notes:	In cases where the result set is less than the Number of Results specified, the available data set is displayed.



Most Frequently Called Destinations

Most Frequently Called Countries

Name:	Most Frequently Called Countries		
Brief Description:	User views the Top X Most Frequently Called Countries.		
Entry Points:	1. List of Top X Reports		
	2. Report Dropdown		
Query Parameters:	Report Selection Criteria & Custom Tab		
	1. Hierarchy Name & Position		
	2. Period Range		
	Report Selection Criteria Only		
	1. Number of Results		
	2. Report		
Report Content	Fields		
	1. Number		
	 Countries (Formula: Aggregation of Destinations mapped to countries unless available in the bill feed) 		
	 Number of Calls (Formula: Aggregation of all calls for the called number) 		
	 Duration (Formula: Aggregation of duration for the called number) 		
	5. Total Value [Sort, descending]		
	Footer		
	For all but the first column, totals for all pages (including those not displayed) are displayed at the bottom of each page.		
Chart	None		



Most Frequently Called Countries

Highest Spender Report

Name:	Highest Spender Report		
Brief Description:	User views the Top X Highest Spending Contracts.		
Entry Points:	 List of Top X Reports Report Dropdown 		
Query Parameters:	 <u>Report Selection Criteria & Custom Tab</u> 1. Hierarchy Name & Position [Default: "Current Context"] 2. Period Range [Default: "current context"] User selects a start and end reporting period from two dropdown boxes. <u>Report Selection Criteria Only</u> 1. Number of Results [Default: "10"] Select desired number of results from dropdown selection of predefined number of rows returned by the report query. Dropdown box of values [10, 25, 50, 100] 2. Report [Default: none, character Limit: 40] User selects a different report from a dropdown box. 		
Report Content	Fields 1. Number 2. Owner 3. Billing Account 4. Total Value [Sort, descending] Footer For all but the first column, totals for all pages (including those not displayed) should be displayed at the bottom of each page.		
Chart	None		
Main Path:	 User selects the Highest Spender Reports report from the List of Top X Reports. System determines query parameters based on report context or defaults and returns a tabular report. Use case ends. 		

Alternate Paths:	[A1] User modifies the query parameters
	 User changes any of the query parameters on the "Report" tab or their hierarchy context position and selects Display to execute report.
	System regenerates the report for the scope of selected reporting period and hierarchy context position.
	[A2] User selects the Download action:
	1. System invokes <u>Download</u> use case.
	[A3] No data set is available for the report:
	System invokes <u>No Data</u> use case.

Exception Paths:	 [E1] User encounters a system error: 2. System invokes <u>Error Message</u> use case.
Business Rules:	[B2] The current bill period range and hierarchical position context are persisted from previous action.
Notes:	In cases where the result set is less than the Number of Results specified, the available data set will be displayed.

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	MY ACCOUNT STATMENT	S PAYMENT	ANALYTICS SELF SE	DUTCE	
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	Highest Spender Repo	ort			
	Company Name: Dutch Hor	me Insurance	Hierarchy N	ame: Cost Center	
	User Name: Frank Town		Position:	Cost Center	
				Printer Friendly	Download
	REPORT CUSTOMIZE B	ATCH REQUEST		ThinterThendiy	Download
	Period Range:	From: Oct-06	V To: Oct-06 V		
	Number of results:	10 🗸			
	Top X Reports:	Highest Spend	ler Report	~	
SIEBEL.					Qubmit
					Submit
	Report Details (8 items)				
	Number	<u>Owner</u>	Billing Accou	nt	Total
	003822152803	WRIGHT	Div5		
	4474839312	CARTER	Div2		\$265.39
	7483737646	HILL	Div7		\$97.74
	6828430533	BAKER	Div 1		\$88.82
	6833273947	GONZALEZ	Div 1		\$72.82
	7847493874	LOPEZ	Div6		\$58.40
	2714383473	MITCHELL	Div4		\$45.57
	4474372734	NELSON	Div2		\$28.81
	Total				\$657.55
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Highest Spender Reports

Highest Spending Contracts by Usage Type

Name:	Highest Spending Contracts by Usage Type
Brief Description:	User views the Top X Highest Spending Contracts by Usage Type.
Entry Points:	 List of Top X Reports Report Dropdown
Query Parameters:	Report Selection Criteria & Custom Tab 1. Hierarchy Name & Position 2. Period Range <u>Report Selection Criteria Only</u> 1. Number of Results 2. Report
Report Content	Fields 1. Number 2. Usage Type 3. Total Value [Sort, descending] Footer For all but the first column, totals for all pages (including those not displayed) should be displayed at the bottom of each page.
Chart	None
Main Path:	 User selects the Highest Spending Contracts by Usage Type report from the List of Top X Reports. System determines query parameters based on report context or defaults and returns a tabular report. Use case ends.
Alternate Paths:	 [A1] User modifies the query parameters: User changes any of the query parameters on the "Report" tab or their hierarchy context position and selects Display to execute report. 2. System regenerates the report for the scope of selected reporting period and hierarchy context position. [A2] User selects the Printer-Friendly action: System invokes Printer-Friendly use case. [A3] User selects the Download action: System invokes Download use case.

	1. System invokes <u>No Data</u> use case.
Exception Paths:	[E1] User encounters a system error:
	1. System invokes <u>Error Message</u> use case.
Business Rules:	[B1] The current bill period range and hierarchical position context are persisted from previous action.
Notes:	In cases where the result set is less than the Number of Results specified, the available data set will be displayed.

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	Highest Spending	Contracts by Usa	ige Type				
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	User Name: John Smith		Position: EDOCS				
	_			DOWNLOAD PRINTER FRIENDLY			
	Report / Customize	Batch Request					
	Period Range:	From: Mar 2004 💌 Tr	e: Mar 2004 💌				
	Number of results:	10 💌					
	Top X Reports:	Highest Spending Contra	cts by Usage Type 💌				
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	3215364559	Voice		\$564.05			
	3217493828	Voice		\$275.87			
SIEBEL	3217493833	Voice		\$226.49			
_	3217202241	Voice		\$109.39			
	3217496859	Voice		\$112.09			
	3215374383	Voice		\$72.03			
	3212981610	Voice		\$71.10			
	3217495441	Voice		\$24.00			
	3214002069	Voice		\$10.00			
	3217208348	SMS		\$17.50			
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Highest Spending Contracts by Usage Type

Find Calls

Name:	Find Calls
Brief Description:	User creates a list of calls based on a custom search
Query Parameters:	Report Selection Criteria Tab 1. Hierarchy Name & Position [A1] Period Range [A2] Call Type [A3] Usage Type
Report Content	Fields 1. Date 2. Time 3. Called Number 4. Call Type 5. Usage Type 6. Duration 7. Toll Charges 8. Total Value Footer For all but the first column, totals for all pages (including those not displayed) should be displayed at the bottom of each page.
Chart	None
Main Path:	 User enters or selects search criteria and selects Find action. System determines query parameters based on report context or defaults and returns a tabular report. Use case ends.
Alternate Paths:	 [A1] User modifies the query parameters: User changes any of the query parameters on the "Report" tab or their hierarchy context position and selects Display to execute report. System regenerates the report for the scope of selected reporting period and hierarchy context position. [A2] User selects the Printer-Friendly action: System invokes Printer-Friendly use case. [A3] User selects the Download action: System invokes Download use case.

	1. System invokes <u>No Data</u> use case.						
	[A5] User selects Clear action:1. System clears all the entered information on the page.						
	[A6] User executes a report with a large query result set.1. System returns the result set with minimal latency.						
	Rationale: Prevent user from a long wait time						
Exception Paths:	 [E1] User encounters a system error: 1. System invokes Error Message use case. 						
Business Rules:	[B1] Find Calls report Reports will include both billed and unbilled usage.						
Notes:	A maximum limit has been set to temporarily avoid a server error caused by a submitted query for all records in the database. Setting this maximum limit does not fulfill the requirement for this report. A new approach will be implemented in Release 3.						

MY ACCOUNT STATEMENTS PAYMENTS ANALYTICS SELF SERVICE OVERVIEW HIERARCHY BILLING TOP X USAGE FIND CALLS Find Calls Company Name: American HighTech1 Hierarchy Name: Billing Hierarchy User Name: Aron Bush Position: American HighTech1 FIND REPORT Please enter search criteria to find calls. Relative Period Range: Provious I Reporting Periods Period Range: Prom: Io: Io: Usage Type Voice Called Number: Io: Toll Charges: All and
Find Calls Company Name: American HighTech1 Hierarchy Name: Billing Hierarchy User Name: Aron Bush Position: American HighTech1 FIND REPORT Please enter search criteria to find calls. Relative Period Range: Previous Period Range: Prom: May-05 To: Date Range: From: Usage Type Voice Called Number: To:
Company Name: American HighTech1 Hierarchy Name: Billing Hierarchy User Name: Aron Bush Position: American HighTech1 FIND REPORT Please enter search criteria to find calls. Relative Period Range: Previous Reporting Periods Period Range: From: May-05 To: May-05 Called Number: Date Range: Reporting Period Reporting Period Reporting Period Reporting Periods Reporting Period
User Name: Aron Bush Position: American HighTech1 FIND REPORT Please enter search criteria to find calls. Relative Period Range: • Previous • Reporting Periods Period Range: • Prom: • May-05 • Date Range: • From: • Image: To: Usage Type Voice • Called Number:
FIND REPORT Please enter search criteria to find calls. Relative Period Range: • Previous 1 • Reporting Periods Period Range: • From: May-05 • To: May-05 • • From: • • From: • • • • • • • • • • • • • • •
Please enter search criteria to find calls. Relative Period Range: Previous 1 Reporting Periods Period Range: From: May-05 Date Range: From: Usage Type Called Number:
Total:

Find Calls Search

	OVERVIEW	HIERARCI	MENTS PAYMENTS	ANALYTICS DP X USAGE	SELF SERVICE		
	Find Calls						
	Company N	l ame: Ame	rican HighTech1	Hie	rarchy Name: Billing H	lierarchy	
	User Name:		-		sition: American HighTe		
	User hame.	. MIOITDUSI		FU	sicion. American high to	5011	
					Do	wnload Printer Fri	iendly
	FIND REP	ORT					
						Page 1 c	of 20 🕨 🕅
	Report Detai	ils (395 iter	ns)				
	Date	Time	Called Number	Usage Type	Duration	Toll Charges	Total
-	06/03/2005	06:29	7044518989	Voice	0:01:00	\$0.10	\$0.10
	06/03/2005	06:29	7047775038	Voice	0:06:00	\$0.60	\$0.60
	06/03/2005	09;27	7948473211	Yoice	0:02:00	\$0,20	\$0,20
	06/03/2005	10:19	7048473211	Voice	0:07:00	\$0.70	\$0.70
	06/03/2005	11:00	7048473211	Voice	0:03:00	\$0.30	\$0.30
	06/03/2005	11:07	7048473211	Voice	0:03:00	\$0.30	\$0.30
	06/03/2005	11:29	7048473211	Voice	0:03:00	\$0.30	\$0.30
	06/03/2005	12;13	411	Voice	0:03:00	\$0.30	\$0.30
	06/03/2005	12:56	8037877429	Voice	0:01:00	\$0.10	\$0.10
	06/03/2005	12:57	8037827442	Voice	0:01:00	\$0.10	\$0.10
	06/03/2005	13:06	3148051131	Voice	0:09:00	\$0.90	\$0.90
	06/03/2005	13:14	7047775038	Voice	0:11:00	\$1.10	\$1.10
	06/03/2005	13:15	4054785957	Voice	0;10;00	\$1.00	\$1,00
	06/03/2005	13:27	2032224103	Voice	0:02:00	\$0.20	\$0.20
	06/03/2005	13:28	4047887444	Voice	0:02:00	\$0.20	\$0.20
	06/03/2005	14:49	4513783743	Voice	0:02:00	\$0.20	\$0.20
	06/03/2005	15:53	7043344085	Voice	0:01:00	\$0.10	\$0.10
	06/03/2005	16:06	7042938455	Voice	0:04:00	\$0.40	\$0,40
	06/03/2005	16:12	4519382734	Voice	0:01:00	\$0.10	\$0.10
	06/03/2005	16:16	4514724956	Voice	0:06:00	\$0.60	\$0.60

Find Calls

	Find Ca User: Joh Company:	n Smith						
	Company						Download	Printer Frien
	Find	Re	port				n: <u>Profession</u> :	
								BAC
	Report Deta	912					<u><<</u> <u><</u> Page	2 of 3 > 2
	Date	Time	Called Number	Call Type	Usage Type	Duration	Toll Charges	Tota
	6/1/2004	17:01	5082724325	Call Forward	Voice	5	\$0.00	\$0.0
	6/1/2004	12:23	9492539119	Call Waiting	Voice	4	\$0.00	\$0.0
	6/1/2004	14:04	9495457969	Voicemail	Voice	3	\$0.00	\$0.0
	6/2/2004	11:31	4012676868	Standard	Voice	2	\$0.00	\$0.0
	6/2/2004	19:07	2126971887	Standard	Voice	1	\$0.00	\$0.0
	6/3/2004	13:21	7033915939	Standard	Voice	10	\$0.00	\$10.0
	6/3/2004	17:01	5082724325	Call Forward	Voice	5	\$0.00	\$0.0
	6/3/2004	12:23	9492539119	Call Waiting	Voice	4	\$0.00	\$0.0
	6/3/2004	14:04	9495457969	Voicemail	Voice	3	\$0.00	\$0.0
CS	6/3/2004	11:31	4012676868	Standard	Voice	2	\$0.00	\$0.0
)	6/3/2004	19:07	2126971887	Standard	Voice	1	\$0.00	\$0.0
	6/3/2004	13:21	7033915939	Standard	Voice	5	\$0.00	\$0.0
	6/4/2004	17:01	7033915939	Call Forward	Voice	4	\$0.00	\$10.0
	6/4/2004	12:23	5082724325	Call Waiting	Voice	3	\$0.00	\$0.0
	6/4/2004	14:04	9492539119	Voicemail	Voice	2	\$0,00	\$0.0
	6/4/2004	11:31	9495457969	Standard	Voice	1	\$0.00	\$0,0
	6/5/2004	19:07	4012676868	Standard	Voice	1	\$0.00	\$0.0
	01012004	10.01	2126971887	Standard	Voice	5	\$0.00	\$10.0
	6/5/2004	13:21		and the second se	10.00			
		13:21	7033915939	Call Forward	Voice	4	\$0.00	\$0.0
	6/5/2004		7033915939 9495457969	Call Forward Call Waiting	Voice	4 3	\$0.00 \$0.00	\$0.0 \$0.0

Find Calls Report Results

Cost and Budget Management Reports

Budget Reports

Name:	Budget Report					
Brief Description:	User is presented with a list of available Budget Reports based on the Users current hierarchy context					
Entry Points:	Cost Management-> Budget Reports					
Primary Actors:	This is a Manager/Admin Function only.					
Query Parameters:	Current hierarchy type					
Report Content:	Billing Hierarchy:					
	Contract Budget Report					
	Business Hierarchy:					
	Group Budget Report					
	Contract Budget Report					
Chart:	None. Choices are limited to the available report list					
Main Path:	1. User selects Cost Management tab					
	2. Application determines the list of available reports based on the current hierarchy type					
	3. List of available reports is displayed					
	4. Use case ends.					
Alternate Paths:	None					
Exception Paths:	None					
Business Rules:	none					

telco mar	Help Contact Us Change Language Log Out
	MY ACCOUNT STATMENTS PAYMENT ANALYTICS SELF SERVICE
	OVERVIEW HIERARCHY BILLING TOP X COST MANAGEMENT FIND CALLS
	Cost Management
	Company Name: Dutch Home Insurance Hierarchy Name: Cost Center
	User Name: Frank Town Position: Cost Center
	BUDGET REPORTS BUDGET MANAGEMENT COST REALLOCATION REBILL
	Budget Reports
	Description
	Group Budget Report
	Contract Budget Report
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SIEBEL.	

Cost Management Tab-Budget Reports Screen

Group Budget Report

User views budgeted amounts against actual charges incurred over a period of time. This is a sum of all charges, including taxes and rounding if any, for
all groups below the current selected hierarchy position.
The Group Budget Report will only be shown if the User is in a Business Hierarchy. A Group is defined as the folder that is directly under the current hierarchy position and has at least one or more account nodes under it or its sub-folders.
Cost Management-> Budget Reports -> Group Budget Report
This is a Manager/Admin Function only.
Report Selection Criteria 1. Current hierarchy position 2. Budget Frequency 3. Budget Period See Change Selection Criteria use case for description of parameters.
Top Header Section: Company Name User name Position User Selection Section: Budget Frequency drop down Budget Period drop down Budget Period drop down Chart Report Details: Fields 1) 1) Group (The folders below the current hierarchy position) 2) Current period budget 3) Current period charges 4) Current period variance (Budget-Charges) 5) Prior period charges 7) Prior period variance (Budget-Charges)

	Footer For all but the first column, totals for all pages (including those not displayed) should be displayed at the bottom of each page.
Chart:	Chart Type: side-by-side bar chart
	X axis: Two bars displayed for each group
	Budget Amount (aggregate of all child Service Agreements)
	Actual Group Spend (aggregate of all child Service Agreements)
	Y axis: Charge/Budget Amount
Main Path:	1. User selects the Group Budget Report link from the report list
	 Application determines query parameters based on report context or defaults and returns:
	3. Tabular Report and corresponding Chart
	4. Use case ends.
Alternate Paths:	[A1] User modifies the query parameters:
	1. User changes Budget Frequency
	2. User changes the Budget Period
	[A2] Drilldown: User selects the link for a group.
	 Application recursively invokes same report for the selected group, or if there are no more groups under the selected group, invokes the <u>Contract</u> Budget Report if the group contains contracts only.
Exception Paths:	[E1] User encounters an application error:
	Application invokes <u>Error Message</u> use case. [E2] Result set returns more than 20 Chart Bars
	User will receive a message that the chart was suppressed because of this condition.
Business Rules:	[B1] If there are more than 20 Groups in the result set the chart is suppressed
	[B2] The Group Budget Report will only be shown if the User is in a Business Hierarchy. This report will not be shown if the User is in a Billing Hierarchy.
	[B3] The report should display a list of Sub Groups or Contracts in this particular Business Group.
	[B4] If there is missing Budget or Charge data for a particular Group or Contract, it will be ignored (i.e., if the budget is zero the variance will have a negative number).
	[B5] In a Business Hierarchy, the Contract Budget Report and the Group Budget Report will have the same data.

telcoman	ager			Help	Contact Us Change La	nguage Log Out
	MY ACCOUNT	STATMENTS	PAYMENT ANAL	TICS SELF SERV	ICE	
	OVERVIEW	HIERARCHY B	ILLING TOP X	COST MANAGEMENT	FIND CALLS	
	Group Bud	get Report				
	Company Na	ame: Dutch Home In	surance	Hierarchy Nam	e: Cost Center	
	User Name:	Frank Town		Position: Cos	t Center	
					Printer Friendly	Download
	BUDGET REPO	BUDGET MA	NAGEMENT COST R		BILL	
	Budget Freq	uency Y	rd 🐱			
	Budget Peri	od F)	/-2006 💌			
SIEBEL.						Submit
		1,000.00				
		1,000.00		850.00		
		800.00			770.11	
		g 600.00	550.00			
	:	1 400.00	478.25	474.10		
		400.00				
		200.00				
		0.00			- 	
			Enghaering M	arketing S	ales	
				Groups		
	Report Detai	ls (3 items)				
	Group Name	Prev Period Charges	<u>Current Period</u> <u>Charges</u>	<u>Current Period</u> <u>Budget</u>	<u>Current Period</u> <u>Variance</u>	Prev Year Period Variance
	Engineering	\$482.70	\$478.25	\$550.00	\$71.75	\$57.93
	Marketing	\$548.30	\$474.10	\$430.00	-\$44.10	\$65.80
	Sales Total	\$526.10	\$770.11	\$850.00	\$79.89 \$107.54	\$63.13 \$186.86
	Total	\$1,557.10	\$1,722.46	\$1,830.00	\$107.54	\$100.00
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Group Budget Report

Contract Budget Report

Name:	Contract Budget Report				
Brief Description:	User views budgeted amounts against actual charges incurred over a period of time. This is a sum of all charges, including taxes and rounding if any, for all Contracts (Service Agreements) in the current selected hierarchy position.				
	The Contract Budget Report will be shown if the User is in either a Billing or Business Hierarchy. The Contract is defined as the Service Agreement number (typically the telephone number). The budget amounts are managed for each Service Agreement.				
Entry Points:	Cost Management-> Budget Reports -> Contract Budget Report				
	or through drilldown from Group Budget Report				
Primary Actors:	This is a Manager/Admin Function only				
Query	Report Selection Criteria				
Parameters:	Current hierarchy position				
	Budget Frequency				
	Budget Period				
Report Content:	Top Header Section:				
	Company Name				
	<u>User name</u>				
	Position				
	User Selection Section:				
	Budget Frequency drop down				
	Budget Period drop down				
	<u>Chart</u>				
	Report Details:				
	<u>Fields</u>				
	 Group (Current hierarchy position) Current partial hudget 				
	2) Current period budget				
	3) Current period charges				
	 4) Current period variance (Budget-Charges) 5) Prior period budget 				
	5) Prior period budget				
	6) Prior period charges				

	7) Prior period variance (Budget-Charges)
	8) Variance of the prior year for the same time period.
	Footer
	For all but the first column, totals for all pages (including those not displayed) should be displayed at the bottom of each page.
Chart:	Chart Type: side-by-side bar chart
	X axis: Two bars displayed for each group
	Budget Amount (aggregate of all child Service Agreements)
	Actual Contract Spend (aggregate of all charges associated with each Service Agreement)
	Y axis: Charge/Budget Amount
Main Path:	1. User selects the Cost Management Tab
	2. User selects the Budget Reports tab
	3. User selects Contract Budget Tracking Report
	 System determines query parameters based on report context or defaults and returns:
	a. Tabular Report
	b. Chart
	5. Use case ends.
Alternate Paths:	[A1] User modifies the query parameters:
	1. User changes the Budget Frequency from the dropdown
	2. User changes the Budget Period from the dropdown
Exception Paths:	[E1] User encounters an application error:
	Application invokes Error Message use case.
Business Rules:	[B1] If there are more than 20 Groups in the result set the chart is suppressed
Notes:	None
Configuration:	None
	A L

telco man	ager 🚽		_		Help Co	ontact Us Change Li	anguage Log Out
	MY ACCOUNT	STATMEN	TS PAVI		ICS SELF SERVIC	F	
		IERARCHY	BILLING		OST MANAGEMENT	FIND CALLS	
	Contract Bud	daat Ran	ort				
	Contract Dut	uget Kep	ort				
	Company Nam	e: Dutch H	ome Insuranc	e	Hierarchy Name:	Billing Hierarchy	
	User Name:	Frank Town			Position: Dutch	Home Insurance	
						Printer Friendly	Download
	BUDGET REPORT	IS BUDGE	T MANAGEM	IENT COST REA	ALLOCATION REB		
	Budget Freque	ncy	YTD 🗸				
	Budget Period		FY-2006	6 🗸			
SIEBEL.							Submit
1							
		1,000.00					
		800.00		8	785.53		
	Dollars	600.00					
	Dol	400.00				370.00	
					280.00 220.86	281.45	
		200.00	84.12	77.84 90.0087.14		110.0 b 12.68	
		0.00	30.00	58 10.00	50.00		
		0038221	52803 2714383473 38	24734937 4474372734 447487	8312 6828430553 6833273947 74837	51646 7847493874	
		00384	51. 30		Froups	18.	
	Report Details ((9 items)			•		
	<u>Contract</u> <u>Number</u>		<u>r Period</u> arges	Current Period Charges	<u>Current Period</u> <u>Budget</u>	<u>Current Period</u> <u>Variance</u>	Prev Year Period Variance
	003822152803			\$84.12	\$30.00	-\$54.12	
	2714383473			\$3.58	\$0.00	-\$3.58	
	3824734937			\$77.84	\$10.00	-\$67.84	
	4474372734			\$87.14	\$90.00	\$2.86	
	4474839312			\$766.53	\$850.00	\$83.47	
	6828430533			\$88.26	\$50.00	-\$38.26	
	6833273947			\$220.86	\$280.00	\$59.14	
	7483737646			\$281.45	\$370.00	\$88.55	
	7847493874			\$112.68	\$110.00	-\$2.68	
	Total		\$0.00	\$1,722.46	\$1,790.00	\$67.54	\$0.00
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Contract Budget Report

Budget Report Settings

The following use cases enable the user to specify settings for cost and budget reports.

Budget Management

Name:	Budget Management
Brief Description:	User defines the allocated budget – at a Contract (Service Agreement) level (typically a phone number). These subscriber level budget amounts then roll up to the Groups to define the Group level budget.
Entry Points:	
Primary Actors:	This is a Manager /Admin Function only
Report Content:	User Selection Section: Budget Year Dropdown Yearly Budget Details: Displayed Fields 1. Service Number 2. Yearly Budget Amount Footer Sub-total of Budget for the group Drilldown: Select service number from list User Selection Section: Budget Year Dropdown Budget Details: Displayed Fields 3. Period Name (Month and Year) 4. Budget Amount Footer Sub-total of Budget for the group
Chart:	Not applicable.

1	
Main Path:	1. User selects Budget Management Sub Tab
	2. User chooses to change the Budget Year from the drop down
	(default to current year)
	3. System will display the appropriate budget for that year listing each service number
	 User may drilldown into each Service Number to set monthly budget amounts
	5. User may enter a budget amount for each month
	6. User selects Submit to save input
	7. System will adjust the budget for that particular Service/Month
	8. Use Case Ends
Alternate Paths:	None
Exception Paths:	[E1] User encounters an application error:
	1. Application invokes Error Message use case.
Business Rules:	[B1] Past Budget cells can also be viewed by selecting the drop down "Budget Year"
	[B2] Budget Management is only <u>visible and editable</u> by Admin/Manager. The Admin/Manager will be able to enter future budgets for up to one year.
	[B4] These settings affect Budget Reports only. The Budget Grid will be displayed for an additional 12 months from the current period where there is billing data.
Notes:	None
Configuration:	None

telcomai	nager	Help Contact Us Change Language Log Out
	MY ACCOUNT STATMENTS PAYME OVERVIEW HIERARCHY BILLING	TOP X COST MANAGEMENT FIND CALLS
	OVERVIEW MEROARCHI BIELING	
	Yearly Budget Report	
	Company Name: Dutch Home Insurance	Hierarchy Name: Cost Center
	User Name: Frank Town	Position: Cost Center
		Printer Friendly Download
	BUDGET REPORTS BUDGET MANAGEMEN	IT COST REALLOCATION REBILL
	BUDGET REPORTS BUDGET MANAGEMEN	COST REALLOCATION REBILL
	Budget Year: FY-2006	
	11-2000	
		Submit
SIEBEL.		
	Yearly Budget Details (9 items)	
	Service Number	Yearly Budget Amount
	003822152803	\$70.00
	7483737646	\$370.00
	4474372734	\$90.00
	4474839312	\$850.00
	2714383473	\$0.00
	<u>6833273947</u>	\$280.00
	3824734937	\$10.00
	7847493874	\$110.00
	<u>6828430533</u>	\$50.00
	Total	\$1,830.00
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Budget Management - Yearly Budgeted Amount

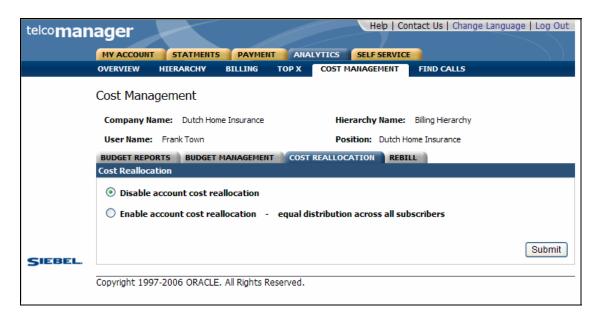
telco man	ader	Help Contact Us Change Lang	guage Log Out
	OVERVIEW HIERARCHY BILLING TOP X	COST MANAGEMENT FIND CALLS	
	Rudget Management		
	Budget Management		
	Company Name: Dutch Home Insurance	Hierarchy Name: Cost Center	
	User Name: Frank Town	Position: Cost Center	
		Printer Friendly	Download
	BUDGET REPORTS BUDGET MANAGEMENT COST	REALLOCATION REBILL	
	Budget Year: FY-2006 V		
			Submit
SIEBEL.			
3.2022	Budaak Dataila (12 itaasa)		
	Budget Management Company Name: Dutch Home Insurance Hierarchy Name: Cost Center User Name: Frank Town Position: Cost Center Printer Friendly Download BUDGET REPORTS BUDGET MANAGEMENT COST REALLOCATION REBILL Budget Year: FY-2006 Submit		
	Jan-06		
	Feb-06		
	Mar-06		
	Apr-06		
	May-06		
	Jun-06		
	Jul-06		
	Aug-06		450.0
	Sep-06		140.0
	Oct-06		260.0
	Nov-06		
	Dec-06		
	Total		\$850.00
	Submit		
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Budget Management - Budgeted Amount by Period

Cost Reallocation Setting

Name:	Cost Reallocation Setting
Brief Description:	User defines the reallocation setting for account level charges. This enables Account level charges to be distributed among the individual subscribers. The reallocated charges are available on any report where non-usage charges are displayed.
	These settings affect the following reports. These reports will now have an option for the user to "Display" or "Not Display" the cost allocation changes:
	Group Spending
	Group Spending Trend
	Account Billing Overview
	Account Billing Details
	Account Billing Trend
	Invoice Billing Details
	Top X Highest Spender Reports
Entry Points:	Cost Management Tab
	Cost Reallocation Subtab
Primary Actors:	This is a Manager /Admin Function has the ability to set the Allocation Amounts.
	The Subscribers can only "view" the reports with the "new charges" if there has been any allocations.
Query	Report Selection Criteria
Parameters:	1. Current hierarchy position
	2. Report
	See <u>Change Selection Criteria</u> use case for description of parameters.
Report Content:	Top Header Section:
	Company Name
	<u>User name</u>
	Position
	User Selection Section:
	Radio Buttons
	 Reallocation Type – valid types are: None – no reallocation Equally – equal distribution across all subscribers
Chart:	Not applicable

Main Path:	1. User Selects Cost Reallocation SubTab
	 User may change the Cost Reallocation by selecting the appropriate radio buttons.
	3. User clicks submit to save the changes
	 System determines query parameters based on report context or defaults and returns the report with the appropriate subscription charges for each Account in the Reports.
	 User may click on the display button to show these Cost Allocation changes in all the reports. This option is only available for the Admin/Manager. The Subscriber User will only get to see the reports with the new charges already in the reports.
	6. Use Case Ends
Alternate Paths:	[A1] User modifies the query parameters:
	 User changes any of the query parameters on the "Billing" tab or their business structure context position and selects Display to execute report.
	2. Application regenerates the report for the scope of selected reporting period and business structure context position.
Exception Paths:	[E1] User encounters an application error:
	Application invokes Error Message use case.
Business Rules:	[B1] The Charges that need to be reallocated should be applied only to the Subscription Charges for each Account.
	[B2] All changes in the subscription charges will affect the reports below and they will need to be recalculated and displayed when requested by user for each report.
	a. Group Spending
	b. Group Spending Trend
	c. Account Billing Overview
	d. Account Billing Details
	e. Account Billing Trend
	f. Invoice Billing Details
	g. Top X Highest Spending
Configuration:	None



Cost Management-Cost Reallocation Settings

OVERVIEW	HIERARCH	IY BILLING	TOP X COS	T MANAGEMENT FIND CALLS			
Contract	Contract Billing Overview						
Company	Name: Dutch	n Home Insurance	1	Hierarchy Name: Billing Hierarchy	,		
User Name	: Frank Tow	'n	Position: Dutch Home Insurance				
				Dowr	nload F	Printer Frier	
REPORT		BATCH REQUEST					
Period Rar	ige:	From: Apr-07	To: Apr-	07 💌			
Rebill Mar	cup:	 Display 	C Not display				
Cost Reall	ocation:	 Display 	 Not display 				
Billing Rep	orts:	Contract Billing) Overview 💌			Subm	
Billing Rep Report Deta		Contract Billing) Overview 🔻			Subr	
		Contract Billing	Dverview -	Allocated Account Charges	Taxes	_	
Report Deta	ails			Allocated Account Charges \$74.84	<u>Тажея</u> \$0.26	Total	
Report Deta <u>Number</u>	ails <u>Owner</u>	Billing Account	Charges			<u>Total</u> \$77,:	
Report Det: <u>Number</u> 2714383473	ails <u>Owner</u> MITCHELL	Billing Account Div4	Charges \$2.20	\$74.84	\$0.26	Total \$77.: \$142.:	
Report Det. Number 2714383473 3822152803	ails Owner MITCHELL WRIGHT	Billing Account Div4 Div5	<u>Charges</u> \$2.20 \$100.60	\$74.84 \$29.50	\$0.26 \$12.08	Total \$77.: \$142.: \$142.:	
Report Deta Number 2714383473 3822152803 3824734937	ails Owner MITCHELL WRIGHT LOPEZ	Billing Account Div4 Div5 Div5	Charges \$2.20 \$100.60 \$100.60	\$74.84 \$29.50 \$29.48	\$0.26 \$12.08 \$12.08	Total \$77.3 \$142.3 \$142.3 \$91.6	
Number 2714383473 3822152803 3824734937 4474372734	aller autores autor	Billing Account Div4 Div5 Div5 Div5 Div2	Charges \$2.20 \$100.60 \$100.60 \$48.00	\$74.84 \$29.50 \$29.48 \$37.88	\$0.26 \$12.08 \$12.08 \$5.76	Subm Total \$77.3 \$142.3 \$142.3 \$142.3 \$91.6 \$533.3 \$216.0	
Number 2714383473 3822152803 3824734937 4474372734 4474839312	alls Owner MITCHELL WRIGHT LOPEZ NELSON CARTER	Billing Account Div4 Div5 Div5 Div5 Div2 Div2	Charges \$2.20 \$100.60 \$100.60 \$48.00 \$442.20	\$74.84 \$29.50 \$29.48 \$37.88 \$37.88	\$0.26 \$12.08 \$12.08 \$5.76 \$53.06	Total \$77.: \$142. \$142. \$91.0 \$533. \$216.	
Number 2714383473 3822152803 3824734937 4474372734 4474839312 6828430533	June Owner MITCHELL WRIGHT LOPEZ NELSON CARTER BAKER	Billing Account Div4 Div5 Div5 Div5 Div2 Div2 Div2 Div1	Charges \$2.20 \$100.60 \$100.60 \$48.00 \$442.20 \$157.60	\$74.84 \$29.50 \$29.48 \$37.88 \$37.88 \$39.48	\$0.26 \$12.08 \$12.08 \$5.76 \$53.06 \$18.92	Total \$77.3 \$142.3 \$142.3 \$91.0 \$533.3	
Number 2714383473 3822152803 3824734937 4474372734 4474839312 6828430533 6833273947	June Owner MITCHELL WRIGHT LOPEZ NELSON CARTER BAKER GONZALEZ	Billing Account Div4 Div5 Div5 Div5 Div2 Div2 Div2 Div1 Div1	Charges \$2.20 \$100.60 \$100.60 \$48.00 \$442.20 \$157.60 \$129.20	\$74.84 \$29.50 \$29.48 \$37.88 \$37.88 \$39.48 \$39.48 \$39.48	\$0.26 \$12.08 \$12.08 \$5.76 \$53.06 \$18.92 \$15.50	Total \$77.; \$142. \$142. \$91. \$533. \$216. \$184.	

Resulting Changes in a Report Example Due to Cost Reallocation and Re-Billing

Markup / Re-Bill Setting

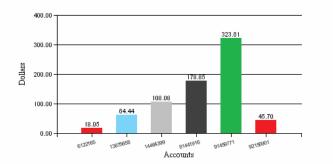
Name:	Mark-up / Re-Bill Setting
Brief Description:	User defines the mark-up/Re-Bill amounts – at the Enterprise or Group level in a Business or Billing Hierarchy.
Entry Points:	Cost Management TabRe-Bill Sub Tab
Primary Actors:	Manager /Admin Function can set the Re-Bill Amounts and view all the reports with or without the Re-Bill option.
	The Subscriber can only view the Reports with the new "Re-Bill Charges". They will not be able to see the old charges in reports.
Query Parameters:	Report Selection Criteria Current hierarchy position Report See Change Selection Criteria use case for description of parameters.
Form Content:	Displayed Fields 1. Mark-up / Re-Bill Indicator • On – Turns on mark-up calculations • Off – Turns off mark-up calculations for all data (i.e., not time-stamped) 2. Mark-up / Re-Bill amount – options are: • Equal – mark-up all charges equally; user must specify percentage amount to mark-up
Chart:	Not applicable
Main Path:	 User selects the Re-Bill subtab under Cost Management System displays the Re-Bill Form as described in the Form Content Section and selects a Business Hierarchy for which to apply the Re-Bill charges. User selects to Turn off/on Re-Bill indicator and enters the type of Re- Bill charges and the amounts of distribution in the section below. User selects submit to save the changes. a. System determines query parameters based on report context or defaults and readjusts charges and generates the Re-Bill Report for that Group within the Business or Billing Hierarchy. If you are a manager or admin you will see the old and the new charges.

	charge" (if there is one). If re-bill is not applied you will see the old charge.
	5. Use case ends.
Alternate Paths:	
Exception Paths:	 User encounters an application error: Application invokes <u>Error Message</u> use case.
Business Rules:	[B1] The charges will be shown as "Other charges" in all appropriate existing reports and will be based on the Subscription charge of each subscriber (service) belonging to that group. The charge will be percentage based. Admin User will be able to see the original charges and updated totals based on the Rebill percentage specified in the Reports.
	[B2] All other users who view Re-Bill reports can only view the reports with the new Re-Bill Charges. The old charges should be transparent to these Users.
	[B3] The Re-Bill Percentages can only be applied at the Root level in a hierarchy, i.e. in a given tree structure path (see examples above) only one node can have the Re-Bill option. In 5.1.1, if the user is not in a Root Node, the Rebill Option will be turned off.
	[B4] Re-Bill charges cannot be applied at a single subscriber level (MTN or Service Level). All nodes should have children. Therefore Re-Billing has to happen at a Group level in a Business Hierarchy.
Configuration:	None

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	HY ACCOUNT STATHENTS PAYMENT AMALYTICS SELF SERVICE
	OVERVIEW HIERARCHY BILLING TOP X COST MANAGEMENT FIND CALLS
	Cost Management
	Company Name: Dutch Home Insurance Hierarchy Name: Billing Hierarchy
	User Name: Frank Town Position: Dutch Home Insurance
	BUDGET REPORTS BUDGET MANAGEMENT COST REALLOCATION REBILL
	Rebill
	Oisable Rebill
	◯ Enable Rebill - Percentage (%) 0
	Submit
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Cost Management-Re-Bill Settings

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	MY ACCOUNT STATMENT	S PAYMENT ANA			
	OVERVIEW HIERARCHY	BILLING TOP X	COST MANAGEMENT	FIND CALLS	
	Account Billing Overvi	iew			
	Company Name: Dutch Hor	me Insurance	Hierarchy Name:	Billing Hierarchy	
	User Name: Frank Town		Position: Dutch	Home Insurance	
	REPORT CUSTOMIZE B/	ATCH REQUEST		Printer Friendly	Download
		-			
	Period Range:	From: Nov-06 🔽 To	Nov-06 🗸		
	Rebill Markup:	🔘 Display 💿 Not o	display		
	Billing Reports:	Account Billing Overvi	ew 💌		
SIEBEL.					Submit



Report Details (6 items)							
Billing Account	<u>Charges</u>	<u>Taxes</u>	<u>Total</u>				
6122165	\$18.05	\$0.00	<u>\$18.05</u>	I			
13875658	\$58.40	\$6.04	<u>\$64.44</u>	I			
14464399	\$97.74	\$10.34	\$108.08	Ι			
81441916	\$161.64	\$17.21	\$178.85	Ι			
<u>91459771</u>	\$294.20	\$29.41	<u>\$323.61</u>	Ι			
<u>92156901</u>	\$45.57	\$0.13	<u>\$45.70</u>	I			
Total	\$675.60	\$63.13	\$738.73	I			

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Cost Management-Re-Bill Settings

Glossary of Terms

Term	DEFINITION
Account	The payment agreement between a service provider and a customer. An account may contain one or more contracts (a.k.a. Billing Account)
BUSINESS RULE	Description of a decision made during a business process. May describe the behavior of the application.
CONSOLIDATION	The process of presenting a customer with information from multiple account invoices for a single company or organization.
CONTRACT	Defines the usage plan, features, and device for a specific phone number.
Cost Center	A business structure used to allocate expenses and usage. A typical business structure is comprised of a hierarchical tree of cost centers. Each cost center may be defined as, but not limited to a company, location, department, or region used for organizational spending reports.
CUSTOMER	The consumer of the service from a provider. Customers can either be individuals (B2C) or small, medium, and large businesses (B2B).
DOCUMENT	A single statement or set of account data from an input data source. The input data source may consist of many individual documents. Document content roughly corresponds to data typically provided to customers in print form on the Web.
HIERARCHY	A node tree with a single root node, intermediate nodes, and leaf nodes. The hierarchy tree may be used to consolidate several accounts into a single billing hierarchy or provide an organizational structure consisting of cost centers for organizational spending reports.
INVOICE	A statement of charges and service usage provided to a customer by the service provider. Used to inform the customer credits, debits, and the amount due for an account
Message	A relatively small set of information that is delivered via the Web or email message to user. Can be synonymous to notification and alert.
MODULE	 Self-contained collections of code, scripts, and configuration information that is functionally coherent. They need not be self-contained, but inter-module dependencies must be defined and managed. A large grained software structure. The software architecture can be described in terms of modules and their interaction.
User	 A user is an enrolled customer with a unique login name, password, and individually assigned and managed permissions. In a hierarchy, a user is typically assigned to a node.