



Application Guide for Oracle Self-Service E-Billing (Consumer Edition)

Version 6.1.1

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What's New in This Release

What's New in Application Guide for Oracle Self-Service E-Billing (Consumer Edition), Version 6.1.1

Table 1 lists changes in this version of the documentation to support this release of the software.

Table 1. What's New in Application Guide for Oracle Self-Service E-Billing (Consumer Edition), Version 6.1.1

Topic	Description
"Managing a Profile" on page 22	Modified topic. Added the option to choose additional bill-ready notification methods when Digital Access Information System (DAISY) file format is enabled for a user.
"CSR Overview" on page 143 "Enrolling the Bootstrap User as the Initial CSR Administrator" on page 145 "Enrolling a CSR" on page 147 "Setting a CSR Password and Security Question" on page 149	Modified topics. Updated the enrollment use cases to add steps for enrolling the bootstrap administrator. The bootstrap administrator is no longer preconfigured with Oracle Self-Service E-Billing.

What's New in Application Guide for Oracle Self-Service E-Billing (Consumer Edition), Version 6.1

Table 2 lists changes in this version of the documentation to support this release of the software.

Table 2. What's New in Application Guide for Oracle Self-Service E-Billing (Consumer Edition), Version 6.1

Topic	Description
"Self-Enrolling an Authorized User of an Existing Consumer Account" on page 10	Modified topic. Address, mobile phone, and mobile service provider fields have been added.
"Logging In" on page 20	Modified topic. Added a new feature that prompts a user to enter a new email address if he or she previously had undeliverable notifications.
"Managing a Profile" on page 22	Modified topic. Address, mobile phone, and mobile service provider fields have been added.

Table 2. What's New in Application Guide for Oracle Self-Service E-Billing (Consumer Edition), Version 6.1

Topic	Description
"Setting User Preferences" on page 28	Modified topic. An option to receive paper bills has been added.
"Creating a One-Time Payment" on page 47	Modified topic. Updated the Web services.
"Viewing Payment Activity" on page 58	Modified topic. Updated the Web services.
Chapter 6, "Managing Analytic Batch Reports"	New chapter. Describes the new use cases for scheduling analytical reports in batch mode and viewing a list of the completed, pending, failed, and scheduled analytical batch reports.
Chapter 9, "Utility Application Use Cases"	New chapter. Describes the use cases that are unique to the Utility application.

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Enrollment and Login Use Cases

This chapter describes Oracle Self-Service E-Billing application use cases with which the user can enroll and log into Oracle Self-Service E-Billing. It includes the following topics:

- [About User Characteristics on page 9](#)
- [Self-Enrolling an Authorized User of an Existing Consumer Account on page 10](#)
- [Setting a Password and Security Question on page 14](#)
- [Resetting a Password on page 16](#)
- [Logging In on page 20](#)
- [Managing a Profile on page 22](#)
- [Setting User Preferences on page 28](#)
- [Setting Account Lockout Status on page 30](#)
- [Logging Out on page 32](#)
- [Timeout on page 32](#)

About User Characteristics

This topic describes the work roles associated with managing Oracle Self-Service E-Billing user profiles, which are listed in [Table 3](#).

Table 3. User Characteristics

User Profile	Description
B2C Customer	
B2C Primary User	The B2C user can be associated with only one billing account. A B2C user is responsible for viewing, analyzing, and paying for his or her account, and can submit a dispute or service request for an account. If a customer has a family plan, he or she can request that subscribers have access to some or all of the account data and can have some or all permissions to manage the account.
Service Provider	
Provider CSR Administrator	Responsible for managing CSR users and monitoring the productivity and effectiveness of the CSR users.
Provider CSR User	Responsible for handling calls in the call center. A CSR user is rated on the number of calls he or she can handle and how quickly he or she resolves most issues, and the number of callbacks for a given case. CSR users can be part of full-time employees with medium to high turnover.

Table 3. User Characteristics

User Profile	Description
Provider Quality Assurance (QA User)	Responsible for reviewing and approving the quality and accuracy of the billing data before accepting the data for presentation to the customer online. The QA user views the data in the same manner as the customer users to validate that the statements, details, amount due, and other characteristics of the bill are accurate and complete.
Provider IT Administrator	Responsible for managing all provider users, loading periodic billing data, maintaining the connections to external databases, such as external billing, accounts receivable, and payment data. Responsible for maintaining registration and enrollment of all other provider users. Responsible for running batch jobs that load billing data, synchronize databases, send notifications, and purge old data.
Provider, Integrator, or Global Services Developer	Responsible for setting up seed data, and customizing the appearance, process flows, statement layout, and report content in Oracle Self-Service E-Billing.

Self-Enrolling an Authorized User of an Existing Consumer Account

All B2C users are required to be authorized in Oracle Self-Service E-Billing, provide a password, a security question and a security answer. [Table 4](#) lists and describes the self-enrollment use case functions.

Table 4. Self-Enrolling of an Authorized User of an Existing Consumer Account

Functions	Description
Name	B2C Self Enrolling an Authorized User of an Existing Consumer Account.
Feature Area	User Management - Enrollment
Primary User	Consumer user
Precondition	■ The consumer account has been previously created in Oracle Self-Service E-Billing. ■ The consumer needs to have a copy of his or her statement available.
Trigger	The user navigates to Oracle Self-Service E-Billing and clicks the Enroll tab.

Table 4. Self-Enrolling of an Authorized User of an Existing Consumer Account

Functions	Description
Page Content - User Enrollment page	User Enrollment page Module: Enroll as a user ■ Text: ■ Billing Information ■ Personal Information ■ Mailing Address ■ Contact Information ■ Email Address ■ Asterisk (*) Required Fields ■ Prompts: ■ Billing Account Number ■ Service Number (Telecommunications Application only) ■ Meter ID (Utility Application only) ■ User Name (Configurable; Default is a minimum of eight characters) ■ First Name ■ Middle Name ■ Last Name ■ Address Line 1 ■ Address Line 2 ■ Address Line 3 ■ Country (Select from list) ■ City ■ State (Select from list) ■ Zip Code ■ Home Phone Number ■ Mobile Phone Number ■ Mobile Service Provider (Select from list) ■ Email Address ■ Confirm Email

Table 4. Self-Enrolling of an Authorized User of an Existing Consumer Account

Functions	Description
Page Content - User Enrollment page, continued	■ Buttons: ■ Next ■ Cancel ■ Subnavigational bar: ■ Login ■ Enroll
Page Content - Verify User Enrollment page	Verify User Enrollment page The content on this page is the same as the User Enrollment page, with the following additional text: Enrollment for Consumer users only; Business Customers must contact a Customer Care Representative. Attributes entered in the User Enrollment page display here.
Page Content - Edit User Enrollment page	Edit User Enrollment page The content on this page is the same as the User Enrollment page. Attributes entered in the User Enrollment page display here.
Configuration Points	■ The number of characters in a user name ■ The number of characters for the validation code within the HTTPS request
Functions	■ Oracle Self-Service E-Billing-generated validation codes and passwords cannot contain the following characters: a, A, e, E, 3, o, O, 0, i, l, 1, u, U, y, Y, \$, @, !, * ■ The account that has been created and set to inactive state expires within four hours, and only a CSR administrator can reset the account. ■ Oracle Self-Service E-Billing cannot reuse the validation code for 30 days after initially being created. ■ The message on the Login page after enrolling states: <i>An email notification has been sent to the email address you have supplied during the enrollment process, you must review it so that you can log into the application.</i>

Main Path for Self-Enrolling of an Authorized User of an Existing Consumer Account

The main path to self-enroll an authorized user of an existing consumer account is as follows:

- 1 The user navigates to Oracle Self-Service E-Billing and clicks the Enroll tab.

Oracle Self-Service E-Billing displays the User Enrollment page.

- 2** The user enters the data prompted and clicks Next.

Oracle Self-Service E-Billing validates the information for formatting and completeness and then verifies that the billing account number, service number (Telecommunications application only), and meter ID (Utility application only) are valid in Oracle Self-Service E-Billing. Oracle Self-Service E-Billing displays the Verify User Enrollment page.

- 3** The user verifies the information and clicks Next.

Oracle Self-Service E-Billing sends an email to the consumer user email address with the password. The email must contain an HTTPS link with a unique validation code. The validation code must:

- Use an abbreviated list of characters.
- Contain at least one uppercase character, one lowercase character, and one number.

The Login screen appears displaying the following message: *An email notification has been sent to the email address you have supplied during the enrollment process, you must review it so that you can log into the application.*

Alternate Path for Self-Enrolling of an Authorized User of an Existing Consumer Account

This use case can have the following alternate paths:

- The user clicks Cancel on the User Enrollment page.

Oracle Self-Service E-Billing displays the Login screen.

- The user clicks Cancel on the Verify User Enrollment page.

Oracle Self-Service E-Billing displays the Edit User Enrollment page. The user edits as needed and clicks Next, then verifies the information on the Verify User Enrollment page and clicks Next.

Exceptions for Self-Enrolling of an Authorized User of an Existing Consumer Account

This use case can have the exceptions:

One of the form fields is an empty string when submitted

Oracle Self-Service E-Billing displays the populated Enrollment Form with the following error message: *Please provide a value for ****.*

The user name field does not meet the form validation when submitted

Oracle Self-Service E-Billing displays the populated Enrollment Form with the following error message: *Please provide a user name that is eight (configurable) characters in length.*

The email address does not have at least one valid character preceding the at sign @, preceding the period, and following the period

Oracle Self-Service E-Billing displays the populated Enrollment Form with the following error message: *Please provide a valid email address.*

Oracle Self-Service E-Billing cannot find the account number or service number

Oracle Self-Service E-Billing displays the populated Enrollment Form with the following error message: *The information you have provided does not currently match our system records, please try again, or call customer service at: xxx-xxx-xxxx.*

Setting a Password and Security Question

All users must create a password, security question, and answer.

Table 5 lists and describes the Setting a Password and Security Question use case functions.

Table 5. Setting a Password and Security Question

Functions	Description
Name	Setting a Password and Security Question
Feature Area	Enrollment
Primary User	Consumer user
Precondition	The consumer must have completed the Self-Enrollment and received the email generated by that use case.
Trigger	The user clicks the HTTPS request sent in an email.
Configuration Points	■ The number of characters in a password; Payment Card Industry (PCI) Data Security Standard requires a minimum of seven characters. ■ The complexity of the password. ■ The number of questions for the security question. ■ The list of security questions.

Main Path for Setting a Password and Security Question

The main path to set a password and security question is as follows:

- 1 The user clicks the HTTPS request sent in an email.

Oracle Self-Service E-Billing displays a form where the consumer user enters the following information:

- User Name

- Password - When a user enters a password in Oracle Self-Service E-Billing, it must contain at least eight characters (configurable) and contain at least the following (configurable):
 - ❑ One uppercase character
 - ❑ One lowercase character
 - ❑ One number
 - ❑ No Spaces
 - ❑ Special characters are valid.

The password cannot be the same as the user name.

The password cannot be the same as the previously entered password.

- Confirm Password; must be the same as the previously entered password.
- Select a Security Question. Pre-Populated Drop Down (configurable)
 - ❑ Best friend's name from childhood?
 - ❑ The name of the boy or girl you first kissed?
 - ❑ The place where you first met your spouse or significant other?
 - ❑ What is the make and model type of your first car?
 - ❑ What was the name of the school you attended in first grade?
- Security Answer
 - ❑ The form box size is 30 for consistency.
 - ❑ The minimum length of a security question is one (configurable) character and cannot be the space character.
 - ❑ The maximum length of the answer is 100 characters.
 - ❑ Oracle Self-Service E-Billing deletes leading and trailing spaces and does not include these in the calculation of minimum and maximum lengths.
 - ❑ Spaces within the answer are valid.
 - ❑ Special characters are valid and enhance the security level of the answer.

2 The consumer user clicks Submit.

3 Oracle Self-Service E-Billing validates the information on the form for:

- Formatting
- Completeness
- User name and validation code within HTTPS request match in Oracle Self-Service E-Billing.
- The account has not expired; four hour (configurable) time limit
- Password Requirements

4 Oracle Self-Service E-Billing sets the Status Flag in the database indicating this is an active user.

- 5 The Login page appears and displays the following message: *Your security credentials have been accepted, please log in to access your billing information.*

Alternate Path for Setting a Password and Security Question

This use case can have the following alternate path:

- The user clicks Cancel.

The Login screen appears.

Exceptions for Setting a Password and Security Question

Exceptions can occur with this use case.

The account flag for validation has expired (the default is four hours, configurable)

Oracle Self-Service E-Billing displays a message that states: *Please contact a customer service representative at xxx-xxx-xxxx to have your account reactivated, as too much time has elapsed since you initiated the enrollment process.*

One of the form fields is an empty string when submitted

Oracle Self-Service E-Billing displays the populated Enrollment Form with the following error message: *Please provide a value for ****.*

The password or confirm password does not meet the requirements

Oracle Self-Service E-Billing displays the pre-populated form with the following error message: *Please provide a valid password and confirm password.*

The password and confirm passwords are not exactly the same

Oracle Self-Service E-Billing displays the pre-populated Enrollment page with the following error message: *Please provide a valid password and confirm password.*

Resetting a Password

If a consumer user forgets his or her password for Oracle Self-Service E-Billing, he or she can reset it in this use case.

Table 6 lists and describes the Resetting a Password use case functions.

Table 6. Resetting a Password

Functions	Description
Name	Resetting a Password
Feature Area	Authentication and Enrollment

Table 6. Resetting a Password

Functions	Description
Primary User	Consumer user, CSR administrator. The CSR administrator can have super or normal privileges.
Precondition	The consumer user must be currently enrolled in Oracle Self-Service E-Billing.
Trigger	The consumer user clicks the Forgot Password link on the Login page.
Configuration Points	■ The number of times the user can enter an incorrect account number, user name, and service number. ■ The number of times the user can enter an incorrect security question or security answer. ■ The number of characters in a password; Payment Card Industry (PCI) Data Security Standard requires a minimum of seven characters. ■ The complexity of the password.

Main Path for Resetting a Password

The main path to reset a password is as follows:

- 1 The consumer user clicks the Forgot Password link on the Login page
Oracle Self-Service E-Billing displays the Forgot Password page.
- 2 The user enters the following value:
 - User name - Required
- 3 The user clicks Next.
- 4 Oracle Self-Service E-Billing validates the form information for:
 - Formatting
 - Completeness

Oracle Self-Service E-Billing validates the user ID and determines whether it is a B2C customer.
- 5 Oracle Self-Service E-Billing displays another Forgot Password form where the consumer user fills out the following information:
 - Account Number - Required
 - Service Number - Required
- 6 The user clicks Next.
- 7 Oracle Self-Service E-Billing validates the form information for:
 - Formatting

■ Completeness

Oracle Self-Service E-Billing validates the account number, user name, and service number.

After five (configurable) tries by the consumer user, the account is locked and Oracle Self-Service E-Billing displays an error message.

- 8 Oracle Self-Service E-Billing displays a Security Question and Answer Form. The following security questions appear in a drop down list:
 - Best friend's name from childhood?
 - The name of the boy or girl you first kissed?
 - The place where you first met your spouse or significant other?
 - What is the make and model type of your first car?
 - What was the name of the school you attended in first grade?
- 9 The user selects the security question he or she answered during the enrollment process. Oracle Self-Service E-Billing displays the Security Answer field.
- 10 The user provides the same answer he or she entered during the enrollment process. The answer must be an exact match and is case-sensitive.
- 11 The user clicks Next. Oracle Self-Service E-Billing validates:
 - The form information for completeness.
 - The security question and answer. After five (configurable) tries by the consumer user, the account is locked and the end-user receives an error message.
- 12 Oracle Self-Service E-Billing displays a Reset Password form with the following values:
 - Password - The default value is eight (configurable) characters. The password must contain at least the following characters (configurable):
 - One uppercase character
 - One lowercase character
 - One number
 - No spaces
 - Special characters are valid.
 - The password cannot be the same as the user name.
 - The password cannot be the same as the previously entered password.
 - Confirm Password - Must be the same as the password the user entered in the previous field.
- 13 The user clicks Next.
- 14 Oracle Self-Service E-Billing validates the form information for:
 - Formatting
 - Completeness
 - Password Requirements

- 15** The Login page appears displaying the following message: *Please log into the application using your new personal password you have just created.*

Alternate Path for Resetting a Password

This use case can have the following alternate path:

- The user clicks Cancel on any screen.

The Login page appears.

Exceptions for Resetting a Password

Exceptions can occur with this use case.

One of the form fields is an empty string when submitted

Oracle Self-Service E-Billing displays the populated Forgot Password form with the following error message: *Please provide a value for ****.*

The account number, user name, or service number are not valid

Oracle Self-Service E-Billing displays the populated Forgot Password form with the following error message: *The information you have provided does not currently match our system records, please try again, or call customer service at: xxx-xxx-xxxx.*

After five (configurable) times a user does not enter the correct account number, or user name, or service number information

Oracle Self-Service E-Billing displays the Login page with the following error message: *Please contact your customer self service representative at xxx-xxx-xxxx to get your account reactivated.*

The security question or security answer does not match what was previously entered

Oracle Self-Service E-Billing displays the populated Security Question form with the following error message: *The information you have provided does not currently match our system records, please try again, or call customer service at: xxx-xxx-xxxx.*

After five (configurable) times a user does not enter the correct security question or security answer

Oracle Self-Service E-Billing displays the Login page with the following error message: *Please contact your customer self service representative at xxx-xxx-xxxx to get your account reactivated.*

The password or confirm password does not meet the requirements

Oracle Self-Service E-Billing displays the populated Create Password form with the following error message: *Please provide a valid password and confirm password.*

The password and confirm password are not exactly the same

Oracle Self-Service E-Billing displays the populated Create Password form with the following error message: *Please provide a valid password and confirm password.*

Logging In

In this use case, a user logs in to the Web site to access Oracle Self-Service E-Billing. [Table 7](#) lists and describes the use case functions.

Table 7. Logging In

Functions	Description
Name	Logging In
Functional Area	User Management
Primary Users	Consumer user
Trigger	The user navigates to the Login page by entering the URL into a supported browser or user follows a link from service provider's landing page available to all anonymous users.

Table 7. Logging In

Functions	Description
Standard Features	■ Validation of the user name and password input. ■ Authentication of the user name and password. ■ Enroll as a new user link. ■ Disclaimer text and standard footer links.
Configuration Points	■ Validation rules for user name and password: ■ User name: The user's telephone number (the default). An alternative user name can be the user's first initial and full last name when not logged in using a phone. ■ Password: (Default) Must be at least six characters and must contain at least one uppercase letter, one lowercase letter, and one number to comply with Sarbanes-Oxley guidelines. ■ Ability to force users to change their passwords at first login if the user name and password were created by a CSR or a company administrator. ■ Parameters can be passed through the URL with a secure token that contains the preferred language, currency, and market segment information to personalize the user's experience. For example, if a user has changed the language preference on the service provider's consumer portal page, the Login screen must be presented in the same language, if available, and set for the remainder of the user's session until changed by the user. ■ Ability to bypass the Login screen to use single sign-on (SSO) applications (for example, Siebel CRM, Oracle Identity Manager, CA SiteMinder or other third-party application). Along with the Login information, the user's language and currency preference can be passed to Oracle Self-Service E-Billing to set user preferences.

Main Path for Logging In

The main path to log in is as follows:

- 1 The user enters login information:
 - User name
 - Password
- 2 The user clicks Submit.
- 3 Oracle Self-Service E-Billing validates data and identifies the user's data access and permissions:
 - **Vertical.** The type of vertical application, either Telco or Utility.
 - **Market.** Consumer

■ **Role.** Determines permissions

■ **Access.** Data access

- 4 Oracle Self-Service E-Billing displays the default page determined by the user's attributes (Vertical, Market, Role, Method, Access, and Language).

Alternate Paths for Logging In

This use case can have various alternate paths.

- The customer attempts to log in with invalid credentials.

The UI displays the following message: *The sign-in information you have entered does not match what we have on file, Please reenter your sign-in information.*

- Oracle Self-Service E-Billing prompts the user to enter a valid email address due to undeliverable notifications:

- a After the user logs in successfully, Oracle Self-Service E-Billing displays the following message: *We are unable to confirm delivery of email notifications using the address in your personal profile. Please enter the email address you would like to receive billing related notifications.*
- b The user enters a new email address, enters the email address again to confirm, and then clicks Submit.
- c Oracle Self-Service E-Billing verifies that email addresses match and are valid, prompting the user to reenter if necessary.
- d The following message displays: *An email notification has been sent to the email address you have supplied. Please follow the link in the message to complete the validation.*
- e The user clicks the link provided in the email message, which displays the Login screen where a message states: *Thank you! Your email address has been successfully verified.*

The user clicks the Enroll tab

The UI displays the Enrollment use case.

Exceptions for Logging In to the Billing and Payment Application

Exceptions can occur with this use case.

The User Does Not Click the Verification Link in Email After Entering a New Email Address

If a user entered a new email address in the alternate scenario where she had undeliverable notifications, and if she does not click the validation link in the new notification she receives, then that alternate scenario is repeated.

Managing a Profile

In this use case, consumer users can view their current profile information and can modify their personal information, password, and security question.

Table 8 lists and describes the Managing a Profile use case functions.

Table 8. Managing a Profile

Functions	Description
Name	Managing a Profile
Feature Area	User Management.
Description	Lets users view and modify their current profile information.
User	Consumer user, CSR administrator. The CSR administrator can have super or normal privileges.
Trigger	The user clicks the My Accounts tab, then the Personal subtab.
Prerequisites	The consumer user is currently enrolled in Oracle Self-Service E-Billing.
Active Links (Breadcrumbs)	■ My Account. Redisplays the Profile Details page. ■ Personal. Redisplays the Profile Details page.
subnavigational Bar	■ User Profile (Active) ■ Notifications ■ Contacts ■ Preferences
Page Names	■ Profile Details ■ Change Password ■ Change Security Question

Table 8. Managing a Profile

Functions	Description
Page Contents - Profile Details Page	Profile Details page Buttons: ■ Update ■ Reset Text: ■ Personal Information ■ Mailing Address ■ Contact Information ■ Email Address ■ Asterisk (*) Required Fields Data: User ID Prompts: ■ First Name ■ Middle Name ■ Last Name ■ (If Digital Access Information System (DAISY) file format is enabled for the user) Additional Bill Ready Notification - Check box ■ Address Line 1 ■ Address Line 2 ■ Address Line 3 ■ Zip Code ■ City ■ Country (Select from list) ■ State (Select from list) ■ Home Phone Number ■ Mobile Phone Number ■ Mobile Service Provider (Select from list) ■ Email Address ■ Confirm Email Address Links: ■ Change Password ■ Change Security Question

Table 8. Managing a Profile

Functions	Description
Page Contents - Change Password Page	Change Password page Module: Change Password Buttons: ■ Submit ■ Cancel Prompts: ■ Old Password ■ New Password (Cannot be the same as the previously entered password.) ■ Confirm Password Text: Asterisk (*) Required Fields

Table 8. Managing a Profile

Functions	Description
Page Contents - Change Security Question Page	Change Security Question page Module: Enter Security Question and Answer Buttons: ■ Submit ■ Cancel Prompts: ■ Security Question (Select from the following configurable list) ■ Best friend's name from childhood? ■ The name of the boy or girl you first kissed? ■ The place where you first met your spouse or significant other? ■ What is the make and model type of your first car? ■ What was the name of the school you attended in first grade? ■ Security Answer Text: Asterisk (*) Required Fields
Configuration Points	■ If Web services are configured, then the data displayed comes from your external CRM application. If Web services are not configured, then the Oracle Self-Service E-Billing database provides the data. ■ The number of characters in a password; Payment Card Industry (PCI) Data Security Standard requires a minimum of seven characters. ■ The complexity of the password. ■ The number of questions for the security question. ■ The list of security questions.

Main Path for Managing a Profile

The main path to manage a profile is as follows:

- 1 The user clicks the My Accounts tab, then the Personal subtab.
- 2 The user can do any of the following:
 - The user changes the editable profile information, then clicks Update.

Oracle Self-Service E-Billing validates the form information for formatting and completeness and then displays the updated user information with the following message: *Success Message - Your profile information has been updated successfully.*

- The user clicks the Change Password link to display the Change Password page, enters his or her old password, new password, reenters the new password, and then clicks Submit.

The password must be eight characters by default (configurable) and must meet the following criteria:

- ❑ Must contain at least one uppercase character.
- ❑ Must contain at least one lowercase character.
- ❑ Must contain at least one number.
- ❑ Spaces are not valid.
- ❑ Special characters are valid and enhance the security level of the password.

Oracle Self-Service E-Billing validates the form information for formatting, completeness, and password requirements and then generates an email indicating the password has been reset and sends it to the email address in Oracle Self-Service E-Billing. The following message appears: *Success Message - Your password has been reset.*

- The user clicks the Change Security Question link to display the Change Security Question page, selects a security question from the list, enters a security answer, and then clicks Submit. The security answer must meet the following criteria:

- ❑ The minimum length is one character.
- ❑ The maximum length is 100 characters. Oracle Self-Service E-Billing deletes leading and trailing spaces and does not include these in the calculation of minimum and maximum lengths.
- ❑ Spaces are valid.
- ❑ Special characters are valid and enhance the security level of the answer.

Oracle Self-Service E-Billing validates the information on the form for formatting and completeness and then displays the following message: *Success Message - Your security question and answer have been reset.*

Alternate Paths for Managing a Profile

Alternate paths can occur in this use case.

The user clicks Reset on the Manage Profile page

The page refreshes with the original settings.

The user clicks Cancel on the Change Password page

The Manage Profile page appears.

The user clicks Cancel on the Change Security Question page

The Manage Profile page appears.

Exceptions for Managing a Profile

Exceptions can occur with this use case.

One of the form fields is an empty string when submitted

Oracle Self-Service E-Billing displays the Change Password form with the following error message: *Please provide a value for ****.*

The password or confirm password does not meet the requirements

Oracle Self-Service E-Billing displays the Change Password form with the following error message: *Please provide a valid password and confirm password.*

The password and confirm passwords are not exactly the same

Oracle Self-Service E-Billing displays the pre-populated Change Password form with the following error message: *Please provide a valid password and confirm password.*

If no question is selected or if the security answer provided is an empty string

Oracle Self-Service E-Billing displays the Change Security Question Form with the following error message: *Please select a question and a valid answer for the question selected.*

Setting User Preferences

In this use case, users can set a personal language preference and specify whether they also want a paper bill. Setting a preferred language displays all screen text, attributes, error messages, and email notifications in the preferred language for that user each time he or she logs in.

Oracle Self-Service E-Billing is preconfigured with U.S. English only; you must localize your implementation to provide additional languages. For information about localization, see *Implementation Guide for Oracle Self-Service E-Billing*. If Oracle Self-Service E-Billing is localized and a user has not selected a preferred language, the Billing and Payment application displays in the language configured as the default.

Table 9 lists and describes the Setting User Preferences use case functions.

Table 9. Setting User Preferences

Function	Description
Name	Setting a Preferred Language
Feature Area	User Management
Description	User sets preferred language and specifies whether to also receive paper bills.
User	User, administrator user
Preconditions	The user is currently enrolled and logged into Oracle Self-Service E-Billing.

Table 9. Setting User Preferences

Function	Description
Trigger	The user clicks the My Account tab, Personal subtab, and the Preferences page tab, or clicks Language.
Active Links (Breadcrumbs)	■ My Account. Displays the Profile Details page for the user. ■ Personal. Displays the Profile Details page for the user.
subnavigational Bar	■ User Profile ■ Notifications ■ Contacts ■ Preferences (Active)
Page Content - User Preferences Page	User Preferences Page Module: Change Preferences Prompts: ■ Language (Select from list) ■ Paper On/Off (Radio buttons for On and Off) Text: Asterisk (*) Required Fields Buttons: ■ Submit ■ Cancel
Page Tabs	■ User Access ■ Notifications ■ Contacts ■ Preferences
Configuration Points	■ If Web services are configured, then the data displayed comes from your external CRM application. If Web services are not configured, then the Oracle Self-Service E-Billing database provides the data. ■ Oracle Self-Service E-Billing is preconfigured with U.S. English only; you must localize your implementation to provide additional languages.

Main Path for Setting User Preferences

The main path to set user preferences is as follows:

- 1 The user clicks the My Account tab, Personal subtab, and the Preferences page tab, or clicks Language.

Oracle Self-Service E-Billing displays the User Preferences page.

- 2 The user can select a language and a paper bill option (on or off).
- 3 The user clicks Submit.

Oracle Self-Service E-Billing displays the following message: *Success Message - Your preferences changed successfully.*

Alternate Paths for Setting User Preferences

The following alternate path can occur in this use case.

The user clicks Cancel

Oracle Self-Service E-Billing redisplay the User Preferences page.

Exceptions for Setting a Preferred Language

None

Setting Account Lockout Status

In this use case, various triggers cause an account to lock. The locked account prevents the user from logging in to Oracle Self-Service E-Billing.

Table 10 lists and describes the Setting Account Lockout Status use case functions.

Table 10. Setting Account Lockout Status

Functions	Description
Name	Setting Account Lockout Status
Functional Area	Login and Authentication
Primary Users	Consumer user, CSR administrator. The CSR administrator can have super or normal privileges.
Prerequisites	Consumer user is currently enrolled in Oracle Self-Service E-Billing

Table 10. Setting Account Lockout Status

Functions	Description
Trigger	■ On the Login page a user tries more than five (configurable) times to log in. This counter is stored in the database, so time is not relevant. ■ In the Forgot Password and Reset Password use case, when a user tries more than five (configurable) times to enter the user name, account number, or service number. This is a counter that must be stored in the database, so time is not relevant. ■ In the Forgot Password and Reset Password use case, when a user tries more than five (configurable) times to enter the Security Question or Security Answer. This is a counter that must be stored in the database, so time is not relevant.
Configuration Points	■ Number of incorrect entries on the Login page ■ Number of incorrect entries on the Forgot Password use case-Password ■ Number of incorrect entries on the Forgot Password use case - Security Question
Functions	■ The value set in the database must be unique for each trigger point.

Main Path for Set Account Lockout Status

The main path to set lockout status is as follows:

- 1 Oracle Self-Service E-Billing displays the Login page with the following error message: *Please contact your customer self service representative at xxx-xxx-xxxx to get your account reactivated.*
- 2 Oracle Self-Service E-Billing sets the status flag in the database indicating this account has been locked for one of the reasons described in [Table 10](#).

Logging Out

In this use case, a user exits Oracle Self-Service E-Billing and ends the session. [Table 11](#) lists and describes the use case functions.

Table 11. Logging Out

Functions	Description
Name	Logging Out
Functional Area	User Management.
Primary User	Consumer user
Trigger	The user chooses to log out from the global navigation bar.
Configuration Points	Message text
Standard Features	Link to the Login page.

Main Path for Logging Out

The main path to log out is as follows:

- 1 The user's session ends.
- 2 The UI displays the following message with a link to the Login page to reenter Oracle Self-Service E-Billing:

You have successfully logged out of the E-Billing application. To ensure maximum protection of your personal information, we recommend that you close your internet browser. Login

Alternate Path for Logging Out

The user's session reaches the timeout.

Timeout

In this use case, a user who is logged in to Oracle Self-Service E-Billing is automatically logged out after being idle for a specified period of time. The default is 15 minutes. [Table 12](#) lists and describes the use case functions.

Table 12. Timeout

Functions	Description
Name	Timeout of Oracle Self-Service E-Billing.
Functional Area	User Management.
Primary User	Consumer user

Table 12. Timeout

Functions	Description
Trigger	Inactivity of the user
Configuration Points	The service provider can configure the timeout idle period.

Main Path for Timeout

The main path when timing out is as follows:

- 1 The user's session becomes idle.
- 2 Oracle Self-Service E-Billing times the amount of inactivity.
- 3 Oracle Self-Service E-Billing logs the user out after a period of time (default is 15 minutes).
- 4 When the user selects an action, Oracle Self-Service E-Billing responds displays the following message with a link to log back in:

Your session has been inactive for a period of time, and to ensure maximum protection of your personal information, we ask you to sign back into the application.

Alternate Paths for Timeout

There are no alternate paths when timing out.

3

Statement Presentment Use Cases

This chapter describes use cases for statement presentment. It includes the following topics:

- [Viewing the Statement Summary on page 35](#)
- [Viewing the Account Summary on page 37](#)
- [Viewing the Service Summary on page 38](#)
- [Viewing the Usage Summary on page 39](#)
- [Viewing Usage Detail on page 42](#)
- [Viewing Transaction Details on page 44](#)
- [Disputing a Transaction on page 45](#)

Viewing the Statement Summary

This use case is used to view a statement summary.

[Table 13](#) lists and describes the use case functions.

Table 13. Viewing the Statement Summary

Functions	Description
Name	Viewing the Statement Summary
Functional Area	Statement Presentment
Primary Users	Consumer user
Triggers	■ The user clicks the Statement tab. ■ The user clicks the Select Statement Summary link from any other page under the Statements tab.
Main Path	The main path to view the Statement Summary is as follows: 1 The user clicks the Statement tab. 2 The user clicks the Statement Summary link.

Table 13. Viewing the Statement Summary

Functions	Description
Alternate Paths	The user selects a different account number from a list. Oracle Self-Service E-Billing displays the Statement Summary for the selected account for the current period. The user selects a different statement period. Oracle Self-Service E-Billing displays the Statement Summary for the current account for the selected period. The user clicks the Previous Balance link. Oracle Self-Service E-Billing displays the previous period Statement Summary for the current account. The user clicks the total current charges link. Oracle Self-Service E-Billing displays the Account Summary. The user clicks the Print Summary link within the Quick Links section. Oracle Self-Service E-Billing downloads the bill summary only (the first page of the bill) in PDF format.
Standard Features	■ Printer-Friendly view ■ Download CSV, PDF, or XML
Configuration Points	Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ PDF. A percentage of the CSV threshold value (default is 10%). ■ XML. A percentage of the CSV threshold value (default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then a PDF threshold value set at 10% must process in batch mode when it has 300 or more result set lines.

Viewing the Account Summary

This use case is used to view an account summary. [Table 14](#) lists and describes the use case functions.

Table 14. Viewing the Account Summary

Functions	Description
Name	Viewing the Account Summary.
Functional Area	Statement Presentment
Primary Users	Consumer user
Trigger	Consumer user drills down from Statement Summary.
Main Path	The main path to view the Account Summary is as follows: 1 The user clicks the Statements tab. 2 The user clicks the Account Summary link.
Alternate Paths	■ The user selects a different account number from a list. Oracle Self-Service E-Billing displays the Statement Summary for the selected account for the current period. ■ The user selects a different statement period. Oracle Self-Service E-Billing displays the Statement Summary for the current account for the selected period. ■ The user clicks the Previous Balance link. Oracle Self-Service E-Billing displays the previous period Statement Summary for the current account. ■ The user clicks the Total Current Charges link. Oracle Self-Service E-Billing displays the Account Summary.
Standard Features	■ Printer-Friendly view ■ Download CSV or XML
Configuration Points	Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ XML. A percentage of the CSV threshold value (default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.

Viewing the Service Summary

This use case is used to view summary of charges for a single service agreement. [Table 15](#) lists and describes the use case functions.

Table 15. Viewing the Service Summary

Functions	Description
Name	Viewing the Service Summary Report
Functional Area	Statement Presentment
Primary Users	Consumer user
Trigger	The user selects a service agreement number in Statement Summary.
Main Path	The main path to view the Service Summary is as follows: 1 The user clicks the Statements tab. 2 The user clicks the Select Service Summary link.
Alternate Paths	The user selects a different service agreement number. The UI displays the Service Summary for the selected service agreement number and current period. The user selects a different bill date. The UI displays the Service Summary for the current service agreement number for the selected period. The user clicks Total Usage Charges. The UI displays the Usage Summary for the current service agreement and current period. The user selects a usage type. The user selects one of the following: ■ Usage Type 1 (voice) links to Voice Detail Report for the current service agreement and current period. ■ Usage Type 2 (messages) links to Messages Detail Report for the current service agreement and current period. ■ Usage Type 3 (data) links to Data Detail Report for the current service agreement and current period. ■ Usage Type n links to N Detail Report for the current service agreement and current period.

Table 15. Viewing the Service Summary

Functions	Description
Standard Features	■ Printer-Friendly view ■ Download CSV or XML
Configuration Points	Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ XML. A percentage of the CSV threshold value (default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.

Viewing the Usage Summary

This use case is used to view the usage type breakdown for each service type, such as voice, messages, and data. [Table 16](#) lists and describes the use case functions.

Table 16. Viewing the Usage Summary

Functions	Description
Name	Viewing the Usage Summary
Functional Area	Statement Presentment
Primary Users	Consumer user
Trigger	The user clicks the Total Usage Charges link in Service Summary.
Main Path	The main path to view the Usage Summary is as follows: ■ The user clicks the Total Usage Charges link in Service Summary. The UI displays the Usage Summary for the current service agreement and current period.

Table 16. Viewing the Usage Summary

Functions	Description
Alternate Paths	The user selects a different service agreement number. The UI displays the Usage Summary for the selected service agreement number and current period. The user selects a different bill date. The UI displays the Usage Summary for the current service agreement number for the selected period. The user clicks a column header to sort in ascending or descending sequence. 1 The user clicks the header link. 2 Oracle Self-Service E-Billing sorts the column in ascending order. 3 The user clicks the header link again. 4 Oracle Self-Service E-Billing sorts the column in descending order. The user searches for a string in any column (including notes text). 1 The user selects an attribute from the list. 2 The user enters the search string with or without wildcards: ■ String no wildcards; exact match string ■ String with end asterisk; starts with string ■ String with front asterisk; ends with string ■ String with front and end asterisk; contains string 3 Oracle Self-Service E-Billing displays all records that match the search criteria. The user clicks the Contact Link icon (not shown in the sample views). The UI displays the Corporate or Personal Contact list entry. The contact link appears only if the number is in the contact list. The user clicks a tariff link (such as weekend calls or peak calls). The UI displays the Categorize Transaction report for the current service agreement, the period, and the selected record.
Standard Features	■ Printer-Friendly view ■ Download CSV or XML

Table 16. Viewing the Usage Summary

Functions	Description
Configuration Points	Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ XML. A percentage of the CSV threshold value (default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.
Alternate Paths	The user selects a different service agreement number The UI displays the Usage Summary for the selected service agreement number and current period. The user selects a different bill date The UI displays the Usage Summary for the current service agreement number for the selected period. The user selects a different usage type The UI displays the Usage Summary for the current service agreement number for the selected period and usage type. The user selects a usage type total The user selects one of the following usage type totals: ■ Usage Type 1 (voice) links to Voice Detail Report for the current service agreement and current period. ■ Usage Type 2 (messages) links to Messages Detail Report for the current service agreement and current period. ■ Usage Type 3 (data) links to Data Detail Report for the current service agreement and current period. ■ Usage Type n links to N Detail Report for the current service agreement and current period.

Table 16. Viewing the Usage Summary

Functions	Description
Standard Features	■ Printer-Friendly view ■ Download CSV or XML
Configuration Points	Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ XML. A percentage of the CSV threshold value (default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.

Viewing Usage Detail

This use case is used to view the detail usage transactions. [Table 17](#) lists and describes the use case functions.

Table 17. Viewing Usage Detail

Functions	Description
Name	Viewing Usage Detail
Functional Area	Statement Presentment
Primary Users	Consumer user
Trigger	■ The user selects a service type in Service Summary. ■ The user clicks the Usage Type Total Charges link in Usage Summary.
Main Path	The main path to view the Usage Detail is as follows: 1 The user clicks the Statement tab. 2 The user clicks the Usage Detail link. 3 The user clicks the Total Cost link in the Usage summary. The UI displays the Usage Detail screen.

Table 17. Viewing Usage Detail

Functions	Description
Alternate Paths	The user selects a different service agreement number. The UI displays the Usage Summary for the selected service agreement number and current period. The user selects a different bill date. The UI displays the Usage Summary for the current service agreement number for the selected period. The user clicks a column header to sort in ascending or descending sequence. 1 The user clicks the header link. 2 Oracle Self-Service E-Billing sorts the column in ascending order. 3 The user clicks the header link again. 4 Oracle Self-Service E-Billing sorts the column in descending order. The user searches for a string in any column (including notes text). 1 The user selects an attribute from list. 2 The user enters the search string with or without wildcards: ■ String no wildcards; exact match string ■ String with end asterisk; starts with string ■ String with front asterisk; ends with string ■ String with front and end asterisk; contains string 3 Oracle Self-Service E-Billing displays all records that match the search criteria. The user clicks a contact link icon (not shown in the sample views). The UI displays the Corporate or Personal Contact list entry. The contact link appears only if the number is in the contact list. The user clicks a tariff link (such as weekend calls or peak calls). The UI displays the Categorize Transaction report for the current service agreement, the period, and the selected record.

Table 17. Viewing Usage Detail

Functions	Description
Standard Features	■ Printer-Friendly view ■ Download CSV or XML
Configuration Points	Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ XML. A percentage of the CSV threshold value (default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.

Viewing Transaction Details

This use case is used to view all available transaction details, and to change the category, add a note, or dispute the transaction. [Table 18](#) lists and describes the use case functions.

Table 18. Viewing Transaction Details

Functions	Description
Name	Viewing Transaction Details
Functional Area	Statement, Split-Billing, and Disputes
Brief Description	The user views all available transaction details, might change the category, add a note, or dispute the transaction.
Primary Users	Consumer user
Trigger	The user clicks the Tariff Type link on the Usage Detail page.
Main Path	The main path to view the transaction details is as follows: ■ The user clicks the Tariff Type link on the Usage Detail page. The UI displays the Categorize Transaction view with all available attributes and values.

Table 18. Viewing Transaction Details

Functions	Description
Alternate Paths	The user clicks the contact link icon (not in sample views) next to the contact name. The UI displays the Corporate or Personal Contact list entry. The user changes the category and clicks Submit. Oracle Self-Service E-Billing updates the category for the record. The user adds a text note and clicks Submit. 1 Oracle Self-Service E-Billing adds the text to the transaction record. 2 Oracle Self-Service E-Billing displays a note icon in Usage Details report. The user clicks Dispute. The UI displays the dispute transaction page.
Standard Features	■ Printer-Friendly view ■ Download (CSV)

Disputing a Transaction

This use case is used to dispute a specific transaction. [Table 19](#) lists and describes the use case functions.

Table 19. Disputing a Transaction

Functions	Description
Name	Disputing A Transaction
Functional Area	Statement Presentment, Disputes

Table 19. Disputing a Transaction

Functions	Description
Main Path	The main path to dispute a transaction is as follows: 1 The user clicks the dispute link on the Categorize Transaction page. The UI displays the Disputes page: ■ Transaction Date ■ Posting Date ■ Dispute Number ■ Description ■ Amount ■ Actions: Submit; Cancel ■ Reason for Dispute ■ Account Number 2 The user enters text for a specific dispute and clicks Submit. The UI displays Disputes Page 3 (confirmation): ■ Information from previous page (full text of dispute) ■ Actions: Print this page 3 Oracle Self-Service E-Billing saves dispute details.
Alternate Paths	■ The user clicks the link to print the page. ■ The UI displays a page without navigation. ■ The card member uses the browser print function to print the page.
Exceptions	The card member enters an invalid field and the UI displays an error message.

4

Payment Processing Use Cases

This chapter describes use cases for consumers to perform functions such as completing a single online payment, scheduling regular account payments, updating payment account information, and viewing all payment activity within a user-specified time period. It includes the following topics:

- [Creating a One-Time Payment on page 47](#)
- [Setting Up and Managing Recurring Payments on page 55](#)
- [Viewing Payment Activity on page 58](#)
- [Managing Payment Accounts on page 65](#)

Creating a One-Time Payment

A consumer user can use this use case to complete a single online payment for one billing account. If the payment is for multiple billing accounts, then the payment is transacted as a single payment, but information such as the amount applied to each account is annotated to the transaction for A/R for reconciliation. A user can create a payment account (credit card or bank account) when creating a one-time payment for future one-time payments or recurring payments. [Table 20](#) lists and describes the functions.

Table 20. Creating a One-Time Payment

Function	Description
Name	Create One-Time Payment
Feature Area	Payment
Description	Lets a user make a payment to their billing account.
Primary User	Consumer User
Triggers	■ The user clicks the Payments tab and the One-Time Payment menu option. ■ The user clicks the Make a Payment quick link.
Page Titles	■ One-Time Payment ■ Make One-Time Payment ■ Confirm One-Time Payment ■ Payment Summary

Table 20. Creating a One-Time Payment

Function	Description
Page Content: One-Time Payment Page	One-Time Payment Page Select Billing Accounts (<i>Number of Items</i>) Module ■ Buttons: ■ Next (to select a billing account) ■ Reset (to deselect a billing account) ■ Columns (All columns are sortable): ■ Billing Account Number ■ Statement Date ■ Due Date ■ Recurring Payment ■ Last Payment Date (Displays the real-time data if Web services are enabled.) ■ Statement Amount (<i>Currency Code</i>) ■ Current Amount Due (<i>Currency Code</i>) ■ Check box next to each billing account ■ Label: Total ■ Data: ■ Total of Statement Amounts (<i>Currency Code</i>) ■ Total of Current Amount Due (<i>Currency Code</i>)

Table 20. Creating a One-Time Payment

Function	Description
Page Content: Make One-Time Payment Page	Make One-Time Payment Page ■ Module: Select Billing Accounts (<i>Number of Items</i>) ■ Buttons: ■ Next (to make the payment) ■ Cancel (to display the One-Time Payment screen) ■ Prompt: Payment Amount ■ Columns (All columns are sortable): ■ Billing Account Number ■ Due Date ■ Recurring Payment ■ Statement Amount (<i>Currency Code</i>) ■ Current Amount Due (<i>Currency Code</i>) (Displays the real-time amount if Web services are enabled.) ■ Payment Amount ■ Label: Total ■ Data: ■ Total of Statement Amounts (<i>Currency Code</i>) ■ Total of Current Amount Due (<i>Currency Code</i>)
Page Content: One-Time Payment Page - Select Payment Options	One-Time Payment Page - Select Payment Options Modules: ■ Manage One-Time Payment ■ Payee Details ■ Add Bank Account ■ Add Credit Card

Table 20. Creating a One-Time Payment

Function	Description
Page Content: One-Time Payment Page - Select Payment Options, continued	Manage One-Time Payment Module ■ Buttons: ■ Submit (to submit the payment) ■ Back (to cancel the payment and return to the Make One-Time Payment page) ■ Text - Asterisk (*) Required Fields The Payment Date is automatically populated with today's date and the text field disabled. The text field will be enabled if the user checks Save this information to my payment account or by selecting an alternate payment method. ■ Prompts: ■ Payment Date (Select one) ■ Select Payment Method ☐ Use Saved Payment Account (Select one) ☐ Enter New Payment Information (Select one) Payee Details Module ■ Prompts: ■ Payee (Select one) ■ Payee Account (Select one) Add Bank Account Module ■ Prompts: ■ Bank Name ■ Routing Number ■ Account Number ■ Account Type (Checking or Savings)

Table 20. Creating a One-Time Payment

Function	Description
Page Content: One-Time Payment Page - Select Payment Options, continued	Add Credit Card Module ■ Prompts: ■ Credit Card Number ■ Name on Credit Card ■ Credit Card Type (AMEX, Discover, MasterCard, or Visa) ■ Expiration Date (MM/YYYY) ■ CW Code (The CVV Code is used for Validation purpose only.) ■ Country (United States) ■ Address Line 1 ■ Address Line 2 ■ City ■ State (Choose from list) ■ Postal Code ■ (Check Box) Save this information in my payment accounts

Table 20. Creating a One-Time Payment

Function	Description
Page Content: Confirm One-Time Payment Page	Confirm One-Time Payment Page ■ Modules: ■ Payment Date ■ Selected Billing Accounts (<i>Number of Items</i>) - Payment Date Module ■ Buttons: ■ Confirm (to confirm and submit the payment) ■ Cancel (to cancel the payment and return to the One-Time Payment page) ■ Data: ■ Payment Date ■ Payment Account ■ Payee ■ Payee Account - Selected Billing Accounts (<i>Number of Items</i>) Module ■ Columns (All columns are sortable): ■ Billing Account Number ■ Due Date ■ Recurring Payment ■ Statement Amount (<i>Currency Code</i>) ■ Current Amount Due (<i>Currency Code</i>) (Displays the real-time amount if Web services are enabled.) ■ Payment Amount ■ Label: Total ■ Data: ■ Total of Statement Amounts (<i>Currency Code</i>) ■ Total of Current Amount Due (<i>Currency Code</i>)

Table 20. Creating a One-Time Payment

Function	Description
Page Content: Payment Summary Page	Payment Summary Page ■ Module: Payment Information (<i>Number of Items</i>) ■ Columns: ■ Account Number ■ Due Date ■ Payment Account ■ Amount Due (<i>Currency Code</i>) (Displays the real-time amount if Web services are enabled.) ■ Payment Amount (<i>Currency Code</i>)
Configuration Points	■ If Web services are configured, then Oracle Self-Service E-Billing displays the Last Payment Date and Current Amount Due on a billing account retrieved from the external payment transactions. ■ Max Pay Thresholds are configurable by payment application. ■ Paging shows 25 billing accounts at a time (configurable).
Rules	■ One-time payments can take place immediately (future date not required). ■ Process Failed payments appear on the Payment Activity view after payment has been processed by the billing system. ■ Payment processing is assumed to occur only on business days. Payment processing blackout dates are configurable. ■ After a payment is scheduled, the status appears as Scheduled on the Payment Activity view. After the payment is processed, the status changes to Processed. For status definitions, see “Oracle Self-Service E-Billing displays a message with the validation error (card number digits, invalid routing number, and so on).” on page 67. ■ Oracle Self-Service E-Billing is preconfigured to support North American ACH and VeriSign payment gateways.

Main Path for Creating a One-Time Payment

The main path to create a one-time payment is as follows:

- 1 The user clicks the Payments tab.

Oracle Self-Service E-Billing displays the One-Time Payment page listing the billing account statements for the user.

- 2 The user can optionally search for one or more accounts. The user enters a particular account number or a statement, due date, last payment, or amount due date range, then click Go.
Oracle Self-Service E-Billing displays the list of selected account statements in tabular format.
- 3 The user selects all, one, or multiple billing accounts for which to make payment and clicks Next.
Oracle Self-Service E-Billing displays the Make One-Time Payment page.
- 4 The user can enter a payment amount different from the amount due.
- 5 The user clicks Next.
Oracle Self-Service E-Billing displays the One-Time Payment page with the Make One-Time Payment and Payee Details modules.
- 6 The user enters a payment date or selects one from the calendar.
- 7 The user chooses to use either a saved payment account or enter a new payment method. For a saved payment account, the user selects the account. For a new payment method, the user specifies whether it is a bank account or a credit card, then enters or selects the information prompted. The user has the option to save the new payment account information or make an instant payment and not save the account information (the default).
- 8 The user clicks Submit.
Oracle Self-Service E-Billing displays the Confirm One-Time Payment page.
- 9 The user verifies the one-time payment information and clicks Confirm.
The Payment Summary page appears with the message: *Thank you for your payment. It is currently being processed and your Payment ID is (Payment ID). Please review the Payment Activity screen for an updated status in the next 24 hours.*

Alternate Path for Creating a One-Time Payment

The following alternate paths can occur in this use case:

- The account has a recurring payment setup. The following warning message appears: *You selected one or more accounts with a recurring payment. More than one payment to your account may result. Do you wish to continue? Payments are already made for the following Billing Accounts: Account Numbers. Continuing will result in duplicate payments.*
- The user enters a partial amount to be paid. The following warning message appears: *For one or more Billing Accounts, payment amount entered is less than the due amount. Do you want to continue?*
- The user enters a payment amount in the wrong format. The following message appears: *Enter a valid amount in the format #,##0.00.*
- The user can use the Reset button to change entries.
- The user enters an amount greater than the current amount due. Oracle Self-Service E-Billing displays the following warning message: *For one or more Billing Accounts, payment amount entered is greater than the due amount. Do you want to continue?*
Oracle Self-Service E-Billing limits the transaction to the total amount due (configurable).

Exceptions for Creating a One-Time Payment

The following exceptions can occur in this use case:

- The user cancels the transaction and Oracle Self-Service E-Billing returns the user to the initial One-Time Payment screen.
- Oracle Self-Service E-Billing cannot find the billing account and displays the following message: *Billing account not found. Oracle Self-Service E-Billing receives Automated Clearing House (ACH) failure.*
- Oracle Self-Service E-Billing displays the following payment failure message: *Your bank account could not be verified. Please review the bank account information you provided and try again. Oracle Self-Service E-Billing does not perform the transaction.*

Setting Up and Managing Recurring Payments

Users can use this use case to pay monthly charges automatically and set up an automatic recurring payment to a payee at regular intervals for a user-specified amount. The user can edit any recurring payment that is still active. The changes are applied to all future payments. The user can also decide whether to apply the changes to the next outgoing scheduled payment.

The user can cancel a recurring payment, which stops any future automatic payments. If a recurring payment is canceled, the user has the option to cancel any payments that are already scheduled. The user can cancel the scheduled payment or only the future payments in the recurring payment definition. [Table 21](#) lists and describes the functions.

Table 21. Setting Up and Managing Recurring Payments

Function	Description
Name	Set Up and Manage Recurring Payments
Feature Area	Payment
Description	Lets a user set up and manage recurring payments against their associated billing accounts.
Users	Consumer user
Trigger	The user clicks the Payments tab and the Recurring Payment subtab.
Configurations	Scheduled Payment Sidebar has a display default of 10 most recent scheduled payments. This limit can be configurable.
Standard Features	■ Multiple payment accounts ■ Email notification of payment event ■ Paging ■ Sorting

Main Path for Setting Up and Managing Recurring Payments

The following paths describe how to set up and manage recurring payments.

Viewing Recurring Payments

The user follows this main path to view recurring payments:

- 1** The user chooses to view recurring payments.

Oracle Self-Service E-Billing displays the Recurring Payment page. The recurring payments previously created by the user are displayed with the following column headings:
 - Billing Account Number
 - Amount Type (Total amount due, Total amount within X threshold, Fixed amount)
 - Pay Interval (A number of days before due date, a specific day of the month (values entered when the recurring payment was created)).
 - Effective Period (Until canceled, a specific number of payments, or until a date)
- 2** The user can choose from the following options:
 - Delete selected recurring payment (for one billing account at a time).
 - Edit selected recurring payment (for one billing account at a time).
 - Add recurring payment (continue with use case main path).

Adding a Recurring Payment

The user follows this main path to add a recurring payment:

- 1** The user clicks Add Recurring Payment from the Recurring Payments page.
- 2** The user clicks Billing Accounts.

The user selects multiple billing accounts to which a new recurring payment is applied.
- 3** The user clicks Payment Account.

Field of payment accounts previously saved by the user (payment accounts created by other users are not displayed). The user has an option to create a new payment account.
- 4** The user chooses a payment amount options:
 - Total Amount Due (Default)
 - Total Amount Within Threshold (The user enters threshold amount and receives a notification if amount due exceeds threshold)
 - Fixed Amount (The user enters a fixed amount)
- 5** Payment Date. The user selects an option and enters a value:
 - The number of business days before due date (Default 2 days before due date)
 - On a specific day of every month

- 6 The user defines the effective duration of the recurring payment, defining a value for X where specified.
 - Until Canceled (Default)
 - For X payments
 - Until date X (Text box and popup calendar)
- 7 The user clicks Save.

The Recurring Payment Confirmation page appears.
- 8 The user can modify the selected accounts.
- 9 The user clicks Confirm to save the recurring payment

Oracle Self-Service E-Billing displays a confirmation message and adds the recurring payment to the list of scheduled recurring payments.

Alternate Paths for Setting Up and Managing Recurring Payments

Alternate paths can occur when setting up and managing recurring payments.

Creating a New Payment Account

The following alternative path can occur when creating a new payment account:

- 1 Oracle Self-Service E-Billing takes user to Payment Accounts page and New Payment Account functionality. Both bank and credit card accounts are permitted for recurring payments.
- 2 User enters a one-time payment for an account that already has a scheduled recurring payment.
- 3 Oracle Self-Service E-Billing displays a notification that a recurring payment already exists for this account. Oracle Self-Service E-Billing notifies the user that if the payment is scheduled, then a double payment might occur.
- 4 The user can click Confirm or Cancel.

Viewing and Editing Recurring Payments

An alternative path can occur when creating a new payment account. The alternative path is identical to the main path with the following exceptions:

- Recurring payments can only be edited one-at-a-time. Group editing of a recurring payment is not in scope.
- Information for the user prior to editing a recurring payment: After editing a recurring payment, any scheduled payment is canceled. A new payment is scheduled in its place based on the new recurring payment options.
- Editing recurring payments includes restrictions. The limitations are as follows:
 - Payment Amount: A recurring payment cannot change from Total Amount to Fixed Amount (or vice-versa).

- Payment Date: A recurring payment cannot change from X Days Before Due Date to On the X Day of Every Month (or vice-versa).
- Present the user only with available edit options.
- A new recurring payment must be created if an edit option is desired but not available.

Canceling Recurring Payments

The user can cancel a recurring payment, which stops any future automatic payments. If a recurring payment is canceled, the user has the option to cancel any payments that are already scheduled. The user decides whether to cancel the scheduled payment or just the future payments in the recurring payment definition.

Roles and Permissions - Viewing Payment Activity

Any user with permission to view payment activity must be able to view any payment made against any billing account to which the user has access. This includes check payments posted through the mail.

Administrator Roles

The administrator user might experience performance delays when dealing with large numbers of accounts.

Viewing Payment Activity

This use case lets a consumer view a list of all payment activity for a configurable time period. Scheduled payments appear in payment activity and can be canceled prior to being processed. Payment activity can be searched or filtered. The user can also edit scheduled payments. [Table 22](#) lists and describes the functions.

Table 22. Viewing Payment Activity

Function	Description
Name	Viewing Payment Activity
Feature Area	Payment.
Description	Lets a user view transactional history for her associated billing accounts.
Primary User	Consumer User and CSR User
Trigger	The user clicks the Payments tab and the Payment Activity menu option.
Standard Features	■ Edit or cancel a scheduled payment. ■ Sorting and Paging. ■ Search or Filter (Search for a payment, or filter by type, account, status, or date range).

Table 22. Viewing Payment Activity

Function	Description
Page Content - Payment Activity Page	■ Modules: ■ Search By ■ List of Payment Transactions (<i>Number of Items</i>) - Search By Module ■ Prompts: ■ Account Number ■ Payment Type (All, CSR Updated, Recurring, One-Time, CSR Initiated. Web services can also pass in the following payment types: Mail In, Lock box, Kiosk, and Via Phone) ■ Status (All, Canceled, Failed, Failed Authorization, Paid, Processed, Returned, Scheduled) ■ Payment Transactions (From and To date fields with pop-up calendars) ■ Button - View - List of Payment Transactions (<i>Number of Items</i>) Module ■ Columns: ■ Billing Account ■ Payment Type ■ Amount (<i>Currency Code</i>) ■ Status ■ Payment Scheduled Date ■ Payment Transaction Date ■ Actions (Not available for payment transactions from an external source using Web services.) □ Edit. Edit scheduled payments □ Cancel. Cancel scheduled payments □ View Details. View transaction details for initiated payments.

Table 22. Viewing Payment Activity

Function	Description
Page Content - Payment Details Page	Payment Details Page ■ Modules: ■ Payment Information ■ <i>(Number of Items)</i> Payment Information Module ■ Data: ■ Account Number ■ Payment Type ■ Payment Scheduled Date ■ Payment Transaction Date ■ Payment Amount ■ Payment Account ■ Status ■ Date Created ■ Date Modified <i>(Number of Items)</i> Module ■ Button - Back ■ Columns: ■ Account ■ Statement Date ■ Statement Number ■ Amount Due ■ Due Date ■ Amount Paid

Table 22. Viewing Payment Activity

Function	Description
Page Content - Edit One-Time Payment Page	Edit One-Time Payment Page ■ Modules: ■ Edit One-Time Payment ■ Accounts Selected for Payment (<i>Number of Items</i>) Edit One-Time Payment Module ■ Buttons: ■ Submit ■ Cancel ■ Prompt: Payment Date (with popup calendar) Accounts Selected for Payment (<i>Number of Items</i>) Module ■ Data: ■ Account Number ■ Payment Account ■ Due Date ■ Amount Due (<i>Currency Code</i>) ■ Payment Date ■ Total (payment amount total) ■ Prompt: Payment Amount (Displays editable amount) ■ Text: ■ Total ■ Asterisk (*) Required Fields

Table 22. Viewing Payment Activity

Function	Description
Page Content - Confirm One-Time Payment Page	Modules: ■ Payment Date ■ Accounts Selected for Payment (<i>Number of Items</i>) Payment Date Module ■ Buttons: ■ Submit ■ Cancel ■ Data: Payment Date Accounts Selected for Payment (<i>Number of Items</i>) Module ■ Buttons: ■ Submit ■ Cancel ■ Data: ■ Account Number ■ Payment Account ■ Due Date ■ Amount Due (<i>Currency Code</i>) ■ Payment Amount (<i>Currency Code</i>) ■ Total (of payment amounts) ■ Text: Total
Page Content - Manage One-Time Payment Page	■ Button: Back ■ Text: Success Message Your selected billing account is updated successfully.

Table 22. Viewing Payment Activity

Function	Description
Page Content - Cancel One-Time Payment Page	Cancel One-Time Payment Page ■ Modules: ■ Cancel One-Time Payment ■ Payment Information (<i>Number of Items</i>) Cancel One-Time Payment Module ■ Buttons: ■ Submit ■ Cancel ■ Text: You are about to cancel the payment. Do you wish to continue? Payment Information (<i>Number of Items</i>) Module ■ Columns: ■ Account Number ■ Payment Amount ■ Due Date ■ Amount Due (<i>Currency Code</i>) ■ Payment Date ■ Payment Amount (<i>Currency Code</i>)
Page Content - Cancel Payment Confirmation Page	Cancel Payment Confirmation Page ■ Buttons: ■ Back ■ Text: Your selected payment was canceled successfully.
Configuration Points	■ When Web services are configured, payments external to Oracle Self-Service E-Billing are retrieved. ■ Configurable values for payment source when A/R reconciliation jobs are set up include: Online Check, Online Credit, Offline Check, and Offline Credit. ■ Number of month's history presented. ■ Initial sort order for each column (ascending or descending).

Main Path for Viewing Payment Activity

The main path to view payment activity is as follows:

- The user clicks the Payment tab, and then clicks the Payment Activity sub-menu option.
Oracle Self-Service E-Billing displays the Payment Activity screen showing all scheduled one-time and recurring payments.

Alternate Paths

The following alternate paths can occur with this use case.

The user views details for a payment

- On the Payment Details page, the user clicks the View Details link for a payment.
Oracle Self-Service E-Billing displays the Payment Details page showing detailed information about the payment and accounts.

The user edits a scheduled payment

- 1 On the Payment Details page, the user clicks the Edit link for a scheduled payment.
- 2 The user can edit the payment date and amount fields only, including on recurring payments that are scheduled.

In case of multiple accounts grouped in one payment transaction, the user can change the amount for each billing account. When editing a scheduled payment from the Payment Activity view, the user is restricted from adding or removing a billing account from the scheduled payment.

- 3 The user clicks Submit.
- 4 The Manage One-Time Payment page appears with the following message: *Your selected billing account is updated successfully.*

Oracle Self-Service E-Billing uses the date of this edit as the last modified date.

The user cancels a scheduled payment

- 1 On the Payment Details page, the user clicks the Cancel link for a scheduled payment.
Oracle Self-Service E-Billing displays the following question: You are about to cancel the payment. Do you wish to continue?
- 2 The user verifies the payment information shown and clicks Submit (or clicks Cancel to return to the Payment Activity page).
- 3 Oracle Self-Service E-Billing displays the Cancel Payment Confirmation page.

Managing Payment Accounts

A user can use this use case to add, edit, or delete payment account information. [Table 23](#) lists and describes the functions.

Table 23. Managing Payment Accounts

Function	Description
Name	Manage Payment Accounts.
Feature Area	Payments.
Description	Lets the user add, edit, or delete payment account information.
Users	Consumer User.
Trigger	The user clicks Payments, and then Accounts.
Standard Features	■ Form validation for Bank (Checking) Account or Credit Card. ■ Email notifications for payment account actions.
Payment Account Deletion	■ When a payment account is deleted, the user is warned that all recurring payment setups created for this payment account will be deleted. ■ When a payment account is deleted, the users are prompted to confirm that they want to delete all the scheduled payments against this payment account.
Credit Card Expiration	■ If this credit card has expired, then the user is not allowed to create a recurring payment against this credit card. ■ If this credit card expires after creating a recurring payment, then the recurring payment setup is not deleted.
Roles and Permissions	Consumer users can only view or edit payment accounts and payment instructions that they created previously.

Main Path for Managing Payment Accounts

The following paths describe how to managing payment accounts.

Adding a Credit Card Account

The main path to add a credit card account is as follows:

- 1 The user clicks the Payment Account subtab from the Manage Recurring Payments tab.
Oracle Self-Service E-Billing displays a list of existing payment accounts and the ability to add, edit, or delete those accounts.
- 2 The user chooses to add a credit card account.
- 3 Oracle Self-Service E-Billing displays the form to add a credit card account that contains the following fields:

- Payment Account Name
 - Credit Card Number
 - Name on Credit Card
 - Credit Card Type
 - Expiration Date
 - Card Verification Code (CVV)
 - Address Line 1
 - Add Address Line 2
 - City
 - State
 - Zip Code
 - Country
 - Payee
- 4 The user saves the form.
 - 5 Oracle Self-Service E-Billing validates the information and updates the list of payment accounts.

Alternate Paths

Alternate paths can occur in this use case.

Adding a New Bank Account

- 1 Oracle Self-Service E-Billing displays screen to add a bank account that contains the following information.
 - Payment Account Name
 - Account Type
 - Bank Name
 - Account Number
 - Routing Number
 - Payee
 - Diagram of a check identifying the location of the bank account and routing
- 2 User enters the information and saves the form.
- 3 Oracle Self-Service E-Billing validates the information as being correct and updates the list of payment accounts.

Editing an Account

- 1 Oracle Self-Service E-Billing displays the edit account screen containing credit card or bank account editable fields showing the current information for the specified account.
- 2 User enters the information and saves the form.
- 3 Oracle Self-Service E-Billing validates the information and updates the list of payment accounts.

Deleting an Account

- 1 Oracle Self-Service E-Billing displays a message to ensure the user wants to delete the account. If the account is in use by the recurring payment feature, the following message appears:
This payment account is currently in use by a recurring payment. To avoid cancellation of the recurring payment and all future payments, select Cancel and select a new payment method for the recurring payment.
- 2 Oracle Self-Service E-Billing displays a confirmation screen.
- 3 Oracle Self-Service E-Billing deletes the account and redisplay the screen.
- 4 Oracle Self-Service E-Billing deletes any recurring payments still associated with the payment account.
- 5 Oracle Self-Service E-Billing is unable to validate payment information.
- 6 Oracle Self-Service E-Billing displays a message with the validation error (card number digits, invalid routing number, and so on).

5

Analytic Reporting Use Cases

This chapter describes the use cases for reports that analyze payment data. It includes the following topics:

- [Viewing the List of Standard Billing Reports on page 69](#)
- [Viewing the Account Billing Overview Report on page 71](#)
- [Viewing the Statement Billing Overview Report on page 74](#)
- [Viewing the Service Billing Overview Report on page 77](#)
- [Viewing the Account Billing Trend Report on page 80](#)
- [Viewing the Service Billing Trend Report on page 82](#)
- [Viewing the Service Details Report on page 85](#)

Viewing the List of Standard Billing Reports

Users can view and access a list of standard billing reports in this use case. [Table 24](#) lists and describes the functions.

Table 24. Viewing the List of Standard Billing Reports

Function	Description
Name	Viewing the List of Standard Billing Reports
Description	The user views a list of standard billing reports and chooses one to view: ■ Account Billing Overview ■ Statement Billing Overview ■ Service Billing Overview ■ Account Billing Trend ■ Service Billing Trend ■ Service Details
Feature Area	Analytic Reports
Primary User	Consumer user, CSR hosting administrator
Trigger	The user clicks the Analytics tab.
Configuration Points	None
Business Rules	None

Main Path for Viewing the List of Standard Billing Reports

The main path to view the list of standard billing reports is as follows:

- 1** The user clicks Analytics, then Standard Reports.
- 2** The user clicks one of the following standard reports:
 - Account Billing Overview
 - Account Billing Trend
 - Statement Billing Overview
 - Service Billing Overview
 - Service Billing Trend
 - Service Details

Alternate Paths for Viewing the List of Standard Billing Reports

Alternate paths can occur with this use case.

The user clicks an active link

Oracle Self-Service E-Billing refreshes the page.

The user clicks an active page tab for standard, custom, or batch reports

Oracle Self-Service E-Billing displays the selected page.

Exceptions for Viewing the List of Standard Billing Reports

Exceptions can occur with this use case.

The user encounters an error

Oracle Self-Service E-Billing invokes the Error Message use case.

Viewing the Account Billing Overview Report

A user can view an overview of all billing accounts associated with the user.

Table 25 lists and describes the Viewing the Account Billing Overview Report use case functions.

Table 25. Viewing the Account Billing Overview Report

Function	Description
Name	Viewing the Account Billing Overview Report
Description	The user views an overview of billing accounts that he or she is associated with for the current month.
Feature Area	Analytic Reports
Primary User	Consumer user, CSR hosting administrator
Prerequisites	■ The user has been successfully enrolled and authenticated. ■ The B2C user has been linked to two or more accounts.
Trigger	The user clicks the Analytics Tab, Billing Reports, Account Billing Overview.
Chart	Bar Chart (Default): ■ X-axis: Reporting Period ■ Y-axis: Dollars
Standard Features	■ Printer-Friendly view ■ Download CSV, PDF, or XML

Table 25. Viewing the Account Billing Overview Report

Function	Description
Report Content	Header: ■ Report Details ■ Number of Items Columns: ■ Account Number (Sort Ascending, Hyperlink to Service Billing Overview for selected account) ■ Number of Contracts ■ Monthly Charges ■ Usage Charges ■ Credits ■ Other Charges ■ Taxes ■ Total (Hyperlink to Statement Billing Overview for selected account number in row, ■ T (Hyperlink to Account Billing Trend for selected account number in row) Footer (Total Row): ■ Total - Literal ■ Monthly Charges ■ Usage Charges ■ Credits ■ Other Charges ■ Taxes

Table 25. Viewing the Account Billing Overview Report

Function	Description
Configuration Points	■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ PDF. A percentage of the CSV threshold value (default is 10%). ■ XML. A percentage of the CSV threshold value (default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then a PDF threshold value set at 10% must process in batch mode when it has 300 or more result set lines. ■ All report detail columns are sortable.
Business Rules	None
Functions	The user can customize or submit a batch request for this report.

Main Path for Viewing the Account Billing Overview Report

The main path to view the Account Billing Overview report is as follows:

- The user selects the Account Billing Overview report from the List of Billing Reports.
Oracle Self-Service E-Billing determines the query parameters and displays the report.

Alternate Paths for Viewing the Account Billing Overview Report

Alternate paths can occur in this use case.

The user clicks an active link

Oracle Self-Service E-Billing displays the List of Standard Reports.

The user clicks an active page tab for the active report, custom, or batch reports

Oracle Self-Service E-Billing displays the selected page.

The user clicks the Download action

Oracle Self-Service E-Billing downloads the report.

The user clicks the Printer-Friendly action

Oracle Self-Service E-Billing invokes Printer-Friendly use case.

The user changes reporting period

Oracle Self-Service E-Billing displays the report for the new period.

The user selects a different report

Oracle Self-Service E-Billing displays the selected report.

Exceptions for Viewing the Account Billing Overview

Exceptions can occur with this use case.

The user encounters a server system error

Oracle Self-Service E-Billing invokes the Error Message use case.

Viewing the Statement Billing Overview Report

Users can view the charge types summarized by invoice.

[Table 26](#) lists and describes the Viewing the Statement Billing Overview Report use case functions.

Table 26. Viewing the Statement Billing Overview Report

Function	Description
Name	Viewing the Statement Billing Overview
Description	A statement summary for a user over a defined reporting period.
Feature Area	Analytic Reports
Primary User	Consumer user, CSR hosting administrator
Prerequisites	The user has been successfully enrolled and authenticated.
Trigger	The user clicks the Analytics Tab, Billing Reports, Statement Billing Overview link or Statement Billing Overview from the list.
Standard Features	■ Printer-Friendly view ■ Download CSV or XML

Table 26. Viewing the Statement Billing Overview Report

Function	Description
Report Content	Header: ■ Report Details ■ Number of Items Columns: ■ Statement (Sort Most Recent First, hyperlink to Statement Summary for that billing period) ■ Statement Date ■ Period ■ Account Number ■ Monthly Charges ■ Usage Charges ■ Credits ■ Other Charges ■ Taxes ■ Total Footer (Total Row): ■ Total - Literal ■ Monthly Charges ■ Usage Charges ■ Credits ■ Other Charges ■ Taxes ■ Total
Configuration Points	■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ XML. A percentage of the CSV threshold value (default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then a PDF threshold value set at 10% must process in batch mode when it has 300 or more result set lines. ■ All report detail columns are sortable.

Table 26. Viewing the Statement Billing Overview Report

Function	Description
Business Rules	None
Functions	The user can submit a batch request for this report.

Main Path for Viewing the Statement Billing Overview Report

The main path to view the Statement Billing Overview report is as follows:

- The user selects the Statement Billing Overview report from the List of Billing Reports.
Oracle Self-Service E-Billing determines the query parameters and returns the Statement Billing Overview report.

Alternate Paths for Viewing the Statement Billing Overview Report

Alternate paths can occur in this use case.

The user clicks an active link

Oracle Self-Service E-Billing displays the List of Standard Reports.

The user clicks an active page tab for the active report or to request a batch report

Oracle Self-Service E-Billing displays the selected page.

The user clicks the Download action

Oracle Self-Service E-Billing downloads the report.

The user clicks the Printer-Friendly action

Oracle Self-Service E-Billing invokes Printer-Friendly use case.

The users changes reporting period

Oracle Self-Service E-Billing displays the report for the new period.

The user selects a different report

Oracle Self-Service E-Billing displays the selected report.

Exceptions for Viewing the Statement Billing Overview Report

Exceptions can occur with this use case.

The user encounters an error

Oracle Self-Service E-Billing invokes the Error Message use case.

Viewing the Service Billing Overview Report

This report tracks all of the services monthly charges for one or more service numbers over a user-defined reporting period.

Table 27 lists and describes the Viewing the Service Billing Overview Report use case functions.

Table 27. Viewing the Service Billing Overview Report

Function	Description
Name	Viewing the Service Billing Overview Report
Description	This report tracks all of the services monthly charges for one or more service numbers over a user-defined reporting period.
Feature Area	Analytic Reports
Primary User	Consumer user, CSR hosting administrator
Prerequisites	The user has been successfully enrolled and authenticated.
Trigger Points	The user clicks the Analytics tab, and then clicks the Service Billing Overview link or selects Service Billing Overview from the list.
Standard Features	■ Printer-Friendly view ■ Download CSV or XML

Table 27. Viewing the Service Billing Overview Report

Function	Description
Report Content	Header: ■ Service Charges ■ Number of Items Columns: ■ Service Number ■ Name ■ Monthly Charges ■ Usage Charges ■ Credits ■ Other Charges ■ Taxes ■ Total (Sort Most Expensive First) ■ T (Hyperlinks to Service Billing Trend for the Service Number within the corresponding row) Footer (Total Row): ■ Total - Literal ■ Monthly Charges ■ Usage Charges ■ Credits ■ Other Charges ■ Taxes ■ Total ■ T (Hyperlinks to Service Billing Trend for all Service Numbers)
Configuration Points	■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ XML. A percentage of the CSV threshold value (default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines. ■ All report detail columns are sortable.

Table 27. Viewing the Service Billing Overview Report

Function	Description
Business Rules	None
Functions	The user can submit a batch request for this report.

Main Path for Viewing the Service Billing Overview Report

The main path to view the Service Billing Overview report is as follows:

- 1 The user selects the report from the List of Billing Reports.
- 2 Oracle Self-Service E-Billing determines the query parameters according to report context or default values and displays the report.

Alternate Paths for Viewing the Service Billing Overview Report

Alternate paths can occur in this use case.

The user clicks an active link

Oracle Self-Service E-Billing displays the List of Standard Reports.

The user clicks an active page tab for the active report or to request a batch report

Oracle Self-Service E-Billing displays the selected page.

The user clicks the Download action

Oracle Self-Service E-Billing downloads the report.

The user clicks the Printer-Friendly action

Oracle Self-Service E-Billing invokes Printer-Friendly use case.

The user changes reporting period

Oracle Self-Service E-Billing displays the report for the new period.

The user selects a different report

Oracle Self-Service E-Billing displays the selected report.

Exceptions for Service Billing Overview Report

Exceptions can occur with this use case.

The user encounters an error

Oracle Self-Service E-Billing invokes the Error Message use case.

Viewing the Account Billing Trend Report

This report tracks the monthly charges for an account over a user-defined reporting period.

Table 28 lists and describes the Viewing the Account Billing Trend Report use case functions.

Table 28. Viewing the Account Billing Trend Report

Function	Description
Name	Viewing the Account Billing Trend Report
Description	This report tracks the monthly charges for an account over a user-defined reporting period.
Feature Area	Analytic Reports
Primary User	Consumer user, CSR hosting administrator
Prerequisites	The user has been successfully enrolled and authenticated.
Trigger Points	The user clicks the Analytics Tab, and then clicks the Account Billing Trend link or selects Account Billing Trend from the list.
Chart	Bar Chart (Default): ■ X-axis: Reporting Period ■ Y-axis: Dollars
Standard Features	■ Printer-Friendly view ■ Download CSV or XML

Table 28. Viewing the Account Billing Trend Report

Function	Description
Report Content	Header: ■ Report Details ■ Number of Items Columns: ■ Period (Sort Most Recent First, hyperlink to Service Billing Overview for selected period) ■ Number of Contracts ■ Monthly Charges ■ Usage Charges ■ Credits ■ Other Charges ■ Taxes ■ Total Footer (Total Row): ■ Total - Literal ■ Monthly Charges ■ Usage Charges ■ Credits ■ Other Charges ■ Taxes ■ Total
Configuration Points	■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ XML. A percentage of the CSV threshold value (default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines. ■ All report detail columns are sortable.
Business Rules	None
Functions	The user can submit a batch request for this report.

Main Path for Viewing the Account Billing Trend Report

The main path to view the Account Billing Trend report is as follows:

- 1** The user selects the report from the List of Billing Reports.
- 2** Oracle Self-Service E-Billing determines query parameters according to report context and displays the report.

Alternate Paths for Viewing the Account Billing Trend Report

Alternate paths can occur in this use case.

The user clicks an active link

Oracle Self-Service E-Billing displays the List of Standard Reports.

The user clicks an active page tab for the active report or to request a batch report

Oracle Self-Service E-Billing displays the selected page.

The user clicks the Download action

Oracle Self-Service E-Billing downloads the report.

The user clicks the Printer-Friendly action

Oracle Self-Service E-Billing invokes Printer-Friendly use case.

The user changes reporting period

Oracle Self-Service E-Billing displays the report for the new period.

The user selects a different report

Oracle Self-Service E-Billing displays the selected report.

Exceptions for Viewing the Account Billing Trend Report

Exceptions can occur with this use case.

The user encounters a server system error

Oracle Self-Service E-Billing invokes the Error Message use case.

Viewing the Service Billing Trend Report

This report tracks the monthly charges for one or more service numbers over a user defined reporting period.

Table 29 lists and describes the Service Billing Trend use case functions.

Table 29. Viewing the Service Billing Trend Report

Function	Description
Name	Viewing the Service Billing Trend Report
Description	This report tracks the monthly charges for one or more service numbers over a user defined reporting period.
Feature Area	Analytic Reports
Primary User	Consumer user, CSR hosting administrator
Prerequisites	The user has been successfully enrolled and authenticated.
Trigger Points	The user clicks the Analytics Tab, and then clicks the Service Billing Trend link or selects Service Billing Trend from the list.
Chart	Bar Chart (Default): ■ X-axis: Reporting Period ■ Y-axis: Dollars
Standard Features	■ Printer-Friendly view ■ Download CSV or XML

Table 29. Viewing the Service Billing Trend Report

Function	Description
Report Content	Header: ■ Report Details ■ Number of Items Columns: ■ Period (Sort Most Recent First, hyperlink to Service Details) ■ Monthly Charges ■ Usage Charges ■ Credits ■ Other Charges ■ Taxes ■ Total Footer (Total Row): ■ Total - Literal ■ Monthly Charges ■ Usage Charges ■ Credits ■ Other Charges ■ Taxes ■ Total
Configuration Points	■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ XML. A percentage of the CSV threshold value (default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines. ■ All report detail columns are sortable.
Business Rules	None
Functions	The user can submit a batch request for this report.

Main Path for Viewing the Service Billing Trend Report

The main path to view the Service Billing Trend report is as follows:

- 1 The user selects the report from the List of Billing Reports.
- 2 Oracle Self-Service E-Billing determines query parameters according to report context or default values and displays the report.

Alternate Paths for Viewing the Service Billing Trend Report

Alternate paths can occur in this use case.

The user clicks an active link

Oracle Self-Service E-Billing displays the List of Standard Reports.

The user clicks an active page tab for the active report or to request a batch report

Oracle Self-Service E-Billing displays the selected page.

The user clicks the Download action

Oracle Self-Service E-Billing downloads the report.

The user clicks the Printer-Friendly action

Oracle Self-Service E-Billing invokes Printer-Friendly use case.

The user changes reporting period

Oracle Self-Service E-Billing displays the report for the new period.

The user selects a different report

Oracle Self-Service E-Billing displays the selected report.

Exceptions for Viewing the Service Billing Trend Report

Exceptions can occur with this use case.

The user encounters a server system error

Oracle Self-Service E-Billing invokes the Error Message use case.

Viewing the Service Details Report

This report tracks the service transactional details for one or more service numbers over a user-defined reporting period.

Table 30 lists and describes the Viewing the Service Details Report use case functions.

Table 30. Viewing the Service Details Report

Function	Description
Name	Viewing the Service Details Report
Description	This report tracks the service transactional details for one or more service numbers over a user-defined reporting period.
Feature Area	Analytic Reports
Primary User	Consumer user, CSR hosting administrator
Prerequisites	The user has been successfully enrolled and authenticated.
Trigger Points	The user clicks the Analytics Tab, and then clicks the Service Details link or selects Service Details from the list.
Business Rules	None
Standard Features	■ Printer-Friendly view ■ Download CSV, PDF, or XML

Table 30. Viewing the Service Details Report

Function	Description
Report Content	Header: ■ Report Details ■ Number of Items ■ Page Elements (Default is 10 transactions listed on each page) Columns: ■ Date (Sort Most Recent First) ■ Time ■ Service Number ■ Name ■ Number Called ■ Category ■ Memo (Icon) ■ Dispute (Icon) ■ Type ■ Tariff (Hyperlink to Service Transaction Detail) ■ Destination ■ Volume ■ Total Charges Footer (Total Row): ■ Total - Literal ■ Total Charges
Configuration Points	■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ PDF. A percentage of the CSV threshold value (default is 10%). ■ XML. A percentage of the CSV threshold value (default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then a PDF threshold value set at 10% must process in batch mode when it has 300 or more result set lines. ■ All report detail columns are sortable.

Table 30. Viewing the Service Details Report

Function	Description
Business Rules	None
Functions	The user can customize or submit a batch request for this report.

Main Path for Viewing the Service Details Report

The main path to view the Service Details report is as follows:

- The user selects the Service Billing Overview from the List of Billing Reports.
Oracle Self-Service E-Billing determines query parameters according to report context or default values and displays a tabular report.

Alternate Paths for Viewing the Service Details Report

Alternate paths can occur in this use case.

The user clicks an active link

Oracle Self-Service E-Billing displays the List of Standard Reports.

The user clicks an active page tab for the active report, or to customize or request a batch report

Oracle Self-Service E-Billing displays the selected page.

The user clicks the Download action

Oracle Self-Service E-Billing downloads the report.

The user clicks the Printer-Friendly action

Oracle Self-Service E-Billing invokes Printer-Friendly use case.

The user changes reporting period

Oracle Self-Service E-Billing displays the report for the new period.

The user selects a different report

Oracle Self-Service E-Billing displays the selected report.

Exceptions for Viewing the Service Details Report

Exceptions can occur with this use case.

The user encounters a server system error

Oracle Self-Service E-Billing invokes the Error Message use case.

6

Managing Analytic Batch Reports

This chapter describes use cases for creating and managing analytic batch reports. It includes the following topics:

- [Creating Analytic Batch Reports on page 91](#)
- [Viewing Completed Billing Batch Reports on page 95](#)
- [Viewing Pending Billing Batch Reports on page 96](#)
- [Viewing Failed Billing Batch Reports on page 97](#)
- [Viewing Scheduled Billing Batch Reports on page 99](#)

Creating Analytic Batch Reports

This use case lets users schedule reports to run in a single occurrence or generate reports regularly over a period of time. Users can choose the reporting period, when to run the reports, the download file formats, and whether to share the reports with other users.

[Table 31](#) lists and describes the use case functions.

Table 31. Creating Batch Reports

Function	Description
Name	Creating Analytic Batch Reports
Primary User	B2C users
Trigger	The user navigates to the Analytics tab, selects a standard or custom billing report, then clicks Batch Request.
Active Hyperlinks (Breadcrumbs)	■ Analytics. Displays the standard billing reports. ■ Billing Reports. Displays the standard billing reports. ■ Batch Request. Displays the Create Batch Report screen.
Page Titles	Page Titles ■ Create Batch Report ■ Confirm Batch Report

Table 31. Creating Batch Reports

Function	Description
Prompts	Create Batch Report page ■ Batch Report Name. The user enters a report name. ■ Select Report Options: ■ Period Range. The user selects the range of billing periods to report on. □ From. The options for the start of the range are: Prior (default), Latest, or a particular billing period. □ To. The options for the end of the range are: Latest (default) or a particular billing period. ■ Chart Type (If available). The user selects the chart type for the report: Bar (Default) or Pie. ■ Select Download File Types. The user can choose to generate the report in HTML, CSV, XML, and PDF (if available) file formats. ■ Select Report Generation Date: ■ Single occurrence. A one-time report (default). ■ Select Day of the Week to Run Weekly. The user selects the day of the week. ■ Select Day of the Week to Run Bi-weekly. The user selects the day of the week. ■ Schedule a Specific Day Within the Month. The user selects a day of the month, from the 1st to the 31st. If the user selects a day that does not appear in a month, the report generates on the last day of the month. ■ Select Effective Period (If not a single occurrence report): ■ Until canceled. The report will continue to generate until the user changes the schedule. ■ Set Maximum Number of Times to Run Report. The user specifies a number. ■ Until Date. The user enters a date or selects one from the popup calendar. Confirm Batch Report page None

Table 31. Creating Batch Reports

Function	Description
Page Content	Create Batch Report page Attributes: ■ Report Details □ Company Name □ Position □ Report Name Buttons: ■ Next. Oracle Self-Service E-Billing performs a verification check on the form data and displays the Confirm Batch Report page. ■ Back. This button displays the selected report. Confirm Batch Report page Attributes: ■ Report Details □ User Name □ Position □ Report Name ■ Selected Report Options □ Batch Report Name □ Marked for (Private or Public) □ Period Range □ Chart Type □ File Type Options □ Generation Date □ Effective Period (If not a single occurrence report) Buttons: ■ Submit. This button submits the batch report request and displays the Scheduled Billing Reports page. ■ Cancel. This button displays the selected report. ■ Printer Friendly. This button displays print view of the report request.

Table 31. Creating Batch Reports

Function	Description
Configuration Points	None
Business Rules	The current bill period range (single period) is used as the default criteria.

Main Path for Creating Batch Reports

The main path to create batch reports is as follows:

- 1 The user clicks the Analytics tab, clicks the link for a standard (or custom) billing report, then clicks the Batch Reports tab.
Oracle Self-Service E-Billing displays the Create Batch Report page.
- 2 The user specifies a report name in the Batch Report Name field.
- 3 The user clicks or leaves blank the Share With Others option.
- 4 The user selects the From and To billing period ranges.
- 5 The user selects the chart type.
- 6 The user selects the download file types.
- 7 The user specifies the report generation date.
If this is not a single occurrence report, the user selects the effective period.
- 8 The user clicks Next.
Oracle Self-Service E-Billing validates the information on the form and displays the Confirm Batch Report screen.
- 9 The user verifies the information on the Confirm Batch Report screen and clicks Submit.
Oracle Self-Service E-Billing displays the Scheduled Billing Reports page showing the newly scheduled report.

Alternate Paths for Creating Batch Reports

There are alternate paths for this use case.

The user clicks Cancel at the Confirm Batch Report screen

The user clicks the Cancel button at the Confirm Batch Report screen; Oracle Self-Service E-Billing displays the selected report.

Exceptions for Creating Batch Reports

Exceptions can occur in this use case.

Incomplete form

The user does not fill out all of the options within the form.

System error

The user encounters a system error.

Viewing Completed Billing Batch Reports

This use case lets users display a list of the billing batch reports that have run successfully and can be downloaded.

Table 32 lists and describes the use case functions.

Table 32. Viewing Completed Billing Batch Reports

Function	Description
Name	Viewing Completed Billing Batch Reports
Primary User	B2C users
Trigger	The user clicks the Analytics tab, then clicks Batch Reports.
Active Hyperlinks (Breadcrumbs)	■ Analytics. Displays the standard reports. ■ Batch Reports. Displays the Completed Billing Reports page.
Page Title	Completed Billing Reports
Prompts	None
Page Content	Completed Billing Reports page Header: ■ Completed Billing Reports (Number of items) ■ Report Details: ■ Report Name (A hyperlink that displays the report in HTML.) ■ Account Number ■ Request Date (Default sort, most recent first.) ■ Run Date ■ Actions (CSV, XML, PDF, View Selection Criteria, and Delete Report icons. Only the formats selected for report generation appear here.) Paging Elements: ■ Page x of Total (if needed)
Configuration Points	All columns are sortable except for the Actions column.
Business Rules	None

Main Path for Viewing Completed Billing Batch Reports

The main path to view completed billing batch reports is as follows:

- 1 The user clicks the Analytics tab.
- 2 The user clicks Batch Reports.

Oracle Self-Service E-Billing displays the Completed Billing Reports page showing the billing batch reports that have run and are available for downloading.

Alternate Paths for Viewing Completed Billing Batch Reports

There are no alternate paths for this use case.

Exceptions for Viewing Completed Billing Batch Reports

Exceptions can occur in this use case.

System error

The user encounters a system error.

Viewing Pending Billing Batch Reports

This use case lets users display a list of the billing batch reports that have been requested and are still in the queue to be generated.

Table 33 lists and describes the use case functions.

Table 33. Viewing Pending Billing Batch Reports

Function	Description
Name	Viewing Pending Billing Batch Reports
Primary User	B2C users
Trigger	The user clicks the Analytics tab, Batch Reports, and then the Pending tab.
Active Hyperlinks (Breadcrumbs)	■ Analytics. Displays the standard reports. ■ Batch Reports. Displays the Completed Billing Reports page.
Page Title	Pending Billing Reports
Prompts	None

Table 33. Viewing Pending Billing Batch Reports

Function	Description
Page Content	Header ■ Pending Billing Reports (Number of items) Report Details: ■ Report Name ■ Account Number ■ Request Date (Default sort, oldest first.) ■ Actions (View Selection Criteria and Delete Report icons) Paging Elements: ■ Page x of Total (if needed)
Configuration Points	All columns are sortable except for the Actions column.
Business Rules	None

Main Path for Viewing Pending Billing Batch Reports

The main path to view pending billing batch reports is as follows:

- 1 The user clicks the Analytics tab.
- 2 The user clicks Batch Reports.
- 3 The user clicks the Pending tab.

Oracle Self-Service E-Billing displays the Pending Billing Reports page showing the billing batch reports that are waiting in the queue to be generated.

Alternate Paths for Viewing Pending Billing Batch Reports

There are no alternate paths for this use case.

Exceptions for Viewing Pending Billing Batch Reports

Exceptions can occur in this use case.

System error

The user encounters a system error.

Viewing Failed Billing Batch Reports

This use case lets users display a list of the billing batch reports that failed.

Table 34 lists and describes the use case functions.

Table 34. Viewing Failed Billing Batch Reports

Function	Description
Name	Viewing Failed Billing Batch Reports
Primary User	B2C users
Trigger	The user clicks the Analytics tab, Batch Reports, and then the Failed tab.
Active Hyperlinks (Breadcrumbs)	■ Analytics. Displays the standard reports. ■ Batch Reports. Displays the Completed Billing Reports page.
Page Title	Failed Billing Reports
Prompts	None
Page Content	Header: ■ Failed Billing Reports (Number of items) Report Details: ■ Report Name ■ Account Number ■ Request Date (Default sort, most recent first.) ■ Run Date ■ Actions (View Selection Criteria and Delete Report icons) Paging Elements: ■ Page x of Total (if needed)
Configuration Points	All columns are sortable except for the Actions column.
Business Rules	None

Main Path for Viewing Failed Billing Batch Reports

The main path to view failed billing batch reports is as follows:

- 1 The user clicks the Analytics tab.
- 2 The user clicks Batch Reports.
- 3 The user clicks the Failed tab.

Oracle Self-Service E-Billing displays the Failed Billing Reports page showing the billing batch reports that failed when run.

Alternate Paths for Viewing Failed Billing Batch Reports

There are no alternate paths for this use case.

Exceptions for Viewing Failed Billing Batch Reports

Exceptions can occur in this use case.

System error

The user encounters a system error.

Viewing Scheduled Billing Batch Reports

This use case lets users display a list of the billing batch reports that are scheduled to run.

Table 35 lists and describes the use case functions.

Table 35. Viewing Scheduled Billing Batch Reports

Function	Description
Name	Viewing Scheduled Billing Batch Reports
Primary User	B2C users
Trigger	The user clicks the Analytics tab, Batch Reports, and then the Scheduled tab.
Active Hyperlinks (Breadcrumbs)	■ Analytics. Displays the standard reports. ■ Batch Reports. Displays the Completed Billing Reports page.
Page Title	Scheduled Billing Reports
Prompts	None
Page Content	Header: ■ Scheduled Billing Reports (Number of items) Report Details: ■ Report Name ■ Account Number ■ Period Range ■ File Types (HTML, CSV, XML, and PDF) ■ Actions (View Selection Criteria and Delete Report icons) Paging Elements: ■ Page x of Total (if needed)
Configuration Points	All columns are sortable except File Types and Actions.
Business Rules	None

Main Path for Viewing Scheduled Billing Batch Reports

The main path to view scheduled billing batch reports is as follows:

- 1** The user clicks the Analytics tab.
- 2** The user clicks Batch Reports.
- 3** The user clicks the Scheduled tab.

Oracle Self-Service E-Billing displays the Scheduled Billing Reports page showing the billing batch reports that are scheduled to run.

Alternate Paths for Viewing Scheduled Billing Batch Reports

There are no alternate paths for this use case.

Exceptions for Viewing Scheduled Batch Reports

Exceptions can occur in this use case.

System error

The user encounters a system error.

7

Top X Reporting Use Cases

This chapter describes use cases that are used to generate reports on the greatest expenses or most frequent activities, called Top X reports. It includes the following topics:

- [Highest Spending Services on page 101](#)
- [Highest Spending Services by Service Agreement on page 105](#)
- [Most Expensive Calls on page 108](#)
- [Longest Calls on page 111](#)
- [Most Frequently Called Numbers on page 114](#)
- [Most Frequently Called Number by Service Agreement on page 117](#)
- [Most Frequently Called Number by Service Agreement Details on page 120](#)
- [Most Frequently Called Destinations on page 123](#)
- [Most Frequently Called Destination by Service Agreement on page 126](#)
- [Most Frequently Called Destination by Service Agreement Details on page 129](#)
- [Most Frequently Called Countries on page 132](#)
- [Most Frequently Called Country by Service Agreement on page 136](#)
- [Most Frequently Called Country by Service Agreement Details on page 139](#)

Highest Spending Services

This use case lets the user generate a report showing which service agreements have the highest total charges, independent of usage type.

[Table 36](#) lists and describes the use case functions.

Table 36. Highest Spending Services

Function	Description
Name	Highest Spending Services
Feature Area	Analytics
Description	The user views a report showing which service agreements have the highest total charges, independent of usage type.
Primary User	Administrator, manager, and subscriber; CSR administrator and user.

Table 36. Highest Spending Services

Function	Description
Trigger	■ The user clicks the Analytics tab, and then clicks the Top X Reports subtab. A report list appears and the user clicks the hyperlink for Highest Spending Services. ■ The user selects Highest Spending Services from the Top X Report drop-down list.
Prompts	Report Selection Criteria Period Range (Default: Current period): ■ The user selects a start and end reporting period. Number of Results ■ Default: 10 ■ The user can select the number of resulting report query rows to view from the following preconfigured values: 10, 25, 50, or 100. Drop-down List: ■ Highest Spending Services (Default) ■ Most Expensive Calls ■ Longest Calls ■ Most Frequently Called Numbers ■ Most Frequently Called Destinations ■ Most Frequently Called Countries
Page Tabs	■ Report (Active) ■ Batch Request
Active Hyperlinks (Breadcrumbs)	■ Analytics. Displays the list of Standard reports. ■ Top X Reports. Displays the list of Top X reports.

Table 36. Highest Spending Services

Function	Description
Report Content	Page Title: ■ Highest Spending Services Header: ■ Report Details ■ Number of items Columns: ■ Service Number (With a hyperlink to the Highest Spending Services by Service Agreement report). ■ Name ■ Account Number ■ Total Charges. Sorted highest to lowest, with a hyperlink on the letter T to the Service Billing Trend report for the service agreement. Total Row: ■ Total (literal) ■ Number of calls ■ Total charges
Business Rules	The current bill period range (single period) is used as the default criteria.
Standard Features	■ Printer-friendly view ■ Download CSV or XML

Table 36. Highest Spending Services

Function	Description
Configuration Points	■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ XML. A percentage of the CSV threshold value (Default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines. ■ All report detail table columns are sortable and display in descending order (highest to lowest); you can change the default sort order to ascending.
Functions	■ Drill-down links are for the selected service agreement. ■ Oracle Self-Service E-Billing calculates the total charge for each service agreement and returns the number of results selected. ■ If the report result set is less than the number of results selected, the available data set displays. ■ If there are ties in the total charge amounts, Oracle Self-Service E-Billing returns service agreements from lowest to highest until it equals the total number requested (10, 25, 50, or 100). ■ Users can submit a batch request for this report.

Main Path for Viewing the Highest Spending Services

The main path to view the Highest Spending Services report is as follows:

- The user selects the Highest Spending Services report from the List of Top X Reports or from the drop-down list of reports.

Oracle Self-Service E-Billing displays the top ten records of the Highest Spending Services report for the current period.

Alternate Paths for Highest Spending Services

Alternate paths can occur in this use case.

The user specifies query parameters

- The user enters start and ending report dates or chooses a different number of results.

Oracle Self-Service E-Billing retrieves the report data based on the selected criteria and displays the Highest Spending Services report.

The user clicks the Download action (CSV or XML)

Oracle Self-Service E-Billing downloads a report in the selected format.

The user clicks the Printer Friendly action

Oracle Self-Service E-Billing displays the print page.

Exceptions for Highest Spending Services

Exceptions can occur in this use case.

The user encounters a system error

Oracle Self-Service E-Billing invokes the error message use case.

Highest Spending Services by Service Agreement

This use case lets the user generate a report showing which service agreements have the highest total charges, independent of usage type, by service number.

Table 37 lists and describes the use case functions.

Table 37. Highest Spending Services by Service Agreement

Function	Description
Name	Highest Spending Services by Service Agreement
Feature Area	Analytics
Description	The user views a report showing which service agreements have the highest total charges, independent of usage type, by service number.
Primary User	Administrator, manager, and subscriber; CSR administrator and user.
Trigger	The user clicks a service number hyperlink on the Highest Spending Services report.
Prompts	None
Page Tabs	Report (Active)
Active Hyperlinks (Breadcrumbs)	■ Analytics. Displays the list of Standard reports. ■ Top X Reports. Displays the list of Top X reports. ■ Highest Spending Services. Displays the Highest Spending Services report.

Table 37. Highest Spending Services by Service Agreement

Function	Description
Report Content	Page Title: ■ Highest Spending Services by Service Agreement Paging Elements (If needed) ■ Page X of Total ■ Paging arrow buttons Header: ■ Report Details ■ Number of items Columns: ■ Service Number ■ Name ■ Account Number ■ Date ■ Time ■ Usage Type ■ Volume ■ Total Charges (Sorted highest to lowest) Total Row: ■ Total (literal) ■ Total charges
Business Rules	The bill period range (single period) selected on the Highest Spending Services Report applies on this drill-down report.
Standard Features	■ Printer-friendly view ■ Download CSV or XML

Table 37. Highest Spending Services by Service Agreement

Function	Description
Configuration Points	■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ XML. A percentage of the CSV threshold value (Default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines. ■ All report detail table columns are sortable (except for service number, name, and account columns) and display in descending order (highest to lowest); you can change the default sort order to ascending.
Functions	This report uses paging elements if the number of results exceeds the threshold set for the page view.

Main Path for Viewing the Highest Spending Services by Service Agreement

The main path to view the Highest Spending Services by Agreement report is as follows:

- The user clicks the Service Number hyperlink on the Highest Spending Services report.
Oracle Self-Service E-Billing displays the Highest Spending Services by Service Agreement report for the selected service number.

Alternate Paths for Viewing the Highest Spending Services by Service Agreement

Alternate paths can occur in this use case.

The user clicks the Download action (CSV or XML)

Oracle Self-Service E-Billing downloads a report in the selected format.

The user clicks the Printer Friendly action

Oracle Self-Service E-Billing displays the print page.

Exceptions for Highest Spending Services by Service Agreement

An exception can occur in this use case.

The user encounters a system error

Oracle Self-Service E-Billing invokes the error message use case.

Most Expensive Calls

This use case lets the user view a report showing the most expensive calls. [Table 38](#) lists and describes the use case functions.

Table 38. Most Expensive Calls

Function	Description
Name	Most Expensive Calls
Feature Area	Analytics
Description	The user views a report showing the most expensive calls.
Primary User	Administrator, manager, and subscriber; CSR administrator and user.
Trigger	■ The user clicks the Analytics tab, and then clicks the Top X Reports subtab. A report list appears and the user clicks the hyperlink for Most Expensive Calls. ■ The user selects Most Expensive Calls from the Top X Report drop-down list.
Prompts	Report Selection Criteria Period Range (Default: Current period): ■ The user selects a start and end reporting period. Number of Results ■ Default: 10 ■ The user can select the number of resulting report query rows to view from the following preconfigured values: 10, 25, 50, or 100. Drop-down List: ■ Highest Spending Services ■ Most Expensive Calls (Default) ■ Longest Calls ■ Most Frequently Called Numbers ■ Most Frequently Called Destinations ■ Most Frequently Called Countries
Page Tabs	■ Report (Active) ■ Batch Request

Table 38. Most Expensive Calls

Function	Description
Active Hyperlinks (Breadcrumbs)	■ Analytics. Displays the list of Standard reports. ■ Top X Reports. Displays the list of Top X reports.
Report Content	Page Title: ■ Most Expensive Calls Header: ■ Report Details ■ Number of items Columns: ■ Date ■ Time ■ Service Number ■ Name ■ Number Called ■ Category (With hyperlink) ■ Type (With hyperlink) ■ Tariff ■ Destination ■ Volume ■ Total Charges Total Row: ■ Total
Business Rules	The current bill period range (single period) is used as the default criteria.
Standard Features	■ Printer-friendly view ■ Download CSV or XML

Table 38. Most Expensive Calls

Function	Description
Configuration Points	Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ XML. A percentage of the CSV threshold value (Default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.
Functions	■ If the report result set is less than the number of results selected, the available data set displays. ■ Users can submit a batch request for this report.

Main Path for Viewing the Most Expensive Calls

The main path to view the Most Expensive Calls report is as follows:

- The user selects the Most Expensive Calls report from the List of Top X Reports or from the drop-down list of reports.

Oracle Self-Service E-Billing displays the top ten records of the Most Expensive Calls report for the current period.

Alternate Paths for Viewing the Most Expensive Calls

Alternate paths can occur in this use case.

The user specifies query parameters

- The user enters start and ending report dates or selects a new number of results.

Oracle Self-Service E-Billing retrieves the report data based on the selected criteria and displays the Most Expensive Calls report.

The user clicks the Download action (CSV or XML)

Oracle Self-Service E-Billing downloads a report in the selected format.

The user clicks the Printer Friendly action

Oracle Self-Service E-Billing displays the print page.

Exceptions for Viewing the Most Expensive Calls

An exception path can occur in this use case.

The user encounters a system error

Oracle Self-Service E-Billing invokes the error message use case.

Longest Calls

The user can use this use case to view a report showing the longest calls. [Table 39](#) lists and describes the use case functions.

Table 39. Longest Calls

Function	Description
Name	Longest Calls
Feature Area	Analytics
Description	The user views a report showing the longest calls.
Primary User	Administrator, manager, and subscriber; CSR administrator and user.
Triggers	■ The user clicks the Analytics tab, and then clicks the Top X Reports subtab. A report list appears and the user clicks the hyperlink for Longest Calls. ■ The user selects Longest Calls from the Top X Report drop-down list.
Prompts	Report Selection Criteria Period Range (Default: Current period): ■ The user selects a start and end reporting period. Number of Results: ■ Default: 10 ■ The user can select the number of resulting report query rows to view from the following preconfigured values: 10, 25, 50, or 100. Drop-down List: ■ Highest Spending Services ■ Most Expensive Calls ■ Longest Calls (Default) ■ Most Frequently Called Numbers ■ Most Frequently Called Destinations ■ Most Frequently Called Countries
Page Tabs	■ Report (Active) ■ Batch Request
Active Hyperlinks (Breadcrumbs)	■ Analytics. Displays the list of Standard reports. ■ Top X Reports. Displays the list of Top X reports.

Table 39. Longest Calls

Function	Description
Report Content	Page Title: ■ Longest Calls Header: ■ Report Details ■ Number of items Columns: ■ Date ■ Time ■ Service Number ■ Name ■ Number Called ■ Category (With a hyperlink) ■ Type (With a hyperlink) ■ Tariff ■ Destination ■ Volume ■ Total Charges Total Row: ■ Total
Business Rules	The current bill period range (single period) is used as the default criteria.
Standard Features	■ Printer-friendly view ■ Download CSV or XML

Table 39. Longest Calls

Function	Description
Configuration Points	Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ XML. A percentage of the CSV threshold value (Default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.
Functions	■ If the report result set is less than the number of results selected, the available data set displays. ■ Users can submit a batch request for this report.

Main Path for Viewing the Longest Calls

The main path to view the Longest Calls report is as follows:

- The user selects the Longest Calls report from the List of Top X Reports or from the drop-down list of reports.

Oracle Self-Service E-Billing displays the top ten records of the Longest Calls report for the current period.

Alternate Paths for Viewing the Longest Calls

Alternate paths can occur in this use case.

The user specifies query parameters

- The user enters start and ending report dates.

Oracle Self-Service E-Billing retrieves the report data based on the selected date range and displays the Longest Calls report.

The user clicks the Printer Friendly action

Oracle Self-Service E-Billing displays the print page.

The user clicks the Download action (CSV or XML)

Oracle Self-Service E-Billing downloads a report in the selected format.

Exceptions for Viewing the Longest Calls

Exceptions can occur in this use case.

The user encounters a system error

Oracle Self-Service E-Billing invokes the error message use case.

Most Frequently Called Numbers

The user can use this use case to view the most frequently called numbers. [Table 40](#) lists and describes the use case functions.

Table 40. Most Frequently Called Numbers

Function	Description
Name	Most Frequently Called Numbers
Feature Area	Analytics
Description	The user views a list of the most frequently called numbers.
Preconditions	The user has successfully enrolled and authenticated in Oracle Self-Service E-Billing.
Primary User	Administrator, manager, and subscriber; CSR administrator and user.
Triggers	■ The user clicks the Analytics tab, and then clicks the Top X Reports subtab. A report list appears and the user clicks the hyperlink for Most Frequently Called Numbers. ■ The user selects Most Frequently Called Numbers from the Top X Report drop-down list.
Prompts	Report Selection Criteria Period Range (Default: Current period): ■ The user selects a start and end reporting period. Number of Results: ■ Default: 10 ■ The user can select the number of resulting report query rows to view from the following preconfigured values: 10, 25, 50, or 100. Drop-down List: ■ Highest Spending Services ■ Most Expensive Calls ■ Longest Calls ■ Most Frequently Called Numbers (Default) ■ Most Frequently Called Destinations ■ Most Frequently Called Countries

Table 40. Most Frequently Called Numbers

Function	Description
Page Tabs	■ Report (Active) ■ Batch Request
Active Hyperlinks (Breadcrumbs)	■ Analytics. Displays the list of Standard reports. ■ Top X Reports. Displays the list of Top X reports.
Report Content	Page Title: ■ Most Frequently Called Numbers Header: ■ Report Details ■ Number of items Columns: ■ Number called (With a hyperlink to the Most Frequently Called Number by Service Agreement report) ■ Number of calls (Sorted highest to lowest) ■ Volume ■ Total Charges. Total Row: ■ Total (literal) ■ Number of calls ■ Total charges
Business Rules	The current bill period (single period) is the default range.
Standard Features	■ Printer-friendly view ■ Download CSV or XML

Table 40. Most Frequently Called Numbers

Function	Description
Configuration Points	■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ XML. A percentage of the CSV threshold value (Default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines. ■ All report detail table columns are sortable and display in descending order (highest to lowest); you can change the default sort order to ascending.
Functions	■ Drill-down links are for the selected number called. ■ Oracle Self-Service E-Billing calculates the total number of calls made to a number called and returns the number of results selected. ■ If the report result set is less than the number of results selected, the available data set displays. ■ If there are ties in the total number of calls to a called number, Oracle Self-Service E-Billing returns service agreements from lowest to highest until it equals the total number requested (10, 25, 50, or 100). ■ The user can submit a batch request for this report.

Main Path for Viewing the Most Frequently Called Numbers

The main path to view the Most Frequently Called Numbers report is as follows:

- The user selects the Most Frequently Called Numbers report from the List of Top X Reports or from the drop-down list of reports.

Oracle Self-Service E-Billing displays the top ten records of the Most Frequently Called Numbers report for the current period.

Alternate Paths for Viewing the Most Frequently Called Numbers

Alternate paths can occur in this use case.

The user specifies query parameters

- The user enters start and ending report dates or selects a new number of results.

Oracle Self-Service E-Billing retrieves the report data based on the selected criteria and displays the Most Frequently Called Numbers report.

The user clicks the Download action (CSV or XML)

Oracle Self-Service E-Billing downloads a report in the selected format.

The user clicks the Printer Friendly action

Oracle Self-Service E-Billing displays the print page.

Exceptions for Most Frequently Called Numbers

Exceptions can occur in this use case.

The user encounters a system error

Oracle Self-Service E-Billing invokes the error message use case.

Most Frequently Called Number by Service Agreement

The user can use this use case to view a list of most frequently called number by service agreement. [Table 41](#) lists and describes the use case functions.

Table 41. Most Frequently Called Number by Service Agreement

Function	Description
Name	Most Frequently Called Number by Service Agreement
Feature Area	Analytics
Description	The user views a list of service agreements by the selected (most frequently) called number.
Preconditions	The user has successfully enrolled and authenticated in Oracle Self-Service E-Billing.
Primary User	Administrator, manager, and subscriber; CSR administrator and user.
Trigger	The user clicks a number called hyperlink on the Most Frequently Called Numbers report.
Page Tabs	Report (Active)
Active Hyperlinks (Breadcrumbs)	■ Analytics. Displays the list of Standard reports. ■ Top X Reports. Displays the list of Top X reports. ■ Most Frequently Called Numbers. Displays the Most Frequently Called Numbers report.

Table 41. Most Frequently Called Number by Service Agreement

Function	Description
Report Content	Page Title: ■ Most Frequently Called Number by Service Agreement Paging Elements (If needed): ■ Page X of Total ■ Paging arrow buttons Header: ■ Report Details ■ Number of items Columns: ■ Number Called ■ Service Number (With a hyperlink to the Most Frequently Called Number by Service Agreement Details report) ■ Number of calls (Sorted highest to lowest) ■ Volume ■ Total Charges. Total Row: ■ Total (literal) ■ Number of calls ■ Volume ■ Total charges
Business Rules	The bill period range (single period) selected on the Most Frequently Called Numbers report applies on this drill-down report.
Standard Features	■ Printer-friendly view ■ Download CSV or XML

Table 41. Most Frequently Called Number by Service Agreement

Function	Description
Configuration Points	■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ XML. A percentage of the CSV threshold value (Default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines. ■ All report detail table columns are sortable and display in descending order (highest to lowest); you can change the default sort order to ascending.
Functions	Drill-down links are for the selected number called and service agreement.

Main Path for Viewing the Most Frequently Called Number by Service Agreement

The main path to view the Most Frequently Called Number by Service Agreement report is as follows:

- The user clicks the Number Called hyperlink on the Most Frequently Called Number report.
Oracle Self-Service E-Billing displays the Most Frequently Called Number by Service Agreement report for the selected number called.

Alternate Paths for Viewing the Most Frequently Called Number by Service Agreement

Alternate paths can occur in this use case.

The user clicks the Download action (CSV or XML)

Oracle Self-Service E-Billing downloads a report in the selected format.

The user clicks the Printer Friendly action

Oracle Self-Service E-Billing displays the print page.

Exceptions for Most Frequently Called Number by Service Agreement

Exceptions can occur in this use case.

The user encounters a system error

Oracle Self-Service E-Billing invokes the error message use case.

Most Frequently Called Number by Service Agreement Details

The user can use this use case to view service details for an individual service agreement selected on the Most Frequently Called Number by Service Agreement report. [Table 42](#) lists and describes the use case functions.

Table 42. Most Frequently Called Number by Service Agreement Details

Function	Description
Name	Most Frequently Called Number by Service Agreement Details
Feature Area	Analytics
Description	The user views service details for an individual service agreement.
Preconditions	The user has successfully enrolled and authenticated in Oracle Self-Service E-Billing.
Primary User	Administrator, manager, and subscriber; CSR administrator and user.
Trigger	The user clicks a service number hyperlink on the Most Frequently Called Number by Service Agreement report.
Page Tabs	Report (Active)
Active Hyperlinks (Breadcrumbs)	■ Analytics. Displays the list of Standard reports. ■ Top X Reports. Displays the list of Top X reports. ■ Most Frequently Called Numbers. Displays the Most Frequently Called Numbers report. ■ Service Agreement. Displays the Most Frequently Called Number by Service Agreement report.

Table 42. Most Frequently Called Number by Service Agreement Details

Function	Description
Report Content	Page Title: ■ Most Frequently Called Number by Service Agreement Details Paging Elements (If needed): ■ Page X of Total ■ Paging arrow buttons Header: ■ Report Details ■ Number of items Columns: ■ Number Called ■ Service Number ■ Date ■ Time ■ Volume ■ Destination ■ Tariff ■ Total Charges. Total Row: ■ Total (literal) ■ Volume ■ Total charges
Business Rules	The bill period range (single period) selected on the Most Frequently Called Numbers report applies on this drill-down report.

Table 42. Most Frequently Called Number by Service Agreement Details

Function	Description
Standard Features	■ Printer-friendly view ■ Download CSV or XML
Configuration Points	■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ XML. A percentage of the CSV threshold value (Default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines. ■ All report detail table columns are sortable except for the Number Called Column and Service Number.

Main Path for Viewing the Most Frequently Called Number by Service Agreement Details

The main path to view the Most Frequently Called Number by Service Agreement Details report is as follows:

- The user clicks the Service Number hyperlink on the Most Frequently Called Number by Service Agreement report.

Oracle Self-Service E-Billing displays the Most Frequently Called Number by Service Agreement Details report for the selected service number.

Alternate Paths for Viewing the Most Frequently Called Number by Service Agreement Details

Alternate paths can occur in this use case.

The user clicks the Download action (CSV or XML)

Oracle Self-Service E-Billing downloads a report in the selected format.

The user clicks the Printer Friendly action

Oracle Self-Service E-Billing displays the print page.

Exceptions for Most Frequently Called Number by Service Agreement Details

Exceptions can occur in this use case.

The user encounters a system error

Oracle Self-Service E-Billing invokes the error message use case.

Most Frequently Called Destinations

The user can use this use case to view a report showing a list of the most frequently called destinations. [Table 43](#) lists and describes the use case functions.

Table 43. Most Frequently Called Destinations

Function	Description
Name	Most Frequently Called Destinations
Feature Area	Analytics
Description	The user views a list of the destinations most frequently called.
Preconditions	The user has successfully enrolled and authenticated in Oracle Self-Service E-Billing.
Primary User	Administrator, manager, and subscriber; CSR administrator and user.
Triggers	■ The user clicks the Analytics tab, and then clicks the Top X Reports subtab. A report list appears and the user clicks the hyperlink for Most Frequently Called Destinations. ■ The user selects Most Frequently Called Destinations from the Top X Report drop-down list.
Prompts	Report Selection Criteria Period Range (Default: Current period): ■ The user selects a start and end reporting period. Number of Results: ■ Default: 10 ■ The user can select the number of resulting report query rows to view from the following preconfigured values: 10, 25, 50, or 100. Drop-down List: ■ Highest Spending Services ■ Most Expensive Calls ■ Longest Calls ■ Most Frequently Called Numbers ■ Most Frequently Called Destinations (Default) ■ Most Frequently Called Countries

Table 43. Most Frequently Called Destinations

Function	Description
Page Tabs	■ Report (Active) ■ Batch Request
Active Hyperlinks (Breadcrumbs)	■ Analytics. Displays the list of Standard reports. ■ Top X Reports. Displays the list of Top X reports.
Report Content	Page Title: ■ Most Frequently Called Destinations Header: ■ Report Details ■ Number of items Columns: ■ Destination (With a hyperlink to the Most Frequently Called Destination by Service Number report) ■ Country ■ Number of Calls (sorted highest to lowest) ■ Volume ■ Total Charges. Total Row: ■ Total (literal) ■ Number of Calls ■ Total charges
Business Rules	The current bill period (single period) is the default range.
Standard Features	■ Printer-friendly view ■ Download CSV or XML

Table 43. Most Frequently Called Destinations

Function	Description
Configuration Points	■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ XML. A percentage of the CSV threshold value (Default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines. ■ All report detail table columns are sortable and display in descending order (highest to lowest); you can change the default sort order to ascending.
Functions	■ Drill-down links are for the destination selected. ■ Oracle Self-Service E-Billing calculates the total number of calls made to a destination and returns the number of results selected. ■ If the report result set is less than the number of results selected, the available data set displays. ■ If there are ties in the total number of calls to a destination, Oracle Self-Service E-Billing returns service agreements from lowest to highest until it equals the total number requested (10, 25, 50, or 100). ■ The user can submit a batch request for this report.

Main Path for Viewing the Most Frequently Called Destinations

The main path to view the Most Frequently Destinations report is as follows:

- The user selects the Most Frequently Called Destinations report from the List of Top X Reports or from the drop-down list of reports.

Oracle Self-Service E-Billing displays the top ten records of the Most Frequently Called Destinations report for the current period.

Alternate Paths for Viewing the Most Frequently Called Destinations

Alternate paths can occur in this use case.

The user specifies query parameters

- 1 The user enters start and ending report dates or clicks a new number of results.

- 2 Oracle Self-Service E-Billing retrieves the report data based on the selected criteria and displays the Most Frequently Called Destinations report.

The user clicks the Download action (CSV or XML)

Oracle Self-Service E-Billing downloads a report in the selected format.

The user clicks the Printer Friendly action

Oracle Self-Service E-Billing displays the print page.

Exceptions for Most Frequently Called Destinations

An exception can occur in this use case.

The user encounters a system error

Oracle Self-Service E-Billing invokes the error message use case.

Most Frequently Called Destination by Service Agreement

The user can use this use case to view a report showing a list of service agreements for the most frequently called destination. [Table 44](#) lists and describes the use case functions.

Table 44. Most Frequently Called Destination by Service Agreement

Function	Description
Name	Most Frequently Called Destination by Service Agreement
Feature Area	Analytics
Description	The user views a list of service agreements associated with the most frequently called destination.
Preconditions	The user has successfully enrolled and authenticated in Oracle Self-Service E-Billing.
Primary User	Administrator, manager, and subscriber; CSR administrator and user.
Trigger	The user clicks the hyperlink for a destination on the Most Frequently Called Destinations report.
Page Tabs	Report (Active)
Active Hyperlinks (Breadcrumbs)	■ Analytics. Displays the list of Standard reports. ■ Top X Reports. Displays the list of Top X reports. ■ Most Frequently Called Destinations. Displays the Most Frequently Called Destinations report.

Table 44. Most Frequently Called Destination by Service Agreement

Function	Description
Report Content	Page Title: ■ Most Frequently Called Destination by Service Agreement Paging Elements (If needed) ■ Page X of Total ■ Paging arrow buttons Header: ■ Report Details ■ Number of items Columns: ■ Destination ■ Country ■ Service Number (With a hyperlink to the Most Frequently Called Destination by Service Number Details report) ■ Number of Calls (sorted highest to lowest) ■ Volume ■ Total Charges. Total Row: ■ Total (literal) ■ Number of Calls ■ Volume ■ Total charges
Business Rules	The period range selected on the Most Frequently Called Destinations report applies on this drill-down report.
Standard Features	■ Printer-friendly view ■ Download CSV or XML

Table 44. Most Frequently Called Destination by Service Agreement

Function	Description
Configuration Points	■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ XML. A percentage of the CSV threshold value (Default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines. ■ All report detail table columns are sortable (except for the number called column) and display in descending order (highest to lowest); you can change the default sort order to ascending.
Functions	Drill-down links are for the destination and selected service agreement.

Main Path for Viewing the Most Frequently Called Destination by Service Agreement

The main path to view the Most Frequently Destinations by Service Agreement report is as follows:

- The user clicks the Destination hyperlink on the Most Frequently Called Destinations report.
Oracle Self-Service E-Billing retrieves the report data and displays a tabular report for the selected destination.

Alternate Paths for Viewing the Most Frequently Called Destination by Service Agreement

Alternate paths can occur in this use case.

The user clicks the Download action (CSV or XML)

Oracle Self-Service E-Billing downloads a report in the selected format.

The user clicks the Printer Friendly action

Oracle Self-Service E-Billing displays the print page.

Exceptions for Most Frequently Called Destination by Service Agreement

An exception can occur in this use case.

The user encounters a system error

Oracle Self-Service E-Billing invokes the error message use case.

Most Frequently Called Destination by Service Agreement Details

The user can use this use case to view a report showing service details for an individual service agreement. [Table 45](#) lists and describes the use case functions.

Table 45. Most Frequently Called Destination by Service Agreement Details

Function	Description
Name	Most Frequently Called Destination by Service Agreement Details
Feature Area	Analytics
Description	The user views service details for a list of service agreements.
Preconditions	The user has successfully enrolled and authenticated in Oracle Self-Service E-Billing.
Primary User	Administrator, manager, and subscriber; CSR administrator and user.
Trigger	The user clicks a service number hyperlink on the Most Frequently Called Destination by Service Agreement report.
Page Tabs	Report (Active)
Active Hyperlinks (Breadcrumbs)	■ Analytics. Displays the list of Standard reports. ■ Top X Reports. Displays the list of Top X reports. ■ Most Frequently Called Destinations. Displays the Most Frequently Called Destinations report. ■ Service Agreement. Displays the Most Frequently Called Destination by Service Agreement report.

Table 45. Most Frequently Called Destination by Service Agreement Details

Function	Description
Report Content	Page Title: ■ Most Frequently Called Destination by Service Agreement Details Paging Elements (If needed) ■ Page X of Total ■ Paging arrow buttons Header: ■ Report Details ■ Number of items Columns: ■ Destination ■ Country ■ Service Number ■ Date ■ Time ■ Number Called ■ Volume ■ Tariff ■ Total Charges Total Row: ■ Total (literal) ■ Number of Calls ■ Volume ■ Total charges
Business Rules	The current period range selected on the Most Frequently Called Destinations report applies on this drill-down report.

Table 45. Most Frequently Called Destination by Service Agreement Details

Function	Description
Standard Features	■ Printer-friendly view ■ Download CSV or XML
Configuration Points	■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ XML. A percentage of the CSV threshold value (Default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines. ■ All report detail table columns are sortable (except for the Destination, Country, and Service Number columns) and display in descending order (highest to lowest); you can change the default sort order to ascending.

Main Path for Viewing the Most Frequently Called Destination by Service Agreement Details

The main path to view the Most Frequently Destination by Service Agreement Details report is as follows:

- The user clicks the Service Number hyperlink on the Most Frequently Called Destination by Service Agreement report.

Oracle Self-Service E-Billing displays the Most Frequently Called Destination by Service Agreement Details report for the selected service number.

Alternate Paths for Viewing the Most Frequently Called Destination by Service Agreement Details

Alternate paths can occur in this use case.

The user clicks the Download action (CSV or XML)

Oracle Self-Service E-Billing downloads a report in the selected format.

The user clicks the Printer Friendly action

Oracle Self-Service E-Billing displays the print page.

Exceptions for Most Frequently Called Destination by Service Agreement Details

An exception can occur in this use case.

The user encounters a system error

Oracle Self-Service E-Billing invokes the error message use case.

Most Frequently Called Countries

The user can use this use case to view a list of countries called most often. [Table 46](#) lists and describes the use case functions.

Table 46. Most Frequently Called Countries

Function	Description
Name	Most Frequently Called Countries
Feature Area	Analytics
Description	The user views a list of the countries most frequently called.
Preconditions	The user has successfully enrolled and authenticated in Oracle Self-Service E-Billing.
Primary User	Administrator, manager, and subscriber; CSR administrator and user.
Triggers	■ The user clicks the Analytics tab, and then clicks the Top X Reports subtab. A report list appears and the user clicks the hyperlink for Most Frequently Called Countries. ■ The user selects Most Frequently Called Countries from the Top X Report drop-down list.

Table 46. Most Frequently Called Countries

Function	Description
Prompts	Report Selection Criteria Period Range (Default: Current period): ■ The user selects a start and end reporting period. Number of Results: ■ Default: 10 ■ The user can select the number of resulting report query rows to view from the following preconfigured values: 10, 25, 50, or 100. Drop-down List: ■ Highest Spending Services ■ Most Expensive Calls ■ Longest Calls ■ Most Frequently Called Numbers ■ Most Frequently Called Destinations ■ Most Frequently Called Countries (Default)
Page Tabs	■ Report (Active) ■ Batch Request
Active Hyperlinks (Breadcrumbs)	■ Analytics. Displays the list of Standard reports. ■ Top X Reports. Displays the list of Top X reports.

Table 46. Most Frequently Called Countries

Function	Description
Report Content	Page Title: ■ Most Frequently Called Countries Header: ■ Report Details ■ Number of items Columns: ■ Country (With a hyperlink to the Most Frequently Called Country by Service Number report) ■ Number of Calls (sorted highest to lowest) ■ Volume ■ Total Charges. Total Row: ■ Total (literal) ■ Number of Calls ■ Total charges
Business Rules	The current bill period (single period) is the default range.
Standard Features	■ Printer-friendly view ■ Download CSV or XML

Table 46. Most Frequently Called Countries

Function	Description
Configuration Points	■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ XML. A percentage of the CSV threshold value (Default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines. ■ All report detail table columns are sortable and display in descending order (highest to lowest); you can change the default sort order to ascending.
Functions	■ Drill-down links are for the country selected. ■ Oracle Self-Service E-Billing calculates the total number of calls made to a country and returns the number of results selected. ■ If the report result set is less than the number of results selected, the available data set displays. ■ If there are ties in the total number of calls to a country, Oracle Self-Service E-Billing returns service agreements from lowest to highest until it equals the total number requested (10, 25, 50, or 100). ■ The user can submit a batch request for this report.

Main Path for Viewing the Most Frequently Called Countries

The main path to view the Most Frequently Called Countries report is as follows:

- The user selects the Most Frequently Called Countries report from the List of Top X Reports or from the drop-down list of reports.

Oracle Self-Service E-Billing displays the top ten records of the Most Frequently Called Countries report for the current period.

Alternate Paths for Viewing the Most Frequently Called Countries

Alternate paths can occur in this use case.

- The user enters start and ending report dates or chooses a different number of results.

Oracle Self-Service E-Billing retrieves the report data based on the selected criteria and displays the Most Frequently Called Countries report.

The user clicks the Download action (CSV or XML)

Oracle Self-Service E-Billing downloads a report in the selected format.

The user clicks the Printer Friendly action

Oracle Self-Service E-Billing displays the print page.

Exceptions for Most Frequently Called Destinations

An exception can occur in this use case.

The user encounters a system error

Oracle Self-Service E-Billing invokes the error message use case.

Most Frequently Called Country by Service Agreement

The user can use this use case to view a report showing a list of service agreements for the most frequently called country. [Table 47](#) lists and describes the use case functions.

Table 47. Most Frequently Called Country by Service Agreement

Function	Description
Name	Most Frequently Called Country by Service Agreement
Feature Area	Analytics
Description	The user views a list of service agreements associated with the most frequently called country.
Preconditions	The user has successfully enrolled and authenticated in Oracle Self-Service E-Billing.
Primary User	Administrator, manager, and subscriber; CSR administrator and user.
Trigger	The user clicks a country hyperlink on the Most Frequently Called Countries report.
Page Tabs	Report (Active)
Active Hyperlinks (Breadcrumbs)	■ Analytics. Displays the list of Standard reports. ■ Top X Reports. Displays the list of Top X reports. ■ Most Frequently Called Countries. Displays the Most Frequently Called Countries report.

Table 47. Most Frequently Called Country by Service Agreement

Function	Description
Report Content	Page Title: ■ Most Frequently Called Country by Service Agreement Paging Elements (If needed) ■ Page X of Total ■ Paging arrow buttons Header: ■ Report Details ■ Number of items Columns: ■ Country ■ Service Number (With a hyperlink to the Most Frequently Called Country by Service Number Details report) ■ Number of Calls (sorted highest to lowest) ■ Volume ■ Total Charges. Total Row: ■ Total (Literal) ■ Number of Calls ■ Volume ■ Total charges
Business Rules	The period range selected on the Most Frequently Called Countries report applies on this drill-down report.
Standard Features	■ Printer-friendly view ■ Download CSV or XML

Table 47. Most Frequently Called Country by Service Agreement

Function	Description
Configuration Points	■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ XML. A percentage of the CSV threshold value (Default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines. ■ All report detail table columns are sortable (except for the country column) and display in descending order (highest to lowest); you can change the default sort order to ascending.
Functions	Drill-down links are for the country and the selected service agreement.

Main Path for Viewing the Most Frequently Called Country by Service Agreement

The main path to view the Most Frequently Called Country by Service Agreement report is as follows:

- The user clicks the Country hyperlink on the Most Frequently Called Countries report.
Oracle Self-Service E-Billing retrieves the report data and displays a tabular report for the selected country.

Alternate Paths for Viewing the Most Frequently Called Country by Service Agreement

Alternate paths can occur in this use case.

The user clicks the Download action (CSV or XML)

Oracle Self-Service E-Billing downloads a report in the selected format.

The user clicks the Printer Friendly action

Oracle Self-Service E-Billing displays the print page.

Exceptions for Most Frequently Called Country by Service Agreement

An exception can occur in this use case.

The user encounters a system error

Oracle Self-Service E-Billing invokes the error message use case.

Most Frequently Called Country by Service Agreement Details

The user can use this use case to view a report showing a list of service details for the most frequently called country. [Table 48](#) lists and describes the use case functions.

Table 48. Most Frequently Called Country by Service Agreement Details

Function	Description
Name	Most Frequently Called Country by Service Agreement Details
Feature Area	Analytics
Description	The user views a list of service details for an individual service agreement.
Preconditions	The user has successfully enrolled and authenticated in Oracle Self-Service E-Billing.
Primary User	Administrator, manager, and subscriber; CSR administrator and user.
Triggers	The user clicks a service number hyperlink on the Most Frequently Called Country by Service Agreement report.
Page Tabs	Report (Active)
Active Hyperlinks (Breadcrumbs)	■ Analytics. Displays the list of Standard reports. ■ Top X Reports. Displays the list of Top X reports. ■ Most Frequently Called Countries. Displays the Most Frequently Called Countries report. ■ Service Agreement. Displays the Most Frequently Called Country by Service Agreement report.

Table 48. Most Frequently Called Country by Service Agreement Details

Function	Description
Report Content	Page Title: ■ Most Frequently Called Country by Service Agreement Paging Elements (If needed) ■ Page X of Total ■ Paging arrow buttons Header: ■ Report Details ■ Number of items Columns: ■ Country ■ Service Number ■ Date ■ Time ■ Number Called ■ Volume ■ Tariff ■ Destination ■ Total Charges Total Row: ■ Total (Literal) ■ Volume ■ Total charges
Business Rules	The period range selected on the Most Frequently Called Countries report applies on this drill-down report.
Standard Features	■ Printer-friendly view ■ Download CSV or XML

Table 48. Most Frequently Called Country by Service Agreement Details

Function	Description
Configuration Points	■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file: ■ CSV. The maximum number of output lines. ■ XML. A percentage of the CSV threshold value (Default is 20%). For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines. ■ All report detail table columns are sortable (except for the country and service number columns) and display in descending order (highest to lowest); you can change the default sort order to ascending.
Functions	Drill-down links are for the country and the selected service agreement.

Main Path for Viewing the Most Frequently Called Country by Service Agreement Details

The main path to view the Most Frequently Called Country by Service Agreement Details report is as follows:

- The user clicks the Service Number hyperlink on the Most Frequently Called Country by Service Agreement report.

Oracle Self-Service E-Billing displays the Most Frequently Called Country by Service Agreement Details report for the selected service number.

Alternate Paths for Viewing the Most Frequently Called Country by Service Agreement

Alternate paths can occur in this use case.

The user clicks the Download action (CSV or XML)

Oracle Self-Service E-Billing downloads a report in the selected format.

The user clicks the Printer Friendly action

Oracle Self-Service E-Billing displays the print page.

Exceptions for Most Frequently Called Country by Service Agreement Details

An exception can occur in this use case.

The user encounters a system error

Oracle Self-Service E-Billing invokes the error message use case.

8

Customer Service Representative Use Cases

This chapter describes the customer service use cases that manage the functional requirements for service providers to effectively manage users. It includes the following topics:

- [CSR Overview on page 143](#)
- [Enrolling the Bootstrap User as the Initial CSR Administrator on page 145](#)
- [Enrolling a CSR on page 147](#)
- [Setting a CSR Password and Security Question on page 149](#)
- [Resetting a CSR Password on page 151](#)
- [Searching for Users on page 154](#)
- [Impersonating a User on page 156](#)
- [Searching and Modifying a CSR User on page 157](#)
- [Adding CSR Users on page 159](#)
- [Editing a CSR User on page 161](#)
- [Managing a CSR Profile on page 162](#)
- [Setting a Preferred Language \(CSR\) on page 164](#)
- [Adding a CSR Administrator on page 166](#)
- [Setting CSR Account Lockout Status on page 168](#)
- [Viewing the Account Lockout Report on page 169](#)
- [Reactivating a Locked Account on page 171](#)

CSR Overview

This topic describes the CSR application, default user login, roles, and tab labels.

CSR Application

Figure 1 shows the functions a CSR performs.

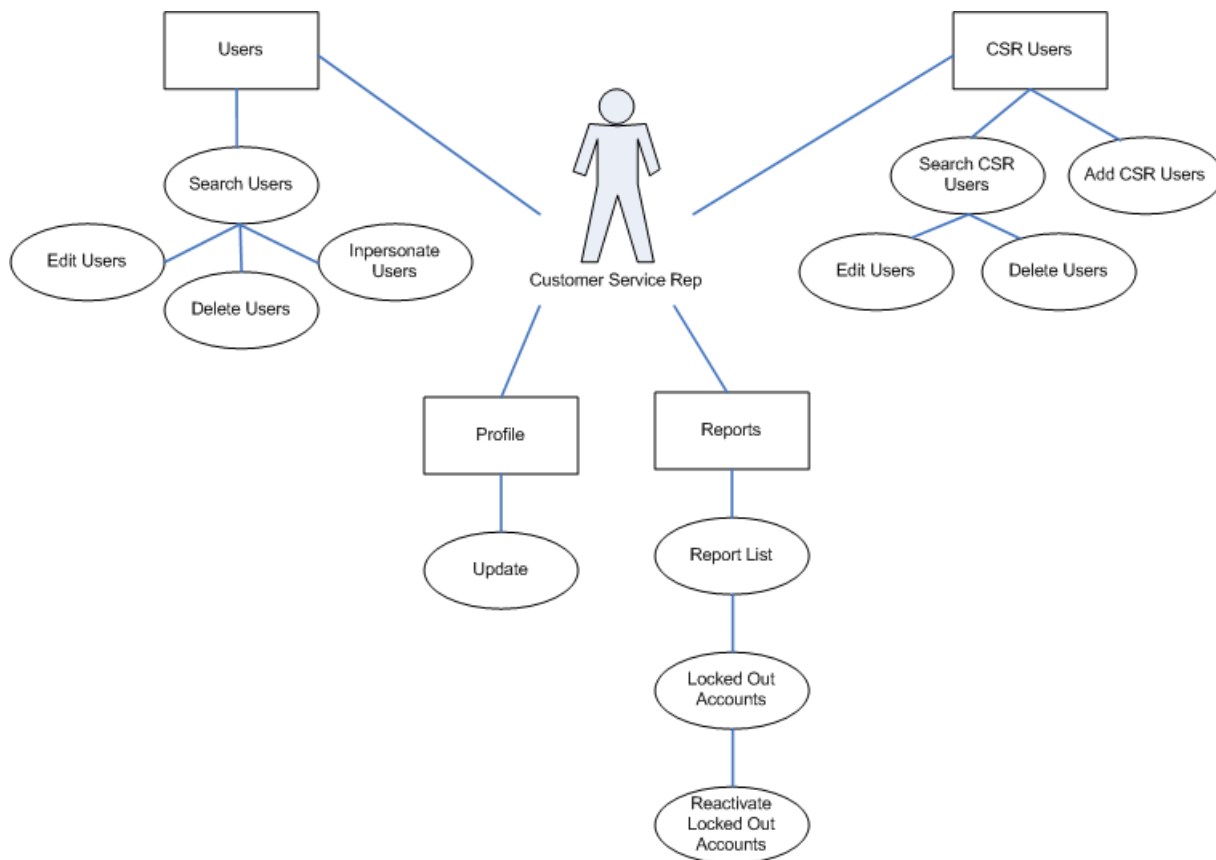


Figure 1. CSR Application Architecture

CSR Default User Login

To maintain security, Oracle Self-Service E-Billing requires the bootstrap user to enroll as the initial CSR administrator, creating a CSR user ID and password that are different from the bootstrap user name and password.

CSR Roles

Figure 2 illustrates the CSR roles.

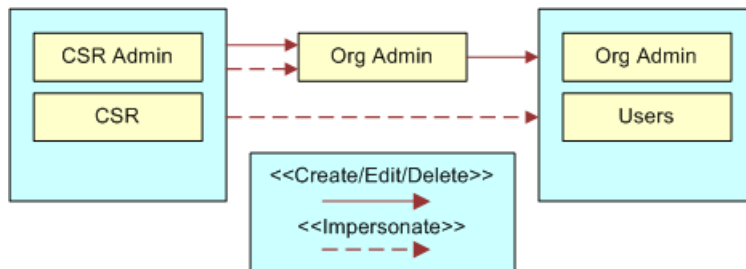


Figure 2. CSR Roles

Enrolling the Bootstrap User as the Initial CSR Administrator

This use case describes how the bootstrap user, created during the installation, enrolls as the initial CSR administrator.

Table 49 lists and describes the use case functions.

Table 49. Enrolling the Bootstrap User as the Initial CSR Administrator

Functions	Description
Name	Enrolling the Bootstrap User as the Initial CSR Administrator
Feature Area	Enrollment
User	Bootstrap User
Trigger	The bootstrap user displays the CSR Login page.
Configuration Points	The number of characters in the temporary password. Oracle Self-Service E-Billing generates the temporary password.
Functions	■ Oracle Self-Service E-Billing-generated validation codes cannot contain the following characters: a, A, e, E, 3, o, O, 0, i, l, 1, u, U, y, Y, \$, @, !, * ■ The account that has been created and set to inactive state expires within four hours, and only a CSR administrator can reset the account. ■ Oracle Self-Service E-Billing cannot reuse the validation code for 30 days after initially being created. ■ The bootstrap user's CSR user name and password must be preserved and can never be changed. This account can be deactivated and reactivated, however.

Main Path for Enrolling the Bootstrap User as the Initial CSR Administrator

The main path to enroll the bootstrap user as the initial CSR administrator is as follows:

- 1 The bootstrap user enters the user name and password created during the installation.

Oracle Self-Service E-Billing determines this is the correct bootstrap user and password and displays the CSR administrator's form. The bootstrap user must provide a new value for each field:
 - CSR Admin User Name - Cannot be the same as the bootstrap user name.
 - CSR Admin First Name
 - CSR Admin Last Name
 - CSR Admin Role: CSR administrator (Read-Only CSR administrator)
 - CSR Admin Email Address
- 2 The bootstrap user clicks Submit.

Oracle Self-Service E-Billing validates the information on the form for:
 - Formatting
 - Completeness
- 3 Oracle Self-Service E-Billing sends an email to the email address provided for the bootstrap user (new CSR administrator).

The email must contain an HTTPS link with a unique validation code. The validation code must satisfy the following conditions:
 - Uses an abbreviated list of characters
 - Contains of at least one uppercase character, one lowercase character, and one number
- 4 Oracle Self-Service E-Billing enters the validation code in the database and sets a status flag in the database indicating this CSR account is inactive.
- 5 Oracle Self-Service E-Billing displays the Login screen with the following message:

A message has been sent to the email address you have supplied during the enrollment process, you'll need to review it so that you can log into the application.

Alternate Paths for Enrolling the Bootstrap User as the Initial CSR Administrator

The bootstrap user clicks Cancel, and Oracle Self-Service E-Billing displays the Login page.

Exceptions for Enrolling the Bootstrap User as the Initial CSR Administrator

Exceptions can occur with this use case.

One of the form fields is an empty string when submitted

Oracle Self-Service E-Billing displays the populated Enrollment Form with the following error message: *Please provide a value for ****.*

The email address does not have at least one valid character preceding the at sign @, preceding the period, and following the period

Oracle Self-Service E-Billing displays the populated Enrollment Form with the following error message: *Please provide a valid email address.*

Enrolling a CSR

This use case lets the initial CSR administrator (and other CSR users with an administrative role) create additional CSR users after the bootstrap user has enrolled as the initial CSR administrator.

Table 50 lists and describes the use case functions.

Table 50. Enrolling a CSR

Functions	Description
Name	Enrolling (CSR)
Feature Area	Enrollment
User	CSR administrator
Trigger	A CSR with an administrator's role clicks CSR Users and Create CSRs.
Prerequisites	Oracle Self-Service E-Billing CSR application has been deployed and the initial CSR administrator has been created.
Configuration Points	■ The length of the CSR user name ■ The number of characters in the temporary password. Oracle Self-Service E-Billing generates the temporary password.
Business Rules	When a CSR user enters the bootstrap user ID and password, Oracle Self-Service E-Billing requires the employee to immediately set a personal CSR user ID and password using different values.
Functions	■ Oracle Self-Service E-Billing-generated validation codes cannot contain the following characters: a, A, e, E, 3, o, O, 0, i, l, 1, u, U, y, Y, \$, @, !, * ■ The account that has been created and set to inactive state expires within four hours, and only a CSR administrator can reset the account. ■ Oracle Self-Service E-Billing cannot reuse the validation code for 30 days after initially being created.

Main Path for Enrolling a CSR

The main path to enroll a CSR is as follows:

- 1 The CSR administrator enters the following information into the form:
 - CSR User Name:
 - Length default is a minimum of eight characters (configurable).
 - User Name cannot be the same as the initial CSR user ID.
 - CSR First Name
 - CSR Last Name
 - CSR Role:
 - CSR administrator
 - CSR
 - CSR Email Address
 - CSR Confirm Email
- 2 The CSR administrator clicks Submit.
- 3 Oracle Self-Service E-Billing validates the information on the form for:
 - Formatting
 - Completeness
 - CSR Email and CSR Confirm Email match
- 4 Oracle Self-Service E-Billing sends an email to the user's email address.

The email must contain an HTTPS link with a unique validation code. The validation code

 - Uses an abbreviated list of characters
 - Contains at least one uppercase character, one lowercase character, and one number
- 5 Oracle Self-Service E-Billing enters the Validation code in the database.
- 6 Oracle Self-Service E-Billing sets a status flag in the database indicating this account is inactive.
- 7 Oracle Self-Service E-Billing displays the Create CSR User screen, populated with the information entered, in a read-only state, with the following message:

A message has been sent to the email address of the CSR user you have just created.

Alternate Paths for Enrolling a CSR

- 1 The user clicks Cancel, and Oracle Self-Service E-Billing displays the CSR Users page.
- 2 The user clicks the back button on the Confirmation page, and Oracle Self-Service E-Billing displays the CSR Users page.

Exceptions for Enrolling a CSR

Exceptions can occur with this use case.

One of the form fields is an empty string when submitted

Oracle Self-Service E-Billing displays the populated Enrollment Form with the following error message: *Please provide a value for ****.*

The User Name field does not meet the form validation after being submitted

Oracle Self-Service E-Billing displays the populated Enrollment Form with the following error message: *Please provide a user name that is eight (configurable) characters in length.*

The email address does not have at least one valid character preceding the at sign @, preceding the period, and following the period

Oracle Self-Service E-Billing displays the populated Enrollment Form with the following error message: *Please provide a valid email address.*

The CSR user enters the bootstrap user ID as a personal CSR user ID

Oracle Self-Service E-Billing displays the following error message: *Invalid user name was entered.*

Setting a CSR Password and Security Question

CSR users must create a password, a security question, and a security answer.

Table 51 lists and describes the use case functions.

Table 51. Setting a CSR Password and Security Question

Functions	Description
Name	Setting a CSR Password and Security Question
Feature Area	Enrollment
User	CSR administrator
Trigger	The CSR user clicks the HTTPS request that was sent to him or her in an email.
Configuration Points	■ The number of characters in a password; Payment Card Industry (PCI) Data Security Standard requires a minimum of seven characters. ■ The complexity of the password. ■ The number of questions for the security question. ■ The list of security questions.

Main Path for Setting a CSR Password and Security Question

The main path to set a CSR password and security question is as follows:

1 Oracle Self-Service E-Billing displays a form. The user must enter:

- CSR User Name
- Password - When a user enters a password, the default is eight (configurable) characters and contains at least (configurable):
 - One uppercase character
 - One lowercase character
 - One Number
 - No Spaces
 - Special characters are valid.

The following rules also apply to the password:

- The password cannot be the same as the user name.
- The password cannot be the same as the previously entered password.
- The password cannot be the same as the bootstrap CSR user ID.
- Confirm Password - Must be the same as the password entered in the previous field.
- Select a Security Question - Pre-Populated Drop Down (Configurable):
 - Best friend's name from childhood?
 - The name of the boy or girl you first kissed?
 - The place where you first met your spouse or significant other?
 - What is the make or model type of your first car?
 - What was the name of the school you attended in first grade?
- Security Answer:
 - Form box size of 30 characters for consistency.
 - The minimum length of a security question is one (configurable) character and cannot be the space character.
 - The maximum length of the answer is 100 characters.
 - Oracle Self-Service E-Billing deletes leading and trailing spaces and does not include these in the calculation of minimum and maximum lengths.
 - Spaces within the answer are valid.
 - Special characters are valid and enhance the security level of the answer.

2 The user clicks Submit.

3 Oracle Self-Service E-Billing validates the information on the form for:

- Formatting

- Completeness
 - CSR user name and validation code within HTTPS request match within Oracle Self-Service E-Billing
 - The account has not expired, four hour (configurable) time limit
 - Password requirements
- 4 Oracle Self-Service E-Billing sets the status flag in the database indicating this is an active CSR user.
 - 5 Oracle Self-Service E-Billing displays the following message with a link to the CSR Login page:
Your security credentials have been accepted, please click here [csr_login](#) to access your billing information.

Alternate Paths for Setting a CSR Password and Security Question

The user clicks Cancel and Oracle Self-Service E-Billing displays the CSR Login page.

Exceptions for Setting a CSR Password and Security Question

Exceptions can occur with this use case.

One of the form fields is an empty string when submitted

Oracle Self-Service E-Billing displays the populated Enrollment Form with the following error message: *Please provide a value for ****.*

The password or confirm password does not meet the requirements

Oracle Self-Service E-Billing displays the pre-populated form with the following error message: *Please provide a valid password and confirm password.*

The password and confirm passwords are not exactly the same

Oracle Self-Service E-Billing displays the pre-populated Enrollment Form with the following error message: *Please provide a valid password and confirm password.*

Resetting a CSR Password

CSR users who forget their password for Oracle Self-Service E-Billing can reset it in this use case or contact their CSR administrator.

Table 52 lists and describes the use case functions.

Table 52. Resetting a CSR Password

Functions	Description
Name	Resetting a CSR Password
Feature Area	Enrollment
User	CSR administrator
Trigger	The CSR user clicks the HTTPS request that was sent in an email.
Prerequisites	The CSR user is currently enrolled in Oracle Self-Service E-Billing and the CSR application is deployed behind the corporate firewall.
Configuration Points	■ The number of times the user can enter an incorrect CSR user, security question, or security answer. ■ The number of characters in a password; Payment Card Industry (PCI) Data Security Standard requires a minimum of seven characters. ■ The complexity of the password.

Main Path for Resetting a CSR Password

The main path to reset a CSR password is as follows:

- 1 Oracle Self-Service E-Billing displays a form to the user who enters the following information:
 - CSR User ID - Required
 - CSR Email Address - Required
 - Select a Security Question - Pre-Populated Drop Down (Configurable):
 - ☐ Best friend's name from childhood?
 - ☐ The name of the boy or girl you first kissed?
 - ☐ The place where you first met your spouse or significant other?
 - ☐ What is the make or model type of your first car?
 - ☐ What was the name of the school you attended in first grade?
 - Security Answer - The user must provide the correct answer he or she supplied during the enrollment process:
 - ☐ The answer has to be an exact match.
 - ☐ The answer is case-sensitive.
- 2 The user clicks Submit.
- 3 Oracle Self-Service E-Billing validates the information on the form for:
 - Completeness

- CSR User ID
 - Email Address
- 4 Oracle Self-Service E-Billing validates the security question and answer. After five (configurable) tries by the user, the account locks and an error message appears.
 - 5 Oracle Self-Service E-Billing displays a Reset Password form with the following values:
 - Password - Default is eight (configurable) characters and contains at least (configurable):
 - One uppercase character
 - One lowercase character
 - One Number
 - No Spaces
 - Special characters are valid.

The password cannot be the same as the user name.

The password cannot be the same as the previously entered password.
 - Confirm Password - Must be the same as the password entered in the previous field.
 - 6 The user clicks Next.
 - 7 Oracle Self-Service E-Billing validates the form for:
 - Formatting
 - Completeness
 - Password Requirements
 - 8 Oracle Self-Service E-Billing displays the CSR Login page with the following message: *Please log into the application using your new personal password you have just created.*

Alternate Paths for Resetting a CSR Password

The user clicks Cancel and Oracle Self-Service E-Billing displays the CSR Login page.

Exceptions for Resetting a CSR Password

Exceptions can occur with this use case.

One of the form fields is an empty string when submitted

Oracle Self-Service E-Billing displays the populated Enrollment Form with the following error message: *Please provide a value for ****.*

The CSR user name, security question, or security answer are not in Oracle Self-Service E-Billing

Oracle Self-Service E-Billing displays the populated Forgot Password form with the following error message: *The information you have provided does not currently match our system records, please try again, or call customer service at: xxx-xxx-xxxx.*

After five (configurable) times a CSR user does not enter the correct the CSR user name, security question, or security answer information

Oracle Self-Service E-Billing displays the Login page with the following error message: *Please contact your customer self service representative at xxx-xxx-xxxx to get your account reactivated.*

The password or confirm password does not meet the requirements

Oracle Self-Service E-Billing displays the pre-populated form with the following error message: *Please provide a valid password and confirm password.*

The password and confirm passwords are not exactly the same

Oracle Self-Service E-Billing displays the pre-populated Enrollment Form with the following error message: *Please provide a valid password and confirm password.*

Searching for Users

The goal of this use case is to identify a consumer user. A CSR can search for a consumer user using any account information, such as ZIP Codes, Tax ID, and so on. [Table 53](#) lists and describes the use case functions.

Table 53. Searching for Users

Functions	Description
Name	Searching for Users
Feature Area	CSR
User	CSR, CSR administrator
Trigger	The CSR or CSR administrator logs in to the CSR application default page or the user clicks the Search for User subtab of the Search tab from any other page.
Precondition	Login
Configuration	None

Table 53. Searching for Users

Functions	Description
Search Screen	■ User First Name - Only characters and apostrophes, hyphens, and spaces are allowed. ■ User Last Name - Only characters and apostrophes, hyphens and spaces are allowed. ■ User ID - Only characters and numbers are allowed. ■ Service Agreement - Only Numbers, spaces, and dashes are allowed. ■ Account Number - Only Numbers, spaces, and dashes are allowed. ■ E-mail Address - Only alpha characters, numbers, underscores, and the at sign (@), are allowed.
Functions	■ Oracle Self-Service E-Billing displays the users (userid) associated at either the account level or the service agreement level in the search results page. ■ The user can configure the number of rows returned for each page. ■ Result set columns are configurable for each implementation.

Main Path for Searching for Users

The main path to search for users is as follows:

- 1 A CSR selects search criteria from the Search Accounts screen.

Oracle Self-Service E-Billing displays the search screen with the following attributes:

- User First Name
- User Last Name
- User ID
- Service Agreement
- Account Number
- Email Address
- Include Inactive Users: Check this box to include both Inactive status as well as Active status users.

- 2 The user enters the search criteria and submits the form. The user can perform partial wildcard search.

Oracle Self-Service E-Billing displays the search results screen of all users matching search criteria:

- User ID
- Name
- E-mail Address (useful for two users with same name)

- Action: Edit or Delete, and Impersonate.

Alternate Paths for Searching for Users

The following alternate paths can occur when searching for users.

The user selected an action on the wrong user from the result list

If the CSR takes an action on the wrong user from the search result, the CSR must be able to return to the original search result list to select another user.

The user clicks the Impersonate link in the search results

Oracle Self-Service E-Billing invokes the Impersonating a User use case.

The CSR user clicks Edit

- The user selects the edit action.

The UI displays the user edit profile screen with the following attributes:

- First Name
- Last Name
- User Name
- Password
- Confirm Password
- Email Address
- Role
- Delete

Impersonating a User

In this use case, a CSR impersonates a consumer user to view specific account information. [Table 54](#) lists and describes the use case functions.

Table 54. Impersonating a User

Functions	Description
Name	Impersonating a User.
Feature Area	CSR
User	CSR, CSR administrator
Trigger	The user clicks the Impersonate link in the search results.

Table 54. Impersonating a User

Functions	Description
Precondition	The CSR can use either search result to locate users and use the Impersonate link to impersonate the user.
Functions	■ A CSR user inherits the same rights and privileges as the user he or she is impersonating. ■ The recommended method to end impersonation sessions is to log out from the Impersonation session.

Main Path for Impersonating a User

In this use case, the CSR user selects a user and invokes the impersonate operation. Then Oracle Self-Service E-Billing opens an impersonation session in a new browser for the selected user, while maintaining the existing CSR navigation for the CSR user.

The CSR user navigates through the CSR application as an user. When finished, the CSR user exits the impersonated user session in a way that is clearly marked for its purpose. The recommended method is to log out from the impersonation session.

Oracle Self-Service E-Billing ends the impersonation session for the selected user and displays the search screen.

Searching and Modifying a CSR User

In this use case, a CSR administrator modifies the profiles of other CSRs, so that other CSRs can access Oracle Self-Service E-Billing. [Table 55](#) lists and describes the use case functions.

Table 55. Searching and Modifying a CSR User

Functions	Description
Name	Searching and Modifying a CSR User
Feature Area	CSR
User	CSR administrator
Trigger	Successful login into the CSR application. The CSR administrator clicks the Manage CSR tab.
Precondition	The CSR administrator user has been created. Organization and Accounts exist.

Table 55. Searching and Modifying a CSR User

Functions	Description
Functions	A wildcard (*) can be added to the end of any value.
Configuration	Search CSR Profile: ■ First Name ■ Last Name ■ CSR ID Modify CSR Profile: ■ First Name ■ Last Name ■ CSR ID - Only characters and numbers allowed. ■ Password ■ Confirm Password ■ Email Address ■ Role - Either CSR or CSR administrator.

Main Path for Searching For and Modifying a CSR User

The main path to search for and modify a CSR user is as follows:

- 1 A CSR chooses to search for another CSR user.
The UI displays the search screen with the following attributes:
 - CSR ID
 - First Name
 - Last Name
- 2 The CSR enters the search criteria and submits the form.
The UI displays the search result with a list of internal user accounts to the administrator.
- 3 The user selects one of the following options:
 - Edit CSR User
 - Delete CSR User
- 4 Oracle Self-Service E-Billing links to the selected page.

Alternate Paths for Searching and Modifying a CSR User

The following alternate paths apply to Search and Modify CSR User.

There are no matching accounts found for the given criteria

The UI displays a message stating that there are no matching results.

The CSR administrator chooses to edit CSR details

- 1 The CSR administrator selects a user from the list and invokes the Edit User option.

The UI displays the Edit User page with the following data:

- First name
- Last name
- CSR ID
- Password
- Password confirmation
- Email Address
- Role

- 2 The user updates fields and submits the form.

Oracle Self-Service E-Billing validates the information and updates the profile for the selected user. The UI displays the updated list of internal users to the administrator.

The CSR administrator selects the Delete operation

- 1 Oracle Self-Service E-Billing displays a confirmation page with the following information:

- First Name
- Last Name
- User Name

- 2 The user confirms the operation.

Oracle Self-Service E-Billing validates the request and logs details of inactivated user and disables the user's access. The UI displays the updated list of internal users.

Adding CSR Users

In this use case, a CSR administrator adds other CSRs. [Table 56](#) lists and describes the use case functions.

Table 56. Adding CSR Users

Functions	Description
Name	Adding CSR Users
Feature Area	CSR
User	Customer service representative administrator

Table 56. Adding CSR Users

Functions	Description
Trigger	The CSR clicks the Create CSR tab.
Precondition	■ The CSR administrator user has been created. ■ An organization and accounts exist.
Functions	■ Only administrator CSRs have the ability to manage other CSR users. ■ User name and password have same limits as users.
Standard Features	Form validation
Configuration Points	■ The number of characters in a password; Payment Card Industry (PCI) Data Security Standard requires a minimum of seven characters. ■ The complexity of the password. ■ The number of questions for the security question. ■ The list of security questions.

Main Path for Adding CSR Users

The main path to add CSR users is as follows:

- 1 A CSR administrator chooses to Add Internal Users. The user selects the Add function for a chosen CSR User and enters the CSR User's details:
 - First Name
 - Last Name
 - User ID
 - Email
 - Role
 - Password
 - Confirm Password
- 2 The administrator internal user enters information and submits the form.
Oracle Self-Service E-Billing confirms the successful creation of the CSR user.

Alternate Paths for Adding CSR Users

In an alternate path, the CSR user creates additional CSR users from the confirmation page.

Editing a CSR User

This use case lets administrative CSR users view the current profile information of all the CSR users, including their own. A CSR administrator can modify the first name, last name, email address, or role.

Table 57 lists and describes the Editing a CSR User use case functions.

Table 57. Editing a CSR User

Functions	Description
Name	Editing a CSR User
Feature Area	CSR.
User	CSR administrator
Trigger	Administrative CSR clicks CSR Users and performs a search, which displays a list of CSR users.
Configuration Points	None

Main Path for Editing a CSR User

The main path to edit a CSR user is as follows:

- 1 The CSR administrator clicks the Edit link for a CSR user.
Oracle Self-Service E-Billing displays the following information:
 - CSR User ID - Hard coded (cannot be changed).
 - Users can change their profile information:
 - First Name - Pre-populated form box - Required
 - Last Name - Pre-populated form box - Required
 - Email address - Pre-populated form box - Required
 - Role Drop Down Box:
 - CSR administrator
 - CSR
- 2 The CSR administrator clicks Update.
- 3 Oracle Self-Service E-Billing validates the form information for:
 - Formatting
 - Completeness
- 4 Oracle Self-Service E-Billing displays the updated user Information with the following success message: *Your profile information has been updated successfully.*

Alternate Path for Editing a CSR User

The CSR administrator clicks Cancel; the Manage Profile Detail screen displays with the original settings.

Managing a CSR Profile

In this use case, CSRs can view their current profile information and can modify their first name, last name, email address, password, and security question.

Table 58 lists and describes the Managing a CSR Profile use case functions.

Table 58. Managing a CSR Profile

Functions	Description
Name	Managing a CSR Profile
Feature Area	CSR User Management.
User	CSR administrator
Trigger	The user clicks the My Profile tab in Oracle Self-Service E-Billing.
Prerequisites	The user is currently enrolled in Oracle Self-Service E-Billing.
Configuration Points	■ The number of characters in a password; Payment Card Industry (PCI) Data Security Standard requires a minimum of seven characters. ■ The complexity of the password. ■ The number of questions for the security question. ■ The list of security questions.

Main Path for Managing a CSR Profile

The main path to manage a CSR profile is as follows:

- 1 Oracle Self-Service E-Billing displays the Update Profile view with the following information:
 - CSR User ID - Hard coded (cannot be changed)
 - Users can change their profile information:
 - First Name - Prepopulated form box - Required
 - Last Name - Prepopulated form box - Required
 - Email address - Prepopulated form box - Required
 - Role - Hard coded (cannot be changed)
 - New Password - Displays an empty form field. Default is eight characters and must contain at least:
 - One uppercase character

- ❑ One lowercase character
- ❑ One Number
- ❑ No Spaces
- ❑ Special characters are valid.
- Confirm Password - Displays an empty form field.
- Security question - CSR selects a security question:
 - ❑ Best friend's name from childhood?
 - ❑ The name of the boy or girl you first kissed?
 - ❑ The place where you first met your spouse or significant other?
 - ❑ What is the make or model type of your first car?
 - ❑ What was the name of the school you attended in first grade?
- Security Answer
 - ❑ Form box size of 30 characters for consistency.
 - ❑ The minimum length of a security question is one (configurable) character and cannot be the space character.
 - ❑ The maximum length of the answer is 100 characters.
 - ❑ Oracle Self-Service E-Billing deletes leading and trailing spaces and does not include these in the calculation of minimum and maximum lengths.
 - ❑ Spaces within the answer are valid.
 - ❑ Special characters are valid and enhance the security level of the answer.
- 2 The user clicks Update.
- 3 Oracle Self-Service E-Billing validates the information on the form for:
 - Formatting
 - Completeness
- 4 Oracle Self-Service E-Billing displays the CSR My Profile confirmation screen with the following success message: *Your changes have been saved.*

Alternate Paths for Managing a CSR Profile

Alternate paths can occur with this use case.

The user clicks Cancel on the Manage Profile page

The page refreshes with the original settings.

The user clicks Cancel on the Change Password page

The Manage Profile page appears.

The user clicks Cancel on the Change Security Question page

The Manage Profile page appears.

Exceptions for Manage CSR Profile

Exceptions can occur with this use case.

One of the form fields is an empty string when submitted

Oracle Self-Service E-Billing displays the Change Password form with the following error message: *Please provide a value for ****.*

The password or confirm password does not meet the requirements

Oracle Self-Service E-Billing displays the Change Password form with the following error message: *Please provide a valid password and confirm password.*

The password and confirm passwords are not exactly the same

Oracle Self-Service E-Billing displays the pre-populated Change Password form with the following error message: *Please provide a valid password and confirm password.*

If no question is selected or if the security answer is an empty string on the Security Question form

Oracle Self-Service E-Billing displays the Change Security Question Form with the following error message: *Please select a question and a valid answer for the question selected.*

Setting a Preferred Language (CSR)

In this use case, CSR users can set a personal language preference. Setting a preferred language displays all screen text, attributes, error messages, and email notifications in the preferred language for that CSR user each time he or she logs in.

Oracle Self-Service E-Billing is preconfigured with U.S. English only; you must localize your implementation to provide additional languages. For information about localization, see *Implementation Guide for Oracle Self-Service E-Billing*. If Oracle Self-Service E-Billing is localized and a CSR user has not selected a preferred language, the Billing and Payment application displays in the language configured as the default.

[Table 59](#) lists and describes the Setting a Preferred Language use case functions.

Table 59. Setting a Preferred Language (CSR)

Function	Description
Name	Setting a Preferred Language (CSR)
Feature Area	CSR User Management.
User	CSR administrator or user

Table 59. Setting a Preferred Language (CSR)

Function	Description
Preconditions	The CSR user is currently enrolled and logged into Oracle Self-Service E-Billing.
Trigger	The user clicks the My Account tab and then the Preferences subtab, or clicks Language.
Page Content	Page title: Change Language Attribute: Language Buttons: ■ Submit ■ Cancel
Subtabs	■ Profile ■ Preferences
Configuration Points	Oracle Self-Service E-Billing is preconfigured with U.S. English only; you must localize your implementation to provide additional languages.

Main Path for Setting a Preferred Language (CSR)

The main path for a CSR to set a preferred language is as follows:

- 1 The CSR user clicks the My Accounts tab and the Preferences subtab, or clicks Language.
- 2 On the Preferences page, the CSR user selects a language and clicks Submit.

Oracle Self-Service E-Billing displays the Billing and Payment application in the chosen language and stores this preference as part of the CSR user's profile.

Each time the CSR user logs in, Oracle Self-Service E-Billing uses the preferred language.

Alternate Paths for Setting a Preferred Language (CSR)

The following alternate path can occur in this use case.

The user clicks Cancel

Oracle Self-Service E-Billing displays the Profile page.

Exceptions for Setting a Preferred Language (CSR)

None

Adding a CSR Administrator

In this use case, CSR users can search a company's organization and add additional administrative users for the company.

Table 60 lists and describes the Adding a CSR Administrator use case functions.

Table 60. Adding a CSR Administrator

Functions	Description
Name	Adding a CSR Administrator
Feature Area	Enrollment.
User	CSR administrator
Prerequisites	A CSR user is set up.
Trigger	CSR administrator clicks the Organizations tab, performs a search, clicks View Admins, and then clicks New Admin.
Configuration Points	■ The number of characters in a user name. ■ The number of characters in the temporary password. Oracle Self-Service E-Billing generates the temporary password.
Functions	■ Oracle Self-Service E-Billing-generated validation codes cannot contain the following characters: a, A, e, E, 3, o, O, 0, i, l, 1, u, U, y, Y, \$, @, !, * ■ The account that has been created and set to inactive state expires within four hours, and only a CSR administrator can reset the account. ■ Oracle Self-Service E-Billing cannot reuse the validation code for 30 days after initially being created.

Main Path for Adding a CSR Administrator

The main path to add a CSR administrator is as follows:

- 1 Oracle Self-Service E-Billing displays a screen where the CSR administrator enters the following information:
 - First Name - Required
 - Last Name- Required
 - Email Address - Required
 - Confirm Email - Required
 - Role - Required
 - Admin
 - Manager

- Subscriber
- User Name - Required
 - The Length of the User Name, default is a minimum of eight characters (configurable).
- 2 The CSR administrator user clicks Next
- 3 Oracle Self-Service E-Billing validates the information on the form for:
 - Formatting
 - Completeness
 - Email and confirm email match
 - User Name Requirements
- 4 Oracle Self-Service E-Billing displays the user enrollment verification form.
- 5 The admin user clicks submit.
- 6 Oracle Self-Service E-Billing sends an email to the user email address.

The email must contain an HTTPS link with a unique validation code. The validation code must use the following:

 - An abbreviated list of characters
 - At least one uppercase character, one lowercase character, and one number
- 7 Oracle Self-Service E-Billing enters the validation code in the database.
- 8 Oracle Self-Service E-Billing sets a status flag in the database indicating this account is inactive.
- 9 Oracle Self-Service E-Billing displays the Organization Search Results page with the following message:

User xxxxxxxx enrollment has been initiated and an email notification has been sent to the user's email address supplied during the enrollment process. You will need to inform this user of the user name that was entered, so they will be able complete the enrollment process.

Alternate Paths for Adding a CSR Administrator

The CSR administrator clicks Cancel and Oracle Self-Service E-Billing displays the Search Results screen.

Exceptions for Adding a CSR Administrator

Exceptions can occur with this use case.

One of the form fields is an empty string when submitted

Oracle Self-Service E-Billing displays the Change Password form with the following error message:
*Please provide a value for ****.*

The user name field does not meet the form validation when submitted

Oracle Self-Service E-Billing displays the populated Enrollment Form with the following error message: *Please provide a user name that is eight (configurable) characters in length.*

The email address does not have at least one valid character preceding the at sign @, preceding the period, and following the period

Oracle Self-Service E-Billing displays the populated Enrollment Form with the following error message: *Please provide a valid email address.*

Setting CSR Account Lockout Status

This use case describes the trigger points that cause Oracle Self-Service E-Billing to lock a CSR user account, preventing the user from logging in.

Table 61 lists and describes the Setting CSR Account Lockout Status use case functions.

Table 61. Setting CSR Account Lockout Status

Functions	Description
Name	Setting CSR Account Lockout Status
Feature Area	Login and Authentication
User	CSR administrator
Trigger	The following conditions can trigger an account lockout: ■ On the Login page a user tries logging in more than five (configurable) times. ■ During the Forgot Password and Reset Password use case, when a user tries more than five (configurable) times to enter his or her User Name, Account Number, or Service Number. ■ During the Forgot Password and Reset Password use case, when a user tries more than five (configurable) times to enter his or her security question or security answer. ■ The user or CSR has not clicked on the HTTPS link within four hours of being sent.
Prerequisites	The CSR user is currently enrolled in Oracle Self-Service E-Billing.

Table 61. Setting CSR Account Lockout Status

Functions	Description
Configuration Points	■ Number of incorrect entries on the Login page. ■ Number of incorrect entries on the Forgot Password use case - Password. ■ Number of incorrect entries on the Forgot Password use case - Security Question. ■ Number of hours before the account locks during the HTTPS validation request.
Functions	The value set in the database is unique for each trigger point.

Main Path for Setting the Account Lockout Status

The main path for a CSR to set the account lockout status for a user is as follows:

- One of the following activities occurs, triggering an account lockout:
 - On the Login page a user tries logging in more than five (configurable) times.
 - During the Forgot Password and Reset Password use case, when a user tries more than five (configurable) times to enter his or her User Name, Account Number, or Service Number.
 - During the Forgot Password and Reset Password use case, when a user tries more than five (configurable) times to enter his or her security question or security answer.
 - The user or CSR has not clicked on the HTTPS link within four hours of being sent.

Oracle Self-Service E-Billing sets the Status flag in the database indicating this account has been locked.

- A user attempts to log in.

Oracle Self-Service E-Billing displays the Login page with the following error message: *Please contact your customer self service representative at xxx-xxx-xxxx to get your account reactivated.*

Viewing the Account Lockout Report

This use case lets the CSR view a report showing accounts that have been locked out of Oracle Self-Service E-Billing or reactivated. The CSR can choose to view a report showing one of the following:

- Locked out customer accounts
- Locked out customer service representatives
- Customer and CSR users reactivated after lockout

Table 62 lists and describes the Viewing the Account Lockout Report use case functions.

Table 62. Viewing the Account Lockout Report

Functions	Description
Name	Viewing the Account Lockout Report
Feature Area	Login and Authentication
User	CSR administrator
Trigger	The CSR administrative user logs in and clicks the Reports (New) link next to My Profile.
Prerequisites	The CSR user is currently enrolled in Oracle Self-Service E-Billing.

Main Path for Viewing the Account Lockout Report

The main path to view the Account Lockout report is as follows:

- 1 Oracle Self-Service E-Billing displays a list of the available Account Lockout reports:
 - Locked Out Customer Accounts
 - Locked Out Customer Service Representatives
 - Locked Out Accounts Reactivated
- 2 The CSR administrator clicks the Locked Out Customer Accounts Link. Oracle Self-Service E-Billing displays a report that shows:
 - User ID
 - Business Account Number - This value displays if the user is tied directly to the ETL Business Account Number. Otherwise the field is blank.
 - Service Number - This value displays if the user is tied directly to a Service Number. Otherwise the field is blank.
 - First Name
 - Last Name
 - Locked Out Reason
 - Incorrect Login
 - Reset Password
 - Security Question
 - Account Expired
 - Action - Re-Activate
- 3 The CSR administrator clicks the Locked Out Customer Service Representatives Link. Oracle Self-Service E-Billing displays a report that shows the following:
 - CSR User ID

- First Name
 - Last Name
 - Locked Out Reason
 - Incorrect Login
 - Reset Password
 - Security Question
 - Account Expired
 - Action - Re-Activate
- 4 The CSR administrator clicks the Locked Out Accounts Reactivated Link. Oracle Self-Service E-Billing displays a report that shows the following:
- CSR User ID or user ID
 - First Name
 - Last Name
 - Locked Out Reason
 - Incorrect Login
 - Reset Password
 - Security Question
 - Account Expired
 - Date and time the account was reactivated

Exceptions for Viewing the Account Lockout Report

Exceptions can occur with this use case.

No one in Oracle Self-Service E-Billing has been locked out and not reset

A message on the page states: *No Accounts have been locked out at this point in time.*

Reactivating a Locked Account

This use case reactivates a CSR or user account that has been locked out.

Table 63 lists and describes the Reactivating a Locked Account use case functions.

Table 63. Reactivating a Locked Account

Functions	Description
Name	Reactivating a Locked Account
Feature Area	Login and Authentication

Table 63. Reactivating a Locked Account

Functions	Description
User	CSR administrator
Trigger	The CSR administrator logs into Oracle Self-Service E-Billing and clicks the Reports (New) link next to My Profile, clicks the Locked Out Accounts link, and then clicks the reactivate link within the report.
Prerequisites	■ The CSR administrator user is currently enrolled in Oracle Self-Service E-Billing. ■ The CSR administrator receives a call from the user or CSR user who is locked out. ■ The CSR administrator validates the email address entered in Oracle Self-Service E-Billing.
Functions	Oracle Self-Service E-Billing-generated validation code cannot contain the characters: a, A, e, E, 3, o, O, 0, i, l, 1, u, U, y, Y, \$, @, !, *

Main Path for Reactivating a Locked Account

The main path to reactivate a locked account is as follows:

- 1 Oracle Self-Service E-Billing sends an email to the user email address.
The email must contain an HTTPS link with a unique validation code. The validation code
 - Uses an abbreviated list of characters
 - Contains of at least one uppercase character, one lowercase character, and one number
- 2 Oracle Self-Service E-Billing enters the validation code in the database.
- 3 Oracle Self-Service E-Billing sets a status flag in the database indicating this account has been reset.
- 4 Oracle Self-Service E-Billing displays the Lockout Account Report, populated with the information displayed earlier, but the action link is no longer active and displays the following message: *An email message has been sent to the account you have just reactivated.*
- 5 Oracle Self-Service E-Billing enters the CSR ID, date and time when the account was reactivated in the database for auditing purposes.

9

Utility Application Use Cases

This chapter describes use cases specific to the Utility billing application. It includes the following topics:

- [Statement Management on page 173](#)
- [Analytics on page 185](#)

Statement Management

The following Statement Management use cases are specific to the Utility application and are described in this topic:

- [“Viewing the Statement Summary” on page 173](#)
- [“Viewing the Usage Details” on page 177](#)
- [“Disputing a Statement” on page 180](#)
- [“Viewing Disputes” on page 183](#)

Viewing the Statement Summary

This Utility application use case is used to view a statement summary.

[Table 64](#) lists and describes the use case functions.

Table 64. Viewing the Statement Summary

Functions	Description
Name	Viewing the Statement Summary
Feature Area	Statement
Description	Displays the user's latest utility statement upon logging in to Oracle Self-Service E-Billing.
Primary Users	Consumer and CSR users
Triggers	■ The user logs in to Oracle Self-Service E-Billing and the Statement Summary appears. ■ The user clicks the Statements tab. ■ The user clicks the Statement Summary menu option from within the Statements tab.

Table 64. Viewing the Statement Summary

Functions	Description
Active Hyperlinks (Breadcrumbs)	Statements - Redisplays the Statement Summary page.
Page Content - Statement Summary Page	Statement Summary Page Modules: ■ Search ■ Account Summary ■ Payment Summary ■ Account Charges ■ Summary of Current Charges ■ Account Adjustments ■ Billing History ■ Analysis of Current Statement ■ Consumption History ■ Notes Search Module ■ Buttons: ■ Go ■ Pay Now ■ Prompts: ■ Account Number ■ Statement Date Account Summary Module ■ Data: ■ Previous Balance (Active link to the previous month's statement) ■ Payment Received ■ Current Charges ■ Adjustments ■ Total Account Charges ■ Total Amount Due On ■ Total amount due (No label)

Table 64. Viewing the Statement Summary

Functions	Description
Page Content - Statement Summary Page, continued	Payment Summary Module ■ Columns: ■ Date (No label) ■ Amount (No label) ■ Data: Last Payment Received Amount Account Charges Module ■ Data: ■ List of Account Charges (No label) ■ Total Account Charges Summary of Current Charges Module ■ Columns: ■ Service type: Miscellaneous, Cable, Electric, Gas, Water, or Waste Water. All service types (except Miscellaneous) are active links that display the Usage Detail page where the particular usage type details are displayed by Premise ID. ■ Amount ■ Data: Total Charges for This Period Account Adjustments Module: ■ Columns: ■ Description of Adjustment (No label) ■ Amount (No label) ■ Data: Total Adjustments Billing History Module: ■ Chart: Bar graph showing current charges for the past three months.

Table 64. Viewing the Statement Summary

Functions	Description
Page Content - Statement Summary Page, continued	Analysis of Current Statement Module (Displays only if there are multiple service types for the account): ■ Data: Service Address ■ Chart: Pie chart of services ■ Active Link: View Details link displays the Usage Detail page for the service address. Consumption History Module (Displays only if there is more than one month's worth of data available): ■ Radio button row (If there are multiple service types for the account.) ■ Text: Service Type (If there is only one service type for the account.) ■ Data: Service Type Description ■ Graph: Bar graph showing total consumption by the account for the past 13 months. Notes Module ■ Text: Please call (800) 192-9111 if you have any questions about your rate
Standard Features	■ Printer-Friendly view ■ Download CSV, PDF, or XML
Main Path	The user logs in to Oracle Self-Service E-Billing.

Table 64. Viewing the Statement Summary

Functions	Description
Alternate Paths	The user selects a different account number from a list and clicks Go. Oracle Self-Service E-Billing displays the Statement Summary for the selected account for the current period. The user selects a different statement period and clicks Go. Oracle Self-Service E-Billing displays the Statement Summary for the current account for the selected period. The user clicks the Previous Balance link. Oracle Self-Service E-Billing displays the previous period Statement Summary for the current account. The user clicks a service type link in the Summary of Current Charges module. Oracle Self-Service E-Billing displays the Usage Details page. The user clicks the Pay Now button. Oracle Self-Service E-Billing displays the One-Time Payment page. The user selects a download format and clicks Go. Oracle Self-Service E-Billing downloads the bill summary only (the first page of the bill) in the selected format (PDF, XML, or CSV). The user clicks the Printer Friendly link. Oracle Self-Service E-Billing displays the Print - Statement Summary window and the Windows Print dialog.
Exceptions	Oracle Self-Service E-Billing invokes the Error Message use case.

Viewing the Usage Details

This Utility application use case is used to view the usage details.

Table 65 lists and describes the use case functions.

Table 65. Viewing the Usage Details

Functions	Description
Name	Viewing the Usage Details
Feature Area	Statement
Description	Displays the user's usage details for a selected service address.
Primary Users	Consumer and CSR users

Table 65. Viewing the Usage Details

Functions	Description
Trigger	The user clicks an active service type link on the Statement Summary page.
Active Hyperlinks (Breadcrumbs)	■ Statements. Displays the Statement Summary page. ■ Usage Detail. Redisplays the Usage Detail page.
Page Content - Usage Details Page	Usage Details Page ■ Buttons: ■ Go ■ Dispute (Shown for the current period only.) ■ Prompts (These prompts display only if the user has multiple accounts): ■ Account Number ■ Service Address ■ Statement Date ■ Text and Images: ■ Service Type Image (Cable, Electric, Gas, Water, or Waste Water) ■ <i>Service Type</i> Quarterly Charges ■ Service From ■ To ■ Data: ■ Account Number (If the user has only one account, then the account number displays. Otherwise a prompt appears.) ■ Service Address (If the user has only one address, then the address displays. Otherwise a prompt appears.) ■ Statement Date (If the user has only one statement, then the statement date displays. Otherwise a prompt appears.) ■ Service Address ■ Service from date ■ Service to date ■ Service-specific charges and amounts

Table 65. Viewing the Usage Details

Functions	Description
Page Content - Usage Details Page, continued	■ Graph: Trend of the consumption for this service address and service for the past 13 months. ■ Columns: ■ Meter ID ■ Section Text: Current Meter Readings ■ Section fields: □ Date □ Reading □ Estimated Flag ■ Section Text: Previous Meter Readings ■ Section Fields: □ Date □ Reading □ Estimated Flag ■ Reading Difference ■ Meter Multiplier ■ Billed Usage ■ Time of Use Code
Standard Features	■ Printer-Friendly view ■ Download CSV, XML, or PDF
Main Path	The main path to view the usage detail is as follows: 1 The user clicks the Statements tab and the Usage Detail menu option. 2 The user clicks the active service type link on the Statement Summary page.

Table 65. Viewing the Usage Details

Functions	Description
Alternate Paths	The user clicks the Dispute button. Oracle Self-Service E-Billing displays the Dispute Statement page for the current period. The user selects a different account number from a list and clicks Go. Oracle Self-Service E-Billing displays the Statement Summary for the selected account for the current period. The user selects a different statement period and clicks Go. Oracle Self-Service E-Billing displays the Statement Summary for the current account for the selected period. The user selects a download format and clicks Go. Oracle Self-Service E-Billing downloads the bill summary only (the first page of the bill) in the selected format (CSV, XML, or PDF). The user clicks the Printer Friendly link. Oracle Self-Service E-Billing displays the Print - Statement Summary window and the Windows Print dialog.
Exceptions	Oracle Self-Service E-Billing invokes the Error Message use case.

Disputing a Statement

This Utility application use case is used to dispute a statement.

Table 66 lists and describes the use case functions.

Table 66. Disputing a Statement

Functions	Description
Name	Disputing a Statement
Feature Area	Statement
Description	Lets a user submit a dispute for a statement.
Primary Users	Consumer and CSR users
Triggers	The user clicks the Dispute button on the Usage Detail page.
Active Hyperlinks (Breadcrumbs)	None

Table 66. Disputing a Statement

Functions	Description
Page Content - Dispute Statement	Dispute Statement Page ■ Prompts: ■ Description (Enter text) ■ Please select the reason for this dispute. Radio buttons: Duplicate Statement or Incorrect Details ■ Data: ■ Account Number ■ Statement Date ■ Statement Amount ■ Text: ■ To complete your dispute, review the transaction information below, provide a description of the dispute, and select a reason for the dispute. ■ If the reason for your dispute is not listed above, please contact a customer service representative at 1-888-888-8888. ■ Buttons: ■ Submit ■ Cancel

Table 66. Disputing a Statement

Functions	Description
Page Content - Dispute Confirmation page	Dispute Confirmation Page (Pop-Up Window) ■ Module: Dispute Details Dispute Details Module: ■ Buttons ■ Print ■ Close ■ Data: ■ Account Number ■ Statement Date ■ Statement Amount ■ Dispute Date ■ Dispute Number ■ Dispute Description ■ Dispute Reason ■ Dispute Status ■ Text: Your dispute has been successfully received and is being reviewed by a customer service representative. Please check the Disputes page for any updates or call a customer service representative at 1-888-888-8888 and refer to the Dispute Transaction Number of xxxxxxxx.
Configuration Point	A Web service can be configured with an external CRM application.
Main Path	The main path to dispute a statement is as follows: 1 The user clicks the Dispute button on the Usage Detail page. Oracle Self-Service E-Billing displays the Dispute Statement page. 2 The user reviews the dispute information, enters a description of the problem, and selects a reason for the dispute. 3 The user clicks Submit. Oracle Self-Service E-Billing displays the Dispute Confirmation page. 4 The user views the dispute information and clicks Close.

Table 66. Disputing a Statement

Functions	Description
Alternate Paths	The user clicks Cancel. Oracle Self-Service E-Billing redisplay the Usage Detail page for the statement.
Exceptions	Oracle Self-Service E-Billing invokes the Error Message use case.

Viewing Disputes

This Utility application use case is used to use case is used to view all disputes that have been entered in Oracle Self-Service E-Billing for the selected billing account.

Table 67 lists and describes the use case functions.

Table 67. Viewing Disputes

Functions	Description
Name	Viewing Disputes
Feature Area	Statement
Description	Lets a user view all disputes for the selected billing account.
Primary Users	Consumer and CSR users
Triggers	■ The user logs in to Oracle Self-Service E-Billing and selects View Disputes from the Statements menu. (The View Disputes subtab displays only if one or more disputes have been entered for the selected billing account.) ■ The user clicks the Statements tab from within Oracle Self-Service E-Billing and selects the View Disputes option.
Active Hyperlinks (Breadcrumbs)	Statements - Redisplays the Statement Summary.

Table 67. Viewing Disputes

Functions	Description
Page Content - View Disputes	View Disputes Page Data: - Account Number (If only one account number is available it is displayed as data.) Module: Report Details (<i>Number of Items</i>) Report Details (<i>Number of Items</i>) Module Table: - Dispute Transaction Number (This number is from the back-office CRM system) - Dispute Number (This number is generated by Oracle Self-Service E-Billing.) - Disputed Statement Date - Disputed Reason - Dispute Date (Default sort is latest to earliest.) - Disputed Status (If no Web service is configured, the dispute - Disputed Amount - Total: Total of all amounts disputed.
Standard Features	- Printer-Friendly view - Download CSV or XML
Configuration Point	A Web service can be configured with an external CRM system.
Main Path	The main path to view disputes is as follows: The user logs in to Oracle Self-Service E-Billing and selects View Disputes from the Statements menu. Oracle Self-Service E-Billing displays the View Disputes page.
Alternate Paths	The user selects a download format and clicks Go. Oracle Self-Service E-Billing downloads the list of disputes in the selected format (CSV or XML). The user clicks the Printer Friendly link. Oracle Self-Service E-Billing displays the Print window and the Windows Print dialog.
Exceptions	Oracle Self-Service E-Billing invokes the Error Message use case.

Analytics

The following Analytics use cases are specific to the Utility application and are described in this topic:

- “Viewing the List of Standard Billing Reports” on page 185
- “Viewing the Account Usage Summary” on page 186
- “Viewing the Service Trends Report” on page 188
- “Viewing the Compare by Zip Code Report” on page 191

Viewing the List of Standard Billing Reports

This Utility application use case lets users view and access a list of standard billing reports in this use case. [Table 68](#) lists and describes the functions.

Table 68. Viewing the List of Standard Billing Reports

Function	Description
Name	Viewing the List of Standard Billing Reports
Feature Area	Analytic Reports
Description	Displays a list of analytic reports that are available to the user.
Primary User	Consumer user, CSR hosting administrator
Triggers	■ The user clicks the Analytics tab. ■ The user clicks the Billing Reports option within the Analytics section.
Active Hyperlinks (Breadcrumbs)	■ Analytics. Redisplays the List of Standard Reports page. ■ Billing Reports. Redisplays the List of Standard Reports page.
Page Content - Standard Reports Page	Standard Reports Page Active links for the following reports: ■ Account Usage Summary ■ Service Trends ■ Compare by Zip Code
Main Path	The main path to view the list of standard billing reports is as follows: ■ The user clicks the Analytics tab. Oracle Self-Service E-Billing displays the list of standard billing reports.

Table 68. Viewing the List of Standard Billing Reports

Function	Description
Alternate Paths	The user clicks the Account Usage Summary active link. Oracle Self-Service E-Billing displays the Account Usage Summary report. The user clicks the Service Trends active link. Oracle Self-Service E-Billing displays the Service Trends report. The user clicks the Compare by Zip Code active link. Oracle Self-Service E-Billing displays the Compare by Zip Code report.
Exceptions	Oracle Self-Service E-Billing invokes the Error Message use case.

Viewing the Account Usage Summary

This Utility application use case lets users view and access the Account Usage Summary report in this use case. [Table 69](#) lists and describes the functions.

Table 69. Viewing the Account Usage Summary Report

Function	Description
Name	Viewing the Account Usage Summary Report
Feature Area	Analytic Reports
Description	Displays the service address, usage, and charges for all service types for a given account that the user can access.
Primary User	Consumer user, CSR hosting administrator
Triggers	■ The user clicks the Analytics tab, then clicks Account Usage Summary from the list of standard reports. ■ The user clicks the Billing Reports menu option within the Analytics tab, then clicks Account Usage Summary.
Active Hyperlinks (Breadcrumbs)	■ Analytics. Redisplays the List of Standard Reports page. ■ Billing Reports. Redisplays the List of Standard Reports page.

Table 69. Viewing the Account Usage Summary Report

Function	Description
Page Content - Account Usage Summary Page	Account Usage Summary Page Subnavigational bar: ■ Report (Active) ■ Batch Request Modules: ■ Search ■ Report Details (<i>Number of Items</i>) Search Module: ■ Button: Submit ■ Prompts: ■ Account Number (Displays as data if only one account number is available.) ■ Period Range (From and To dates) (Displays up to 13 previous periods.) ■ Billing Reports Report Details (<i>Number of Items</i>) ■ Columns (All sortable): ■ Service Address (Default sort is ascending order) ■ Statement Date ■ Service Type ■ Meter Number ■ Billed Usage: □ Number of Units □ Service Type Code ■ Total Charges (<i>Currency Code</i>)
Standard Features	■ Printer-Friendly view ■ Download CSV or XML
Main Path	The main path to view the Account Usage Summary report is as follows: ■ The user clicks the Analytics tab, then clicks Account Usage Summary for the current bill period. Oracle Self-Service E-Billing displays the Account Usage Summary reports.

Table 69. Viewing the Account Usage Summary Report

Function	Description
Alternate Paths	The user selects a different account number from a list and clicks Submit. Oracle Self-Service E-Billing displays the account usage details for the selected account for the current period. The user selects a different statement period and clicks Submit. Oracle Self-Service E-Billing displays the account usage details for the selected statement period. The user selects a different billing report and clicks Submit. Oracle Self-Service E-Billing displays the selected report page. The user selects a download format and clicks Go. Oracle Self-Service E-Billing downloads the account usage data in the selected format (CSV or XML). The user clicks the Printer Friendly link. Oracle Self-Service E-Billing displays the Account Usage Summary window and the Windows Print dialog.
Exceptions	Oracle Self-Service E-Billing invokes the Error Message use case.

Viewing the Service Trends Report

This Utility application use case lets users view and access the Service Trends report in this use case. [Table 70](#) lists and describes the functions.

Table 70. Viewing the Service Trends Report

Function	Description
Name	Viewing the Service Trends Report
Feature Area	Analytic Reports
Description	Displays the usage and charges for an account and service address by service type.
Primary User	Consumer user, CSR hosting administrator
Triggers	■ The user clicks the Analytics tab, then clicks Service Trends from the list of standard reports. ■ The user clicks the Billing Reports menu option within the Analytics tab, then clicks Service Trends.

Table 70. Viewing the Service Trends Report

Function	Description
Active Hyperlinks (Breadcrumbs)	■ Analytics. Redisplays the List of Standard Reports page. ■ Billing Reports. Redisplays the List of Standard Reports page.
Page Content - Service Trends Page	Service Trends Page Subnavigational bar: ■ Report (Active) ■ Batch Request Modules: ■ Search ■ Graph ■ Report Details (<i>Number of Items</i>) Search Module ■ Buttons: ■ Submit ■ Prompts: ■ Account Number (Displays as data if only one account number is available.) ■ Service Address (Displays as data if only one service address is available) ■ Service Type (Displays as data if only one service type is available) ■ Period Range (From and To dates) (Default is the current period; displays up to 13 previous periods.) ■ Billing Reports Graph: ■ Prompt: Service Trend By Billed Usage (Default) or Total Charges ■ Bar graph shows the total charges over the billing periods.

Table 70. Viewing the Service Trends Report

Function	Description
Page Content - Service Trends Page, continued	Report Details (<i>Number of Items</i>) ■ Columns (All sortable): ■ Statement Date (Default sort is descending order) ■ Billed Usage (Service Type Code displays on the header row.) □ Number of Units ■ Total Charges (<i>Currency Code</i>) ■ Text: Total ■ Data: ■ Billed Usage Total ■ Total Charges
Standard Features	■ Printer-Friendly view ■ Download CSV or XML
Main Path	The main path to view the Service Trends report is as follows: ■ The user clicks the Analytics tab, then clicks Service Trends for the current bill period. Oracle Self-Service E-Billing displays the Service Trends reports.

Table 70. Viewing the Service Trends Report

Function	Description
Alternate Paths	The user selects a different account number from a list and clicks Submit. Oracle Self-Service E-Billing displays the Service Trends report for the selected account. The user selects a different statement period and clicks Submit. Oracle Self-Service E-Billing displays the Service Trends report for the selected statement period. The user selects a different service type and clicks Submit. Oracle Self-Service E-Billing displays the Service Trends report for the selected service type. The user selects a different billing report and clicks Submit. Oracle Self-Service E-Billing displays the selected report page. The user selects a download format and clicks Go. Oracle Self-Service E-Billing downloads the Service Trends report in the selected format (CSV or XML). The user clicks the Printer Friendly link. Oracle Self-Service E-Billing displays the Service Trends report window and the Windows Print dialog.
Exceptions	Oracle Self-Service E-Billing invokes the Error Message use case.

Viewing the Compare by Zip Code Report

Users can view and access the Compare by Zip Code report in this use case. [Table 71](#) lists and describes the functions.

Table 71. Viewing the Compare by Zip Code Report

Function	Description
Name	Viewing the Compare by Zip Code Report
Feature Area	Analytic Reports
Description	Displays the usage and charges for an account against the average of all other accounts in the same zip code.
Primary User	Consumer user, CSR hosting administrator

Table 71. Viewing the Compare by Zip Code Report

Function	Description
Triggers	■ The user clicks the Analytics tab, then clicks Compare by Zip Code from the list of standard reports. ■ The user clicks the Billing Reports menu option within the Analytics tab, then clicks Compare by Zip Code.
Active Hyperlinks (Breadcrumbs)	■ Analytics. Redisplays the List of Standard Reports page. ■ Billing Reports. Redisplays the List of Standard Reports page.

Table 71. Viewing the Compare by Zip Code Report

Function	Description
Page Compare by Zip Code Page	Compare by Zip Code Page Subnavigational bar: ■ Report (Active) ■ Batch Request Modules: ■ Search ■ Report Details (<i>Number of Items</i>) Search Module: ■ Buttons: ■ Submit ■ Prompts: ■ Account Number (Displays as data if only one account number is available.) ■ Select Period ■ Service Type (Displays as data if only one service type is available.) ■ Zip Code ■ Billing Reports Report Details (<i>Number of Items</i>): ■ Columns (All sortable): ■ Service Address ■ Your Billed Usage (<i>Service Type Code</i>): □ Number of Units ■ Your Cost (<i>Currency Code</i>) ■ Zip Code's Average Billed Usage (<i>Service Type Code</i>) ■ Zip Code's Average Cost (<i>Currency Code</i>) ■ Usage Difference (<i>Service Type Code</i>) ■ Cost Difference (<i>Currency Code</i>)
Standard Features	■ Printer-Friendly view ■ Download CSV or XML

Table 71. Viewing the Compare by Zip Code Report

Function	Description
Main Path	The main path to view the Compare by Zip Code report is as follows: ■ The user clicks the Analytics tab, then clicks Compare by Zip Code for the current bill period. Oracle Self-Service E-Billing displays the Compare by Zip Code reports.
Alternate Paths	The user selects a different account number from a list and clicks Submit. Oracle Self-Service E-Billing displays the Compare by Zip Code report for the selected account. The user selects a different statement period and clicks Submit. Oracle Self-Service E-Billing displays the Compare by Zip Code report for the selected statement period. The user selects a different service type and clicks Submit. Oracle Self-Service E-Billing displays the Compare by Zip Code report for the selected service type. The user selects a different billing report and clicks Submit. Oracle Self-Service E-Billing displays the selected report page. The user selects a download format and clicks Go. Oracle Self-Service E-Billing downloads the Compare by Zip Code report data in the selected format (CSV or XML). The user clicks the Printer Friendly link. Oracle Self-Service E-Billing displays the Compare by Zip Code report data window and the Windows Print dialog.
Exceptions	Oracle Self-Service E-Billing invokes the Error Message use case.

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