



Assisted Service Application Guide for Oracle Billing Insight

Version 7.0

October 2015

ORACLE®

Copyright © 2005, 2015 Oracle and/or its affiliates. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Contents

Chapter 1: What's New in This Release

Chapter 2: Overview of the Assisted Service Application

About This Guide 9

About the Assisted Service Application 9

Assisted Service Application User Roles 10

Common UI Elements 13

Common Exceptions 19

Chapter 3: Enrolling as an Assisted Service User

Use Case: Logging Into the Assisted Service Application 21

Use Case: Enrolling in the Assisted Service Application 23

Use Case: Logging Out of the Assisted Service Application 24

Use Case: CSR Forgot Password 25

Use Case: Resetting a Forgotten Password 26

Chapter 4: Servicing Billing Accounts

Use Case: Searching for a Billing Account 29

Use Case: Viewing a List of Billing Accounts 32

Chapter 5: Servicing Customer Users

Use Case: Searching for a User 35

Use Case: Viewing a List of Self-Service Users 36

Use Case: Deleting a User 38

Use Case: Impersonating a User 40

Chapter 6: Servicing Companies

Use Case: Searching for a Company 41

Use Case: Viewing a List of Companies 44

Use Case: Viewing a List of Company Administrators	45
Use Case: Viewing a Company Administrator's Details	46
Use Case: Editing a Company Administrator's Details	48
Use Case: Deleting a Company Administrator	49
Use Case: Adding a Company Administrator	51

Chapter 7: Managing Other Assisted Service Users

Use Case: Searching for an Assisted Service User	55
Use Case: Viewing an Assisted Service User's Information	57
Use Case: Editing an Assisted Service User's Information	59
Use Case: Creating a New Assisted Service User	62
Use Case: Deleting an Assisted Service User	64

Chapter 8: Managing a Personal Profile

Use Case: Updating a Personal Profile	67
Use Case: Changing a Personal Password	71
Use Case: Setting or Changing a Security Question	72
Use Case: Setting a Preferred Language	73

Chapter 9: Oracle Billing Insight Application Access Reports

Use Case: Viewing a List of User Access Reports	75
Use Case: Viewing the Lockout Out Customer Accounts Report	76
Use Case: Viewing the Locked Out Customer Service Representatives Report	78
Use Case: Viewing the Locked Out Accounts Reactivated Report	79

Chapter 10: Enterprise Metric Reports

Use Case: Selecting User Metrics Reports	81
Use Case: Viewing the Users Signed In Report	82
Use Case: Viewing the Unique Users Report	85
Use Case: Viewing the Enrolled Users Report	88
Use Case: Viewing a List of Billing Metrics Reports	90
Use Case: Viewing the Billing Files Report	91

Index

1

What's New in This Release

What's New in Assisted Service Application Guide for Oracle Billing Insight, Version 7.0

This is the first version of Assisted Service Application Guide for Oracle Billing Insight.

New Application Features Reflected in This Guide

Use cases for this application were written and organized to reflect the all-new Assisted Service application, which features:

- Responsive Web Design in the user interface
- An updated look-and-feel through the use of Cascading Style Sheets
- The new Merchant user role, who can access ROI enterprise metric reports for user activity and bill load data
- Expanded access to Self-Service functionality, including:
 - Billing account analytics
 - Hierarchy management
 - Full payment capabilities and refund processing

NOTE: Where the view of customer data derives from the Assisted Service application functionality, the reader is referred to *Self-Service Application Guide for Oracle Billing Insight* for use case detail.

This book reflects the following name changes in this version:

- The product name changed to Oracle Billing Insight.
- The Customer Service Representative application name changed to the Assisted Service application.
- The Billing and Payment application name changed to the Self-Service application.

2

Overview of the Assisted Service Application

This chapter describes general features in the Oracle Billing Insight Assisted Service application. It includes the following topics:

- [About This Guide on page 9](#)
- [About the Assisted Service Application on page 9](#)
- [Assisted Service Application User Roles on page 10](#)
- [Common UI Elements on page 13](#)
- [Common Exceptions on page 19](#)

About This Guide

This guide is intended as a reference for programmers who are planning the customization and implementation of the Assisted Service application for an organization; it is not a user guide.

The Assisted Service application is preconfigured with Oracle Billing Insight, and contains the general use case functions and interface described in this guide.

The customer-specific content that agents can view in the Assisted Service application is derived from the particular customer's billing, payment, and personal data, based on his or her user role and privileges, and billing or business hierarchy position (if any) in the Self-Service application. This guide refers the reader to *Self-Service Application Guide for Oracle Billing Insight* for details where necessary.

All use cases described in this guide assume that data has been loaded into Oracle Billing Insight. For details about loading data, see *Administration Guide for Oracle Billing Insight*.

For information about creating a custom implementation of the Assisted Service application, see *Implementation Guide for Oracle Billing Insight*.

About the Assisted Service Application

The Assisted Service application enables agent users, such as customer service representatives, to provide effective customer service to business and consumer users.

Assisted Service application agents can search for and view customer data and perform actions on behalf of customers from within the Assisted Service application. For each user, the agent can see the same functions and data that the user can, with the same privileges as the customer user's assigned role.

The use of Responsive Web Design allows the same application to be used across platforms and devices including mobile devices, tablets, and browsers. The Self-Service application can also be embedded in CRM applications.

Assisted Service Application User Roles

The Assisted Service application use cases are available to users based on the assigned user role and the privileges associated with the role.

Oracle Billing Insight preconfigures the following user roles for accessing the Assisted Service application:

- **CSRAdministrator.** An administrator of the Assisted Service application can create and manage other Assisted Service users, update user profiles, view customer account and Assisted Service user lockout reports, reactivate customer accounts or Assisted Service users, and deleting Assisted Service users.

CSRAdministrators can also access all agent functionality for assisting customers, with the same privileges as the end user's assigned role and hierarchy position (if any). CSRAdministrators can search for and view the same billing account, user, and company data available to an end user and perform any function on behalf of a user (same as a CSR user).

The CSRAdministrator role is assigned by a CSRAdministrator when creating a new Assisted Service application user. (The initial CSRAdministrator is created by the bootstrap user ID after installation.)

- **CSR.** A customer service representative user, or agent, can access all functionality for assisting customers, with the same privileges as the end user's assigned role and hierarchy position (if any). CSR agents can search for and view the same billing account, user, and company data available to an end user and perform any function on behalf of a user.

The CSR user role is assigned by a CSRAdministrator when creating a new Assisted Service application user.

- **Merchant.** A merchant is a business owner user who can view user and billing metric reports for the enterprise only.

The Merchant role is assigned by a CSRAdministrator when creating a new Assisted Service application user.

For details on the Assisted Service application functionality that each user role can access, see *Implementation Guide for Oracle Billing Insight*.

The following sample Assisted-Service application pages show the different Main Menu and login landing pages for each user role:

- ["Login Landing Page for the CSRAdministrator User" on page 11](#)
- ["Login Landing Page for the CSR User" on page 12](#)
- ["Login Landing Page for the Merchant User" on page 12](#)

Login Landing Page for the CSRAdministrator User

When a CSRAdministrator logs in, the Search page displays with the Main Menu options shown in Figure 1.

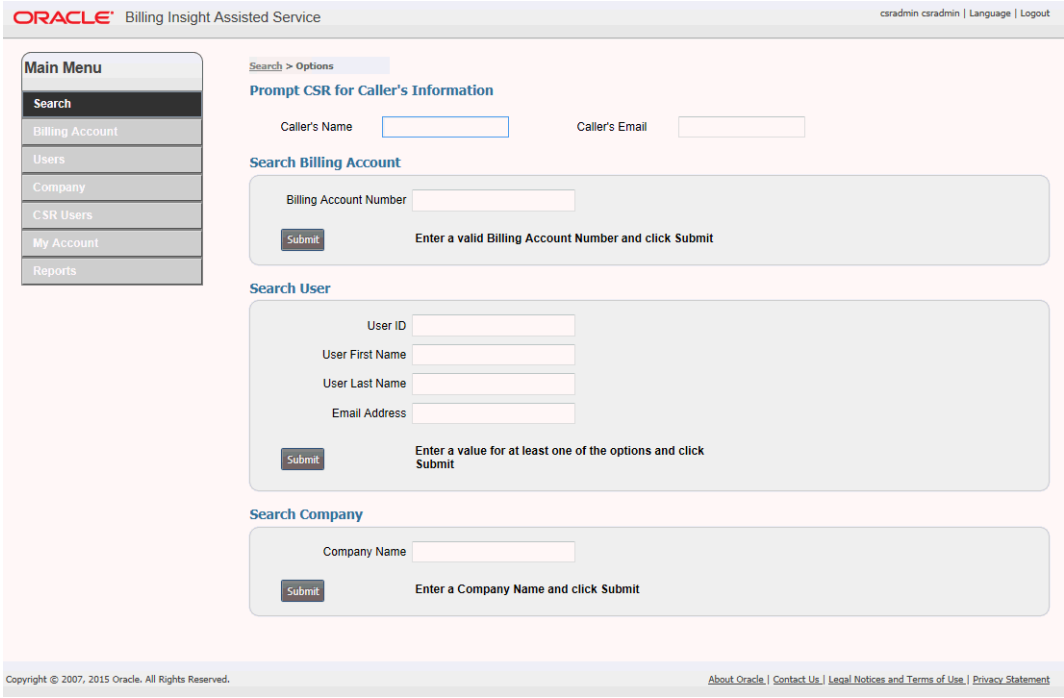


Figure 1. Login Landing Page for the CSRAdministrator User Role

Login Landing Page for the CSR User

When a CSR user logs in, the Search page displays with the Main Menu options shown in [Figure 2](#).

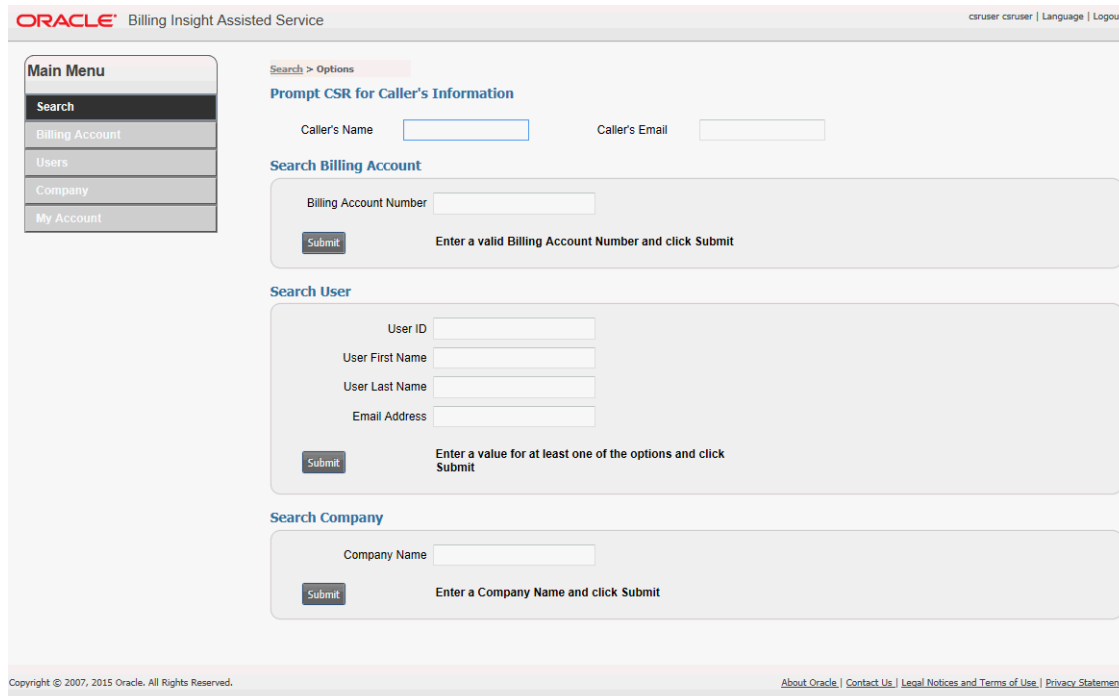


Figure 2. Login Landing Page for the CSR User Role

Login Landing Page for the Merchant User

When the Merchant logs in, the User Metrics page displays with the Main Menu options shown in [Figure 3](#).

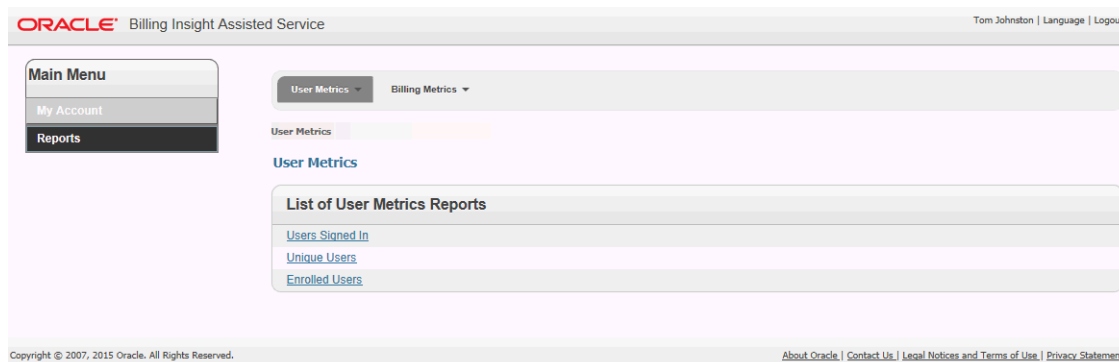


Figure 3. Login Landing Page for the Merchant User Role

Common UI Elements

Pages in the Assisted Service application share some common user interface elements for navigating and searching for information.

These elements frame the main page area that displays user data.

Common UI elements in the Assisted Service application are:

- **Masthead.** The masthead displays at the top of each page and displays the application name, user name, and links for choosing a language and logging out. For details, see [“Masthead Element” on page 13](#).
- **Mailing Address module (For consumer data only, if Web Services are enabled).** The Mailing Address module displays in all pages that a B2C User accesses and displays the user’s address.
- **Report Context module (Business users only).** Report context information appears on the left side of each page, showing the name of the company, hierarchy, and position the user is assigned to, and which defines the scope of the report data displayed on the page. For details, see [“Report Context Module” on page 14](#).
- **Scheduled Payments module (Not shown for prepaid accounts).** In the payment-related use cases, a list of scheduled payments appears on the left side of each page in payment-related use cases, showing the payments scheduled by account number and date. For details, see [“Scheduled Payments Module” on page 15](#).
- **Main Menu and Tab menus.** A Main Menu and Tab menus on each page provide navigation for individual functions. Each Assisted Service user role (CSRAdministrator, CSR, and Merchant) see different sets of tab menus. For details, see [“Main Menu and Tab Menus” on page 15](#).
- **Logical Paths.** Logical paths show the navigation path to each page and provide live links for navigating back. For details, see [“” on page 16](#).
- **Footer module.** The footer displays at the bottom of each screen and displays legal notices and provider contact links. For details, see [“Footer Element” on page 17](#).
- **Paging element.** When needed, the paging element appears to let users navigate multiple report pages. For details, see [“Paging Element” on page 18](#).
- **Download and printer-friendly element.** Where available, the download and printer-friendly features let users download and print reports. For details, see [“Download and Printer-Friendly Elements” on page 18](#).

Masthead Element

The masthead appears at the top of each page in the Assisted Service application, as shown in [Figure 4](#).



Figure 4. Masthead Element

The individual masthead components are described in [Table 1](#).

Table 1. Masthead Components

Component	Description
Text: ORACLE® Billing Insight Assisted Service	Standard Oracle company logo with copyright symbol, and the application name.
Data: User Name	Displays the name of the user logged into the current session.
Data: User Role	Displays the role of the user logged into the current session.
Text and link: Language	Displays the Change Language page. For details, see “Change Language Page Elements” on page 73 .
Text and link: Logout	Displays the Logout page. For details, see “Logout Page Elements” on page 25 .

Report Context Module

The Report Context module displays when viewing report information for a business or consumer user. The report context displays the following information, which identifies the user’s hierarchy position and defines the scope of the report:

- Text and data (business user data only): Company Name *Company name*
- Text and data (business user data only): Hierarchy Name *Hierarchy name*
- Text and data (business user data only): Position *Position*
- Text and data: User ID *User ID*

[Figure 5](#) shows the Report Context module.

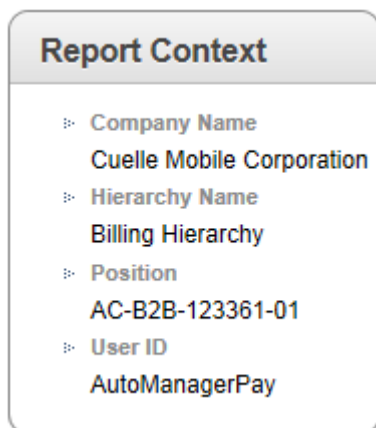


Figure 5. Report Context Module

Scheduled Payments Module

The Scheduled Payments module displays in all payment-related use cases, showing all payments scheduled for the selected account. The Scheduled Payments module does not appear for consumer prepay accounts.

The Scheduled Payments module contains the following elements:

- Text and data: Account Number *Account number*
- Text and data: Date *Date*
- Text (If applicable): No Scheduled Payments

Figure 6 shows the Scheduled Payments module.

Scheduled Payments	
Account Number	Date
AC-B2B-64521A	04/23/2015
More	

Figure 6. Scheduled Payments Module

Main Menu and Tab Menus

Main Menu options appear on the left side of each page and provide access to the functional areas of the Assisted Service application. Tab menus appear across the top of some pages, providing the next level of navigation within a functional area. Some tabs derive from the Self-Service application.

Main Menu and Tab Menus for CSRAdministrator and CSR User Roles

Table 2. lists the Main Menu and tab menu options in the Assisted Service application for the CSRAdministrator and CSR user roles.

Table 2. Main Menu Options and Tabs (CSRAdministrator and CSR User Roles Only)

Main Menu Option	Tab Menus
Search	None
Billing Account	Billing account tab menus derive from the Self-Service application pages. For details, see <i>Self-Service Application Guide for Oracle Billing Insight</i> .
Users	None
Company	None

Table 2. Main Menu Options and Tabs (CSRAdministrator and CSR User Roles Only)

Main Menu Option	Tab Menus
CSR Users (Available for the CSRAdministrator only)	<p>Pages in the CSR user-related use cases display the following tabs:</p> <ul style="list-style-type: none"> ■ View. Displays the View CSR Users page. ■ Create. Displays the Create CSR User Information page.
My Account	<p>Pages in the personal account-related use cases display the following tabs:</p> <ul style="list-style-type: none"> ■ Profile. Displays the My Profile page. ■ Preferences. Displays the Change Language page.
Reports (Available for the CSRAdministrator only)	<p>Pages in the reporting use cases display the following tabs:</p> <ul style="list-style-type: none"> ■ User Access. Displays the User Metrics page. This tab displays the following drop-down options: <ul style="list-style-type: none"> ■ Locked Out Customer Accounts. Displays the Locked Out Customer Accounts page. ■ Locked Out Customer Service Representatives. Displays the Locked Out Customer Service Representatives page. ■ Locked Out Accounts Reactivated. Displays the Locked Out Accounts page.

Main Menu and Tab Menus for the Merchant User Role

Table 3. lists the Main Menu and tab menu options in the Assisted Service application for the Merchant user role.

Table 3. Main Menu Options and Tabs (Merchant User Role Only)

Main Menu Option	Tab Menus
My Account	Pages in the personal account-related use cases display the following tabs: <ul style="list-style-type: none"> ■ Profile. Displays the My Profile page. ■ Preferences. Displays the Change Language page.
Reports	Pages in the reporting use cases display the following tabs: <ul style="list-style-type: none"> ■ User Metrics This tab displays the following drop-down options: <ul style="list-style-type: none"> ■ Users Signed In. Displays the Users Signed In page. ■ Unique Users. Displays the Unique Users page. ■ Enrolled Users. Displays the Enrolled Users. ■ Billing Metrics This tab displays the following drop-down options: <ul style="list-style-type: none"> ■ Billing Files. Displays the Billing Files page.

Logical Paths

Logical paths appear on each page and shows the tab and options leading to the page, for example:

- Assisted Service search functionality: Users > View
- When viewing an end user’s Dashboard: Payments > Make a Payment

Live links within the path let the user navigate back within the same functional tab area.

Figure 7 shows an example of the logical path element.

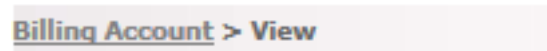


Figure 7. Logical Path Element

Footer Element

The footer displays at the bottom of each screen and displays legal notices and provider contact links.

Table 4 describes the elements of the footer that appears on Assisted Service application pages.

Table 4. Footer Components

Component	Description
Text: <i>Copyright</i> © 2007, 2015 Oracle. All Rights Reserved.	The current Oracle copyright statement.
Text and link: About Oracle	Displays the Oracle Web site.
Text and link: Contact Us	Displays the Contact Oracle page on the Oracle Web site.
Text and link: Legal Notices and Terms of Use	Displays Oracle’s Privacy Policy Overview on the Oracle Web site.
Text and link: Privacy Statement	Displays Oracle’s Privacy Policy Overview on the Oracle Web site.

Paging Element

The paging element displays on detail tables when the number of rows returned exceeds a configured value. Figure 8 shows an example of the Paging element.



Figure 8. Paging Element

Table 5 describes the components of the paging element.

Table 5. Paging Element Components

Component	Description
Paging <i>Num of Total</i>	Text and data.
Page field prompt	Field where the user can enter a specific page number.
Next and Prev buttons	Navigation buttons appear when applicable.

Download and Printer-Friendly Elements

Most reporting use cases derived from the Self-Service Application provide file download and printer-friendly options in the Assisted Service application.

Figure 9 shows an example of the Download and Printer-Friendly elements.

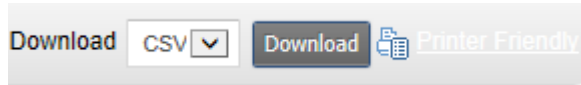


Figure 9. Download and Printer-Friendly Elements

Table 6 describes the components of the download and printer-friendly elements.

Table 6. Download and Printer-Friendly Components

Component	Description
Download	<p>This feature contains the following components:</p> <ul style="list-style-type: none"> ■ Text and drop-down list: Download <i>List</i> ■ Button: Download Action: Displays the File Download dialog for saving the report in the selected format.
Printer-Friendly	<p>This feature contains the following elements:</p> <ul style="list-style-type: none"> ■ Icon: Printer-friendly ■ Text and link: Printer-Friendly Link target: Displays the report in printer-friendly format and displays the Print dialog.

Common Exceptions

The following exceptions can occur throughout the Assisted Service application:

- Error messages display in response to the following:
 - The search criteria return no results.
 - One of the form fields is left blank when submitted.
 - Invalid characters are entered.
- The application times out and displays the Login page.

3

Enrolling as an Assisted Service User

This chapter describes the use cases for enrolling and logging into the Assisted Service application. It includes the following topics:

- [Use Case: Logging Into the Assisted Service Application on page 21](#)
- [Use Case: Enrolling in the Assisted Service Application on page 23](#)
- [Use Case: Logging Out of the Assisted Service Application on page 24](#)
- [Use Case: CSR Forgot Password on page 25](#)
- [Use Case: Resetting a Forgotten Password on page 26](#)

Use Case: Logging Into the Assisted Service Application

This use case lets an enrolled Assisted Service user with any user role (CSRAdministrator, CSR, or Merchant) log into the Assisted Service application. This use case also enables initial access to the Assisted Service application using the bootstrap user ID and password created during Oracle Billing Insight installation.

Main Path for Logging Into the Assisted Service Application

The main path occurs when a user runs the Assisted Service application and is presented with the Login page, enters his or her CSR user ID and password and then clicks Submit.

Alternate Paths for Logging Into the Assisted Service Application

The following alternate paths can occur in this use case:

- An administrator provided with the bootstrap user ID and password runs the Assisted Service application URL.
- A newly created user clicks the link in email.
- A user clicks the Login link on the Logout page.
- A user clicks Update on the Reset Password page.

Login Page Elements

Table 7 describes the elements of this page.

Table 7. Login Page Elements

Page Element	Description
Title Text	Customer Service Application
Login Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none">■ Module title text: Login■ Text and blank field for data entry: *CSR User ID <i>Field</i>■ Text and blank field for data entry: *Password <i>Field</i>■ Text and link: Forgot Password Link target: Displays the CSR Forgot Password page. For details, see “CSR Forgot Password Page Elements” on page 26.■ Button: Submit Action: Logs the user into the Assisted Service application and displays the Search page. If the bootstrap user ID and password are entered, then the CSR Enrollment page appears. For details, see “CSR Enrollment Page Elements” on page 23.■ Button: Reset Action: Clears the form fields.■ Text: *Required Field To take advantage of all of the application’s capabilities, your browser must have pop-ups and Javascript enabled.

Use Case: Enrolling in the Assisted Service Application

This use case lets a newly created user enroll in the Assisted Service application. A CSR ID must first be created by a CSRAdministrator and provided to the individual user for enrollment. This use case also enables an organization to create and enroll the initial CSRAdministrator, which only happens when logging in with the bootstrap user ID and password. (The bootstrap user ID and password are created during product installation.)

Main Path for Enrolling a New User

The main path occurs when a CSRAdministrator clicks the link in the email he or she receives, displaying the CSR Enrollment page.

Alternate Paths for Enrolling a New User

An administrator logs into Oracle Billing Insight using the bootstrap user ID and password created at product installation and creates a CSRAdministrator.

CSR Enrollment Page Elements

Table 8 describes the elements of this page.

Table 8. CSR Enrollment Page Elements

Page Element	Description
Title Text	CSR Enrollment
Enroll CSR Administrator Module (Initial Administrator Enrollment Only)	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: Enroll CSR Administrator ■ Text and blank field for data entry: *CSR Admin User ID <i>Field</i> ■ Text and blank field for data entry: *CSR Admin First Name <i>Field</i> ■ Text and blank field for data entry: *CSR Admin Last Name <i>Field</i> ■ Text and data: *CSR Admin Role <i>CSR Administrator</i> ■ Text and blank field for data entry: *CSR Admin Email Address <i>Field</i> ■ Text and blank field for data entry: *CSR Admin Confirm Email <i>Field</i> ■ Button: Submit Action: Enrolls the administrator in the Assisted Service application and displays the Create Personal Password and Security Question module on the same page. ■ Button: Cancel Action: Cancels the action.

Table 8. CSR Enrollment Page Elements

Page Element	Description
Create Personal Password and Security Question Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: Create Personal Password and Security Question ■ Text and blank field for data entry: *CSR User ID <i>Field</i> ■ Text and blank field for data entry: *Password <i>Field</i> ■ Text and blank field for data entry: *Confirm New Password <i>Field</i>
Create Personal Password and Security Question Module, continued	<ul style="list-style-type: none"> ■ Text and drop-down list: *Security Question <i>List</i> ■ Text and blank field for data entry: *Security Answer <i>Field</i> ■ Button: Submit Action: Enrolls the user in the Assisted Service application and displays the Login page. For details, see “Login Page Elements” on page 22. ■ Button: Cancel Action: Cancels the action.

Use Case: Logging Out of the Assisted Service Application

This use case lets a user log out of the Assisted Service application.

Main Path for Logging Out of the Assisted Service Application

The main path occurs when a user clicks Logout in the page header, and the Assisted Service application logs out the user and displays the Logout page.

Alternate Paths for Logging Out of the Assisted Service Application

The following alternate paths can occur in this use case:

- A user’s session times out, and the Assisted Service application automatically ends the session and displays the Login page.
- A user closes the browser during a session.

Logout Page Elements

Table 9 describes the elements of this page.

Table 9. Logout Page Elements

Page Element	Description
Title Text	Logout
Logout Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: Logout ■ Text, data, and link: You have successfully logged out. To ensure maximum protection of your personal information, we recommend that you close your <i>Browser Name</i>. Click here to <i>Login</i>. Link target: Clicking Link displays the Login page. For details, see “Login Page Elements” on page 22.

Use Case: CSR Forgot Password

This use case lets an Assisted Service application user answer the security question after forgetting his or her password.

Main Path for CSR Forgot Password

The main path occurs when a user forgets his or her password, and clicks Forgot Password on the Login page to display the CSR Forgot Password page.

Alternate Paths for CSR Forgot Password

No alternate paths occur in this use case.

CSR Forgot Password Page Elements

Table 10 describes the elements of this page.

Table 10. CSR Forgot Password Page Elements

Page Element	Description
Title Text	CSR Forgot Password
Enter CSR Credentials Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: Enter CSR Credentials ■ Text and blank field for data entry: *CSR User ID <i>Field</i> ■ Text and blank field for data entry: *CSR Email Address <i>Field</i> ■ Text and drop-down list: *Security Question <i>List</i> ■ Text and blank field for data entry: *Security Answer <i>Field</i> ■ Button: Submit Action: An email is sent to the user's email address with a link to the Reset Password page. For details, see "Use Case: Resetting a Forgotten Password" on page 26. ■ Button: Cancel Action: Cancels the action. ■ Text: * Required Field

Use Case: Resetting a Forgotten Password

This use case lets a user reset a forgotten password.

Main Path for Resetting a Forgotten Password

The main path occurs when a user clicks the link in the email he or she receives after answering the security question on the CSR Forgot Password page to display the Reset Password page.

Alternate Paths for Resetting a Forgotten Password

No alternate paths occur in this use case.

Reset Password Page Elements

Table 11 describes the elements of this page.

Table 11. Reset Password Page Elements

Page Element	Description
Title Text	Reset Password
Reset Password Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: Reset Password ■ Text and blank field for data entry: <i>*CSR User ID Field</i> ■ Text and blank field for data entry: <i>*New Password Field</i> ■ Text and blank field for data entry: <i>*Confirm Password Field</i> ■ Button: Update Action: Saves the CSR's new password and displays the Login page. For details, see "Login Page Elements" on page 22. ■ Button: Cancel Action: Cancels the action. ■ Text: <i>*Required Field</i>.

4

Servicing Billing Accounts

This chapter describes the use cases for Assisted Service agents (CSR or CSRAdministrator users) to service customer billing accounts. It includes the following topics:

- [Use Case: Searching for a Billing Account on page 29](#)
- [Use Case: Viewing a List of Billing Accounts on page 32](#)

Use Case: Searching for a Billing Account

This use case lets an Assisted Service agent search for a customer billing account. A billing account number remains selected until the agent selects another one. (The result of the last billing account search is stored in a cookie.)

Searching for a user embeds the Account Overview (Dashboard) within the Assisted Service application, showing the same data and functionality as would appear for the selected billing account in the Self-Service application.

An agent can use all the functionality shown on the embedded Account Overview (Dashboard). For details about the Account Overview (Dashboard) functionality and content, see *Self-Service Application Guide for Oracle Billing Insight*.

Main Path for Searching for a Billing Account

The main path occurs when an agent logs in, the agent enters a valid billing number on the Search page, clicks Submit to display the View Accounts page, then clicks the account number to embed the Self-Service Account Overview (Dashboard) page.

To view a sample Assisted Service page showing an embedded Dashboard for a billing account, see [“Sample Assisted Service Page With an Embedded Billing Account Overview” on page 32](#).

For details about Search page elements, see [“Search Page Elements” on page 30](#).

For details on the View Accounts page elements, see [“View Accounts Page Elements” on page 33](#).

Alternate Paths for Searching for a Billing Account

The following alternate paths can occur in this use case:

- An agent selects the Search option from the Main Menu to display the Search page.
- An agent enters a full or partial wildcard character search, then clicks Submit. Valid wildcard characters are % and *.
- An agent selects the Billing Account option from the Main Menu and enters a valid account number or a full or partial wildcard character search on the View Accounts page. For details, see [“View Accounts Page Elements” on page 33](#).

Search Page Elements

Table 12 describes the elements of this page.

Table 12. Search Page Elements

Page Element	Description
Page Title	Search (Title does not appear on screen)
Prompt CSR for Caller's Information	This module displays the following elements: <ul style="list-style-type: none"> ■ Module title text: Prompt CSR for Caller's Information ■ Text and blank field for data entry: Caller's Name <i>Field</i> ■ Text and blank field for data entry: Caller's Email <i>Field</i>
Search Billing Account Module	This module displays the following elements: <ul style="list-style-type: none"> ■ Module title text: Search Billing Account ■ Text and blank field for data entry: Billing Account Number <i>Field</i> ■ Text: Enter a valid Billing Account Number and click Submit. ■ Button: Submit Action: Searches for the billing account and embeds the Self-Service Dashboard for the account. For details, see "Sample Assisted Service Page With an Embedded Billing Account Overview" on page 32.

Table 12. Search Page Elements

Page Element	Description
Search User Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: Search User ■ Text and blank field for data entry: User ID <i>Field</i> ■ Text and blank field for data entry: User First Name <i>Field</i> ■ Text and blank field for data entry: User Last Name <i>Field</i> ■ Text and blank field for data entry: Email Address <i>Field</i> ■ Text: Enter a value for at least one of the options and click Submit. ■ Button: Submit Action: Displays the Self-Service Dashboard (overview) for the user within the Assisted Service application. For details, see “Sample Assisted Service Page With an Embedded User Dashboard (Overview)” on page 36.
Search Company Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: Search Company ■ Text and blank field for data entry: Company Name <i>Field</i> ■ Text: Enter a company name and click Submit. ■ Button: Submit Action: Displays the Self-Service Dashboard (overview) for the company within the Assisted Service application. For details, see “Sample Assisted Service Page With an Embedded Company Dashboard” on page 44.

Sample Assisted Service Page With an Embedded Billing Account Overview

Figure 10 shows the Assisted Service application with the Self-Service Account Overview (Dashboard) for a selected billing account.

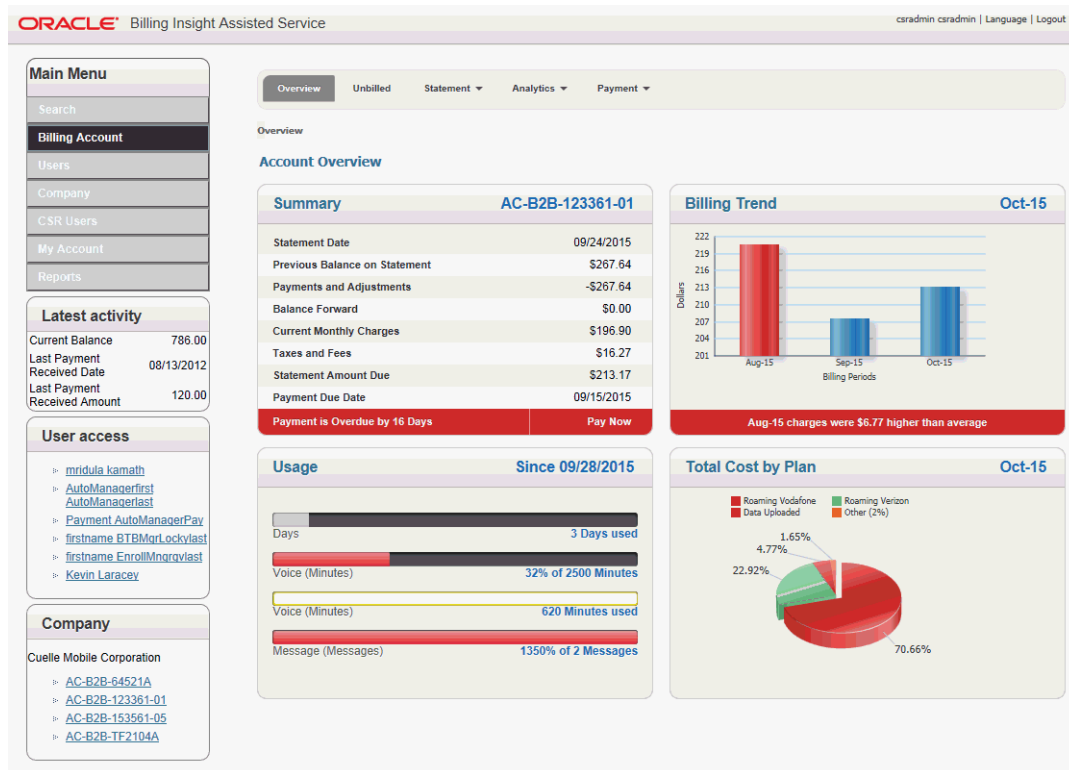


Figure 10. Self-Service Account Overview (Dashboard) for a Selected Billing Account

Use Case: Viewing a List of Billing Accounts

This use case lets an Assisted Service agent view a list of billing accounts.

Main Path for Viewing a List of Billing Accounts

The main path occurs when an agent enters a full or partial wildcard character in the Billing Account Number field on the Search page and clicks Submit to display the View Accounts page. Valid wildcard characters are % and *.

Alternate Paths for Viewing a List of Billing Accounts

An alternate path occurs when an agent does not currently have a billing account selected, and clicks Billing Account on the Main Menu, and enters a full or partial wildcard search on the View Accounts page.

View Accounts Page Elements

Table 13 describes the elements of this page.

Table 13. View Accounts Page Elements

Page Element	Description
Page Title Text	View Accounts
Prompt CSR for Caller's Information	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: Prompt CSR for Caller's Information ■ Text and blank field for data entry: Caller's Name <i>Field</i> ■ Text and blank field for data entry: Caller's Email <i>Field</i>
Search Accounts Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: Search Accounts ■ Text and blank field for data entry: Billing Account Number <i>Field</i> ■ Text: Enter a valid billing account number and click Submit. ■ Button: Submit Action: Displays the Self-Service Account Overview for the account. For details, see "Sample Assisted Service Page With an Embedded Billing Account Overview" on page 32.

Table 13. View Accounts Page Elements

Page Element	Description
Search Results Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text and data (One of the following): <ul style="list-style-type: none"> ■ Search on data: Search Results for Billing Account Number <i>Number</i> (<i>Number</i> items) ■ Wildcard search: Search Results for Billing Account Number (<i>Number</i> items) ■ Column titles: <ul style="list-style-type: none"> ■ Text and sorting link: Account Number ■ Text and sorting link: Account Type ■ Text and sorting link: Biller ID
Search Results Module, continued	<ul style="list-style-type: none"> ■ Column content: <ul style="list-style-type: none"> ■ Data and link: Account number Link target: Displays the Self-Service Account Overview for the account. For details, see “Sample Assisted Service Page With an Embedded Billing Account Overview” on page 32. ■ Data: Account type ■ Data: Biller ID

5

Servicing Customer Users

This chapter describes the use cases for Assisted Service agents (CSR or CSRAdministrator users) to service customer users. It includes the following topics:

- [Use Case: Searching for a User on page 35](#)
- [Use Case: Viewing a List of Self-Service Users on page 36](#)
- [Use Case: Deleting a User on page 38](#)
- [Use Case: Impersonating a User on page 40](#)

Use Case: Searching for a User

This use case lets an agent search for a Self-Service application user. Searching for a user embeds the user's Dashboard (overview) within the Assisted Service application page. The Dashboard contains user-specific content and functionality derived from the Self-Service application.

The user-specific content and available functionality is derived from the selected user's billing, payment, and personal data, based on his or her user role and privileges, and billing or business hierarchy position (if any) in the Self-Service application.

The agent can use all the functionality shown on the embedded Self-Service Dashboard. for the user. For details about the Dashboard functionality and content, see *Self-Service Application Guide for Oracle Billing Insight*.

Main Path for Searching for a User

The main path occurs when an agent logs in, the Assisted Service application displays the Search page, the agent enters a valid user ID, clicks Submit to display the View Accounts page, then clicks the user ID to embed the user's Self-Service Dashboard (overview) in the Assisted Service page.

To view a sample Assisted Service page showing an embedded Dashboard for a user, see "[Sample Assisted Service Page With an Embedded User Dashboard \(Overview\)](#)" on page 36.

For details about Search page elements, see "[Search Page Elements](#)" on page 30.

For details about View Users page elements, see "[View Users Page Elements](#)" on page 37.

Alternate Paths for Searching for a User

The following alternate paths can occur in this use case:

- An agent selects the Search option from the Main Menu to display the Search page.
- An agent enters a full or partial wildcard character search in one of the user fields and clicks Submit. Valid wildcard characters are % and *.
- An agent enters a value in one or more of the user fields and clicks Submit.

- An agent selects the Users option from the Main Menu and enters a valid user ID or other full or partial search criteria on the View Users page. For details, see “View Users Page Elements” on page 37.

Sample Assisted Service Page With an Embedded User Dashboard (Overview)

Figure 11 shows the Assisted Service application with a selected user’s Self-Service Dashboard.

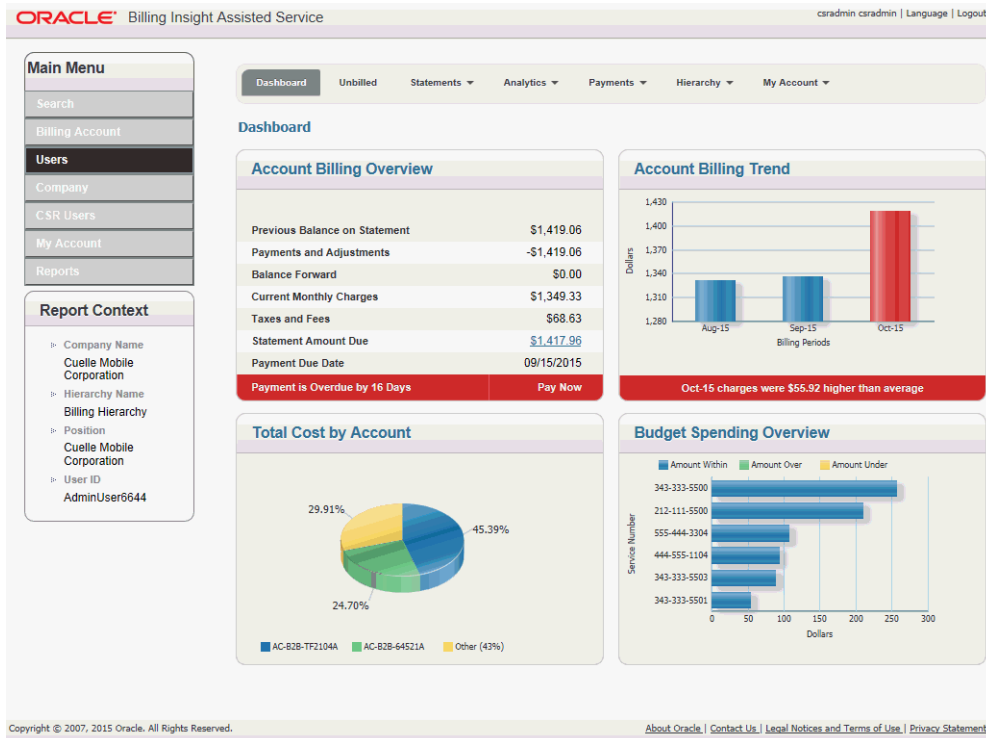


Figure 11. Assisted Service Application With a User’s Self-Service Dashboard

Use Case: Viewing a List of Self-Service Users

This use case lets an agent view a list of Self-Service application users.

Main Path for Viewing a List of Self-Service Users

The main path occurs when an agent selects Users from the Main Menu, enters a full or partial wildcard search on one or more of the user-related fields, and then clicks Submit to display the View Users page. Valid wildcard characters are % and *. For details about View Users page elements, see “View Users Page Elements” on page 37.

Alternate Paths for Viewing a List of Self-Service Users

An alternate path occurs when an agent enters a full or partial wildcard character in one or more of the user-related fields on the Search page and clicks Submit. For details about Search page elements, see [“Search Page Elements” on page 30](#).

View Users Page Elements

[Table 14](#) describes the elements of this page.

Table 14. View Users Page Elements

Page Element	Description
Page Title Text	View Users
Search User Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: Search User ■ Text and blank field for data entry: User ID <i>Field</i> ■ Text and blank field for data entry: User First Name <i>Field</i> ■ Text and blank field for data entry: User Last Name <i>Field</i> ■ Text and blank field for data entry: Email Address <i>Field</i> ■ Text and drop-down list: Role <i>List</i> ■ Text and drop-down list: Status <i>List</i> ■ Text: Enter a value for at least one of the options and click Submit. ■ Button: Submit Action: Displays the Self-Service Dashboard (overview) for the user within the Assisted Service page. For details, see “Sample Assisted Service Page With an Embedded User Dashboard (Overview)” on page 36. ■ Button: Cancel Action: Cancels the action.

Table 14. View Users Page Elements

Page Element	Description
Search Results Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text and data (One of the following): <ul style="list-style-type: none"> ■ Search on data: Search Results for <i>Field_Searched Search_Criteria</i> (<i>Number</i> items) ■ Wildcard search: Search Results for <i>Field_Searched</i> (<i>Number</i> items) ■ Column titles: <ul style="list-style-type: none"> ■ Text and sorting link: User ID ■ Text and sorting link: Name ■ Text and sorting link: Role ■ Text and sorting link: Status ■ Text: Actions
Search Results Module, continued	<ul style="list-style-type: none"> ■ Column content: <ul style="list-style-type: none"> ■ Data and link: User ID Link target: Displays the user’s Self-Service Dashboard. For details, see <i>Self-Service Application Guide for Oracle Billing Insight</i>. ■ Data: First and last name ■ Data: Name ■ Data: Role ■ Data: Status ■ Text and link: Impersonate Link target: Opens a new window showing a view of the user’s Self-Service Dashboard. For details, see “Use Case: Impersonating a User” on page 40. ■ Text and link: Delete Link target: Displays the Delete User page. For details, see “Delete User Page Elements” on page 39.

Use Case: Deleting a User

This use case lets an agent delete a Self-Service application user.

Main Path for Deleting a Self-Service User

The main path occurs when an agent clicks Delete next to a user’s name on the View Users page to display the Delete User page.

Alternate Paths for Deleting a Self-Service User

No alternate paths occur in this use case.

Delete User Page Elements

Table 15 describes the elements of this page.

Table 15. Delete User Page Elements

Page Element	Description
Title text	Delete User
User Details Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: Delete User ■ Text: You are about to delete the user with the information associated below. ■ Text and data: User ID <i>User ID</i> ■ Text and data: *First Name <i>First name</i> ■ Text and data: Middle Name <i>Middle name</i> ■ Text and data: *Last Name <i>Last name</i> ■ Text and data: Address Line 1 <i>Address line 1</i> ■ Text and data: Address Line 2 <i>Address line 2</i> ■ Text and data: City <i>City</i> ■ Text and data: Country <i>Country</i> ■ Text and data: State <i>State</i> ■ Text and data: Postal Code <i>Postal code</i> ■ Text and data: Home Phone Number <i>Home phone number</i> ■ Text and data: Mobile Phone Number <i>Mobile phone number</i> ■ Text and data: Mobile Service Provider <i>Provider name</i> ■ Text and data: *Email <i>Email</i> ■ Text and data: *Role <i>Role</i> ■ Text and data: *Status <i>Status value</i> ■ Text: *Required Field ■ Button: Submit Action: Deletes the user and displays a success message. ■ Button: Back Action: Displays the View Users page.

Use Case: Impersonating a User

This use case lets an agent impersonate a user in the Self-Service application. When an agent impersonates a user, the user's Dashboard displays as it appears in the Self-Service application. The agent inherits the same rights and privileges as the user for the impersonation session, and can view the same information and perform the same actions.

Main Path for Impersonating a User

The main path occurs when an agent clicks Impersonate next to a user on the View User's page, and the user's Self-Service Dashboard displays. For details, see *Self-Service Application Guide for Oracle Billing Insight*.

Alternate Path for Impersonating a User

An alternate path can occur when an agent clicks Impersonate on the View Administrator's page for a company.

6

Servicing Companies

This chapter describes the use cases for Assisted Service agents (CSR or CSRAdministrator users) to service companies (customers). It includes the following topics:

- [Use Case: Searching for a Company on page 41](#)
- [Use Case: Viewing a List of Companies on page 44](#)
- [Use Case: Viewing a List of Company Administrators on page 45](#)
- [Use Case: Viewing a Company Administrator's Details on page 46](#)
- [Use Case: Editing a Company Administrator's Details on page 48](#)
- [Use Case: Deleting a Company Administrator on page 49](#)
- [Use Case: Adding a Company Administrator on page 51](#)

Use Case: Searching for a Company

This use case lets an agent search for a company. Searching for a company embeds a Self-Service Dashboard (overview) for the company within the Assisted Service application page. The Dashboard contains company-specific content and functionality derived from the Self-Service application.

The agent can use all the functionality shown on the embedded Self-Service Dashboard for the company. For details about the Dashboard functionality and content, see *Self-Service Application Guide for Oracle Billing Insight*.

Main Path for Searching for a Company

The main path occurs when an agent logs in, the Assisted Service application displays the Search page, the agent enters a valid company name, clicks Submit to display the View Company page, then clicks the company name to embed the Self-Service Account Dashboard (overview) for the company in the Assisted Service page.

To view a sample page showing an embedded Self-Service Dashboard (overview) for a company see ["Sample Assisted Service Page With an Embedded Company Dashboard" on page 44](#).

For details about Search page elements, see ["Search Page Elements" on page 30](#).

For details about View Companies page elements, see ["Use Case: Viewing a List of Company Administrators" on page 45](#).

Alternate Paths for Searching for a Company

The following alternate paths can occur in this use case:

- An agent selects the Search option from the Main Menu to display the Search page.

- An agent enters a full or partial wildcard character search in the Company Name field and clicks Submit. Valid wildcard characters are % and *.
- An agent selects Company from the Main Menu and enters a valid company name or other full or partial search criteria on the View Company page. For details, see [“Use Case: Viewing a List of Company Administrators” on page 45.](#)

View Company Page Elements

Table 16 describes the elements of this page.

Table 16. View Company Page Elements

Page Element	Description
Page Title	View Company
Prompt CSR for Caller Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: Prompt CSR for Caller’s Information ■ Text and field for data entry: Caller’s Name <i>Field</i> ■ Text and field for data entry: Caller’s Email <i>Field</i>
Search Company Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Text and blank field for data entry: Company Name <i>Field</i> ■ Text and drop-down list: Country <i>List</i> ■ Text and drop-down list: State <i>List</i> ■ Text and blank field for data entry: Company ID <i>Field</i> ■ Text and blank field for data entry: Postal Code <i>Field</i> ■ Text: Enter a value for at least one of the options and click Submit. ■ Button: Submit Action: Displays the Self-Service Dashboard (overview) for the company within the Assisted Service page. For details, see “Sample Assisted Service Page With an Embedded Company Dashboard” on page 44. ■ Button: Cancel Action: Clears the form fields.

Table 16. View Company Page Elements

Page Element	Description
Search Results Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text and data (One of the following): <ul style="list-style-type: none"> ■ Search on data: Search Results for <i>Field_Searched Search_Criteria</i> (<i>Number</i> items) ■ Wildcard search: Search Results for <i>Field_Searched</i> (<i>Number</i> items) ■ Column titles: <ul style="list-style-type: none"> ■ Text and sorting link: Company Name ■ Text and sorting link: Company ID ■ Text and sorting link: State ■ Text and sorting link: Country ■ Text and sorting link: Postal Code ■ Text: Actions
Search Results Module, continued	<ul style="list-style-type: none"> ■ Column content: <ul style="list-style-type: none"> ■ Data and link: Company Name Link target: Displays the Self-Service Dashboard (overview) for the company within the Assisted Service page. For details, see “Sample Assisted Service Page With an Embedded Company Dashboard” on page 44. ■ Data: Company ID ■ Data: State ■ Data: Country ■ Data: Postal Code ■ Data and link: Administrators Link target: Displays the View Administrators page. For details, see “View Administrators Page Elements” on page 45.

Sample Assisted Service Page With an Embedded Company Dashboard

Figure 12 shows the Assisted Service application with a selected company's Self-Service Dashboard

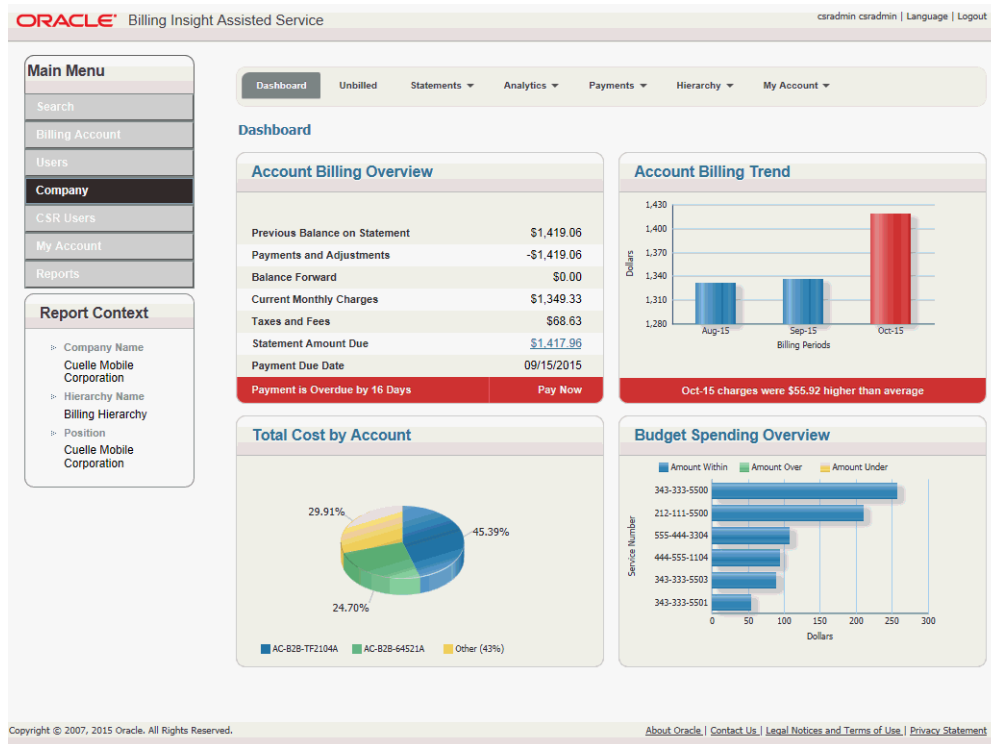


Figure 12. Self-Service Dashboard for a Selected Company

Use Case: Viewing a List of Companies

This use case lets an agent view a list of companies.

Main Path for Viewing a List of Companies

The main path occurs when an agent selects Company from the Main Menu, then enters a full or partial wildcard search on one or more of the company-related fields, and then clicks Submit to display the View Companies page. Valid wildcard characters are % and *. For details about View Companies page elements, see [“Use Case: Viewing a List of Company Administrators” on page 45.](#)

Alternate Paths for Viewing a List of Companies

An alternate path occurs when an agent enters a full or partial wildcard character in one or more of the company-related fields on the Search page and clicks Submit. For details about Search page elements, see [“Search Page Elements” on page 30.](#)

Use Case: Viewing a List of Company Administrators

This use case lets an agent view a list of a company's Admin users.

Main Path for Viewing a List of Company Administrators

The main path occurs when an agent clicks Administrators next to a company name on the View Company page to display the View Administrators page.

Alternate Paths for Viewing a List of Company Administrators

No alternate paths occur with this use case.

View Administrators Page Elements

Table 17 describes the elements of this page.

Table 17. View Administrators Page Elements

Page Element	Description
Page Title	View Administrators
Search Administrators Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Text and blank field for data entry: Administrator First Name <i>Field</i> ■ Text and blank field for data entry: Administrator Last Name <i>Field</i> ■ Text and blank field for data entry: Company Name <i>Field</i> ■ Text: Enter a value for at least one of the options and click Submit. ■ Button: Submit Action: Searches for the administrator. ■ Button: Cancel Action: Cancels the action.

Table 17. View Administrators Page Elements

Page Element	Description
Search Results Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text and data (One or a combination of the following, for however many fields are searched on): <ul style="list-style-type: none"> ■ Search on data: Search Results for <i>Field name Criteria (Number items)</i> ■ Wildcard search: Search Results for <i>Field name (Number items)</i> ■ Column titles: <ul style="list-style-type: none"> ■ Text and sorting link: User ID ■ Text and sorting link: First Name ■ Text and sorting link: Last Name ■ Text and sorting link: Company ■ Text and sorting link: Status ■ Text: Action
Search Results Module, continued	<ul style="list-style-type: none"> ■ Column content: <ul style="list-style-type: none"> ■ Data and link: User ID ■ Data: First name ■ Data: Last name ■ Data: Company ■ Data: Status value <p>Text and link: Impersonate Link target: Displays the Self-Service application as the administrator. For details, see "Use Case: Impersonating a User" on page 40</p>

Use Case: Viewing a Company Administrator's Details

This use case lets an agent view a company administrator's details, such as name, address, phone numbers, email, role, and status.

Main Path for Viewing a Company Administrator's Details

The main path occurs when an agent searches for an administrator, then clicks the administrator's user ID on the View Administrator's page to display the Administrator Details dialog box.

Alternate Paths for Viewing a Company Administrator's Details

No alternate paths occur with this use case.

Administrator Details Dialog Box Elements

Table 18 describes the elements of this page.

Table 18. Administrator Details Dialog Box Elements

Page Element	Description
Title Text	Administrator Details
Administrator Details Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Text and data: User ID <i>User ID</i> ■ Text and data: First Name <i>First name</i> ■ Text and data: Middle Name <i>Middle name</i> ■ Text and data: Last Name <i>Last name</i> ■ Text and data: Company <i>Company name</i> ■ Text and data: Address Line 1 <i>Address line 1</i> ■ Text and data: Address Line 2 <i>Address line 2</i> ■ Text and data: City <i>City</i> ■ Text and data: State <i>State</i> ■ Text and data: Country <i>Country</i> ■ Text and data: Postal Code <i>Postal code</i> ■ Text and data: Home Phone Number <i>Home phone number</i> ■ Text and data: Mobile Phone Number <i>Mobile phone number</i> ■ Text and data: Mobile Service Provider <i>Provider name</i> ■ Text and data: Email <i>Email address</i> ■ Text and data: Role <i>Role (Admin)</i> ■ Text and data: Status <i>Status</i> ■ Button: Edit Action: Displays the Edit Administrator page. For details, see "Edit Administrator Page Elements" on page 48. ■ Button: Delete Action: Displays the Delete Administrator Details. For details, see "Delete Administrator Page Elements" on page 50.

Use Case: Editing a Company Administrator's Details

This use case lets an agent edit a company administrator's details.

Main Path for Editing a Company Administrator's Details

The main path occurs when an agent clicks Edit on the Administrator Details dialog box to display the Edit Administrator page.

Alternate Paths for Editing a Company Administrator's Details

No alternate paths occur with this use case.

Edit Administrator Page Elements

Table 19 describes the elements of this page.

Table 19. Edit Administrator Page Elements

Page Element	Description
Title Text	Edit Administrator
Edit Administrator Details Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Text and data: User ID <i>User ID</i> ■ Text and editable data: *First Name <i>First name</i> ■ Text and editable data: Middle Name <i>Middle name</i> ■ Text and editable data: *Last Name <i>Last name</i> ■ Text and data: *Company <i>Company name</i> ■ Text and editable data: *Address Line 1 <i>Address line 1</i> ■ Text and editable data: Address Line 2 <i>Address line 2</i> ■ Text and editable data: *City <i>City</i> ■ Text and drop-down list: *Country <i>List</i> ■ Text and editable data: *State <i>State</i> ■ Text and editable data: *Postal Code <i>Postal code</i>

Table 19. Edit Administrator Page Elements

Page Element	Description
Edit Administrator Details Module, continued	<ul style="list-style-type: none"> ■ Text and editable data: Home Phone Number <i>Home phone number</i> ■ Text and editable data: Mobile Phone Number <i>Mobile phone number</i> ■ Text and drop-down list: Mobile Service Provider <i>List</i> ■ Text and editable data: *Email <i>Email address</i> ■ Text and data: *Role <i>Role (Admin)</i> ■ Text and data: *Status <i>Status</i> ■ Text: *Primary Contact ■ Text and radio selection buttons: Button <i>Yes</i> Button <i>No</i>
Edit Administrator Details Module, continued	<ul style="list-style-type: none"> ■ Text: *Required field ■ Button: Submit Action: Saves the data. ■ Button: Cancel Action: Cancels the action.

Use Case: Deleting a Company Administrator

This use case lets an agent delete a company administrator.

Main Path for Deleting a Company Administrator

The main path occurs when an agent clicks Delete on the Administrator Details dialog box to display the Delete Administrator page.

Alternate Paths for Deleting a Company Administrator

No alternate paths occur with this use case.

Delete Administrator Page Elements

Table 20 describes the elements of this page.

Table 20. Delete Administrator Page Elements

Page Element	Description
Title Text	Delete Administrator
Delete Administrator Details Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Text and data: *User ID <i>User ID</i> ■ Text and data: *First Name <i>First name</i> ■ Text and data: Middle Name <i>Middle name</i> ■ Text and data: *Last Name <i>Last name</i> ■ Text and data: Company <i>Company name</i> ■ Text and data: *Address Line 1 <i>Address line 1</i> ■ Text and data: Address Line 2 <i>Address line 2</i> ■ Text and data: *City <i>City</i> ■ Text and data: *Country <i>Country</i> ■ Text and data: *State <i>State</i> ■ Text and data: *Postal Code <i>Postal code</i> ■ Text and data: Home Phone Number <i>Home phone number</i> ■ Text and data: Mobile Phone Number <i>Mobile phone number</i> ■ Text and data: Mobile Service Provider <i>Provider name</i> ■ Text and data: *Email <i>Email address</i> ■ Text and data: *Role <i>Role (Admin)</i> ■ Text and data: *Primary Contact <i>Yes or No</i> ■ Text: *Required field ■ Button: Submit Action: Deletes the company administrator. ■ Button: Cancel Action: Cancels the action.

Use Case: Adding a Company Administrator

This use case lets an agent add a new administrator for a company.

Main Path for Editing a Adding a Company Administrator

The main path occurs when an agent clicks Add New on the View Administrators page to display the Add Administrator Information page.

Alternate Paths for Adding a Company Administrator

No alternate paths occur with this use case.

Add Administrator Information Page Elements

Table 21 describes the elements of this page.

Table 21. Add Administrator Information Page Elements

Page Element	Description
Title Text	Add Administrator Information
Administrator Details Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: Administrator Details ■ Text and blank field for data entry: *User ID <i>Field</i> ■ Text and blank field for data entry: *First Name <i>Field</i> ■ Text and blank field for data entry: Middle Name <i>Field</i> ■ Text and blank field for data entry: *Last Name <i>Field</i> ■ Text and data: Company Name <i>Company name</i> ■ Text and blank field for data entry: Address Line 1 <i>Field</i> ■ Text and blank field for data entry: Address Line 2 <i>Field</i> ■ Text and blank field for data entry: City <i>Field</i> ■ Text and drop-down list: Country <i>List</i> ■ Text and drop-down list: State <i>List</i>

Table 21. Add Administrator Information Page Elements

Page Element	Description
Administrator Details Module, continued	<ul style="list-style-type: none"> ■ Text and blank field for data entry: *Postal Code <i>Field</i> ■ Text and blank field for data entry: Home Phone Number <i>Field</i> ■ Text and blank field for data entry: Mobile Phone Number <i>Field</i> ■ Text and drop-down list: Mobile Service Provider <i>List</i> ■ Text and blank field for data entry: *Email <i>Field</i> ■ Text and blank field for data entry: *Confirm Email <i>Field</i>
Administrator Details Module, continued	<ul style="list-style-type: none"> ■ Text and data: *Role <i>Role (Admin)</i> ■ Text and radio buttons: *Primary Contact <i>Button Yes Button No</i> ■ Text: *Required field ■ Button: Submit Action: Saves the data. ■ Button: Back Action: Displays the View Company page. ■ Button: Cancel Action: Cancels the action.

Confirm Administrator Information Page Elements

Table 22 describes the elements of this page.

Table 22. Confirm Administrator Information Page Elements

Page Element	Description
Title Text	Confirm Administrator Information
Administrator Details Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: Administrator Details ■ Text and data: *User ID <i>User ID</i> ■ Text and data: *First Name <i>First name</i> ■ Text and data: Middle Name <i>Name</i> ■ Text and data: *Last Name <i>Name</i> ■ Text and data: Company Name <i>Company name</i> ■ Text and data: Address Line 1 <i>Address line 1</i> ■ Text and data: Address Line 2 <i>Address line 2</i> ■ Text and data: City <i>City</i> ■ Text and data: Country <i>Country</i> ■ Text and data: State <i>State</i> ■ Text and data: Postal Code <i>Code</i> ■ Text and data: Home Phone Number <i>Number</i> ■ Text and data: Mobile Phone Number <i>Number</i> ■ Text and data: Mobile Service Provider <i>List</i> ■ Text and data: *Email <i>Email</i> ■ Text and data: *Confirm Email <i>Email</i> ■ Text and data: *Role <i>Admin</i> ■ Text and data: *Primary Contact <i>Yes or No</i> ■ Text: *Required field ■ Button: Submit Action: Saves the data and displays a success message. ■ Button: Back Action: Displays the View Company page.

7

Managing Other Assisted Service Users

This chapter describes use cases for a CSRAdministrator to service other Assisted Service users, including other CSRAdministrators, CSRs, and Merchant users. It includes the following topics:

- [Use Case: Searching for an Assisted Service User on page 55](#)
- [Use Case: Viewing an Assisted Service User's Information on page 57](#)
- [Use Case: Editing an Assisted Service User's Information on page 59](#)
- [Use Case: Creating a New Assisted Service User on page 62](#)
- [Use Case: Deleting an Assisted Service User on page 64](#)

Use Case: Searching for an Assisted Service User

This use case lets a CSRAdministrator search for all Assisted Service application users.

Main Path for Searching for a User

The main path occurs when a CSRAdministrator selects CSR Users from the Main Menu, and enters the user ID on the View CSR Users page.

Alternate Paths for Searching for a User

The following alternate paths can occur in this use case:

- A CSRAdministrator specifies the first and last name of the user, the user's email address, role, or status value on the View CSR Users page, then clicks Submit.
- A CSRAdministrator enters a full or partial wildcard character search in one or more of the fields on the View CSR Users page, then clicks Submit. Valid wildcard characters are % and *.

View CSR Users Page Elements

Table 23 describes the elements of this page.

Table 23. View CSR Users Page Elements

Page Element	Description
Page Title	View CSR Users
Search CSR Users Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none">■ Module title text: Search CSR Users■ Text and blank field for data entry: CSR User ID <i>Field</i>■ Text and blank field for data entry: CSR First Name <i>Field</i>■ Text and blank field for data entry: CSR Last Name <i>Field</i>■ Text and blank field for data entry: CSR Email <i>Field</i>■ Text and drop-down list: CSR Role <i>List</i>■ Text and drop-down list: Status <i>List</i>■ Text: Enter a value for at least one of the options and click Submit.■ Button: Submit Action: Searches for the CSR and displays the Search Results module.■ Button: Cancel Action: Cancels the action.

Table 23. View CSR Users Page Elements

Page Element	Description
Search Results Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text and data (One of the following): <ul style="list-style-type: none"> ■ Search on data: Search Results for <i>Field_Searched Search_Criteria</i> (<i>Number</i> items) ■ Wildcard search: Search Results for <i>Field_Searched</i> (<i>Number</i> items) ■ Column titles: <ul style="list-style-type: none"> ■ Text and sorting link: CSR User ID ■ Text and sorting link: CSR First Name ■ Text and sorting link: CSR Last Name ■ Text and sorting link: CSR Role ■ Text and sorting link: Status
Search Results Module, continued	<ul style="list-style-type: none"> ■ Column content: <ul style="list-style-type: none"> ■ Data and link: CSR user ID Link target: Displays the CSR User Information dialog box. For details, see “Use Case: Viewing an Assisted Service User’s Information” on page 57. ■ Data: CSR first name ■ Data: CSR last name ■ Data: CSR role ■ Data: CSR status

Use Case: Viewing an Assisted Service User’s Information

This use case lets a CSRAdministrator view details about another Assisted Service user, including the user’s name, address, phone numbers, service provider, email address, role, and status.

Main Path for Viewing an Assisted Service User’s Information

The main path occurs when a CSRAdministrator searches for an agent user, then clicks a CSR user ID on the View CSR Users page, to display the CSR User Information dialog with the agent’s details. For details on searching for an Assisted Service user, see [“Use Case: Searching for an Assisted Service User” on page 55.](#)

Alternate Paths for Viewing an Assisted Service User’s Information

No alternate paths occur with this use case.

CSR User Information Dialog Box Elements

Table 24 describes the elements of this dialog box.

Table 24. CSR User Information Dialog Box Elements

Page Element	Description
Dialog Box Title	CSR User Information
CSR User Information Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Text and data: CSR User ID <i>User ID</i> ■ Text and data: CSR First Name <i>First name</i> ■ Text and data: CSR Middle Name <i>Middle name</i> ■ Text and data: CSR Last Name <i>Last name</i> ■ Text and data: Address Line 1 <i>Address line 1</i> ■ Text and data: Address Line 2 <i>Address line 2</i> ■ Text and data: City <i>City</i> ■ Text and data: State <i>State</i> ■ Text and data: Country <i>Country</i> ■ Text and data: Postal Code <i>Postal code</i> ■ Text and data: Home Phone Number <i>Home phone number</i> ■ Text and data: Mobile Phone Number <i>Mobile phone number</i> ■ Text and data: Mobile Service Provider <i>Provider name</i> ■ Text and data: CSR Email <i>Email</i> ■ Text and data: CSR Role <i>Role</i> ■ Text and data: Status <i>Status</i> ■ Text and link: Edit Link target: Displays the Edit CSR User Information page. For details, see "Use Case: Editing an Assisted Service User's Information" on page 59. ■ Text and link: Delete Link target: Displays the Delete CSR User page. For details, see "Use Case: Deleting an Assisted Service User" on page 64.

Use Case: Editing an Assisted Service User's Information

This use case lets a CSRAdministrator edit another agent user's information, including name, address, phone numbers, service provider, and email address.

Main Path for Editing a Agent User's Information

The main path occurs when a CSRAdministrator clicks Edit on the CSR User Information dialog box to display the Edit CSR User Information page.

Alternate Paths for Editing a Agent User's Information

No alternate paths occur with this use case.

Edit CSR User Information Page Elements

Table 25 describes the elements of this page.

Table 25. Edit CSR User Information Page Elements

Page Element	Description
Title Text	Edit CSR User Information
CSR User Details Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: CSR User Details ■ Text and data: CSR User ID <i>User ID</i> ■ Text and editable data: *CSR First Name <i>First name</i> ■ Text and editable data: CSR Middle Name <i>Middle name</i> ■ Text and editable data: *CSR Last Name <i>Last name</i> ■ Text and editable data: Address Line 1 <i>Address line 1</i> ■ Text and editable data: Address Line 2 <i>Address line 2</i> ■ Text and editable data: City <i>City</i> ■ Text and drop-down list: Country <i>List</i> ■ Text and drop-down list: State <i>List</i> ■ Text and editable data: Postal Code <i>Postal code</i> ■ Text and editable data: Home Phone Number <i>Home phone number</i> ■ Text and editable data: Mobile Phone Number <i>Mobile phone number</i> ■ Text and drop-down list: Mobile Service Provider <i>List</i> ■ Text and editable data: *CSR Email <i>Email</i> ■ Text and drop-down list: *CSR Role <i>List</i> ■ Text and data: *Status <i>Status</i> ■ Button: Submit Action: Displays the Confirm CSR user Information page. For details, see "Confirm CSR User Information Page Elements" on page 61. ■ Button: Back Action: Displays the View CSR Users page. ■ Button: Cancel Action: Cancels the action. ■ Text: *Required Field

Confirm CSR User Information Page Elements

Table 26 describes the elements of this page.

Table 26. Confirm CSR User Information Page Elements

Page Element	Description
Title Text	Confirm CSR User Information
CSR User Details Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: CSR User Details ■ Text and data: CSR User ID <i>User ID</i> ■ Text and data: *CSR First Name <i>First name</i> ■ Text and data: CSR Middle Name <i>Middle name</i> ■ Text and data: *CSR Last Name <i>Last name</i> ■ Text and data: Address Line 1 <i>Address line 1</i> ■ Text and data: Address Line 2 <i>Address line 2</i> ■ Text and data: City <i>City</i> ■ Text and data: Country <i>Country</i> ■ Text and data: State <i>State</i> ■ Text and data: Postal Code <i>Postal code</i> ■ Text and data: Home Phone Number <i>Home phone number</i> ■ Text and data: Mobile Phone Number <i>Mobile phone number</i> ■ Text and data: Mobile Service Provider <i>Provider name</i> ■ Text and data: *CSR Email <i>Email</i> ■ Text and data: *CSR Role <i>Role</i> ■ Text and data: *Status <i>Status</i> ■ Button: Submit Action: Saves the data. ■ Button: Back Action: Displays the View CSR Users page. ■ Text: *Required Field

Use Case: Creating a New Assisted Service User

This use case lets a CSRAdministrator create new Assisted Service application users, including other CSRAdministrators, CSRs, and Merchant users.

Main Path for Creating a New Agent

The main path occurs when a CSRAdministrator selects CSR Users from the Main Menu, then clicks Create to display the Create CSR User Information page.

Alternate Paths for Creating a New Agent

An alternate path occurs when a CSRAdministrator clicks Create.

Create CSR User Information Page Elements

Table 27 describes the elements of this page.

Table 27. Create CSR User Information Page Elements

Page Element	Description
Title Text	Create CSR User Information
CSR User Details Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: CSR User Details ■ Text and blank field for data entry: *CSR User ID <i>Field</i> ■ Text and blank field for data entry: *CSR First Name <i>Field</i> ■ Text and blank field for data entry: CSR Middle Name <i>Field</i> ■ Text and blank field for data entry: *CSR Last Name <i>Field</i> ■ Text and blank field for data entry: Address Line 1 <i>Field</i> ■ Text and blank field for data entry: Address Line 2 <i>Field</i> ■ Text and blank field for data entry: City <i>Field</i> ■ Text and drop-down list: Country <i>List</i> ■ Text and drop-down list: State <i>List</i> ■ Text and blank field for data entry: Postal Code <i>Field</i> ■ Text and blank field for data entry: Home Phone Number <i>Field</i> ■ Text and blank field for data entry: Mobile Phone Number <i>Field</i> ■ Text and drop-down list: Mobile Service Provider <i>List</i> ■ Text and blank field for data entry: *CSR Email <i>Field</i> ■ Text and blank field for data entry: *CSR Confirm Email <i>Field</i> ■ Text and drop-down list: *CSR Role <i>List</i> ■ Text: *Required Field ■ Button: Submit Action: Displays the Confirm CSR User Information page. For details, see "Confirm CSR User Information Page Elements" on page 61. ■ Button: Cancel Action: Cancels the action.

Use Case: Deleting an Assisted Service User

This use case lets a CSRAdministrator delete an Assisted Service application user, including other CSRAdministrator, CSR, and Merchant users.

Main Path for Deleting an Assisted Service User

The main path occurs when a CSRAdministrator clicks Delete on the CSR User Information dialog box to display the Delete CSR User Information page.

Alternate Paths for Deleting an Assisted Service User

No alternate paths occur with this use case.

Delete CSR User Information Page Elements

Table 28 describes the elements of this page.

Table 28. Delete CSR User Information Page Elements

Page Element	Description
Title text	Delete CSR User
CSR User Details Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: CSR User Details ■ Text and data: CSR User ID <i>User ID</i> ■ Text and data: *CSR First Name <i>First name</i> ■ Text and data: CSR Middle Name <i>Middle name</i> ■ Text and data: *CSR Last Name <i>Last name</i> ■ Text and data: Address Line 1 <i>Address line 1</i> ■ Text and data: Address Line 2 <i>Address line 2</i> ■ Text and data: City <i>City</i> ■ Text and data: Country <i>Country</i> ■ Text and data: State <i>State</i> ■ Text and data: Postal Code <i>Postal code</i> ■ Text and data: Home Phone Number <i>Home phone number</i> ■ Text and data: Mobile Phone Number <i>Mobile phone number</i> ■ Text and data: Mobile Service Provider <i>Provider name</i> ■ Text and data: *CSR Email <i>Email</i> ■ Text and data: *CSR Role <i>Role</i> ■ Text and data: Status <i>Status</i> ■ Text: *Required Field ■ Button: Submit Action: Deletes the CSR. ■ Button: Back Action: Displays the View CSR Users page.

8

Managing a Personal Profile

This chapter describes the use cases for an Assisted Service application user to manage his or her personal profile and preferred language. It includes the following topics:

- [Use Case: Updating a Personal Profile on page 67](#)
- [Use Case: Changing a Personal Password on page 71](#)
- [Use Case: Setting or Changing a Security Question on page 72](#)
- [Use Case: Setting a Preferred Language on page 73](#)

Use Case: Updating a Personal Profile

This use case lets an Assisted Service application user update the information in his or her personal profile, including name, address phone numbers, mobile service number, and email address.

Main Path for Updating a Personal Profile

The main path occurs when a user selects My Account from the Main Menu to display the My Profile page.

Alternate Paths for Updating a Personal Profile

The following alternate paths can occur in this use case:

- A user clicks the Profile tab.
- A Merchant user selects My Accounts from the Main menu.

My Profile Page Elements

Table 29 describes the elements of this page.

Table 29. My Profile Page Elements

Page Element	Description
Title Text	My Profile
Personal Details Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: Personal Details ■ Text and data: CSR User ID <i>User ID</i> ■ Text and editable data: *First Name <i>First name</i> ■ Text and editable data: Middle Name ■ Text and editable data: *Last Name <i>Last name</i> ■ Text and editable data: Address Line 1 <i>Address line 1</i> ■ Text and editable data: Address Line 2 <i>Address line 2</i> ■ Text and editable data: City <i>City</i> ■ Text and drop-down list: *Country <i>List</i> ■ Text and drop-down list: *State <i>List</i>

Table 29. My Profile Page Elements

Page Element	Description
Personal Details Module, continued	<ul style="list-style-type: none"> ■ Text and editable data: *Postal Code <i>Postal code</i> ■ Text and editable data: Home Phone Number <i>Home phone number</i> ■ Text and editable data: Mobile Phone Number <i>Mobile phone number</i> ■ Text and drop-down list: Mobile Service Provider <i>List</i> ■ Text and editable data: *Email <i>Email</i> ■ Text and data (drop-down list for a CSR administrator): *Role <i>Role</i> or <i>List</i> ■ Text and data: *Status <i>Status</i> ■ Text: *Required Field ■ Text and link: Change Password Link target: Displays the Change Password page. For details, see “Change Password Page Elements” on page 71. ■ Text and link: Change Security Question Link target: Displays the Change Security Question page. For details, see “Change Security Question Page Elements” on page 72.
Personal Details Module, continued	<ul style="list-style-type: none"> ■ Button: Submit Action: Displays the Confirm Profile Information page. For details, see “Confirm Profile Information Page Elements” on page 70. ■ Button: Cancel Action: Cancels the action.

Confirm Profile Information Page Elements

Table 30 describes the elements of this page.

Table 30. Confirm Profile Information Page Elements

Page Element	Description
Title Text	Confirm Profile Information
Personal Details Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: Personal Details ■ Text and data: CSR User ID <i>User ID</i> ■ Text and data: *First Name <i>First Name</i> ■ Text and data: Middle Name <i>Middle Name</i> ■ Text and data: *Last Name <i>Last Name</i> ■ Text and data: Address Line 1 <i>Address line 1</i> ■ Text and data: Address Line 2 <i>Address line 2</i> ■ Text and data: City <i>City</i> ■ Text and data: Country <i>Country</i> ■ Text and data: State <i>State</i> ■ Text and data: Postal Code <i>Postal code</i> ■ Text and data: Home Phone Number <i>Home phone number</i> ■ Text and data: Mobile Phone Number <i>Mobile phone number</i> ■ Text and data: Mobile Service Provider <i>Provider name</i> ■ Text and data: *Email <i>Email</i> ■ Text and data: *Role <i>Role</i> ■ Text and data: *Status <i>Status</i> ■ Text: *Required Field ■ Button: Submit Action: Saves the data. ■ Button: Cancel Action: Cancels the action.

Use Case: Changing a Personal Password

This use case lets an Assisted Service application user change his or her own password.

Main Path for Changing a Password

The main path occurs when a user clicks Change Password on the My Profile page to display the Change Password page.

Alternate Paths for Changing a Password

No alternate paths occur in this use case.

Change Password Page Elements

Table 31 describes the elements of this page.

Table 31. Change Password Page Elements

Page Element	Description
Page Title Text	Change Password
Change Password Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: Change Password ■ Text and blank field for data entry: *Old Password <i>Field</i> ■ Text and blank field for data entry: *New Password <i>Field</i> ■ Text and blank field for data entry: *Confirm Password <i>Field</i> ■ Button: Submit Action: Saves the data. ■ Button: Back Action: Displays the My Profile page. ■ Button: Cancel Action: Cancels the action. ■ Text: *Required Field

Use Case: Setting or Changing a Security Question

This use case lets a user set or change his or her own security question.

Main Path for Setting a Security Question

The main path occurs when a user clicks Change Security Question on the My Profile page to display the Change Security Question page.

Alternate Paths for a Security Question

No alternate paths occur in this use case.

Change Security Question Page Elements

Table 32 describes the elements of this page.

Table 32. Change Security Question Page Elements

Page Element	Description
Page Title Text	Change Security Question
Change Security Question Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: Change Security Question ■ Text and blank field for data entry: *Security Question <i>Field</i> ■ Text and blank field for data entry: *Security Answer <i>Field</i> ■ Button: Submit Action: Saves the data. ■ Button: Back Action: Displays the My Profile page. ■ Button: Cancel Action: Cancels the action. ■ Text: *Required Field

Use Case: Setting a Preferred Language

This use case lets a user set his or her preferred language for the Assisted Service user interface.

Main Path for Changing the Preferred Language

The main path occurs when a user selects My Account from the Main Menu, then clicks Preferences to display the Change Language page.

Alternate Paths for Changing the Preferred Language

The following alternate paths can occur in this use case:

- A user clicks Language on the masthead.
- A user clicks Preferences.
- A Merchant user selects My Account from the Main Menu, and clicks Preferences.

Change Language Page Elements

Table 33 describes the elements of this page.

Table 33. Change Language Page Elements

Page Element	Description
Page Title Text	Change Language
User Preferences Module	This module displays the following elements: <ul style="list-style-type: none"> ■ Module title text: User Preferences ■ Text and drop-down list: *Select Language <i>List</i> ■ Text: *Required Field ■ Button: Submit Action: Saves the data. ■ Button: Cancel Action: Cancels the action.

9

Oracle Billing Insight Application Access Reports

This chapter describes the use cases for the CSRA Administrator for viewing user and account lockout reports and reactivating users. It includes the following topics:

- [Use Case: Viewing a List of User Access Reports on page 75](#)
- [Use Case: Viewing the Lockout Out Customer Accounts Report on page 76](#)
- [Use Case: Viewing the Locked Out Customer Service Representatives Report on page 78](#)
- [Use Case: Viewing the Locked Out Accounts Reactivated Report on page 79](#)

Use Case: Viewing a List of User Access Reports

This use case lets a CSRA Administrator view a list of and access management reports that provide information related to both customer accounts and Assisted Service users who have been locked out of an application.

Main Path for Viewing a List of User Access Reports

The main path occurs when a CSRA Administrator chooses Reports from the Main Menu, displaying the User Access page.

Alternate Paths for Viewing a List of User Access Reports

An alternate path occurs when a CSRA Administrator clicks User Access.

User Access Page Elements

Table 34 describes the elements of this page.

Table 34. User Access Page Elements

Page Element	Description
Page Title Text	User Access
User Access Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none">■ Module title text: User Access■ Text and link: Locked Out Customer Accounts Link target: Displays the Locked Out Customer Accounts page. For details, see “Use Case: Viewing the Lockout Out Customer Accounts Report” on page 76.■ Text and link: Locked Out Customer Service Representatives Link target: Displays the Locked Out Customer Service Representatives page. For details, see “” on page 77.■ Text and link: Locked Out Accounts Reactivated Link target: Displays the Locked Out Accounts Reactivated page. For details, see “Use Case: Viewing the Locked Out Accounts Reactivated Report” on page 79.

Use Case: Viewing the Lockout Out Customer Accounts Report

This use case lets a CSRA Administrator view the Locked Out Customer Accounts report, which contains a list of customer users that have been locked out of the Self-Service application. The CSRA Administrator can also reactivate a locked-out Self-Service customer.

Main Path for Viewing the Locked Out Customer Accounts Report

The main path occurs when a CSRA Administrator selects Reports from the Main Menu, then clicks Locked Out Customer Accounts to display the Locked Out Customer Accounts page.

Alternate Paths for Viewing the Locked Out Customer Accounts Report

An alternate path occurs when a CSRA Administrator clicks User Access, and selects Locked Out Customer Accounts from the drop-down tab menu.

Locked Out Customer Accounts Page Elements

Table 35 describes the elements of this page.

Table 35. Locked Out Customer Accounts Page Elements

Page Element	Description
Page Title Text	Locked Out Customer Accounts
Locked Out Customer Accounts Report Details Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text and data: Locked Out Customer Accounts Report Details (<i>Number</i> items) ■ Column titles: <ul style="list-style-type: none"> ■ Text and sorting link: User ID ■ Text and sorting link: Account Number ■ Text and sorting link: First Name ■ Text and sorting link: Last Name ■ Text and sorting link: User Role ■ Text and sorting link: Lockout Reason ■ Text: Actions ■ Column content: <ul style="list-style-type: none"> ■ Data: User ID ■ Data: Account number ■ Data: First name ■ Data: Last name ■ Data: User role ■ Data: Lockout reason ■ Text and link: Re-Activate Link action: Reactivates a locked-out customer account.

Use Case: Viewing the Locked Out Customer Service Representatives Report

This use case lets a CSRA Administrator view the Locked Out Customer Service Representatives report, which contains a list of Assisted Service users who have been locked out of the Assisted Service application. A CSRA Administrator can also reactivate a locked-out Assisted Service user.

Main Path for Viewing the Locked Out Customer Service Representatives Report

The main path occurs when a CSRA Administrator selects Reports from the Main Menu, and then clicks Locked Out Customer Service Representatives to display the Locked Out Customer Service Representatives page.

Alternate Paths for Viewing the Locked Out Customer Service Representatives Report

An alternate path occurs when a CSRA Administrator clicks User Access, and selects Locked Out Customer Service Representatives from the drop-down tab menu.

Locked Out Customer Service Representatives Page Elements

Table 36 describes the elements of this page.

Table 36. Locked Out Customer Service Representatives Page Elements

Page Element	Description
Page Title Text	Locked Out Customer Service Representatives
Locked Out Customer Service Representatives Details Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text and data: Locked Out Customer Service Representatives Report Details (<i>Number</i> items) ■ Column titles: <ul style="list-style-type: none"> ■ Text and sorting link: User ID ■ Text and sorting link: First Name ■ Text and sorting link: Last Name ■ Text and sorting link: User Role ■ Text and sorting link: Lockout Reason ■ Text: Actions ■ Column content: <ul style="list-style-type: none"> ■ Data: CSR user ID ■ Data: First name ■ Data: Last name ■ Data: User role ■ Data: Lockout reason ■ Text and link: Re-Activate <p>Link action: Reactivates a locked-out customer account.</p>

Use Case: Viewing the Locked Out Accounts Reactivated Report

This use case lets a CSRA Administrator view the Locked Out Accounts Reactivated report, which contains a list of both Self-Service customer accounts and Assisted Service users that have been reactivated.

Main Path for Viewing the Locked Out Accounts Reactivated Report

The main path occurs when a CSRA Administrator chooses Reports from the Main Menu, clicks User Access, and then clicks Locked Out Accounts Reactivated to display the Locked Out Accounts Reactivated page.

Alternate Paths for Viewing the Locked Out Accounts Reactivated Report

An alternate path occurs when a CSRAdministrator clicks User Access, and selects Locked Out Accounts Reactivated from the drop-down tab menu.

Locked Out Accounts Reactivated Page Elements

Table 37 describes the elements of this page.

Table 37. Locked Out Accounts Reactivated Page Elements

Page Element	Description
Page Title Text	Locked Out Accounts Reactivated
Locked Out Accounts Reactivated Report Details Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text and data: Locked Out Accounts Reactivated Report Details (<i>Number</i> items) ■ Column titles: <ul style="list-style-type: none"> ■ Text and sorting link: User ID ■ Text and sorting link: First Name ■ Text and sorting link: Last Name ■ Text and sorting link: User Role ■ Text and sorting link: Lockout Reason ■ Text and sorting link: Date ■ Column content: <ul style="list-style-type: none"> ■ Data: CSR or customer user ID ■ Data: First name ■ Data: Last name ■ Data: User role ■ Data: Lockout reason ■ Date: Reactivation date and time

10 Enterprise Metric Reports

This chapter describes the use cases for a Merchant user to view enterprise-level metric reports. It includes the following topics:

- [Use Case: Selecting User Metrics Reports on page 81](#)
- [Use Case: Viewing the Users Signed In Report on page 82](#)
- [Use Case: Viewing the Unique Users Report on page 85](#)
- [Use Case: Viewing the Enrolled Users Report on page 88](#)
- [Use Case: Viewing a List of Billing Metrics Reports on page 90](#)
- [Use Case: Viewing the Billing Files Report on page 91](#)

Use Case: Selecting User Metrics Reports

This use case lets a Merchant user select user metric reports to view for the enterprise. User metric reports provide summary information about users accessing the Oracle Billing Insight applications, including:

- Users Signed In Report
- Unique Users Report
- Enrolled Users Report

Main Path for Selecting User Metrics Reports

The main path occurs when a Merchant user logs into the Assisted Service application to display the User Metrics page listing the available user metric reports.

Alternate Paths for Selecting User Metrics Reports

The following alternate paths can occur in this use case:

- A user clicks the User Metrics tab.
- A user selects Reports from the Main Menu.

User Metrics Page Elements

Table 38 describes the elements of this page.

Table 38. User Metrics Page Elements

Page Element	Description
Page Title Text	User Metrics
List of User Metrics Report Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: List of User Metrics Reports ■ Text and link: Users Signed in Link target: Displays the Users Signed In page. For details, see “Use Case: Viewing the Users Signed In Report” on page 82. ■ Text and link: Unique Users Link target: Displays the Unique Users page. For details, see “Use Case: Viewing the Unique Users Report” on page 85. ■ Text and link: Enrolled Users Link target: Displays the Enrolled Users page. For details, see “Use Case: Viewing the Enrolled Users Report” on page 88.

Use Case: Viewing the Users Signed In Report

This use case lets a Merchant user view the Users Signed In report, which shows the volume of all users, including administrators and all other user roles, who logged into each of the corresponding Oracle Billing Insight applications during the selected time period:

- Self-Service Application (business and consumer users)
- Assisted Service Application
- Command Center (production environment)

The Users Signed In report can present data in both tabular and graphical format, including a line, bar, or stacked bar chart. A user can choose another time period or chart type.

Main Path for Viewing the Users Signed In Report

The main path occurs when a Merchant clicks Users Signed In on the User Metrics page to display the Users Signed In page.

Alternate Paths for Viewing the Users Signed In Report

The following alternate paths can occur in this use case:

- A user clicks the User Metrics tab, and Users Signed In.
- A user clicks Reports on the Main Menu, and Users Signed In.

Users Signed In Page Elements

Table 39 describes the elements of this page.

Table 39. Users Signed In Page Elements

Page Element	Description
Page Title Text	Users Signed In
Prompt Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Text and drop-down list: Report Period <i>List</i> ■ Text and drop-down list: Chart Type <i>List</i> ■ Button: Submit <p>Action: Displays the selected report.</p>
Users Signed In Chart Module	<p>This module displays either a line or bar chart showing the volume of users that logged into the following applications during the selected time period:</p> <ul style="list-style-type: none"> ■ End Users. All users that logged into the Self-Service Application (business and consumer users). ■ CSRs. All users that logged into the Assisted Service Application. ■ Sys. Admin. All system administrators that logged into the Command Center (production environment). <p>The chart also contains a color key.</p>

Table 39. Users Signed In Page Elements

Page Element	Description
Report Details Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: Report Details for Last <i>Selected Time Frame</i> (<i>Number</i> items) ■ Text and link: Download Link target: A prompt to download or save the report in Microsoft Office Excel CSV file format. ■ Column titles: <ul style="list-style-type: none"> ■ One of the following text and sorting links: <ul style="list-style-type: none"> □ Hour □ Day □ Month ■ Text and sorting link: End Users ■ Text and sorting link: CSRs ■ Text and sorting link: Sys. Admin ■ Text and sorting link: Total ■ Column content: <ul style="list-style-type: none"> ■ One of the following fields: <ul style="list-style-type: none"> □ Data: Time □ Text and data: Today <i>Time</i> □ Text and data: Yesterday <i>Time</i> □ Data: Day of the week □ Data: <i>Month</i> and <i>Day</i> □ Data: <i>Month</i> and <i>Year</i> ■ Data: Number of end users ■ Data: Number of CSRs ■ Data: Number of system administrators ■ Data: Total number of users for the row

Table 39. Users Signed In Page Elements

Page Element	Description
Report Details Module, continued	<ul style="list-style-type: none"> ■ Content of the total row: <ul style="list-style-type: none"> ■ Text: Total ■ Data: Total number of end users ■ Data: Total number of CSRs ■ Data: Total number of system administrators ■ Data: Total number of users for the report

Use Case: Viewing the Unique Users Report

This use case lets a Merchant user view the Unique Users report, which shows the volume of unique users relative to the total number of users who signed into all Oracle Billing Insight applications during a selected time period:

- Self-Service Application (business and consumer users)
- Assisted Service Application
- Command Center (production environment)

The Unique Users report can present data in both tabular and graphical format, in line or bar chart. A user can choose another time period or chart type.

Main Path for Viewing the Unique Users Report

The main path occurs when a Merchant clicks Unique Users on the User Metrics page to display the Users Signed In page

Alternate Paths for Viewing the Unique Users Report

The following alternate paths can occur in this use case:

- A user clicks the User Metrics tab, and Unique Users.
- A user clicks Reports on the Main Menu, and Unique Users.

Unique Users Page Elements

Table 40 describes the elements of this page.

Table 40. Unique Users Page Elements

Page Element	Description
Page Title Text	Unique Users
Prompt Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Text and drop-down list: Report Period <i>List</i> ■ Text and drop-down list: Chart Type <i>List</i> ■ Button: Submit Action: Displays the selected report.
Unique Users Chart Module	<p>This module displays a line or bar chart showing the volume of unique users who accessed the Oracle Billing Insight applications relative to the total number of user sign-ins during a selected time period. The chart also contains a color key.</p>

Table 40. Unique Users Page Elements

Page Element	Description
Report Details Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: Report Details for Last <i>Selected Time Frame</i> (<i>Number</i> items) ■ Text and link: Download Link target: A prompt to download or save the report in Microsoft Office Excel CSV file format. ■ Column titles: <ul style="list-style-type: none"> ■ One of the following text and sorting links: <ul style="list-style-type: none"> □ Day □ Month ■ Text and sorting link: Unique Users ■ Text and sorting link: Total Users
Report Details Module, continued	<ul style="list-style-type: none"> ■ Column content: <ul style="list-style-type: none"> ■ One of the following fields: <ul style="list-style-type: none"> □ Data: <i>Month</i> and <i>Day</i> □ Data: <i>Month</i> and <i>Year</i> ■ Data: Number unique users ■ Data: Number of total users for the row ■ Content of the total row: <ul style="list-style-type: none"> ■ Text: Total ■ Data: Total number of unique users who logged in ■ Data: Total number of user logins

Use Case: Viewing the Enrolled Users Report

This use case lets a Merchant user view the Enrolled Users report, which shows the volume of all users, including administrators and all other user roles, who enrolled in each of the corresponding Oracle Billing Insight applications during the selected time period:

- Self-Service Application (business and consumer users)
- Assisted Service Application
- Command Center (production environment)

The Enrolled Users report can present data in both tabular and graphical format, including a line, bar, or stacked bar chart. A user can choose another time period or chart type.

Main Path for Viewing the Enrolled Users Report

The main path occurs when a Merchant clicks Enrolled Users on the User Metrics page to display the Enrolled Users page.

Alternate Paths for Viewing the Enrolled Users Report

The following alternate paths can occur in this use case:

- A user clicks the User Metrics tab, and Enrolled Users.
- A user clicks Reports on the Main Menu, and Enrolled Users.

Enrolled Users Page Elements

Table 41 describes the elements of this page.

Table 41. Enrolled Users Page Elements

Page Element	Description
Page Title Text	Enrolled Users
Prompt Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Text and drop-down list: Report Period <i>List</i> ■ Text and drop-down list: Chart Type <i>List</i> ■ Button: Submit Action: Displays the selected report.

Table 41. Enrolled Users Page Elements

Page Element	Description
Enrolled Users Chart Module	<p>This module displays a line, bar, or stacked bar chart showing the volume of Self-Service and Assisted Service application users that enrolled in one of the corresponding Oracle Billing Insight applications during a selected time period:</p> <ul style="list-style-type: none"> ■ End Users. All users that enrolled in the Self-Service Application (business and consumer users). ■ CSRs. All CSR users that enrolled in the Assisted Service Application. ■ Sys. Admin. All CSRAdministrators that enrolled in the Command Center (production environment). <p>The chart also contains a color key.</p>
Report Details Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: Report Details for Last <i>Selected Time Frame</i> (<i>Number</i> items) ■ Text and link: Download Link target: A prompt to download or save the report in Microsoft Office Excel CSV file format. ■ Column content: <ul style="list-style-type: none"> ■ One of the following fields: <ul style="list-style-type: none"> □ Data: Day of the week □ Data: <i>Month and Day</i> □ Data: <i>Month and Year</i> ■ Data: Number of end users ■ Data: Number of CSRs ■ Data: Number of system administrators ■ Data: Total number of users for the row

Table 41. Enrolled Users Page Elements

Page Element	Description
Report Details Module, continued	<ul style="list-style-type: none"> ■ Column titles: <ul style="list-style-type: none"> ■ One of the following text and sorting links: <ul style="list-style-type: none"> □ Day □ Month ■ Text and sorting link: End Users ■ Text and sorting link: CSRs ■ Text and sorting link: Sys. Admin ■ Text and sorting link: Total
Report Details Module, continued	<ul style="list-style-type: none"> ■ Content of the total row: <ul style="list-style-type: none"> ■ Text: Total ■ Data: Total number of end users ■ Data: Total number of CSRs ■ Data: Total number of system administrators ■ Data: Total number of users for the report

Use Case: Viewing a List of Billing Metrics Reports

This use case lets a Merchant user select billing metric reports to view for the enterprise. User metric reports provide summary information about billing data in the Oracle Billing Insight applications. Users can view the Billing Files report.

Main Path for Selecting Billing Metrics Reports

The main path occurs when a Merchant user clicks the Billing Metrics tab, displaying the Billing Metrics page listing the available reports.

Alternate Paths for Selecting Billing Metrics Reports

An alternate path occurs when a user selects Reports from the Main Menu, and clicks Billing Metrics.

Billing Metrics Page Elements

Table 42 describes the elements of this page.

Table 42. Billing Metrics Page Elements

Page Element	Description
Page Title Text	Billing Metrics
List of Billing Metrics Reports Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: List of User Metrics Reports ■ Text and link: Billing Files Link target: Displays the Billing Files page. For details, see Use Case: Viewing the Billing Files Report on page 91.

Use Case: Viewing the Billing Files Report

This use case lets a Merchant user view the Billing Files report, which shows a list of billing data files that were loaded during a selected time period, along with the load status, date, time elapsed, file size, and number of transactions in the file.

Main Path for Viewing the Billing Files Report

The main path occurs when a Merchant clicks the Reports option on the Main Menu, clicks the Billing Metrics tab, and Billing Files to display the Billing Files page.

Alternate Paths for Viewing the Billing Files Report

The following alternate paths can occur in this use case:

- A user clicks the Billing Metrics tab, and Billing Files.
- A user clicks Billing Files on the Billing Metrics page.

Billing Files Page Elements

Table 43 describes the elements of this page.

Table 43. Billing Files Page Elements

Page Element	Description
Page Title Text	Billing Files
Prompt Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Text and drop-down list: Billing Period From <i>List</i> ■ Text and drop-down list: To <i>List</i> ■ Button: Submit Action: Displays the selected report. ■ Download and printer-friendly elements
Billing Files Report Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text and data: Billing Files (<i>Number</i> items) ■ Column titles: <ul style="list-style-type: none"> ■ Text and sorting link: Status ■ Text and sorting link: Billing File Name ■ Text and sorting link: Load Date ■ Text and sorting link: Elapsed Time ■ Text and sorting link: File Size (MB) ■ Text and sorting link: No. Transactions ■ Column content: <ul style="list-style-type: none"> ■ Status icon ■ Data and link (if the load failed): Billing file name Link target: Displays the Billing File Error Log dialog. For details, see Table 44 on page 93. ■ Data: Load date ■ Data: Elapsed time ■ Data: File size ■ Data: Number of transactions

Billing File Error Log Dialog Box Elements

Table 44 describes the elements of this page.

Table 44. Billing File - Error Log Page Elements

Page Element	Description
Page Title Text	Billing File - Error Log
Report Module	<p>This module displays the following elements:</p> <ul style="list-style-type: none"> ■ Module title text: Billing Files - Error Log ■ Column titles: <ul style="list-style-type: none"> ■ Text: Billing File Name ■ Text: Error(s) ■ Column content: <ul style="list-style-type: none"> ■ Graphic: Status icon ■ Data: Load date ■ Data: Elapsed time ■ Data: File size ■ Data: Number of transactions

Index

No index available for this guide.

