Assisted Service Application Guide for Oracle Billing Insight

Version 7.1

July 2016

ORACLE®

Contents

Chapter 7:   Managing Other Assisted Service Users

Chapter 8:   Managing a Personal Profile

Chapter 9:   Oracle Billing Insight Application Access Reports

Chapter 10: Enterprise Metric Reports

Index

1 What's New in This Release

What's New in Assisted Service Application Guide for Oracle Billing Insight, Version 7.1

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

Table 1.   New Product Features in Assisted Service Application Guide for Oracle Billing Insight, Version 7.1

Topic	Description
Multiple topics	Modified topics. The following general changes have been made: ■ UI text and error messages have been edited to facilitate translation. ■ Some references to CSR users have been changed to internal users. ■ Fields for entering email address (and confirm email address) are no longer case sensitive. ■ Fields for entering the user security question answer are no longer case sensitive.
"Use Case: Viewing the Lockout Out Customer Accounts Report" on page 78 "Use Case: Viewing the Locked Out Agents Report" on page 81 "Use Case: Viewing the Locked Out Accounts Reactivated Report" on page 83	Modified topics. Search and download functions were added to the locked out and reactivation reports.
"Use Case: Viewing the Billed Revenue Report" on page 100	New topic. Describes the use case for viewing the Billed Revenue report (merchant users only).
"Use Case: Selecting a Payment Metrics Report" on page 102	New topic. Describes the use case for selecting a payment metric report.
"Use Case: Viewing the Payment Transactions Report" on page 102	New topic. Describes the use case for viewing the Payment Transactions report and details (merchant users only).

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
- Login Landing Pages 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 internal 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.

The CSRAdministrator role 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 another CSRAdministrator when creating a new Assisted Service application user. (The initial CSRAdministrator user 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 CSR administrator 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 CSR administrator 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.*

Login Landing Pages

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 an internal user with the CSRAdministrator role 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 content.

NOTE: Other UI elements can appear as part of embedded Self-Service Application pages.

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 14.

- **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.

- **Main Menu and Tab menus.** A Main Menu and Tab menus on each page provide navigation for individual functions. Each Assisted Service user role (CSRAdminstrator, CSR, and Merchant) see different sets of tab menus. For details, see "Main Menu and Tab Menus" on page 14.

- **Logical Paths.** Logical paths show the navigation path to each page and provide live links for navigating back. For details, see "Logical Paths" on page 17.

- **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 17.

- **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 2.

Table 2.   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 75.
Text and link: Logout	Displays the Logout page. For details, see "Logout Page Elements" on page 25.

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

Table 3.   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 *Self-Service Application Guide for Oracle Billing Insight*.
Customer Users	None
Company	None

Table 3.   Main Menu Options and Tabs (CSRAdministrator and CSR User Roles Only)

Main Menu Option	Tab Menus
Internal Users (Available for the CSRAdministrator only)	Pages in the internal user-related use cases display the following tabs: ■ **View.** Displays the View Internal Users page. ■ **Create.** Displays the Create CSR User Information page.
My Account	Pages in the my account-related use cases display the following tabs: ■ **Profile.** Displays the My Profile page. ■ **Preferences.** Displays the Change Language page.
Reports (Available for the CSRAdministrator only)	Pages in the reporting use cases display the following tabs: ■ **User Access.** Displays the User Access page with links to the user access reports: 　■ **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 4. lists the Main Menu and tab menu options in the Assisted Service application for the Merchant user role.

Table 4.   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: ■ **Profile.** Displays the My Profile page. ■ **Preferences**. Displays the Change Language page.
Reports	Pages in the reporting use cases display the following tabs: ■ User Metrics This tab displays the following drop-down options: 　■ **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: 　■ **Billing Files.** Displays the Billing Files page. 　■ **Billed Revenue**. Displays the Billed Revenue page. ■ Payment Metrics This tab displays the Payment Transactions 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 5 shows an example of the logical path element.

Billing Account > View
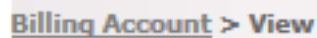
Figure 5.   Logical Path Element

Footer Element

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

Table 5 describes the elements of the footer that appears on Assisted Service application pages.

Table 5.   Footer Components

Component	Description
Text: *Copyright© 2007, 2016 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 6 shows an example of the Paging element.

Page 1 of 15 ▶ ▶|

Figure 6.   Paging Element

Table 6 describes the components of the paging element.

Table 6.   Paging Element Components

Component	Description
Paging *Num* of *Total*	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 7 shows an example of the Download and Printer-Friendly elements.
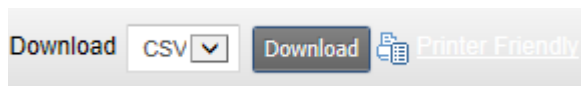
Figure 7.   Download and Printer-Friendly Elements

Table 7 describes the components of the download and printer-friendly elements.

Table 7.   Download and Printer-Friendly Components

Component	Description
Download	This feature contains the following components: ■ Text and drop-down list: Download *List* ■ Button: Download Action: Displays the File Download dialog for saving the report in the selected format.
Printer-Friendly	This feature contains the following elements: ■ 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: 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 8 describes the elements of this page.

Table 8.   Login Page Elements

Page Element	Description
Title Text	Customer Service Application
Login Module	This module displays the following elements:
	■ Module title text: Login
	■ Text and blank field for data entry: *User ID *Field*
	■ Text and blank field for data entry: *Password *Field*
	■ Text and link: Forgot Password Link target: Displays the Forgot Password page. For details, see "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 Fields To take advantage of all of the application's features, enable Javascript and pop-ups in your browser.

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 CSR Administrator and provided to the individual user for enrollment. This use case also enables an organization to create and enroll the initial CSR administrator, 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 CSR administrator 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 new CSR administrator.

CSR Enrollment Page Elements

Table 9 describes the elements of this page.

Table 9.   CSR Enrollment Page Elements

Page Element	Description
Title Text	CSR Enrollment
Enroll CSR Administrator Module (Initial Administrator Enrollment Only)	This module displays the following elements: ■ Module title text: Enroll CSR Administrator ■ Text and blank field for data entry: *CSR Admin User ID *Field* ■ Text and blank field for data entry: *CSR Admin First Name *Field* ■ Text and blank field for data entry: *CSR Admin Last Name *Field* ■ Text and data: *CSR Admin Role *CSR Administrator* ■ Text and blank field for data entry: *CSR Admin Email Address *Field* ■ Text and blank field for data entry: *CSR Admin Confirm Email *Field* ■ 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 9.   CSR Enrollment Page Elements

Page Element	Description
Create Personal Password and Security Question Module	This module displays the following elements: ■ Module title text: Create Personal Password and Security Question ■ Text and blank field for data entry: *User ID *Field* ■ Text and blank field for data entry: *Password *Field* ■ Text and blank field for data entry: *Confirm New Password *Field*

Create Personal Password and Security Question Module, continued	■ Text and drop-down list: *Security Question *List*
	
	■ Text and blank field for data entry: *Security Answer *Field*
	
	■ Text: Password Policy:
	
	  Password must be at least 8 character(s) long.
	  Password must contain at least 1 lowercase letter(s).
	  Password must contain at least 1 numeric character(s).
	  Password must contain at least 1 uppercase letter(s).
	
	■ 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 10 describes the elements of this page.

Table 10.   Logout Page Elements

Page Element	Description
Title Text	Logout
Logout Module	This module displays the following elements: ■ Module title text: Logout ■ Text, data, and link: You have successfully logged out. To ensure maximum protection of your personal information, it is recommended that you close your browser window. To log back into the application, please click here to *Login*. Link target: Clicking Link displays the Login page. For details, see "Login Page Elements" on page 22.

Use Case: Forgot Password

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

Main Path for 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 Forgot Password page.

Alternate Paths for Forgot Password
No alternate paths occur in this use case.

Forgot Password Page Elements

Table 11 describes the elements of this page.

Table 11.   Forgot Password Page Elements

Page Element	Description
Title Text	Forgot Password
Enter CSR Credentials Module	This module displays the following elements: ■ Module title text: Enter CSR Credentials ■ Text and blank field for data entry: *User ID *Field* ■ Text and blank field for data entry: *Email Address *Field* ■ Text and drop-down list: *Security Question *List* ■ Text and blank field for data entry: *Security Answer *Field* ■ 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 Fields

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 Forgot Password page to display the CSR Reset Password page.

Alternate Paths for Resetting a Forgotten Password

No alternate paths occur in this use case.

CSR Reset Password Page Elements

Table 12 describes the elements of this page.

Table 12.   CSR Reset Password Page Elements

Page Element	Description
Title Text	CSR Reset Password

Enter New Password Module	This module displays the following elements:
	
	■ Module title text: Enter New Password
	
	■ Text and blank field for data entry: *Password *Field*
	
	■ Text and blank field for data entry: *Confirm New Password *Field*
	
	■ Text: Password Policy:
	
	   Password must be at least 8 character(s) long.
	   Password must contain at least 1 lowercase letter(s).
	   Password must contain at least 1 numeric character(s).
	   Password must contain at least 1 uppercase letter(s).
	
	■ Button: Submit
	   Action: Saves the new password and displays the Login page. For details, see "Login Page Elements" on page 22.
	
	■ Button: Cancel
	   Action: Cancels the action.
	
	■ Text: *Required Fields

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 access all the functionality shown on the embedded Account Overview (Dashboard). For details about the 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 Assisted Service application displays Search page, the agent enters a valid billing number, and then clicks Submit to display the View Accounts page. (From here the agent can verify that they have the correct billing account and click a button to embed the Self-Service Account Overview (Dashboard) page for the billing acocunt within the Assisted Service application.)

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 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 13 describes the elements of this page.

Table 13.   Search Page Elements

Page Element	Description
Page Title	Search (Title does not appear on screen)
Prompt for Caller's Information	This module displays the following elements: ■ Module title text: Prompt for Caller's Information ■ Text and blank field for data entry: Caller's Name *Field* ■ Text and blank field for data entry: Caller's Email *Field*
Search Billing Account Module	This module displays the following elements: ■ Module title text: Search Billing Account ■ Text and blank field for data entry: Billing Account Number *Field* ■ 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 13.   Search Page Elements

Page Element	Description
Search Customer Users Module	This module displays the following elements: ■ Module title text: Search Customer Users ■ Text and blank field for data entry: User ID *Field* ■ Text and blank field for data entry: First Name *Field* ■ Text and blank field for data entry: Last Name *Field* ■ Text and blank field for data entry: Email Address *Field* ■ 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 Customer User Dashboard (Overview)" on page 36.
Search Company Module	This module displays the following elements: ■ Module title text: Search Company ■ Text and blank field for data entry: Company Name *Field* ■ 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 46.

Sample Assisted Service Page With an Embedded Billing Account Overview

Figure 8 shows the Assisted Service application with the embedded Self-Service Account Overview (Dashboard) for a selected billing account.
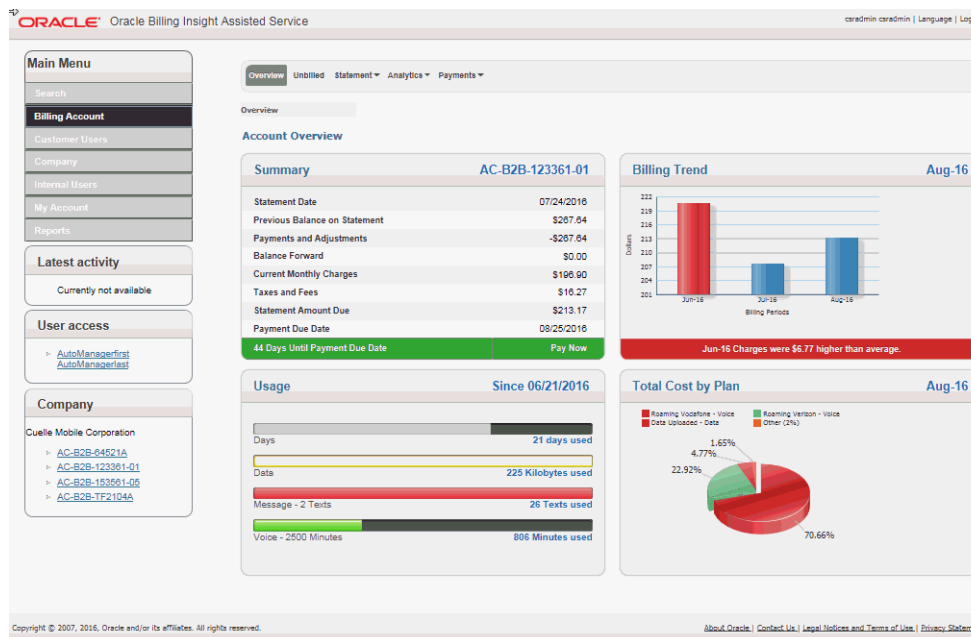

Figure 8.   Embedded Self-Service Account Overview (Dashboard) for a Selected Billing Account

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 14 describes the elements of this page.

Table 14.   View Accounts Page Elements

Page Element	Description
Page Title Text	View Accounts
Prompt for Caller's Information	This module displays the following elements: ■ Module title text: Prompt for Caller's Information ■ Text and blank field for data entry: Caller's Name *Field* ■ Text and blank field for data entry: Caller's Email *Field*
Search Billing Accounts Module	This module displays the following elements: ■ Module title text: Search Billing Accounts ■ Text and blank field for data entry: Billing Account Number *Field* ■ Text: Enter a valid billing account number and click Submit. ■ Button: Submit Action: Displays the Search Results for Billing Account Module listing the billing account.

Search Results for Billing Account Module	This module displays the following elements:
	
	■ Module title text and data (One of the following):
	
	  ■ Search on data: Search Results for Billing Account Number *Account number* (*Number* Item(s))
	
	  ■ Wildcard search: Search Results for Billing Account Number (*Number* Item(s))
	
	■ Column titles:
	
	  ■ Text and sorting link: Account Number
	
	  ■ Text and sorting link: Account Type
	
	  ■ Text and sorting link: Biller ID

Search Results Module, continued	■ Column content:
	
	  ■ 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 Customer User on page 35
- Use Case: Viewing a List of Customer Users on page 37
- Use Case: Deleting a Customer User on page 39
- Use Case: Impersonating a Customer User on page 41

Use Case: Searching for a Customer User

This use case lets an agent search for a customer (Self-Service application) user. Searching for a customer 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 access 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 Customer 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 customer user, see "Sample Assisted Service Page With an Embedded Customer User Dashboard (Overview)" on page 36.

For details about Search page elements, see "Search Page Elements" on page 30.

For details about View Customer Users page elements, see "View Customer Users Page Elements" on page 37.

Alternate Paths for Searching for a Customer 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.

Sample Assisted Service Page With an Embedded Customer User Dashboard (Overview)
Figure 9 shows the Assisted Service application with the selected user's embedded Self-Service Dashboard.
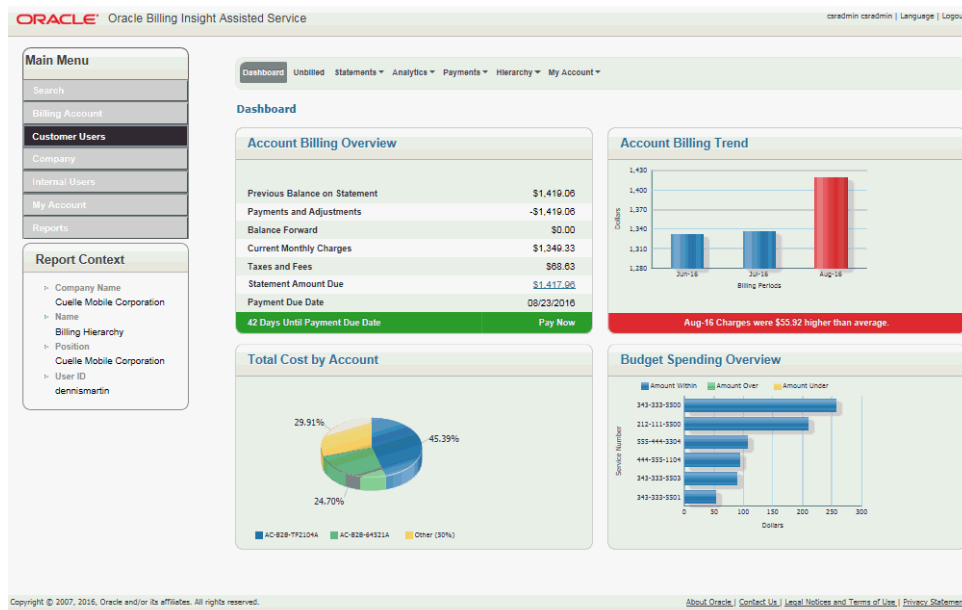
Figure 9.   Embedded Assisted Service Application With a User's Self-Service Dashboard

Use Case: Viewing a List of Customer Users

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

Main Path for Viewing a List of Customer 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 Customer Users page. Valid wildcard characters are % and *.

Alternate Paths for Viewing a List of Customer 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 Customer Users Page Elements

Table 15 describes the elements of this page.

Table 15.   View Customer Users Page Elements

Page Element	Description
Page Title Text	View Customer Users
Search Customer Users Module	This module displays the following elements: ■ Module title text: Search Customer Users ■ Text and blank field for data entry: User ID *Field* ■ Text and blank field for data entry: User First Name *Field* ■ Text and blank field for data entry: User Last Name *Field* ■ Text and blank field for data entry: Email Address *Field* ■ Text and drop-down list: Role *List* ■ Text and drop-down list: Status *List* ■ Text: Enter a value for at least one of the options and click Submit. ■ Button: Submit Action: Displays the Search Results Module listing the user. ■ Button: Cancel Action: Cancels the action.

Table 15.   View Customer Users Page Elements

Page Element	Description

Search Results Module	This module displays the following elements:
	
	■ Module title text and data (One of the following):
	
	   ■ Search on data: Search Results for *Field_Searched Search _Criteria* (*Number* Item(s))
	
	   ■ Wildcard search: Search Results for *Field_Searched* (*Number* Item(s))
	
	■ Column titles:
	
	   ■ Text and sorting link: User ID
	
	   ■ Text and sorting link: User Name
	
	   ■ Text and sorting link: Role
	
	   ■ Text and sorting link: Status
	
	   ■ Text: Actions

Search Results Module, continued	■ Column content:
	
	   ■ Data and link: User ID
	   Link target: Displays the Self-Service Dashboard (overview) for the user within the Assisted Service page. For details, see "Sample Assisted Service Page With an Embedded Customer User Dashboard (Overview)" on page 36
	
	   ■ Data: User's first and last 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 Customer User" on page 41.
	
	   ■ Text and link: Delete
	   Link target: Displays the Delete User page. For details, see "Delete User Page Elements" on page 40.

Use Case: Deleting a Customer User

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

Main Path for Deleting a Customer User

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

Alternate Paths for Deleting a Customer User

No alternate paths occur in this use case.

Delete User Page Elements

Table 16 describes the elements of this page.

Table 16.   Delete User Page Elements

Page Element	Description
Title text	Delete User
User Details Module	This module displays the following elements: ■ Module title text: User Details ■ Text: You are about to delete the user with the information associated below. ■ Text and data: User ID *User ID* ■ Text and data: *First Name *First name* ■ Text and data: Middle Name *Middle name* ■ Text and data: *Last Name *Last name* ■ Text and data: Address Line 1 *Address line 1* ■ Text and data: Address Line 2 *Address line 2* ■ Text and data: City *City* ■ Text and data: Country *Country* ■ Text and data: State *State* ■ Text and data: Postal Code *Postal code* ■ Text and data: Home Phone Number *Home phone number* ■ Text and data: Mobile Phone Number *Mobile phone number* ■ Text and data: Mobile Service Provider *Provider name* ■ Text and data: *Email *Email* ■ Text and data: *Role *Role* ■ Text and data: *Status *Status value* ■ Text: *Required Fields ■ Button: Submit Action: Deletes the user and displays a success message. ■ Button: Back Action: Displays the View Users page.

Use Case: Impersonating a Customer User

This use case lets an agent impersonate a customer 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 Customer 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 Customer 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

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 access 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, and then clicks Submit to display the View Company page. (From here the agent can verify that they have the correct company and click a button to embed the Self-Service Account Dashboard (overview) for the company within the Assisted Service application.)

To view a sample page showing an embedded Self-Service Dashboard (overview) for a company see

For details about the Search page, see

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.

View Company Page Elements

Table 17 describes the elements of this page.

Table 17.　View Company Page Elements

Page Element	Description
Page Title	View Company
Prompt for Caller Module	This module displays the following elements: ■ Module title text: Prompt for Caller's Information ■ Text and field for data entry: Caller's Name *Field* ■ Text and field for data entry: Caller's Email *Field*
Search Company Module	This module displays the following elements: ■ Text: Search Company ■ Text and blank field for data entry: Company Name *Field* ■ Text and drop-down list: Country *List* ■ Text and drop-down list: State *List* ■ Text and blank field for data entry: Company ID *Field* ■ Text and blank field for data entry: Postal Code *Field* ■ Text: Enter a value for at least one of the options and click Submit. ■ Button: Submit Action: Displays the Search Results Module listing the company. ■ Button: Cancel Action: Clears the form fields.

Table 17.   View Company Page Elements

Page Element	Description
Search Results Module	This module displays the following elements: ■ Module title text and data (One of the following): ■ Search on data: Search Results for *Field_Searched Search _Criteria* (*Number* Item(s)) ■ Wildcard search: Search Results for *Field_Searched* (*Number* Item(s)) ■ Column titles: ■ 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	■ Column content: ■ 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 46. ■ 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 47.

Sample Assisted Service Page With an Embedded Company Dashboard
Figure 10 shows the Assisted Service application with a selected company's embedded Self-Service Dashboard.
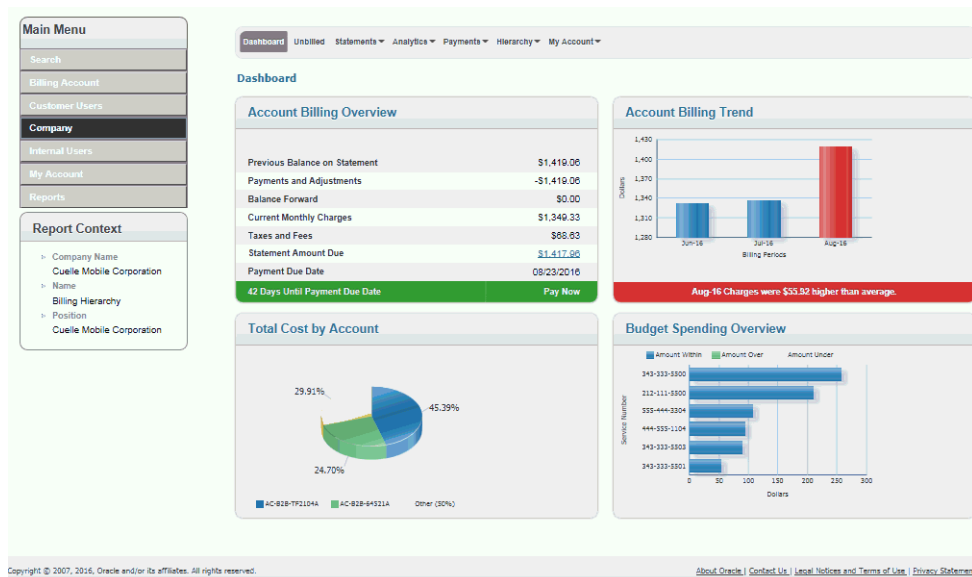
Figure 10. Embedded Self-Service Dashboard for a Selected Company

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 "View Company Page Elements" on page 44.

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 18 describes the elements of this page.

Table 18.   View Administrators Page Elements

Page Element	Description
Page Title	View Administrators
Search Administrators Module	This module displays the following elements: ■ Text and blank field for data entry: Administrator First Name *Field* ■ Text and blank field for data entry: Administrator Last Name *Field* ■ 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 18.   View Administrators Page Elements

Page Element	Description
Search Results Module	This module displays the following elements: ■ Module title text and data (One or a combination of the following, for however many fields are searched on): 　■ Search on data: Search Results for *Field name Criteria* (*Number* Item(s)) 　■ Wildcard search: Search Results for *Field name* (*Number* Item(s)) ■ Column titles: 　■ Text: Primary 　■ Text and sorting link: User ID 　■ Text and sorting link: First Name 　■ Text and sorting link: Last Name 　■ Text and sorting link: Status 　■ Text: Action
Search Results Module, continued	■ Column content: 　■ Button (inactive): A radio-style button appears if this is the primary administrator for the company, otherwise it is blank. 　■ Data and link: User ID 　Link target: Displays the Administrator Details dialog. For details, see "Administrator Details Dialog Box Elements" on page 50. 　■ Data: First name 　■ Data: Last name 　■ Data: Status value 　■ Text and link: Impersonate 　Link target: Displays the Self-Service application as the administrator. For details, see "Use Case: Impersonating a Customer User" on page 41. ■ Button: Add New Action: Displays the Add Administrator Information page. For details, see "Add Administrator Information Page Elements" on page 54.

Use Case: Viewing a Company Administrator's Information

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

Main Path for Viewing a Company Administrator's Information

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

Alternate Paths for Viewing a Company Administrator's Information

No alternate paths occur with this use case.

Administrator Details Dialog Box Elements

Table 19 describes the elements of this page.

Table 19.   Administrator Details Dialog Box Elements

Page Element	Description
Title Text	Administrator Details
Administrator Details Module	This module displays the following elements: ■ Text and data: User ID *User ID* ■ Text and data: First Name *First name* ■ Text and data: Middle Name *Middle name* ■ Text and data: Last Name *Last name* ■ Text and data: Company *Company name* ■ Text and data: Address Line 1 *Address line 1* ■ Text and data: Address Line 2 *Address line 2* ■ Text and data: City *City* ■ Text and data: State *State* ■ Text and data: Country *Country* ■ Text and data: Postal Code *Postal code* ■ Text and data: Home Phone Number *Home phone number* ■ Text and data: Mobile Phone Number *Mobile phone number* ■ Text and data: Mobile Service Provider *Provider name* ■ Text and data: Email *Email address* ■ Text and data: Role *Role (Admin)* ■ Text and data: Status *Status* ■ Button: Edit Action: Displays the Edit Administrator Information page. For details, see "Edit Administrator Information Page Elements" on page 51. ■ Button: Delete Action: Displays the Delete Administrator Information. For details, see "Delete Administrator Information Page Elements" on page 53.

Use Case: Editing a Company Administrator's Information

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

Main Path for Editing a Company Administrator's Information

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

Alternate Paths for Editing a Company Administrator's Information

No alternate paths occur with this use case.

Edit Administrator Information Page Elements

Table 20 describes the elements of this page.

Table 20.   Edit Administrator Information Page Elements

Page Element	Description
Title Text	Edit Administrator Information
Administrator Details Module	This module displays the following elements: ■ Module title text: Administrator Details ■ Text and data: User ID *User ID* ■ Text and editable data: *First Name *First name* ■ Text and editable data: Middle Name *Middle name* ■ Text and editable data: *Last Name *Last name* ■ Text and data: *Company *Company name* ■ Text and editable data: *Address Line 1 *Address line 1* ■ Text and editable data: Address Line 2 *Address line 2* ■ Text and editable data: *City *City* ■ Text and drop-down list: *Country *List* ■ Text and editable data: *State *State* ■ Text and editable data: *Postal Code *Postal code*

Table 20.   Edit Administrator Information Page Elements

Page Element	Description
Edit Administrator Details Module, continued	■ Text and editable data: Home Phone Number *Home phone number* ■ Text and editable data: Mobile Phone Number *Mobile phone number* ■ Text and drop-down list: Mobile Service Provider *List* ■ Text and editable data: *Email *Email address* ■ Text and data: *Role *Role (Admin)* ■ Text and data: *Status *Status* ■ Text: *Primary Contact ■ Text and radio selection buttons: Button *Yes* Button *No*

Edit Administrator Details Module, continued	■ Text: *Required Fields
	
	■ Button: Submit
	    Action: Saves the data.
	
	■ Button: Back
	    Action: Displays the View Administrators page.
	
	■ 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 Information page.

Alternate Paths for Deleting a Company Administrator

No alternate paths occur with this use case.

Delete Administrator Information Page Elements
Table 21 describes the elements of this page.

Table 21.   Delete Administrator Information Page Elements

Page Element	Description
Title Text	Delete Administrator Information
Delete Administrator Details Module	This module displays the following elements: ■ Module title text: Administrator Details ■ Text and data: *User ID *User ID* ■ Text and data: *First Name *First name* ■ Text and data: Middle Name *Middle name* ■ Text and data: *Last Name *Last name* ■ Text and data: Company *Company name* ■ Text and data: *Address Line 1 *Address line 1* ■ Text and data: Address Line 2 *Address line 2* ■ Text and data: *City *City* ■ Text and data: *Country *Country* ■ Text and data: *State *State* ■ Text and data: *Postal Code *Postal code* ■ Text and data: Home Phone Number *Home phone number* ■ Text and data: Mobile Phone Number *Mobile phone number* ■ Text and data: Mobile Service Provider *Provider name* ■ Text and data: *Email *Email address* ■ Text and data: *Role *Role (Admin)* ■ Text and data: *Primary Contact *Yes* or *No* ■ Text: *Required Fields ■ 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 22 describes the elements of this page.

Table 22.   Add Administrator Information Page Elements

Page Element	Description
Title Text	Add Administrator Information
Administrator Details Module	This module displays the following elements: ■ Module title text: Administrator Details ■ Text and blank field for data entry: *User ID *Field* ■ Text and blank field for data entry: *First Name *Field* ■ Text and blank field for data entry: Middle Name *Field* ■ Text and blank field for data entry: *Last Name *Field* ■ Text and data: Company Name *Company name* ■ Text and blank field for data entry: Address Line 1 *Field* ■ Text and blank field for data entry: Address Line 2 *Field* ■ Text and blank field for data entry: City *Field* ■ Text and drop-down list: Country *List* ■ Text and drop-down list: State *List*

Table 22. Add Administrator Information Page Elements

Page Element	Description
Administrator Details Module, continued	■ Text and blank field for data entry: *Postal Code *Field* ■ Text and blank field for data entry: Home Phone Number *Field* ■ Text and blank field for data entry: Mobile Phone Number *Field* ■ Text and drop-down list: Mobile Service Provider *List* ■ Text and blank field for data entry: *Email *Field* ■ Text and blank field for data entry: *Confirm Email *Field*
Administrator Details Module, continued	■ Text and data: *Role *Role (Admin)* ■ Text and radio buttons: *Primary Contact *Button* Yes *Button* No ■ Text: *Required Fields ■ 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 23 describes the elements of this page.

Table 23. Confirm Administrator Information Page Elements

Page Element	Description
Title Text	Confirm Administrator Information

Administrator Details Module	This module displays the following elements:
	■ Module title text: Administrator Details
	■ Text and data: *User ID *User ID*
	■ Text and data: *First Name *First name*
	■ Text and data: Middle Name *Name*
	■ Text and data: *Last Name *Name*
	■ Text and data: Company Name *Company name*
	■ Text and data: Address Line 1 *Address line 1*
	■ Text and data: Address Line 2 *Address line 2*
	■ Text and data: City *City*
	■ Text and data: Country *Country*
	■ Text and data: State *State*
	■ Text and data: Postal Code *Code*
	■ Text and data: Home Phone Number *Number*
	■ Text and data: Mobile Phone Number *Number*
	■ Text and data: Mobile Service Provider *List*
	■ Text and data: *Email *Email*
	■ Text and data: *Confirm Email *Email*
	■ Text and data: *Role *Admin*
	■ Text and data: *Primary Contact *Yes* or *No*
	■ Text: *Required Fields
	■ 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 CSR administrator to service other Assisted Service users, including other CSR administrators, CSRs, and Merchant users. It includes the following topics:

Use Case: Searching for an Assisted Service User

This use case lets an internal user with the CSRAdministrator role search for all Assisted Service application users.

Main Path for Searching for a User

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

Alternate Paths for Searching for a User

The following alternate paths can occur in this use case:

■ A CSR administrator specifies the first and last name of the user, the user's email address, role, or status value on the View Internal Users page, then clicks Submit.

■ A CSR administrator enters a full or partial wildcard character search in one or more of the fields on the View Internal Users page, then clicks Submit. Valid wildcard characters are % and *.

View Internal Users Page Elements

Table 24 describes the elements of this page.

Table 24.   View Internal Users Page Elements

Page Element	Description
Page Title	View Internal Users
Search Internal Users Module	This module displays the following elements:
	■ Module title text: Search Internal Users
	■ Text and blank field for data entry: User ID *Field*
	■ Text and blank field for data entry: First Name *Field*
	■ Text and blank field for data entry: Last Name *Field*
	■ Text and blank field for data entry: Email *Field*
	■ Text and drop-down list: Role *List*
	■ Text and drop-down list: Status *List*
	■ Text: Enter a value for at least one of the options and click Submit.
	■ Button: Submit Action: Searches for the use and displays the Search Results module.
	■ Button: Cancel Action: Cancels the action.

Table 24. View Internal Users Page Elements

Page Element	Description
Search Results Module	This module displays the following elements: ■ Module title text and data (One of the following): 　■ Search on data: Search Results for *Field_Searched Search _Criteria* (*Number* Item(s)) 　■ Wildcard search: Search Results for *Field_Searched* (*Number* Item(s)) ■ Column titles: 　■ Text and sorting link: User ID 　■ Text and sorting link: First Name 　■ Text and sorting link: Last Name 　■ Text and sorting link: Role 　■ Text and sorting link: Status
Search Results Module, continued	■ Column content: 　■ Data and link: User ID 　Link target: Displays the User Information dialog box. For details, see "Use Case: Viewing an Assisted Service User's Information" on page 59. 　■ Data: First name 　■ Data: Last name 　■ Data: Role 　■ Data: Status

Use Case: Viewing an Assisted Service User's Information

This use case lets a CSR administrator 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 CSR administrator searches for an agent user, then clicks a user ID on the View Internal Users page, to display the 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 57.

Alternate Paths for Viewing an Assisted Service User's Information
No alternate paths occur with this use case.

User Information Dialog Box Elements
Table 25 describes the elements of this dialog box.

Table 25.   User Information Dialog Box Elements

Page Element	Description
Dialog Box Title	User Information
User Information Module	This module displays the following elements: ■ Text and data: User ID *User ID* ■ Text and data: First Name *First name* ■ Text and data: Middle Name *Middle name* ■ Text and data: Last Name *Last name* ■ Text and data: Address Line 1 *Address line 1* ■ Text and data: Address Line 2 *Address line 2* ■ Text and data: City *City* ■ Text and data: State *State* ■ Text and data: Country *Country* ■ Text and data: Postal Code *Postal code* ■ Text and data: Home Phone Number *Home phone number* ■ Text and data: Mobile Phone Number *Mobile phone number* ■ Text and data: Mobile Service Provider *Provider name* ■ Text and data: Email *Email* ■ Text and data: Role *Role* ■ Text and data: Status *Status* ■ Text and link: Edit Link target: Displays the Edit Internal User Information page. For details, see "Use Case: Editing an Assisted Service User's Information" on page 61. ■ Text and link: Delete Link target: Displays the Delete Internal User page. For details, see "Use Case: Deleting an Assisted Service User" on page 66.

Use Case: Editing an Assisted Service User's Information

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

Main Path for Editing an Internal User's Information

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

Alternate Paths for Editing an Internal User's Information

No alternate paths occur with this use case.

Edit Internal User Information Page Elements

Table 26 describes the elements of this page.

Table 26.   Edit Internal User Information Page Elements

Page Element	Description
Title Text	Edit Internal User Information
Internal User Details Module	This module displays the following elements: ■ Module title text: Internal User Details ■ Text and data: User ID *User ID* ■ Text and editable data: *First Name *First name* ■ Text and editable data: Middle Name *Middle name* ■ Text and editable data: *Last Name *Last name* ■ Text and editable data: Address Line 1 *Address line 1* ■ Text and editable data: Address Line 2 *Address line 2* ■ Text and editable data: City *City* ■ Text and drop-down list: Country *List* ■ Text and drop-down list: State *List* ■ Text and editable data: Postal Code *Postal code* ■ Text and editable data: Home Phone Number *Home phone number* ■ Text and editable data: Mobile Phone Number *Mobile phone number* ■ Text and drop-down list: Mobile Service Provider *List* ■ Text and editable data: *Email *Email* ■ Text and drop-down list: *Role *List* ■ Text and data: *Status *Status* ■ Text: *Required Fields ■ Button: Submit Action: Displays the Confirm Internal User Information page. For details, see "Confirm Internal User Information Page Elements" on page 63. ■ Button: Back Action: Displays the View Internal Users page. ■ Button: Cancel Action: Cancels the action.

Confirm Internal User Information Page Elements

Table 27 describes the elements of this page.

Table 27.   Confirm Internal User Information Page Elements

Page Element	Description
Title Text	Confirm Internal User Information
Internal User Details Module	This module displays the following elements:
	■ Module title text: Internal User Details
	■ Text and data: User ID *User ID*
	■ Text and data: *First Name *First name*
	■ Text and data: Middle Name *Middle name*
	■ Text and data: *Last Name *Last name*
	■ Text and data: Address Line 1 *Address line 1*
	■ Text and data: Address Line 2 *Address line 2*
	■ Text and data: City *City*
	■ Text and data: Country *Country*
	■ Text and data: State *State*
	■ Text and data: Postal Code *Postal code*
	■ Text and data: Home Phone Number *Home phone number*
	■ Text and data: Mobile Phone Number *Mobile phone number*
	■ Text and data: Mobile Service Provider *Provider name*
	■ Text and data: *Email *Email*
	■ Text and data: *Role *Role*
	■ Text and data: *Status *Status*
	■ Text: *Required Fields
	■ Button: Submit Action: Saves the data.
	■ Button: Back Action: Displays the View Internal Users page.

Use Case: Creating a New Assisted Service User

This use case lets a CSR administrator create new Assisted Service application users, including other CSR administrators, CSRs, and Merchant users.

Main Path for Creating a New Assisted Service User

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

Alternate Paths for Creating a New Assisted Service User

An alternate path occurs when a CSR administrator clicks Create.

Create Internal User Information Page Elements

Table 28 describes the elements of this page.

Table 28. Create Internal User Information Page Elements

Page Element	Description
Title Text	Create Internal User Information
Internal User Details Module	This module displays the following elements:
	■ Module title text: Internal User Details
	■ Text and blank field for data entry: *User ID *Field*
	■ Text and blank field for data entry: *First Name *Field*
	■ Text and blank field for data entry: Middle Name *Field*
	■ Text and blank field for data entry: *Last Name *Field*
	■ Text and blank field for data entry: Address Line 1 *Field*
	■ Text and blank field for data entry: Address Line 2 *Field*
	■ Text and blank field for data entry: City *Field*
	■ Text and drop-down list: Country *List*
	■ Text and drop-down list: State *List*
	■ Text and blank field for data entry: Postal Code *Field*
	■ Text and blank field for data entry: Home Phone Number *Field*
	■ Text and blank field for data entry: Mobile Phone Number *Field*
	■ Text and drop-down list: Mobile Service Provider *List*
	■ Text and blank field for data entry: *Email *Field*
	■ Text and blank field for data entry: *Confirm Email *Field*
	■ Text and drop-down list: *Role *List*
	■ Text: *Required Fields
	■ Button: Submit Action: Displays the Confirm Internal User Information page. For details, see "Confirm Internal User Information Page Elements" on page 63.
	■ Button: Cancel Action: Cancels the action.

Use Case: Deleting an Assisted Service User

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

Main Path for Deleting an Assisted Service User

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

Alternate Paths for Deleting an Assisted Service User

No alternate paths occur with this use case.

Delete Internal User Information Page Elements
Table 29 describes the elements of this page.

Table 29.   Delete Internal User Information Page Elements

Page Element	Description
Title text	Delete Internal User

Internal User Details Module	This module displays the following elements:
	
	■ Module title text: Internal User Details
	
	■ Text and data: User ID *User ID*
	
	■ Text and data: *First Name *First name*
	
	■ Text and data: Middle Name *Middle name*
	
	■ Text and data: *Last Name *Last name*
	
	■ Text and data: Address Line 1 *Address line 1*
	
	■ Text and data: Address Line 2 *Address line 2*
	
	■ Text and data: City *City*
	
	■ Text and data: Country *Country*
	
	■ Text and data: State *State*
	
	■ Text and data: Postal Code *Postal code*
	
	■ Text and data: Home Phone Number *Home phone number*
	
	■ Text and data: Mobile Phone Number *Mobile phone number*
	
	■ Text and data: Mobile Service Provider *Provider name*
	
	■ Text and data: *Email *Email*
	
	■ Text and data: *Role *Role*
	
	■ Text and data: Status *Status*
	
	■ Text: *Required Fields
	
	■ Button: Submit
	    Action: Deletes the user.
	
	■ Button: Back
	    Action: Displays the View Internal 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

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 30 describes the elements of this page.

Table 30.   My Profile Page Elements

Page Element	Description
Title Text	My Profile
Personal Details Module	This module displays the following elements: ■　Module title text: Personal Details ■　Text and data: User ID *User ID* ■　Text and editable data: *First Name *First name* ■　Text and editable data: Middle Name ■　Text and editable data: *Last Name *Last name* ■　Text and editable data: Address Line 1 *Address line 1* ■　Text and editable data: Address Line 2 *Address line 2* ■　Text and editable data: City *City* ■　Text and drop-down list: *Country *List* ■　Text and drop-down list: *State *List*

Table 30.   My Profile Page Elements

Page Element	Description
Personal Details Module, continued	■ Text and editable data: *Postal Code *Postal code* ■ Text and editable data: Home Phone Number *Home phone number* ■ Text and editable data: Mobile Phone Number *Mobile phone number* ■ Text and drop-down list: Mobile Service Provider *List* ■ Text and editable data: *Email *Email* ■ Text and data (drop-down list for a CSR administrator): *Role *Role* or *List* ■ Text and data: *Status *Status* ■ Text: *Required Fields ■ Text and link: Change Password Link target: Displays the Change Password page. For details, see "Change Password Page Elements" on page 73. ■ Text and link: Change Security Question Link target: Displays the Change Security Question page. For details, see "Change Security Question Page Elements" on page 74.
Personal Details Module, continued	■ Button: Submit Action: Displays the Confirm Profile Information page. For details, see "Confirm Profile Information Page Elements" on page 72. ■ Button: Cancel Action: Cancels the action.

Confirm Profile Information Page Elements

Table 31 describes the elements of this page.

Table 31.   Confirm Profile Information Page Elements

Page Element	Description
Title Text	Confirm Profile Information
Personal Details Module	This module displays the following elements:
	■ Module title text: Personal Details
	■ Text and data: User ID *User ID*
	■ Text and data: *First Name *First Name*
	■ Text and data: Middle Name *Middle Name*
	■ Text and data: *Last Name *Last Name*
	■ Text and data: Address Line 1 *Address line 1*
	■ Text and data: Address Line 2 *Address line 2*
	■ Text and data: City *City*
	■ Text and data: Country *Country*
	■ Text and data: State *State*
	■ Text and data: Postal Code *Postal code*
	■ Text and data: Home Phone Number *Home phone number*
	■ Text and data: Mobile Phone Number *Mobile phone number*
	■ Text and data: Mobile Service Provider *Provider name*
	■ Text and data: *Email *Email*
	■ Text and data: *Role *Role*
	■ Text and data: *Status *Status*
	■ Text: *Required Fields
	■ 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 32 describes the elements of this page.

Table 32.   Change Password Page Elements

Page Element	Description
Page Title Text	Change Password
Change Password Module	This module displays the following elements:
	■ Module title text: Change Password
	■ Text and blank field for data entry: *Old Password *Field*
	■ Text and blank field for data entry: *New Password *Field*
	■ Text and blank field for data entry: *Confirm New Password *Field*
	■ Text: *Required Fields
	■ Button: Submit Action: Saves the data and displays a success message on the My Profile page.
	■ Button: Back Action: Displays the My Profile page.
	■ Button: Cancel Action: Cancels the action.

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 33 describes the elements of this page.

Table 33.   Change Security Question Page Elements

Page Element	Description
Page Title Text	Change Security Question
Change Security Question Module	This module displays the following elements: ■ Module title text: Change Security Question ■ Text and blank field for data entry: *Security Question *Field* ■ Text and blank field for data entry: *Security Answer *Field* ■ Button: Submit Action: Saves the data. ■ Button: Back Action: Displays the My Profile page. ■ Button: Cancel Action: Cancels the action. ■ Text: *Required Fields

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 34 describes the elements of this page.

Table 34. Change Language Page Elements

Page Element	Description
Page Title Text	Change Language
User Preferences Module	This module displays the following elements: ■ Module title text: User Preferences ■ Text and drop-down list: *Select Language *List* ■ Text: *Required Fields ■ 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 CSR administrator to view user and account lockout reports and reactivate users. It includes the following topics:

Use Case: Viewing a List of User Access Reports

This use case lets a CSR 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 CSR 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 CSR administrator clicks User Access.

User Access Page Elements

Table 35 describes the elements of this page.

Table 35.   User Access Page Elements

Page Element	Description
Page Title Text	User Access
User Access Module	This module displays the following elements: ■ Module title text: User Access ■ Text and link: Locked Out Customer Accounts Link target: Displays the Locked Out Customer Accounts page. For details, see "Locked Out Customer Accounts Page Elements" on page 79. ■ Text and link: Locked Out Customer Service Representatives Link target: Displays the Locked Out Customer Service Representatives page. For details, see "Locked Out Agents Page Elements" on page 81. ■ Text and link: Locked Out Accounts Reactivated Link target: Displays the Locked Out Accounts Reactivated page. For details, see "Locked Out Accounts Reactivated Page Elements" on page 83.

Use Case: Viewing the Lockout Out Customer Accounts Report

This use case lets a CSR 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 CSR 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 CSR 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 CSR administrator clicks User Access, and selects Locked Out Customer Accounts from the drop-down tab menu.

Locked Out Customer Accounts Page Elements
Table 36 describes the elements of this page.

Table 36.   Locked Out Customer Accounts Page Elements

Page Element	Description
Page Title Text	Locked Out Customer Accounts

Table 36.   Locked Out Customer Accounts Page Elements

Page Element	Description
Search By Module	This module displays the following elements: ■ Module title text: Search By ■ Text and blank field for data entry: User ID *Field* ■ Text and blank field for data entry: First Name *Field* ■ Text and blank field for data entry: Last Name *Field* ■ Text and blank field for data entry: Account Number *Field* ■ Text and drop-down list: Lockout Reason *List* ■ Button: View Action: Displays the Locked Out Customer Accounts report for the selected criteria.
Locked Out Customer Accounts Report Details Module	This module displays the following elements: ■ Module title text: Locked Out Customer Accounts (*Number* Item(s)) ■ Column titles: 　■ 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: Role 　■ Text and sorting link: Lockout reason 　■ Text: Actions ■ Column content: 　■ Data: User ID 　■ Data: Account number 　■ Data: First name 　■ Data: Last name 　■ Data: User role 　■ Data: Lockout reason 　■ Text and link: Reactivate 　Link action: Reactivates a locked-out customer account.

Use Case: Viewing the Locked Out Agents Report

This use case lets a CSR administrator view the Locked Out Agents report, which displays a list of Assisted Service users who have been locked out of the Assisted Service application. A CSR administrator can also reactivate a locked-out Assisted Service user.

Main Path for Viewing the Locked Out Agents Report

The main path occurs when a CSR administrator selects Reports from the Main Menu, and then clicks Locked Out Agents to display the Locked Out Agents page.

Alternate Paths for Viewing the Locked Out Agents Report

An alternate path occurs when a CSR administrator clicks User Access, and selects Locked Out Agents from the drop-down tab menu.

Locked Out Agents Page Elements

Table 37 describes the elements of this page.

Table 37.   Locked Out Agents Page Elements

Page Element	Description
Page Title Text	Locked Out Agents

Table 37.   Locked Out Agents Page Elements

Page Element	Description
Search By Module	This module displays the following elements: ■ Module title text: Search By ■ Text and blank field for data entry: User ID *Field* ■ Text and blank field for data entry: First Name *Field* ■ Text and blank field for data entry: Last Name *Field* ■ Text and drop-down list: Lockout Reason *List* ■ Button: View Action: Displays the Locked Out Agents report for the selected criteria.

Locked Out Customer Service Representatives Details Module	This module displays the following elements:
	
	■ Module title text and data: Locked Out Agents Report Details (*Number* Item(s))
	
	■ Column titles:
	
	    ■ Text and sorting link: User ID
	
	    ■ Text and sorting link: First Name
	
	    ■ Text and sorting link: Last Name
	
	    ■ Text and sorting link: Role
	
	    ■ Text and sorting link: Lockout Reason
	
	    ■ Text: Actions
	
	■ Column content:
	
	    ■ Data: CSR user ID
	
	    ■ Data: First name
	
	    ■ Data: Last name
	
	    ■ Data: User role
	
	    ■ Data: Lockout reason
	
	    ■ Text and link: Reactivate
	    Link action: Reactivates a locked-out customer account.

Use Case: Viewing the Locked Out Accounts Reactivated Report

This use case lets a CSR 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 CSR 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 CSR administrator clicks User Access, and selects Locked Out Accounts Reactivated from the drop-down tab menu.

Locked Out Accounts Reactivated Page Elements

Table 38 describes the elements of this page.

Table 38.   Locked Out Accounts Reactivated Page Elements

Page Element	Description
Page Title Text	Locked Out Accounts Reactivated

Table 38.   Locked Out Accounts Reactivated Page Elements

Page Element	Description
Search By Module	This module displays the following elements: ■ Module title text: Search By ■ Text and blank field for data entry: User ID *Field* ■ Text and blank field for data entry: First Name *Field* ■ Text and blank field for data entry: Last Name *Field* ■ Text and drop-down list: Lockout Reason *List* ■ Button: View Action: Displays the Locked Out Accounts Reactivated report for the selected criteria.

Locked Out Accounts Reactivated Report Details Module	This module displays the following elements:
	
	■ Module title text and data: Locked Out Accounts Reactivated Report Details (*Number* Item(s))
	
	■ Column titles:
	
	   ■ Text and sorting link: User ID
	
	   ■ Text and sorting link: First Name
	
	   ■ Text and sorting link: Last Name
	
	   ■ Text and sorting link: Role
	
	   ■ Text and sorting link: Lockout Reason
	
	   ■ Text and sorting link: Date
	
	■ Column content:
	
	   ■ Data: Agent 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 a User Metrics Reports on page 87
- Use Case: Viewing the Users Signed In Report on page 88
- Use Case: Viewing the Unique Users Report on page 91
- Use Case: Viewing the Enrolled Users Report on page 94
- Use Case: Selecting a Billing Metrics Reports on page 97
- Use Case: Viewing the Billing Files Report on page 97
- Use Case: Viewing the Billed Revenue Report on page 100
- Use Case: Selecting a Payment Metrics Report on page 102
- Use Case: Viewing the Payment Transactions Report on page 102

Use Case: Selecting a User Metrics Reports

This use case lets a Merchant select a user metrics report for the enterprise. User metrics 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 39 describes the elements of this page.

Table 39.   User Metrics Page Elements

Page Element	Description
Page Title Text	User Metrics
List of User Metrics Report Module	This module displays the following elements: ■ 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 88. ■ Text and link: Unique Users Link target: Displays the Unique Users page. For details, see "Use Case: Viewing the Unique Users Report" on page 91. ■ Text and link: Enrolled Users Link target: Displays the Enrolled Users page. For details, see "Use Case: Viewing the Enrolled Users Report" on page 94.

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 report 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 report 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 40 describes the elements of this page.

Table 40.   Users Signed In Page Elements

Page Element	Description
Page Title Text	Users Signed In
Prompt Module	This module displays the following elements: ■ Text and drop-down list: Report Period *List* ■ Text and drop-down list: Chart Type *List* ■ Button: Submit Action: Displays the selected report.
Users Signed In Chart Module	This module displays either a line or bar chart showing the volume of users that logged into the following applications during the selected report period: ■ **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). The chart also contains a color key.

Table 40.   Users Signed In Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	
	■ Module title text and data: Report Details for Last *Selected Time Frame* (*Number* Item(s))
	
	■ Text and link: Download
	Link target: A prompt to download or save the report in Microsoft Office Excel CSV file format.
	
	■ Column titles:
	
	  ■ One of the following text and sorting links:
	    ❏ 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:
	
	  ■ One of the following fields:
	    ❏ Data: Time
	    ❏ Text and data: Today *Time*
	    ❏ Text and data: Yesterday *Time*
	    ❏ Data: Day of the week
	    ❏ Data: *Month* and *Day*
	    ❏ Data: *Month* and *Year*
	
	  ■ Data: Number of end users
	  ■ Data: Number of CSRs
	  ■ Data: Number of system administrators
	  ■ Data: Total number of users for the row

Table 40.   Users Signed In Page Elements

Page Element	Description

Report Details Module, continued	■ Content of the total row:
	
	  ■ 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 report 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 report 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 41 describes the elements of this page.

Table 41.   Unique Users Page Elements

Page Element	Description
Page Title Text	Unique Users
Prompt Module	This module displays the following elements: ■ Text and drop-down list: Report Period *List* ■ Text and drop-down list: Chart Type *List* ■ Button: Submit Action: Displays the selected report.
Unique Users Chart Module	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 report period. The chart also contains a color key.

Table 41.   Unique Users Page Elements

Page Element	Description

Report Details Module	This module displays the following elements:
	
	■ Module title text and data: Report Details for Last *Selected Time Frame* (*Number* Item(s))
	
	■ Text and link: Download
	Link target: A prompt to download or save the report in Microsoft Office Excel CSV file format.
	
	■ Column titles:
	
	  ■ One of the following text and sorting links:
	
	    ❏ Day
	
	    ❏ Month
	
	  ■ Text and sorting link: Unique Users
	
	  ■ Text and sorting link: Total Users

Report Details Module, continued	■ Column content:
	
	  ■ One of the following fields:
	
	    ❏ Data: *Month* and *Day*
	
	    ❏ Data: *Month* and *Year*
	
	  ■ Data: Number unique users
	
	  ■ Data: Number of total users for the row
	
	■ Content of the total row:
	
	  ■ 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 report 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 report 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 42 describes the elements of this page.

Table 42.   Enrolled Users Page Elements

Page Element	Description
Page Title Text	Enrolled Users
Prompt Module	This module displays the following elements: ■ Text and drop-down list: Report Period *List* ■ Text and drop-down list: Chart Type *List* ■ Button: Submit Action: Displays the selected report.

Table 42.   Enrolled Users Page Elements

Page Element	Description
Enrolled Users Chart Module	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 report period: ■ **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 CSR administrators that enrolled in the Command Center (production environment). The chart also contains a color key.

Table 42.   Enrolled Users Page Elements

Page Element	Description
Report Details Module	This module displays the following elements:
	■ Module title text and data: Report Details for Last *Selected Time Frame* (*Number* Item(s))
	■ Text and link: Download Link target: A prompt to download or save the report in Microsoft Office Excel CSV file format.
	■ Column titles:
	■ One of the following text and sorting links:
	❏ 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:
	■ One of the following fields:
	❏ Data: Day of the week
	❏ Data: *Month* and *Day*
	❏ Data: *Month* and *Year*
	■ Data: Number of end users
	■ Data: Number of CSRs
	■ Data: Number of system administrators
	■ Data: Total number of users for the row
Report Details Module, continued	■ Content of the total row:
	■ 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: Selecting a Billing Metrics Reports

This use case lets a Merchant select a billing metrics report for the enterprise. Billing metric reports provide summary information about billing data in the Oracle Billing Insight applications, including:

■ Billing Files Report

■ Billed Revenues 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 43 describes the elements of this page.

Table 43.   Billing Metrics Page Elements

Page Element	Description
Page Title Text	Billing Metrics
List of Billing Metrics Reports Module	This module displays the following elements: ■ Module title text: List of Billing Metrics Reports ■ Text and link: Billing Files Link target: Displays the Billing Files page. For details, see "Billing Files Page Elements" on page 98. ■ Text and link: Billed Revenue Link target: Displays the Billed Revenue page. For details, see "Billed Revenue Page Elements" on page 101.

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 report 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 occurs 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 44 describes the elements of this page.

Table 44.   Billing Files Page Elements

Page Element	Description
Page Title Text	Billing Files

Table 44. Billing Files Page Elements

Page Element	Description
Prompt Module	This module displays the following elements: ■ Text and drop-down list: Billing Period From *List* ■ Text and drop-down list: To *List* ■ Button: Submit Action: Displays the selected report. ■ Download and printer-friendly elements
Billing Files Report Module	This module displays the following elements: ■ Module title text and data: Billing Files (*Number* Item(s)) ■ Column titles: 　■ 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: Number of Transactions ■ Column content: 　■ Status icon (mouse over to view text) 　■ Data and link (if the load failed): Billing file name 　Link target: Displays the Billing File Error Log dialog. For details, see Table 45 on page 100. 　■ Data: Load date 　■ Data: Elapsed time 　■ Data: File size 　■ Data: Number of transactions

Billing File Error Log Dialog Box Elements

Table 45 describes the elements of this page.

Table 45.　Billing File - Error Log Page Elements

Page Element	Description
Page Title Text	Billing File - Error Log
Billing Files - Error Log Module	This module displays the following elements: ■ Module title text: Billing Files - Error Log ■ Column titles: 　■ Text: Billing File Name 　■ Text: Errors ■ Column content: 　■ Data: Billing file name 　■ Data: Error description

Use Case: Viewing the Billed Revenue Report

This use case lets a Merchant user view the Billed Revenue report, which shows the total billed revenue and total number of statements for the selected billing report period in both graphical bar chart and report formats.

Main Path for Viewing the Billed Revenue Report

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

Alternate Paths for Viewing the Billing Files Report

The following alternate paths can occurs in this use case:

■ A user clicks the Billing Metrics tab, and Billed Revenue.

■ A user clicks Billed Revenue on the Billing Metrics page.

Billed Revenue Page Elements

Table 46 describes the elements of this page.

Table 46.   Billed Revenue Page Elements

Page Element	Description
Page Title Text	Billed Revenue
Prompt Module	This module displays the following elements: ■ Text and drop-down list: Billing Period From *List* ■ Text and drop-down list: To *List* ■ Button: Submit Action: Displays the selected report.
Total Number of Statements Module	This module displays the following elements: ■ Module title text and data: Total Number of Statements ■ Graphical bar chart: Shows the total number of statements for the selected report period.
Total Billed Revenue Module	■ Module title text and data: Total Billed Revenue ■ Graphical bar chart: Shows the total billed revenue amount for the selected report period.
Report Details Billed Revenue Module	This module displays the following elements: ■ Module title text and data: Report Details Billed Revenue (*Number* Item(s)) ■ Column titles: 　■ Text and sorting link: Bill Period 　■ Text and sorting link: Number of Statements 　■ Text, data, and sorting link: Billed Revenue (*Currency*) ■ Column content: 　■ Data: Bill Period 　■ Data: Number of Statements 　■ Data: Billed Revenue (*Currency*) ■ Content of the total row: 　■ Text: Total 　■ Data: Number of statements 　■ Data: Billed revenue amount

Use Case: Selecting a Payment Metrics Report

This use case lets a Merchant user select a payment metric report for the enterprise. Payment metric reports provide summary information about users accessing the Oracle Billing Insight applications, and include the Payment Metrics report.

Main Path for Selecting Payment 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 Payment 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.

Payment Metrics Page Elements

Table 47 describes the elements of this page.

Table 47.   Payment Metrics Page Elements

Page Element	Description
Page Title Text	Payment Metrics
List of Payment Metric Reports Module	This module displays the following elements: ■ Module title text: List of Payment Metric Reports ■ Text and link: Payment Transactions Link target: Displays the Payment Transactions page. For details, see "Payment Transactions Page Elements" on page 103.

Use Case: Viewing the Payment Transactions Report

This use case lets a Merchant user view the Payment Transactions report, which shows a status summary for payments, including successful, processing, and failed payments for the selected report period in both graphical bar chart and report formats.

Main Path for Viewing the Payment Transactions Report

The main path occurs when a Merchant clicks the Reports option on the Main Menu, then clicks the Payment Metrics to display the Payment Transactions page.

Alternate Paths for Viewing the Payment Transactions Report

The following alternate paths can occurs in this use case:

■ A user clicks the Payment Metrics tab.

Payment Transactions Page Elements

Table 48 describes the elements of this page.

Table 48.   Payment Transactions Page Elements

Page Element	Description
Page Title Text	Payment Transactions
Prompt Module	This module displays the following elements: ■ Text and drop-down list: Report Period *List* ■ Button: Submit Action: Displays the selected report. ■ Download and printer-friendly elements
Payment Status Module	This module displays the following elements: ■ Module title text: Payment Status ■ Graphical pie chart: Shows the total number of payments with each status (successful, processing, and failed) for the selected report period.

Table 48.   Payment Transactions Page Elements

Page Element	Description
Transaction Totals Module	This module displays the following elements: ■ Module title text and data: Transaction Totals (*Number I*tem(s)) ■ Graphical bar chart: Shows transaction amounts for each day or month in the selected period.

Report Details Module	This module displays the following elements:
	
	■ Column titles:
	
	  ■ Text: Number of Payments
	
	  ■ Text and data: Amount (*Currency*)
	
	■ Column content:
	
	  ■ One or more of the following status sections:
	
	    ❑ Data and link: Total Processing
	    Link target: Displays the Payment Transactions Processing page. For details, see "Payment Transactions Processing Page Elements" on page 105.
	
	    ❑ Data and link: Total Successful
	    Link target: Displays the Successful Payment Transactions page. For details, see "Successful Payment Transactions Page Elements" on page 106.
	
	    ❑ Data and link: Total Failed
	    Link target: Displays the Failed Payment Transactions page. For details, see "Failed Payment Transactions Page Elements" on page 108.
	
	    ❑ Data, for each status: Payment type (Bank Transfer, Credit Card, and so on)
	
	  ■ Data: Number of payments
	
	  ■ Data: Amount

Payment Transactions Processing Page Elements

Table 51 describes the elements of this page.

Table 49.   Payment Transactions Processing Page Elements

Page Element	Description
Page Title Text	Payment Transactions Processing
Prompt Module	This module displays the following elements: ■ Download and printer-friendly elements
Search Payment Transactions Processing Module	This module displays the following elements: ■ Module title text: Payment Transactions Processing ■ Text and drop-down list: Payment Type *List* ■ Text and blank field for data entry: Billing Account Number *Field* ■ Button: View Action: Displays the report for the selected criteria.
List of Payment Transactions Processing Module	This module displays the following elements: ■ Module title text: List of Payment Transactions Processing (*Number* Item(s)) ■ Column titles: 　■ Text and sorting link: Billing Account Number 　■ Text and sorting link: Payment Type 　■ Text and sorting link: Payment Account ■ Column content: 　■ Data: Billing account number 　■ Data: Payment type 　■ Data: Payment Account ■ Content of the total row: 　■ Text: Total 　■ Data: *Currency* Total payment amount

Successful Payment Transactions Page Elements

Table 50 describes the elements of this page.

Table 50.   Successful Payment Transactions Page Elements

Page Element	Description
Page Title Text	Successful Payment Transactions
Prompt Module	This module displays the following elements: ■ Download and printer-friendly elements

Table 50.   Successful Payment Transactions Page Elements

Page Element	Description
Search Successful Payments Module	This module displays the following elements: ■ Module title text: Search Successful Payments ■ Text and drop-down list: Payment Type *List* ■ Text and blank field for data entry: Billing Account Number *Field* ■ Text and blank field for data entry: Payment Transactions From *Field* ■ Icon and link: Calendar 　Link target: Popup Calendar Selector ■ Text and blank field for data entry: To *Field* ■ Icon and link: Calendar 　Link target: Popup Calendar Selector ■ Button: View 　Action: Displays the report for the selected criteria.
List of Successful Payment Transactions Module	This module displays the following elements: ■ Module title text: List of Successful Payment Transactions (*Number* Item(s)) ■ Column titles: 　■ Text and sorting link: Payment Txn Number 　■ Text and sorting link: Payment Txn Date 　■ Text and sorting link: Payment Type 　■ Text and sorting link: Billing Account Number 　■ Text and sorting link: Payment Amount (*Currency*) ■ Column content: 　■ Data: Payment transaction number 　■ Data: Payment transaction date 　■ Data: Payment type 　■ Data: Billing account number 　■ Data: (*Currency*) Payment amount ■ Content of the total row: 　■ Text: Total 　■ Data: *Currency* Total payment amount

Failed Payment Transactions Page Elements

Table 51 describes the elements of this page.

Table 51. Failed Payment Transactions Page Elements

Page Element	Description
Page Title Text	Failed Payment Transactions
Prompt Module	This module displays the following elements: ■ Download and printer-friendly elements

Table 51.   Failed Payment Transactions Page Elements

Page Element	Description
Search Failed Payments Module	This module displays the following elements: ■ Module title text: Search Failed Payments ■ Text and drop-down list: Payment Type *List* ■ Text and blank field for data entry: Billing Account Number *Field* ■ Text and blank field for data entry: Payment Transactions From *Field* ■ Icon and link: Calendar Link target: Popup Calendar Selector ■ Text and blank field for data entry: To *Field* ■ Icon and link: Calendar Link target: Popup Calendar Selector ■ Button: View Action: Displays the report for the selected criteria.

List of Failed Payment Transactions Module	This module displays the following elements:
	
	■ Module title text: List of Failed Payment Transactions (*Number* Item(s))
	
	■ Column titles:
	
	  ■ Text and sorting link: Payment Txn Number
	
	  ■ Text and sorting link: Payment Txn Date
	
	  ■ Text and sorting link: Payment Type
	
	  ■ Text and sorting link: Billing Account Number
	
	  ■ Text and sorting link: Failed Reason
	
	■ Column content:
	
	  ■ Data: Payment transaction number
	
	  ■ Data: Payment transaction date
	
	  ■ Data: Payment transaction number
	
	  ■ Data: Payment type
	
	  ■ Data: Billing Account Number
	
	  ■ Data: Failed reason

Index

No index available for this guide.