



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

Version 6.0.4

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# Contents

## **Chapter 1: What's New in This Release**

## **Chapter 2: Enrollment and Login Use Cases**

About User Characteristics	11
Self-Enrolling an Authorized User of an Existing Consumer Account	12
Setting a Password and Security Question	15
Resetting a Password	17
Logging In	20
Managing a Profile	22
Setting a Preferred Language	25
Setting Account Lockout Status	27
Logging Out	28
Timeout	29

## **Chapter 3: Statement Presentment Use Cases**

Viewing the Statement Summary Report	31
Viewing the Account Summary	33
Viewing the Service Summary Report	34
Viewing the Usage Summary	35
Viewing Usage Detail	38
Viewing Transaction Details	40
Disputing a Transaction	42

## **Chapter 4: Payment Processing Use Cases**

About Payment Processing on a Server	43
Processing of the Scheduled Payment Job	43
Processing of the ACH Return Payment Job	44
Processing of the Recurring Payment Job	45

Synchronizing Payments to A/R 45

About ACH Return Codes 46

## **Chapter 5: Analytic Reporting Use Cases**

Viewing the List of Standard Billing Reports 47

Viewing the Account Billing Overview Report 49

Viewing the Statement Billing Overview Report 52

Viewing the Service Billing Overview Report 55

Viewing the Account Billing Trend Report 58

Viewing the Service Billing Trend Report 60

Viewing the Service Details Report 63

## **Chapter 6: Top X Reporting Use Cases**

Highest Spending Services 67

Highest Spending Services by Service Agreement 71

Most Expensive Calls 74

Longest Calls 77

Most Frequently Called Numbers 80

Most Frequently Called Number by Service Agreement 83

Most Frequently Called Number by Service Agreement Details 86

Most Frequently Called Destinations 89

Most Frequently Called Destination by Service Agreement 92

Most Frequently Called Destination by Service Agreement Details 95

Most Frequently Called Countries 98

Most Frequently Called Country by Service Agreement 102

Most Frequently Called Country by Service Agreement Details 105

## **Chapter 7: Customer Service Representative Use Cases**

CSR Overview 109

Enrolling Initial CSR Administrator 111

Enrolling a CSR 113

Setting a CSR Password and Security Question 116

Resetting a CSR Password 118

Searching for Users	120
Impersonating a User	122
Searching and Modifying a CSR User	123
Adding CSR Users	125
Editing a CSR User	126
Managing a CSR Profile	128
Setting a Preferred Language (CSR)	130
Adding a CSR Administrator	131
Setting CSR Account Lockout Status	134
Viewing the Account Lockout Report	135
Reactivating a Locked Account	137

## Index



# 1

## What's New in This Release

### What's New in Application Guide for Oracle Self-Service E-Billing (Consumer Edition), Version 6.0.4

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

Table 1. What's New in Application Guide for Oracle Self-Service E-Billing (Consumer Edition), Version 6.0.4.

Topic	Description
<a href="#">"Setting a Preferred Language" on page 25</a> <a href="#">"Setting a Preferred Language (CSR)" on page 130</a>	New topics. These use cases describe how to set a preferred language in implementations that have been localized. The preferred language is used in the user's subsequent sessions of Oracle Self-Service E-Billing.
<a href="#">"Highest Spending Services" on page 67</a>	New topic. This topic describes the new drill-down report available from the Highest Spending Services report.
<a href="#">"Most Frequently Called Number by Service Agreement" on page 83</a> <a href="#">"Most Frequently Called Number by Service Agreement Details" on page 86</a>	New topics. These topics describe the new drill-down reports available from the Most Frequently Called Number report.
<a href="#">"Most Frequently Called Destination by Service Agreement" on page 92</a> <a href="#">"Most Frequently Called Destination by Service Agreement Details" on page 95</a>	New topics. These topics describe the new drill-down reports available from the Most Frequently Called Destination report.
<a href="#">"Most Frequently Called Country by Service Agreement" on page 102</a> <a href="#">"Most Frequently Called Country by Service Agreement Details" on page 105</a>	New topics. These topics describe the new drill-down reports available from the Most Frequently Called Country report.
<a href="#">"Notification Types and Email Templates"</a>	Deleted chapter. This chapter has been moved to <i>Implementation Guide for Oracle Self-Service E-Billing</i> .

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

Table 2. New Product Features in Application Guide for Oracle Self-Service E-Billing (Consumer Edition), Version 6.0.3

Topic	Description
<a href="#">"Setting a Password and Security Question" on page 15</a>	New topic. This topic describes the new use case that requires each user to set a personal password and security question to comply with the Payment Card Industry Data Security Standard (PCI DSS).
<a href="#">"Resetting a Password" on page 17</a>	New topic. This topic describes the new use case that lets a user who has forgotten his or her password to create a new one. This use case was added to comply with the Payment Card Industry Data Security Standard (PCI DSS).
<a href="#">"Managing a Profile" on page 22</a>	New topic. This topic describes the new use case that lets a user manage his or her own profile to comply with the Payment Card Industry Data Security Standard (PCI DSS).
<a href="#">"Setting Account Lockout Status" on page 27</a>	New topic. This topic describes the new use case that lets an administrator change a user's lockout status. This use case was added to comply with the Payment Card Industry Data Security Standard (PCI DSS).
<a href="#">"Enrolling Initial CSR Administrator" on page 111</a>	New topic. This topic describes the new use case that requires the initial CSR administrator to enroll using the default CSR user ID and password to comply with the Payment Card Industry Data Security Standard (PCI DSS).
<a href="#">"Enrolling a CSR" on page 113</a>	New topic. This topic describes the new use case that requires the initial CSR (and other CSR users with an administrative role) to enroll new CSR users to comply with the Payment Card Industry Data Security Standard (PCI DSS).
<a href="#">"Setting a CSR Password and Security Question" on page 116</a>	New topic. This topic describes the new use case that requires each CSR user to set a personal password and security question to comply with the Payment Card Industry Data Security Standard (PCI DSS).
<a href="#">"Resetting a CSR Password" on page 118</a>	New topic. This topic describes the new use case that lets CSR users who have forgotten their password create a new one. This use case was added to comply with the Payment Card Industry Data Security Standard (PCI DSS).
<a href="#">"Editing a CSR User" on page 126</a>	New topic. This topic describes the new use case that lets administrative CSR users view and modify the current profile information of all the CSR users, including their own profile. This use case was added to comply with the Payment Card Industry Data Security Standard (PCI DSS).

Table 2. New Product Features in Application Guide for Oracle Self-Service E-Billing (Consumer Edition), Version 6.0.3

Topic	Description
<a href="#">"Adding a CSR Administrator" on page 131</a>	New topic. This topic describes the new use case that lets CSR users search a company's organization and add additional administrative users for the company. This use case was added to comply with the Payment Card Industry Data Security Standard (PCI DSS).
<a href="#">"Setting CSR Account Lockout Status" on page 134</a>	New topic. This topic describes the new use case of incidents that cause Oracle Self-Service E-Billing to lock a CSR user account, preventing the user from logging in. This use case was added to comply with the Payment Card Industry Data Security Standard (PCI DSS).
<a href="#">"Viewing the Account Lockout Report" on page 135</a>	New topic. This topic describes the new use case that lets a CSR administrator display a report showing one of the following: <ul style="list-style-type: none"> <li>■ Locked out customer (end user) accounts</li> <li>■ Locked out CSR users</li> <li>■ Customer accounts that have been reactivated after lockout</li> </ul> This use case was added to comply with the Payment Card Industry Data Security Standard (PCI DSS).
<a href="#">"Reactivating a Locked Account" on page 137</a>	New topic. This topic describes the new use case that lets a CSR administrator reactivate a customer account or CSR that has been locked out of Oracle Self-Service E-Billing. This use case was added to comply with the Payment Card Industry Data Security Standard (PCI DSS).
<a href="#">Chapter 5, "Analytic Reporting Use Cases"</a>	Chapter added for the addition of use cases for reports that analyze billing and payment data.
<a href="#">Chapter 6, "Top X Reporting Use Cases"</a>	Chapter added for the addition of use cases for reports that show top x activities, such as the greatest expenses and most frequent activities.
<a href="#">Chapter 3, "Notification Types and Email Templates"</a>	Modified chapter. Updated with template content for new email notification types for compliance with the Payment Card Industry Data Security Standard (PCI DSS).
<a href="#">"Viewing the Statement Summary Report" on page 31</a>	Modified topic. PDF and XML formats are now available with the Statement Summary.

Table 2. New Product Features in Application Guide for Oracle Self-Service E-Billing (Consumer Edition), Version 6.0.3

Topic	Description
<a href="#">"Viewing the Account Summary" on page 33</a> <a href="#">"Viewing the Service Summary Report" on page 34</a> <a href="#">"Viewing the Usage Summary" on page 35</a> <a href="#">"Viewing Usage Detail" on page 38</a>	Modified topics. You can download reports as XML files.
<a href="#">"Self-Enrolling an Authorized User of an Existing Consumer Account" on page 12</a> <a href="#">"Adding CSR Users" on page 125</a> <a href="#">"Managing a CSR Profile" on page 128</a>	Modified topics. These topics were updated to describe the updates required for compliance with the Payment Card Industry Data Security Standard (PCI DSS).

Table 3 lists changes made to this guide to support release 6.0.1 of the software.

Table 3. New Product Features in Application Guide for Oracle Self-Service E-Billing (Consumer Edition), Version 6.0.1

Topic	Description
<a href="#">"Searching for Users" on page 120</a>	The CSR user search now includes filtering to include inactive users.

# 2

## Enrollment and Login Use Cases

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

- [About User Characteristics on page 11](#)
- [Self-Enrolling an Authorized User of an Existing Consumer Account on page 12](#)
- [Setting a Password and Security Question on page 15](#)
- [Resetting a Password on page 17](#)
- [Logging In on page 20](#)
- [Managing a Profile on page 22](#)
- [Setting a Preferred Language on page 25](#)
- [Setting Account Lockout Status on page 27](#)
- [Logging Out on page 28](#)
- [Timeout on page 29](#)

### About User Characteristics

This topic describes the work roles associated with managing Oracle Self-Service E-Billing user profiles, which are listed in [Table 4](#).

Table 4. User Characteristics

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

Table 4. User Characteristics

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

## Self-Enrolling an Authorized User of an Existing Consumer Account

All B2C users are required to be authorized in Oracle Self-Service E-Billing, provide a password, a security question and a security answer. [Table 5](#) lists and describes the self-enrollment use case functions.

Table 5. Self-Enrolling of an Authorized User of an Existing Consumer Account

Functions	Description
<b>Name</b>	B2C Self Enrolling an Authorized User of an Existing Consumer Account.
<b>Feature Area</b>	User Management - Enrollment
<b>Primary User</b>	Consumer user
<b>Precondition</b>	The consumer account has been previously created in Oracle Self-Service E-Billing.
<b>Trigger</b>	The user clicks the Enroll tab.
<b>Standard Features</b>	None

Table 5. Self-Enrolling of an Authorized User of an Existing Consumer Account

Functions	Description
<b>Configuration Points</b>	<ul style="list-style-type: none"> <li>■ The number of characters in a user name</li> <li>■ The number of characters for the validation code within the HTTPS request</li> </ul>
<b>Notes</b>	<ul style="list-style-type: none"> <li>■ Oracle Self-Service E-Billing-generated validation codes cannot contain the following characters: a, A, e, E, 3, o, O, 0, i, l, 1, u, U, y, Y, \$, @, !, *</li> <li>■ The account that has been created and set to inactive state expires within four hours, and only a CSR administrator can reset the account.</li> <li>■ Oracle Self-Service E-Billing cannot reuse the validation code for 30 days after initially being created.</li> </ul>

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

The following path describes this use case.

- 1 Oracle Self-Service E-Billing displays a form for entering the following data:
  - Account Number - Required
  - First Name - Required
  - Last Name - Required
  - Service Number - Required
  - Email Address - Required
  - Confirm Email - Required
  - User Name - Required. Configurable; Default is a minimum of eight characters.
- 2 The user clicks Submit.
- 3 Oracle Self-Service E-Billing validates the information on the form for:
  - Formatting
  - Completeness
  - Validity of the account number and service number
  - Matching email and confirm email
  - User Name Requirements
- 4 The Enrollment confirmation form appears.
- 5 The user clicks Submit.

- 6 Oracle Self-Service E-Billing sends an email to the consumer user email address with the password.  
The email must contain an HTTPS link with a unique validation code. The validation code must
  - Use an abbreviated list of characters.
  - Contain at least one uppercase character, one lowercase character, and one number.
- 7 Oracle Self-Service E-Billing enters the Validation Code in the database.
- 8 Oracle Self-Service E-Billing sets a status flag in the database indicating this account is inactive.
  - The Login screen appears displaying the following message:  
*An email notification has been sent to the email address you have supplied during the enrollment process, you'll need to review it so that you can log into the application.*

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

The user clicks Cancel and the Login screen appears.

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

Exceptions can occur with this use case.

### One of the form fields is an empty string when submitted

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

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

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

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

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

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

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

# Setting a Password and Security Question

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

Table 6 lists and describes the Setting a Password and Security Question use case functions.

Table 6. Setting a Password and Security Question

Functions	Description
<b>Name</b>	Setting a Password and Security Question
<b>Feature Area</b>	Enrollment
<b>Primary User</b>	Consumer user
<b>Precondition</b>	The consumer must have completed the Self-Enrollment and received the email generated by that use case.
<b>Trigger</b>	The user clicks the HTTPS request sent in an email.
<b>Configuration Points</b>	<ul style="list-style-type: none"> <li>■ The number of characters in a password; PCI requirements state that seven characters is the minimum allowed.</li> <li>■ The complexity of the password.</li> <li>■ The number of questions for the security question.</li> <li>■ The list of security questions.</li> </ul>

## Main Path for Setting a Password and Security Question

The following path describes setting a password and security question:

- 1 Oracle Self-Service E-Billing displays a form where the consumer user enters the following information:
  - User Name
  - Password - When a user enters a password in Oracle Self-Service E-Billing, it must contain at least eight characters (configurable) and contain at least the following (configurable):
    - One uppercase character
    - One lowercase character
    - One number
    - No Spaces
    - Special characters are valid.
 The password cannot be the same as the user name.  
 The password cannot equal the previously entered password.
  - Confirm Password; must be the same as the previously entered password.

- Select a Security Question. Pre-Populated Drop Down (configurable)
  - Best friend's name from childhood
  - The name of the boy or girl you first kissed
  - The place where you first met your spouse or significant other
  - What is the make and model type of your first car
  - What was the name of the school you attended in first grade
- Security Answer
  - The form box size is 30 for consistency.
  - The minimum length of a security question is one (configurable) character and cannot be the space character.
  - The maximum length of the answer is 100 characters.
  - Oracle Self-Service E-Billing trims leading and trailing spaces and does not include these in the calculation of minimum and maximum lengths.
  - Spaces within the answer are valid.
  - Special characters are valid and enhance the security level of the answer.
- 2 The consumer user clicks Submit.
- 3 Oracle Self-Service E-Billing validates the information on the form for:
  - Formatting
  - Completeness
  - User name and validation code within HTTPS request match in Oracle Self-Service E-Billing.
  - The account has not expired; four hour (configurable) time limit
  - Password Requirements
- 4 Oracle Self-Service E-Billing sets the Status Flag in the database indicating this is an active user.
- 5 The Login page appears and displays the following message: *Your security credentials have been accepted, please log in to access your billing information.*

### Alternate Path for Setting a Password and Security Question

The user clicks Cancel and the Login screen appears.

### Exceptions for Setting a Password and Security Question

Exceptions can occur with this use case.

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

Oracle Self-Service E-Billing displays a message that states:

*Please contact a customer service representative at xxx-xxx-xxxx to have your account reactivated, as too much time has elapsed since you initiated the enrollment process.*

**One of the form fields is an empty string when submitted**

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

**The password or confirm password does not meet the requirements**

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

**The password and confirm passwords are not exactly the same**

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

## Resetting a Password

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

Table 7 lists and describes the Resetting a Password use case functions.

Table 7. Resetting a Password

Functions	Description
<b>Name</b>	Resetting a Password
<b>Feature Area</b>	Authentication and Enrollment
<b>Primary User</b>	Consumer user, CSR administrator (super or normal privileges)
<b>Precondition</b>	The consumer user must be currently enrolled in Oracle Self-Service E-Billing.
<b>Trigger</b>	The consumer user clicks the Forgot Password link on the Login page.
<b>Configuration Points</b>	<ul style="list-style-type: none"> <li>■ The number of times the user can enter an incorrect account number, user name, and service number.</li> <li>■ The number of times the user can enter an incorrect security question or security answer.</li> <li>■ The number of characters in a password, PCI requirements state that seven characters is the minimum allowed.</li> <li>■ The complexity of the password.</li> </ul>

## Main Path for Resetting a Password

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

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

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

After five (configurable) tries by the consumer user, the account is locked and Oracle Self-Service E-Billing displays an error message.
- 7 Oracle Self-Service E-Billing displays a Security Question and Answer Form. The following security questions appear in a drop down list:
  - Best friend's name from childhood
  - The name of the boy or girl you first kissed
  - The place where you first met your spouse or significant other
  - What is the make and model type of your first car
  - What was the name of the school you attended in first grade
- 8 The user selects the security question he or she answered during the enrollment process. Oracle Self-Service E-Billing displays the Security Answer field.
- 9 The user provides the same answer he or she entered during the enrollment process. The answer must be an exact match and is case-sensitive.
- 10 The user clicks Next. Oracle Self-Service E-Billing validates:
  - The form information for completeness.
  - The security question and answer. After five (configurable) tries by the consumer user, the account is locked and the end-user receives an error message.

- 11** Oracle Self-Service E-Billing displays a Reset Password form with the following values:
- Password - The default value is eight (configurable) characters. The password must contain at least the following characters (configurable):
    - One uppercase character
    - One lowercase character
    - One number
    - No spaces
    - Special characters are valid.
    - The password cannot be the same as the user name.
    - The password cannot equal the previously entered password.
  - Confirm Password - Must equal the password the user entered in the previous field.
- 12** The user clicks Next.
- 13** Oracle Self-Service E-Billing validates the form information for:
- Formatting
  - Completeness
  - Password Requirements
- 14** The Login page appears displaying the following message: *Please log into the application using your new personal password you have just created.*

## Alternate Path for Resetting a Password

The user clicks Cancel on any of the forms and the Login page reappears.

## Exceptions for Resetting a Password

Exceptions can occur with this use case.

### One of the form fields is an empty string when submitted

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

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

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

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

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

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

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

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

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

**The password or confirm password does not meet the requirements**

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

**The password and confirm password are not exactly the same**

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

## Logging In

In this use case, a user logs in to the Web site to access Oracle Self-Service E-Billing. [Table 8](#) lists and describes the use case functions.

Table 8. Logging In

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

Table 8. Logging In

Functions	Description
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ Validation of the username and password input.</li> <li>■ Authentication of the user name and password.</li> <li>■ Change Language action.</li> <li>■ Enroll as a new user link.</li> <li>■ Disclaimer text and standard footer links.</li> </ul>
<b>Configuration Points</b>	<ul style="list-style-type: none"> <li>■ Validation rules for username and password.                             <ul style="list-style-type: none"> <li>■ Username: (Default) The user’s telephone number alternative is first initial and full last name (non-phone user login).</li> <li>■ Password: (Default) Must be at least six characters and must contain at least one uppercase letter, one lowercase letter, and one number to comply with Sarbanes-Oxley guidelines.</li> </ul> </li> <li>■ Ability to force users to change their passwords at first login if the username and password were created by a CSR or a company administrator.</li> <li>■ Change Language: The default is U.S. English, however all Unicode scripts and languages are configurable.</li> <li>■ Parameters can be passed through the URL with a secure token that contains the preferred language, currency, and market segment information to personalize the user’s experience. For example, if a user has changed the language preference on the service provider’s consumer portal page, the Login screen must be presented in the same language, if available, and set for the remainder of the user’s session until changed by the user.</li> <li>■ Ability to bypass the Login screen to use single sign-on (SSO) applications (for example, Siebel CRM, Oracle Identity Manager, CA SiteMinder or other third-party application). Along with the Login information, the user’s language and currency preference can be passed to Oracle Self-Service E-Billing to set user preferences.</li> </ul>

### Main Path for Logging In

The following path describes user login:

- 1 The user enters login information:
  - Username
  - Password
- 2 The user clicks Submit.
- 3 Oracle Self-Service E-Billing validates data and identifies the user’s data access and permissions:

- Vertical: Telco is the default
  - Market: Consumer
  - Role: Determines permissions
  - Access: Data access
- 4 Oracle Self-Service E-Billing displays the default page determined by the user’s attributes (Vertical, Market, Role, Method, Access, and Language).

## Alternate Paths for Logging In

Alternate paths can occur in this use case.

### The customer’s login credentials are invalid.

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

### The user clicks the change language link.

The UI provides a screen to select alternate language for the display of the Login screen and sets the selected language preference for the duration of the user’s session or until changed by the user.

### The user clicks the Enroll tab.

The UI displays the Enrollment use case.

# Managing a Profile

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

Table 9 lists and describes the Managing a Profile use case functions.

Table 9. Managing a Profile

Functions	Description
<b>Name</b>	Managing a Profile
<b>Feature Area</b>	User Management.
<b>User</b>	Consumer user, CSR administrator (super or normal privileges)
<b>Trigger</b>	The consumer user clicks the My Accounts tab, then the Personal subtab in Oracle Self-Service E-Billing.

Table 9. Managing a Profile

Functions	Description
<b>Prerequisites</b>	The consumer user is currently enrolled in Oracle Self-Service E-Billing.
<b>Configuration Points</b>	<ul style="list-style-type: none"> <li>■ The number of characters in a password; PCI requires a minimum of seven characters</li> <li>■ The complexity of the password</li> <li>■ The number of questions for the security question</li> <li>■ The list of security questions</li> </ul>

## Main Path for Managing a Profile

- 1 User Information - Profile (excluding change password and security question)
  - a The user changes his or her profile information:
    - First Name - Prepopulated form box - Required
    - Last Name - Prepopulated form box - Required
    - Email address - Prepopulated form box - Required
 Users cannot change their:
    - User ID
  - b The user clicks Update.
  - c Oracle Self-Service E-Billing validates the form information for:
    - Formatting
    - Completeness
  - d Oracle Self-Service E-Billing displays the updated user information with the following success message: *Your profile information has been changed successfully.*
- 2 User Information - Change Password
  - a The user clicks the link for changing the password.
  - b Oracle Self-Service E-Billing displays the Change Password Form.
    - Old Password - Required
    - New Password - Required (cannot equal the previously entered password.)
    - Confirm Password - Required
 The password is eight characters by default (configurable) and must contain at least:
    - One uppercase character.
    - One lowercase character.
    - One number
    - No spaces

- Special characters are valid.
  - c** The user changes his or her password and clicks submit
  - d** Oracle Self-Service E-Billing validates the form information for:
    - Formatting
    - Password Requirements
  - e** Oracle Self-Service E-Billing generates an email indicating the password has been reset and sends it to the email address in Oracle Self-Service E-Billing.
  - f** Oracle Self-Service E-Billing displays the updated user information with the following success message: *Your password has been reset.*
- 3** User Information - Security Question
  - a** The user clicks the link for Change Security Question.
  - b** Oracle Self-Service E-Billing displays the Change Security Question Form  
Select a Security Question; Pre-Populated Drop Down (Configurable)
    - Best friend's name from childhood
    - The name of the boy or girl you first kissed
    - The place where you first met your spouse or significant other
    - What is the make and model type of your first car
    - What was the name of the school you attended in first grade
  - c** The user provides a security answer.
    - Form box size of 30 characters.
    - The minimum length of a security question is one (configurable) character and cannot be the space character.
    - The maximum length of the answer is 100 characters.
    - Oracle Self-Service E-Billing trims leading and trailing spaces and does not include these in the calculation of minimum and maximum lengths.
    - Spaces within the answer are valid.
    - Special characters are valid and enhance the security level of the answer.
  - d** The consumer user clicks Submit
  - e** Oracle Self-Service E-Billing validates the information on the form for:
    - Formatting
    - Completeness
  - f** Oracle Self-Service E-Billing displays the updated user information with the following success message: *Your security question and answer have been reset.*

## Alternate Paths for Managing a Profile

Alternate paths can occur in this use case.

### The user clicks **Cancel** on the **Manage Profile** page

The page refreshes with the original settings.

### The user clicks **Cancel** on the **Change Password** page

The Manage Profile page appears.

### The user clicks **Cancel** on the **Change Security Question** page

The Manage Profile page appears.

## Exceptions for Managing a Profile

Exceptions can occur with this use case.

### One of the form fields is an empty string when submitted

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

### The password or confirm password does not meet the requirements

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

### The password and confirm passwords are not exactly the same

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

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

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

## Setting a Preferred Language

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

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

Table 10 lists and describes the Setting a Preferred Language use case functions.

Table 10. Setting a Preferred Language

Function	Description
<b>Name</b>	Setting a Preferred Language
<b>Feature Area</b>	User Management
<b>User</b>	End user, administrator user
<b>Preconditions</b>	The user is currently enrolled and logged into Oracle Self-Service E-Billing.
<b>Trigger</b>	End user clicks the My Account tab, Personal subtab, and the Preferences page tab, or clicks Language.
<b>Page Content</b>	Page title: Change Language Attribute: Language Buttons <ul style="list-style-type: none"> <li>■ Submit</li> <li>■ Cancel</li> </ul>
<b>Page Tabs</b>	<ul style="list-style-type: none"> <li>■ User Access</li> <li>■ Notifications</li> <li>■ Contacts</li> <li>■ Preferences</li> </ul>
<b>Configuration Points</b>	Oracle Self-Service E-Billing is preconfigured with U.S. English only; you must localize your implementation to provide additional languages.

## Main Path for Setting a Preferred Language

The following path describes this use case:

- 1 The user clicks the My Account tab, Personal subtab, and the Preferences page tab, or clicks Language.
- 2 On the Preferences page, the user selects a language and clicks Submit.
- 3 Oracle Self-Service E-Billing displays the Billing and Payment application in the chosen language and stores this preference as part of the user's profile.

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

## Alternate Paths for Setting a Preferred Language

The following alternate path can occur in this use case.

### The user clicks Cancel

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

## Exceptions for Setting a Preferred Language

None.

# Setting Account Lockout Status

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

Table 11 lists and describes the Setting Account Lockout Status use case functions.

Table 11. Setting Account Lockout Status

Functions	Description
<b>Name</b>	Setting Account Lockout Status
<b>Functional Area</b>	Login and Authentication
<b>Primary Users</b>	Consumer user, CSR administrator (super or normal privileges)
<b>Prerequisites</b>	Consumer user is currently enrolled in Oracle Self-Service E-Billing
<b>Trigger</b>	<ul style="list-style-type: none"> <li>■ On the Login page a user tries more than five (configurable) times to log in. This counter is stored in the database, so time is not relevant.</li> <li>■ In the Forgot Password and Reset Password use case, when a user tries more than five (configurable) times to enter the user name, account number, or service number. This is a counter that must be stored in the database, so time is not relevant.</li> <li>■ In the Forgot Password and Reset Password use case, when a user tries more than five (configurable) times to enter the Security Question or Security Answer. This is a counter that must be stored in the database, so time is not relevant.</li> </ul>

Table 11. Setting Account Lockout Status

Functions	Description
<b>Configuration Points</b>	<ul style="list-style-type: none"> <li>■ Number of incorrect entries on the Login page</li> <li>■ Number of incorrect entries on the Forgot Password use case- Password</li> <li>■ Number of incorrect entries on the Forgot Password use case - Security Question</li> </ul>
<b>Notes</b>	<ul style="list-style-type: none"> <li>■ The value set in the database must be unique for each trigger point.</li> </ul>

### Main Path for Set Account Lockout Status

- 1 Oracle Self-Service E-Billing displays the Login page with the following error message: *Please contact your customer self service representative at xxx-xxx-xxxx to get your account reactivated.*
- 2 Oracle Self-Service E-Billing sets the status flag in the database indicating this account has been locked for one of the reasons described in [Table 11](#).

## Logging Out

In this use case, a user exits Oracle Self-Service E-Billing and ends the session. [Table 12](#) lists and describes the use case functions.

Table 12. Logging Out

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

### Main Path for Logging Out

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

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

## Alternate Path for Logging Out

The user's session reaches the timeout.

## Timeout

In this use case, a user who is logged in to Oracle Self-Service E-Billing is automatically logged out after being idle for a specified period of time. The default is 15 minutes. [Table 13](#) lists and describes the use case functions.

Table 13. Timeout

Functions	Description
<b>Name</b>	Timeout of Oracle Self-Service E-Billing.
<b>Functional Area</b>	User Management.
<b>Primary User</b>	Consumer user
<b>Trigger</b>	Inactivity of the user
<b>Configuration Points</b>	The service provider can configure the timeout idle period.

## Main Path for Timeout

The following path describes this use case.

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

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

## Alternate Paths for Timeout

None



# 3

## Statement Presentment Use Cases

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

- [Viewing the Statement Summary Report on page 31](#)
- [Viewing the Account Summary on page 33](#)
- [Viewing the Service Summary Report on page 34](#)
- [Viewing the Usage Summary on page 35](#)
- [Viewing Usage Detail on page 38](#)
- [Viewing Transaction Details on page 40](#)
- [Disputing a Transaction on page 42](#)

### Viewing the Statement Summary Report

This use case is used to view a statement overview.

[Table 14](#) lists and describes the use case functions.

Table 14. Viewing the Statement Summary Report

Functions	Description
<b>Name</b>	Viewing the Statement Summary Report
<b>Functional Area</b>	Statement
<b>Primary Users</b>	Consumer user
<b>Trigger</b>	The user clicks the Statement tab. Select the Select Statement Summary link from any other page under the Statements tab.
<b>Main Path</b>	<ol style="list-style-type: none"><li>1 The user clicks the Statement tab.</li><li>2 The user clicks the Statement Summary link.</li></ol>

Table 14. Viewing the Statement Summary Report

Functions	Description
<p><b>Alternate Paths</b></p>	<p><b>The user selects a different account number from a list.</b></p> <p>Oracle Self-Service E-Billing displays the Statement Summary for the selected account for the current period.</p> <p><b>The user selects a different statement period.</b></p> <p>Oracle Self-Service E-Billing displays the Statement Summary for the current account for the selected period.</p> <p><b>The user selects previous balance link.</b></p> <p>Oracle Self-Service E-Billing displays the previous period Statement Summary for the current account.</p> <p><b>The user clicks the total current charges link.</b></p> <p>Oracle Self-Service E-Billing displays the Account Summary.</p> <p><b>The user clicks the Print Summary link within the Quick Links section.</b></p> <p>Oracle Self-Service E-Billing downloads the bill summary only (the first page of the bill) in PDF format.</p>
<p><b>Standard Features</b></p>	<ul style="list-style-type: none"> <li>■ Printer-Friendly view.</li> <li>■ Download CSV, PDF, or XML.</li> </ul>
<p><b>Configuration Points</b></p>	<p>Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file:</p> <ul style="list-style-type: none"> <li>■ <b>CSV.</b> The maximum number of output lines.</li> <li>■ <b>PDF.</b> A percentage of the CSV threshold value (default is 10%).</li> <li>■ <b>XML.</b> A percentage of the CSV threshold value (default is 20%).</li> </ul> <p>For example, if the CSV report threshold is set to 3,000 result set lines, then a PDF threshold value set at 10% must process in batch mode when it has 300 or more result set lines.</p>

## Viewing the Account Summary

This use case is used to view an account summary. [Table 15](#) lists and describes the use case functions.

Table 15. Viewing the Account Summary

Functions	Description
<b>Name</b>	Viewing the Account Summary.
<b>Functional Area</b>	Statement.
<b>Primary Users</b>	Consumer user
<b>Trigger</b>	Consumer user drills down from Statement Summary.
<b>Main Path</b>	<ol style="list-style-type: none"> <li>1 The user clicks the Statements tab.</li> <li>2 The user clicks the Account Summary link.</li> </ol>
<b>Alternate Paths</b>	<ul style="list-style-type: none"> <li>■ The user selects a different account number from a list. Oracle Self-Service E-Billing displays the Statement Summary for the selected account for the current period.</li> <li>■ The user selects a different statement period. Oracle Self-Service E-Billing displays the Statement Summary for the current account for the selected period.</li> <li>■ The user selects previous balance link. Oracle Self-Service E-Billing displays the previous period Statement Summary for the current account.</li> <li>■ The user clicks the total current charges link. Oracle Self-Service E-Billing displays the Account Summary.</li> </ul>
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ Printer-Friendly view.</li> <li>■ Download CSV or XML.</li> </ul>
<b>Configuration Points</b>	<p>Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file:</p> <ul style="list-style-type: none"> <li>■ <b>CSV.</b> The maximum number of output lines.</li> <li>■ <b>XML.</b> A percentage of the CSV threshold value (default is 20%).</li> </ul> <p>For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.</p>

## Viewing the Service Summary Report

This use case is used to view summary of charges for a single service agreement. [Table 16](#) lists and describes the use case functions.

Table 16. Viewing the Service Summary Report

Functions	Description
<b>Name</b>	Viewing the Service Summary Report
<b>Functional Area</b>	Statement.
<b>Primary Users</b>	Consumer user
<b>Trigger</b>	The user selects a service agreement number in Statement Summary, Statement Summary, and Account summary.
<b>Main Path</b>	<ol style="list-style-type: none"> <li>1 The user clicks the Statements tab.</li> <li>2 The user clicks the Select Service Summary link.</li> </ol>
<b>Alternate Paths</b>	<p><b>The user selects a different service agreement number.</b></p> <p>The UI displays the Service Summary for the selected service agreement number and current period.</p> <p><b>The user selects a different bill date.</b></p> <p>The UI displays the Service Summary for the current service agreement number for the selected period.</p> <p><b>The user selects Total Usage Charges.</b></p> <p>The UI displays the Usage Summary for the current service agreement and current period.</p> <p><b>The user selects a usage type.</b></p> <ul style="list-style-type: none"> <li>■ Usage Type 1 (voice) links to Voice Detail Report for the current service agreement and current period.</li> <li>■ Usage Type 2 (messages) links to Messages Detail Report for the current service agreement and current period.</li> <li>■ Usage Type 3 (data) links to Data Detail Report for the current service agreement and current period.</li> <li>■ Usage Type n links to N Detail Report for the current service agreement and current period.</li> </ul>

Table 16. Viewing the Service Summary Report

Functions	Description
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ Printer-Friendly view.</li> <li>■ Download CSV or XML.</li> </ul>
<b>Configuration Points</b>	<p>Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file:</p> <ul style="list-style-type: none"> <li>■ <b>CSV.</b> The maximum number of output lines.</li> <li>■ <b>XML.</b> A percentage of the CSV threshold value (default is 20%).</li> </ul> <p>For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.</p>

## Viewing the Usage Summary

This use case is used to view the usage type breakdown for each service type, such as voice, messages, and data. [Table 17](#) lists and describes the use case functions.

Table 17. Viewing the Usage Summary

Functions	Description
<b>Name</b>	Viewing the Usage Summary
<b>Functional Area</b>	Statement
<b>Primary Users</b>	Consumer user
<b>Trigger</b>	The user selects a total usage charges in Service Summary.
<b>Main Path</b>	<ol style="list-style-type: none"> <li>1 The user selects Total Usage Charges link in Service Summary.</li> <li>2 The UI displays the Usage Summary for the current service agreement and current period.</li> </ol>

Table 17. Viewing the Usage Summary

Functions	Description
<b>Alternate Paths</b>	<p><b>The user selects a different service agreement number.</b></p> <p>The UI displays the Usage Summary for the selected service agreement number and current period.</p> <p><b>The user selects a different bill date.</b></p> <p>The UI displays the Usage Summary for the current service agreement number for the selected period.</p> <p><b>The user clicks a column header to sort in ascending or descending sequence.</b></p> <ol style="list-style-type: none"> <li>1 The user clicks the header link.</li> <li>2 Oracle Self-Service E-Billing sorts the column in ascending order.</li> <li>3 The user clicks the header link again.</li> <li>4 Oracle Self-Service E-Billing sorts the column in descending order.</li> </ol> <p><b>The user searches for a string in any column (including notes text).</b></p> <ol style="list-style-type: none"> <li>1 The user selects an attribute from the list.</li> <li>2 The user enters the search string with or without wildcards: <ul style="list-style-type: none"> <li>■ String no wildcards; exact match string</li> <li>■ String with end asterisk; starts with string</li> <li>■ String with front asterisk; ends with string</li> <li>■ String with front and end asterisk; contains string</li> </ul> </li> <li>3 Oracle Self-Service E-Billing displays all records that match the search criteria.</li> </ol> <p><b>The user selects contact link icon (not in sample views).</b></p> <ul style="list-style-type: none"> <li>■ The UI displays the Corporate or Personal Contact list entry.</li> </ul> <p>The contact link appears only if the number is in the contact list.</p> <p><b>The user selects a tariff link (such as weekend calls or peak calls).</b></p> <p>The UI displays the Categorize Transaction report for the current service agreement, the period, and the selected record.</p>
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ Printer-Friendly view.</li> <li>■ Download CSV or XML.</li> </ul>

Table 17. Viewing the Usage Summary

Functions	Description
<b>Configuration Points</b>	<p>Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file:</p> <ul style="list-style-type: none"> <li>■ <b>CSV.</b> The maximum number of output lines.</li> <li>■ <b>XML.</b> A percentage of the CSV threshold value (default is 20%).</li> </ul> <p>For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.</p>
<b>Alternate Paths</b>	<p><b>The user selects a different service agreement number.</b></p> <p>The UI displays the Usage Summary for the selected service agreement number and current period.</p> <p><b>The user selects a different bill date.</b></p> <p>The UI displays the Usage Summary for the current service agreement number for the selected period.</p> <p><b>The user selects a different usage type.</b></p> <p>The UI displays the Usage Summary for the current service agreement number for the selected period and usage type.</p> <p><b>The user selects a usage type total.</b></p> <ul style="list-style-type: none"> <li>■ Usage Type 1 (voice) links to Voice Detail Report for the current service agreement and current period.</li> <li>■ Usage Type 2 (messages) links to Messages Detail Report for the current service agreement and current period.</li> <li>■ Usage Type 3 (data) links to Data Detail Report for the current service agreement and current period.</li> <li>■ Usage Type n links to N Detail Report for the current service agreement and current period.</li> </ul>

Table 17. Viewing the Usage Summary

Functions	Description
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ Printer-Friendly view.</li> <li>■ Download CSV or XML.</li> </ul>
<b>Configuration Points</b>	<p>Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file:</p> <ul style="list-style-type: none"> <li>■ <b>CSV.</b> The maximum number of output lines.</li> <li>■ <b>XML.</b> A percentage of the CSV threshold value (default is 20%).</li> </ul> <p>For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.</p>

## Viewing Usage Detail

This use case is used to view the detail usage transactions. [Table 18](#) lists and describes the use case functions.

Table 18. Viewing Usage Detail

Functions	Description
<b>Name</b>	Viewing Usage Detail
<b>Functional Area</b>	Statement
<b>Primary Users</b>	Consumer user
<b>Trigger</b>	<ul style="list-style-type: none"> <li>■ The user selects a service type in Service Summary.</li> <li>■ The user selects usage type total charges in Usage Summary.</li> </ul>
<b>Main Path</b>	<ol style="list-style-type: none"> <li>1 Statement tab</li> <li>2 Usage Detail link</li> <li>3 Total Cost link in the Usage summary</li> <li>4 The UI displays the Usage Detail screen.</li> </ol>

Table 18. Viewing Usage Detail

Functions	Description
<b>Alternate Paths</b>	<p><b>The user selects a different service agreement number.</b></p> <p>The UI displays the Usage Summary for the selected service agreement number and current period.</p> <p><b>The user selects a different bill date.</b></p> <p>The UI displays the Usage Summary for the current service agreement number for the selected period.</p> <p><b>The user clicks a column header to sort in ascending or descending sequence.</b></p> <ol style="list-style-type: none"> <li>1 The user clicks the header link.</li> <li>2 Oracle Self-Service E-Billing sorts the column in ascending order.</li> <li>3 The user clicks the header link again.</li> <li>4 Oracle Self-Service E-Billing sorts the column in descending order.</li> </ol> <p><b>The user searches for a string in any column (including notes text).</b></p> <ol style="list-style-type: none"> <li>1 The user selects an attribute from list.</li> <li>2 The user enters the search string with or without wildcards: <ul style="list-style-type: none"> <li>■ String no wildcards; exact match string</li> <li>■ String with end asterisk; starts with string</li> <li>■ String with front asterisk; ends with string</li> <li>■ String with front and end asterisk; contains string</li> </ul> </li> <li>3 Oracle Self-Service E-Billing displays all records that match the search criteria.</li> </ol> <p><b>The user selects a contact link icon (not in sample views).</b></p> <ul style="list-style-type: none"> <li>■ The UI displays the Corporate or Personal Contact list entry.</li> </ul> <p>The contact link appears only if the number is in the contact list.</p> <p><b>The user selects a tariff link (such as weekend calls or peak calls).</b></p> <p>The UI displays the Categorize Transaction report for the current service agreement, the period, and the selected record.</p>

Table 18. Viewing Usage Detail

Functions	Description
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ Printer-Friendly view.</li> <li>■ Download CSV or XML.</li> </ul>
<b>Configuration Points</b>	<p>Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file:</p> <ul style="list-style-type: none"> <li>■ <b>CSV.</b> The maximum number of output lines.</li> <li>■ <b>XML.</b> A percentage of the CSV threshold value (default is 20%).</li> </ul> <p>For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.</p>

## Viewing Transaction Details

This use case is used to view all available transaction details, and to change the category, add a note, or dispute the transaction. [Table 19](#) lists and describes the use case functions.

Table 19. Viewing Transaction Details

Functions	Description
<b>Name</b>	Viewing Transaction Details
<b>Functional Area</b>	Statement, Split-Billing, and Dispute.
<b>Brief Description</b>	The user views all available transaction details, might change the category, add a note, or dispute the transaction.
<b>Primary Users</b>	Consumer user
<b>Trigger</b>	The user clicks the Tariff Type link on the Usage Detail page.
<b>Main Path</b>	<ol style="list-style-type: none"> <li>1 The user selects Tariff Type link on the Usage Detail page.</li> <li>2 The UI displays the Categorize Transaction view with all available attributes and values.</li> </ol>

Table 19. Viewing Transaction Details

Functions	Description
<b>Alternate Paths</b>	<p><b>The user clicks the contact link icon (not in sample views) next to the contact name.</b></p> <p>The UI displays the Corporate or Personal Contact list entry.</p> <p><b>The user changes the category and clicks Submit.</b></p> <p>Oracle Self-Service E-Billing updates the category for the record.</p> <p><b>The user adds a text note and clicks Submit.</b></p> <p><b>1</b> Oracle Self-Service E-Billing adds the text to the transaction record.</p> <p><b>2</b> Oracle Self-Service E-Billing displays a note icon in Usage Details report.</p> <p><b>The user selects Dispute.</b></p> <p>The UI displays the dispute transaction page.</p>
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ Printer-Friendly view.</li> <li>■ Download (CSV).</li> </ul>

## Disputing a Transaction

This use case is used to dispute a specific transaction. [Table 20](#) lists and describes the use case functions.

Table 20. Disputing a Transaction

Functions	Description
<b>Name</b>	Disputing A Transaction
<b>Main Path</b>	<ol style="list-style-type: none"> <li>1 The user clicks the dispute link on the Categorize Transaction page.</li> <li>2 The UI displays the Disputes page: <ul style="list-style-type: none"> <li>■ Transaction Date</li> <li>■ Posting Date</li> <li>■ Dispute Number</li> <li>■ Description</li> <li>■ Amount</li> <li>■ Actions: Submit; Cancel</li> <li>■ Reason for Dispute</li> <li>■ Account Number</li> </ul> </li> <li>3 The user enters text for a specific dispute and clicks Submit.</li> <li>4 The UI displays Disputes Page 3 (confirmation): <ul style="list-style-type: none"> <li>■ Information from previous page (full text of dispute)</li> <li>■ Actions: Print this page</li> </ul> </li> <li>5 Oracle Self-Service E-Billing saves dispute details.</li> </ol>
<b>Alternate Paths</b>	<ul style="list-style-type: none"> <li>■ The user clicks the link to print the page.</li> <li>■ The UI displays a page without navigation.</li> <li>■ The card member uses the browser print function to print the page.</li> </ul>
<b>Exceptions</b>	The card member enters an invalid field and the UI displays an error message.

# 4

## Payment Processing Use Cases

This topic describes use cases for processing payments. It includes the following topics:

- [About Payment Processing on a Server on page 43](#)
- [Processing of the Scheduled Payment Job on page 43](#)
- [Processing of the ACH Return Payment Job on page 44](#)
- [Processing of the Recurring Payment Job on page 45](#)
- [Synchronizing Payments to A/R on page 45](#)
- [About ACH Return Codes on page 46](#)

### About Payment Processing on a Server

To ensure that user information is secure, Oracle Self-Service E-Billing uses the following methods:

- **Secure Socket Layer (SSL).** Ensures that the user connection and information are secure from outside inspection.
- **Encryption.** 128-bit encryption to make user information unreadable as it passes over the Internet.
- **Automatic Sign Out.** Automatic user sign-out of a session if the user is inactive for a specified period of time (server configuration, default is 15 minutes).

### Processing of the Scheduled Payment Job

In this use case, Oracle Self-Service E-Billing processes scheduled payments (ACH and credit cards). [Table 21](#) lists and describes the use case functions.

Table 21. Processing of the Scheduled Payment Job

Functions	Description
<b>Name</b>	Processing of the Scheduled Payment Job
<b>Feature Area</b>	Payment
<b>Users</b>	Command Center administrator and automated processing
<b>Triggers</b>	Scheduled payment job begins
<b>Standard Features</b>	Email is generated when a payment is processed as defined in the user notification preferences.

## Main Path for Processing of the Scheduled Payment Job

In this use case, the job starts and processes scheduled payments (ACH and credit or debit cards).

## Alternate Paths for Processing of the Scheduled Payment Job

Alternate paths can occur in this use case.

### Expired Credit Card

The job identifies an expired credit or debit card. The server generates email to the user notifying that the payment failed. The server does not generate the scheduled payment.

### Failed Payment Request

If for some reason a scheduled payment cannot be created, the server generates email to the user notifying that the payment failed.

# Processing of the ACH Return Payment Job

In this use case, Oracle Self-Service E-Billing processes an NACHA-compliant ACH return file.

[Table 22](#) describes the ACH return payment processing functions.

Table 22. Processing of the ACH Return Payment Job

Functions	Description
Name	ACH Return Payment Processing
Feature Area	Payment
Users	Command Center administrator and automated processing.
Triggers	ACH return job begins.

## Main Path for Processing of the ACH Return Payment Job

In this use case the job starts and processes ACH returns.

## Alternate Path for Processing of the ACH Return Payment Job

None.

# Processing of the Recurring Payment Job

In this use case, Oracle Self-Service E-Billing generates recurring payments. Recurring payments use the rules defined in the user profile. [Table 23](#) lists and describes the use case functions.

Table 23. Processing of the Recurring Payment Job

Functions	Description
<b>Name</b>	Processing of the Recurring Payment Job
<b>Feature Area</b>	Payment
<b>Users</b>	Command Center administrator and automated processing.
<b>Triggers</b>	Recurring payment job begins.
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ When a payment is returned and an ACH return file is sent back with a status of Failed, an email is sent informing the consumer user.</li> <li>■ Email is generated when a recurring payment is scheduled.</li> </ul>

## Main Path for Processing of the Recurring Payment Job

In this use case the job starts and creates scheduled payments triggered by recurring payment rules.

## Alternate Paths for Processing of the Recurring Payment Job

Alternate paths can occur in this use case.

### The recurring payment threshold is exceeded

The job identifies that the recurring payment threshold has been exceeded for recurring payment rules. Oracle Self-Service E-Billing generates email to the user notifying that the payment failed. Oracle Self-Service E-Billing does not generate the scheduled payment.

### The user's credit card is expired

The Job identifies an expired credit card. Oracle Self-Service E-Billing generates email to the user notifying that the payment failed. Oracle Self-Service E-Billing does not generate the scheduled payment.

### The payment request failed

If, for some reason, a scheduled payment cannot be created, then Oracle Self-Service E-Billing generates email to the user notifying that the payment failed.

# Synchronizing Payments to A/R

This is a job that runs to receive all payment information from accounts receivable (A/R Receive).

Table 24 describes the payment synchronization received from accounts receivable.

Table 24. Synchronizing Payments to A/R

Functions	Description
<b>Name</b>	Synchronizing Payments to A/R (standard format)
<b>Feature Area</b>	Payment
<b>Users</b>	Command Center administrator and automated processing.
<b>Triggers</b>	Accounts receivable receives the job start.
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ Accounts receivable synchronization.</li> <li>■ Auto Load job for accounts receivable update.</li> <li>■ Payment source included as an attribute for payment history. Configurable values include: Online ACH, Online CC, Offline Check, and Offline CC. It is recommended to have a standard format for offline payments to be fed to the Oracle Self-Service E-Billing application. This standardized file would then be uploaded to the product's payment history tables so that the user can view all payments.</li> <li>■ The accounts receivable Receive file includes all payments made to the account at the payment level (if possible). The accounts receivable update includes information on how the payment was applied. If one payment is made for three accounts, the payment history will show a single payment while the user can link to details about how the payment was applied.</li> </ul>

### Main Path for Synchronizing Payments to A/R

In this use case, accounts receivable receives the job start. The job sends payment information to accounts receivable. The job then creates a payment batch file.

### Alternate Paths for Synchronizing Payments to A/R

None.

## About ACH Return Codes

The ACH Return Code Reference is at

<http://www.nacha.org/>

# 5

## Analytic Reporting Use Cases

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

- [Viewing the List of Standard Billing Reports on page 47](#)
- [Viewing the Account Billing Overview Report on page 49](#)
- [Viewing the Statement Billing Overview Report on page 52](#)
- [Viewing the Service Billing Overview Report on page 55](#)
- [Viewing the Account Billing Trend Report on page 58](#)
- [Viewing the Service Billing Trend Report on page 60](#)
- [Viewing the Service Details Report on page 63](#)

### Viewing the List of Standard Billing Reports

Users can view and access a list of standard billing reports in this use case. [Table 25](#) lists and describes the functions.

Table 25. Viewing the List of Standard Billing Reports

Function	Description
<b>Name</b>	Viewing the List of Standard Billing Reports
<b>Description</b>	<p>The user views a list of standard billing reports and chooses one to view. The end user views a list of standard billing reports and chooses one to view:</p> <ul style="list-style-type: none"><li>■ Account Billing Overview</li><li>■ Statement Billing Overview</li><li>■ Service Billing Overview</li><li>■ Account Billing Trend</li><li>■ Service Billing Trend</li><li>■ Service Details</li></ul>
<b>Feature Area</b>	Analytic Reports
<b>Primary User</b>	Consumer user, CSR hosting administrator
<b>Prerequisites</b>	The user has been successfully enrolled and authenticated.

Table 25. Viewing the List of Standard Billing Reports

Function	Description
Trigger	The end user clicks the Analytics tab.
Configuration Points	None
Business Rules	None

## Main Path for Viewing the List of Standard Billing Reports

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

## Alternate Paths for Viewing the List of Standard Billing Reports

Alternate paths can occur with this use case.

### The user selects an active link

Oracle Self-Service E-Billing refreshes the page.

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

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

## Exceptions for Viewing the List of Standard Billing Reports

Exceptions can occur with this use case.

### The user encounters an error

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

# Viewing the Account Billing Overview Report

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

Table 26 lists and describes the Viewing the Account Billing Overview Report use case functions.

Table 26. Viewing the Account Billing Overview Report

Function	Description
<b>Name</b>	Viewing the Account Billing Overview Report
<b>Description</b>	The user views an overview of billing accounts that he or she is associated with for the current month.
<b>Feature Area</b>	Analytic Reports
<b>Primary User</b>	Consumer user, CSR hosting administrator
<b>Prerequisites</b>	<ul style="list-style-type: none"> <li>■ The user has been successfully enrolled and authenticated.</li> <li>■ The B2C user has been linked to two or more accounts.</li> </ul>
<b>Trigger</b>	The end user clicks the Analytics Tab, Billing Reports, Account Billing Overview.
<b>Chart</b>	Bar Chart (Default): <ul style="list-style-type: none"> <li>■ X-axis: Reporting Period</li> <li>■ Y-axis: Dollars</li> </ul>
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ Printer-Friendly view.</li> <li>■ Download CSV, PDF, or XML.</li> </ul>

Table 26. Viewing the Account Billing Overview Report

Function	Description
<b>Report Content</b>	<p>Header:</p> <ul style="list-style-type: none"> <li>■ Report Details</li> <li>■ Number of Items</li> </ul> <p>Columns:</p> <ul style="list-style-type: none"> <li>■ Account Number (Sort Ascending, Hyperlink to Service Billing Overview for selected account)</li> <li>■ Number of Contracts</li> <li>■ Monthly Charges</li> <li>■ Usage Charges</li> <li>■ Credits</li> <li>■ Other Charges</li> <li>■ Taxes</li> <li>■ Total (Hyperlink to Statement Billing Overview for selected account number in row,</li> <li>■ T (Hyperlink to Account Billing Trend for selected account number in row)</li> </ul> <p>Footer (Total Row):</p> <ul style="list-style-type: none"> <li>■ Total - Literal</li> <li>■ Monthly Charges</li> <li>■ Usage Charges</li> <li>■ Credits</li> <li>■ Other Charges</li> <li>■ Taxes</li> </ul>

Table 26. Viewing the Account Billing Overview Report

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

## Main Path for Viewing the Account Billing Overview Report

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

## Alternate Paths for Viewing the Account Billing Overview Report

Alternate paths can occur in this use case.

### The user selects an active link

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

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

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

### The user selects the Download action

Oracle Self-Service E-Billing downloads the report.

### The user selects the Printer-Friendly action

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

### The user changes reporting period

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

**The user selects a different report.**

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

**Exceptions for Viewing the Account Billing Overview**

Exceptions can occur with this use case.

**The user encounters a server system error**

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

# Viewing the Statement Billing Overview Report

Users can view the charge types summarized by invoice. [Table 27](#) lists and describes the Viewing the Statement Billing Overview Report use case functions.

Table 27. Viewing the Statement Billing Overview Report

Function	Description
<b>Name</b>	Viewing the Statement Billing Overview
<b>Description</b>	A statement summary for a user over a defined reporting period.
<b>Feature Area</b>	Analytic Reports
<b>Primary User</b>	Consumer user, CSR hosting administrator
<b>Prerequisites</b>	The user has been successfully enrolled and authenticated.
<b>Trigger</b>	The end user clicks the Analytics Tab, Billing Reports, Statement Billing Overview link or Statement Billing Overview from the list.
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ Printer-Friendly view.</li> <li>■ Download CSV or XML.</li> </ul>

Table 27. Viewing the Statement Billing Overview Report

Function	Description
<p><b>Report Content</b></p>	<p>Header:</p> <ul style="list-style-type: none"> <li>■ Report Details</li> <li>■ Number of Items</li> </ul> <p>Columns:</p> <ul style="list-style-type: none"> <li>■ Statement (Sort Most Recent First, hyperlink to Statement Summary for that billing period)</li> <li>■ Statement Date</li> <li>■ Period</li> <li>■ Account Number</li> <li>■ Monthly Charges</li> <li>■ Usage Charges</li> <li>■ Credits</li> <li>■ Other Charges</li> <li>■ Taxes</li> <li>■ Total</li> </ul> <p>Footer (Total Row):</p> <ul style="list-style-type: none"> <li>■ Total - Literal</li> <li>■ Monthly Charges</li> <li>■ Usage Charges</li> <li>■ Credits</li> <li>■ Other Charges</li> <li>■ Taxes</li> <li>■ Total</li> </ul>
<p><b>Configuration Points</b></p>	<ul style="list-style-type: none"> <li>■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file:                             <ul style="list-style-type: none"> <li>■ <b>CSV.</b> The maximum number of output lines.</li> <li>■ <b>XML.</b> A percentage of the CSV threshold value (default is 20%).</li> </ul> <p>For example, if the CSV report threshold is set to 3,000 result set lines, then a PDF threshold value set at 10% must process in batch mode when it has 300 or more result set lines.</p> </li> <li>■ All report detail columns are sortable.</li> </ul>

Table 27. Viewing the Statement Billing Overview Report

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

## Main Path for Viewing the Statement Billing Overview Report

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

## Alternate Paths for Viewing the Statement Billing Overview Report

Alternate paths can occur in this use case.

### The user selects an active link

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

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

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

### The user selects the Download action

Oracle Self-Service E-Billing downloads the report.

### The user selects the Printer-Friendly action

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

### The users changes reporting period

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

### The user selects a different report

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

## Exceptions for Viewing the Statement Billing Overview Report

Exceptions can occur with this use case.

### The user encounters an error

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

# Viewing the Service Billing Overview Report

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

Table 28 lists and describes the Viewing the Service Billing Overview Report use case functions.

Table 28. Viewing the Service Billing Overview Report

Function	Description
<b>Name</b>	Viewing the Service Billing Overview Report
<b>Description</b>	This report tracks all of the services monthly charges for one or more service numbers over a user-defined reporting period.
<b>Feature Area</b>	Analytic Reports
<b>Primary User</b>	Consumer user, CSR hosting administrator
<b>Prerequisites</b>	The user has been successfully enrolled and authenticated.
<b>Trigger Points</b>	The user clicks the Analytics tab, and then clicks the Service Billing Overview link or selects Service Billing Overview from the list.
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ Printer-Friendly view.</li> <li>■ Download CSV or XML.</li> </ul>

Table 28. Viewing the Service Billing Overview Report

Function	Description
<p><b>Report Content</b></p>	<p>Header:</p> <ul style="list-style-type: none"> <li>■ Service Charges</li> <li>■ Number of Items</li> </ul> <p>Columns:</p> <ul style="list-style-type: none"> <li>■ Service Number</li> <li>■ Name</li> <li>■ Monthly Charges</li> <li>■ Usage Charges</li> <li>■ Credits</li> <li>■ Other Charges</li> <li>■ Taxes</li> <li>■ Total (Sort Most Expensive First)</li> <li>■ T (Hyperlinks to Service Billing Trend for the Service Number within the corresponding row)</li> </ul> <p>Footer (Total Row):</p> <ul style="list-style-type: none"> <li>■ Total - Literal</li> <li>■ Monthly Charges</li> <li>■ Usage Charges</li> <li>■ Credits</li> <li>■ Other Charges</li> <li>■ Taxes</li> <li>■ Total</li> <li>■ T (Hyperlinks to Service Billing Trend for all Service Numbers)</li> </ul>
<p><b>Configuration Points</b></p>	<ul style="list-style-type: none"> <li>■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file:                             <ul style="list-style-type: none"> <li>■ <b>CSV.</b> The maximum number of output lines.</li> <li>■ <b>XML.</b> A percentage of the CSV threshold value (default is 20%).</li> </ul> <p>For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.</p> </li> <li>■ All report detail columns are sortable.</li> </ul>

Table 28. Viewing the Service Billing Overview Report

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

## Main Path for Viewing the Service Billing Overview Report

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

## Alternate Paths for Viewing the Service Billing Overview Report

Alternate paths can occur in this use case.

### The user selects an active link

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

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

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

### The user selects the Download action

Oracle Self-Service E-Billing downloads the report.

### The user selects the Printer-Friendly action

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

### The user changes reporting period

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

### The user selects a different report

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

## Exceptions for Service Billing Overview Report

Exceptions can occur with this use case.

### The user encounters an error

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

## Viewing the Account Billing Trend Report

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

[Table 29](#) lists and describes the Viewing the Account Billing Trend Report use case functions.

Table 29. Viewing the Account Billing Trend Report

Function	Description
<b>Name</b>	Viewing the Account Billing Trend Report
<b>Description</b>	This report tracks the monthly charges for an account over a user-defined reporting period.
<b>Feature Area</b>	Analytic Reports
<b>Primary User</b>	Consumer user, CSR hosting administrator
<b>Prerequisites</b>	The user has been successfully enrolled and authenticated.
<b>Trigger Points</b>	The end user clicks the Analytics Tab, and then clicks the Account Billing Trend link or selects Account Billing Trend from the list.
<b>Chart</b>	Bar Chart (Default): <ul style="list-style-type: none"> <li>■ X-axis: Reporting Period</li> <li>■ Y-axis: Dollars</li> </ul>
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ Printer-Friendly view.</li> <li>■ Download CSV or XML.</li> </ul>

Table 29. Viewing the Account Billing Trend Report

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

## Main Path for Viewing the Account Billing Trend Report

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

## Alternate Paths for Viewing the Account Billing Trend Report

Alternate paths can occur in this use case.

### The user selects an active link

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

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

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

### The user selects the Download action

Oracle Self-Service E-Billing downloads the report.

### The user selects the Printer-Friendly action

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

### The user changes reporting period

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

### The user selects a different report

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

## Exceptions for Viewing the Account Billing Trend Report

Exceptions can occur with this use case.

### The user encounters a server system error

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

# Viewing the Service Billing Trend Report

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

Table 30 lists and describes the Service Billing Trend use case functions.

Table 30. Viewing the Service Billing Trend Report

Function	Description
<b>Name</b>	Viewing the Service Billing Trend Report
<b>Description</b>	This report tracks the monthly charges for one or more service numbers over a user defined reporting period.
<b>Feature Area</b>	Analytic Reports
<b>Primary User</b>	Consumer user, CSR hosting administrator
<b>Prerequisites</b>	The user has been successfully enrolled and authenticated.
<b>Trigger Points</b>	The end user clicks the Analytics Tab, and then clicks the Service Billing Trend link or selects Service Billing Trend from the list.
<b>Chart</b>	Bar Chart (Default): <ul style="list-style-type: none"> <li>■ X-axis: Reporting Period</li> <li>■ Y-axis: Dollars</li> </ul>
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ Printer-Friendly view.</li> <li>■ Download CSV or XML.</li> </ul>

Table 30. Viewing the Service Billing Trend Report

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

## Main Path for Viewing the Service Billing Trend Report

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

## Alternate Paths for Viewing the Service Billing Trend Report

Alternate paths can occur in this use case.

### The user selects an active link

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

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

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

### The user selects the Download action

Oracle Self-Service E-Billing downloads the report.

### The user selects the Printer-Friendly action

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

### The user changes reporting period

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

### The user selects a different report

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

## Exceptions for Viewing the Service Billing Trend Report

Exceptions can occur with this use case.

### The user encounters a server system error

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

## Viewing the Service Details Report

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

Table 31 lists and describes the Viewing the Service Details Report use case functions.

Table 31. Viewing the Service Details Report

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

Table 31. Viewing the Service Details Report

Function	Description
<p><b>Report Content</b></p>	<p>Header:</p> <ul style="list-style-type: none"> <li>■ Report Details</li> <li>■ Number of Items</li> <li>■ Page Elements (Default is 10 transactions listed on each page)</li> </ul> <p>Columns:</p> <ul style="list-style-type: none"> <li>■ Date (Sort Most Recent First)</li> <li>■ Time</li> <li>■ Service Number</li> <li>■ Name</li> <li>■ Number Called</li> <li>■ Category</li> <li>■ Memo (Icon)</li> <li>■ Dispute (Icon)</li> <li>■ Type</li> <li>■ Tariff (Hyperlink to Service Transaction Detail)</li> <li>■ Destination</li> <li>■ Volume</li> <li>■ Total Charges</li> </ul> <p>Footer (Total Row):</p> <ul style="list-style-type: none"> <li>■ Total - Literal</li> <li>■ Total Charges</li> </ul>
<p><b>Configuration Points</b></p>	<ul style="list-style-type: none"> <li>■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file:                             <ul style="list-style-type: none"> <li>■ <b>CSV.</b> The maximum number of output lines.</li> <li>■ <b>PDF.</b> A percentage of the CSV threshold value (default is 10%).</li> <li>■ <b>XML.</b> A percentage of the CSV threshold value (default is 20%).</li> </ul> <p>For example, if the CSV report threshold is set to 3,000 result set lines, then a PDF threshold value set at 10% must process in batch mode when it has 300 or more result set lines.</p> </li> <li>■ All report detail columns are sortable.</li> </ul>

Table 31. Viewing the Service Details Report

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

## Main Path for Viewing the Service Details Report

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

## Alternate Paths for Viewing the Service Details Report

Alternate paths can occur in this use case.

### The user selects an active link

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

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

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

### The user selects the Download action

Oracle Self-Service E-Billing downloads the report.

### The user selects the Printer-Friendly action

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

### The user changes reporting period

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

### The user selects a different report

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

## Exceptions for Viewing the Service Details Report

Exceptions can occur with this use case.

### The user encounters a server system error

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

# 6

## Top X Reporting Use Cases

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

- [Highest Spending Services on page 67](#)
- [Highest Spending Services by Service Agreement on page 71](#)
- [Most Expensive Calls on page 74](#)
- [Longest Calls on page 77](#)
- [Most Frequently Called Numbers on page 80](#)
- [Most Frequently Called Number by Service Agreement on page 83](#)
- [Most Frequently Called Number by Service Agreement Details on page 86](#)
- [Most Frequently Called Destinations on page 89](#)
- [Most Frequently Called Destination by Service Agreement on page 92](#)
- [Most Frequently Called Destination by Service Agreement Details on page 95](#)
- [Most Frequently Called Countries on page 98](#)
- [Most Frequently Called Country by Service Agreement on page 102](#)
- [Most Frequently Called Country by Service Agreement Details on page 105](#)

### Highest Spending Services

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

[Table 32](#) lists and describes the use case functions.

Table 32. Highest Spending Services

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

Table 32. Highest Spending Services

Function	Description
<b>Trigger</b>	<ul style="list-style-type: none"> <li>■ The user clicks the Analytics tab, and then clicks the Top X Reports subtab. A report list appears and the user selects the hyperlink for Highest Spending Services.</li> <li>■ The user selects Highest Spending Services from the Top X Report drop-down list.</li> </ul>
<b>Prompts</b>	<p>Report Selection Criteria</p> <p>Period Range (Default: Current period.)</p> <ul style="list-style-type: none"> <li>■ The user selects a start and end reporting period.</li> </ul> <p>Number of Results</p> <ul style="list-style-type: none"> <li>■ Default: 10</li> <li>■ The user can select the number of resulting report query rows to view from the following preconfigured values: 10, 25, 50, or 100.</li> </ul> <p>Drop-down List:</p> <ul style="list-style-type: none"> <li>■ Highest Spending Services (Default)</li> <li>■ Most Expensive Calls</li> <li>■ Longest Calls</li> <li>■ Most Frequently Called Numbers</li> <li>■ Most Frequently Called Destinations</li> <li>■ Most Frequently Called Countries</li> </ul>
<b>Page Tabs</b>	<ul style="list-style-type: none"> <li>■ Report (Active)</li> <li>■ Batch Request</li> </ul>
<b>Active Hyperlinks (Breadcrumbs)</b>	<ul style="list-style-type: none"> <li>■ <b>Analytics.</b> Displays the list of Standard reports.</li> <li>■ <b>Top X Reports.</b> Displays the list of Top X reports.</li> </ul>

Table 32. Highest Spending Services

Function	Description
<b>Report Content</b>	<p>Page Title:</p> <ul style="list-style-type: none"> <li>■ Highest Spending Services</li> </ul> <p>Header:</p> <ul style="list-style-type: none"> <li>■ Report Details</li> <li>■ Number of items</li> </ul> <p>Columns:</p> <ul style="list-style-type: none"> <li>■ Service Number (With a hyperlink to the Highest Spending Services by Service Agreement report).</li> <li>■ Name</li> <li>■ Account Number</li> <li>■ Total Charges. Sorted highest to lowest, with a hyperlink on the letter T to the Service Billing Trend report for the service agreement.</li> </ul> <p>Total Row:</p> <ul style="list-style-type: none"> <li>■ Total (literal)</li> <li>■ Number of calls</li> <li>■ Total charges</li> </ul>
<b>Business Rules</b>	The current bill period range (single period) is used as the default criteria.
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ Printer-friendly view</li> <li>■ Download CSV or XML</li> </ul>

Table 32. Highest Spending Services

Function	Description
<b>Configuration Points</b>	<ul style="list-style-type: none"> <li>■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file:                             <ul style="list-style-type: none"> <li>■ <b>CSV.</b> The maximum number of output lines.</li> <li>■ <b>XML.</b> A percentage of the CSV threshold value (Default is 20%).</li> </ul>                             For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.                         </li> <li>■ All report detail table columns are sortable and display in descending order (highest to lowest); you can change the default sort order to ascending.</li> </ul>
<b>Note</b>	<ul style="list-style-type: none"> <li>■ Drill-down links are for the selected service agreement.</li> <li>■ Oracle Self-Service E-Billing calculates the total charge for each service agreement and returns the number of results selected.</li> <li>■ If the report result set is less than the number of results selected, the available data set displays.</li> <li>■ If there are ties in the total charge amounts, Oracle Self-Service E-Billing returns service agreements from lowest to highest until it equals the total number requested (10, 25 50, or 100).</li> <li>■ Users can submit a batch request for this report.</li> </ul>

### Main Path for Using Highest Spending Services

The following path describes the Highest Spending Services use case:

- 1 The user selects the Highest Spending Services report from the List of Top X Reports or from the drop-down list of reports.
- 2 Oracle Self-Service E-Billing displays the top ten records of the Highest Spending Services report for the current period.

### Alternate Paths for Highest Spending Services

Alternate paths can occur in this use case.

#### The user specifies query parameters

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

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

**The user selects the Download action (CSV or XML)**

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

**The user selects the Printer Friendly action**

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

**Exceptions for Highest Spending Services**

Exceptions can occur in this use case.

**The user encounters a system error**

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

# Highest Spending Services by Service Agreement

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

Table 33 lists and describes the use case functions.

Table 33. Highest Spending Services by Service Agreement

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

Table 33. Highest Spending Services by Service Agreement

Function	Description
<b>Report Content</b>	<p>Page Title:</p> <ul style="list-style-type: none"> <li>■ Highest Spending Services by Service Agreement</li> </ul> <p>Paging Elements (If needed)</p> <ul style="list-style-type: none"> <li>■ Page X of Total</li> <li>■ Paging arrow buttons</li> </ul> <p>Header:</p> <ul style="list-style-type: none"> <li>■ Report Details</li> <li>■ Number of items</li> </ul> <p>Columns:</p> <ul style="list-style-type: none"> <li>■ Service Number</li> <li>■ Name</li> <li>■ Account Number</li> <li>■ Date</li> <li>■ Time</li> <li>■ Usage Type</li> <li>■ Volume</li> <li>■ Total Charges (Sorted highest to lowest)</li> </ul> <p>Total Row:</p> <ul style="list-style-type: none"> <li>■ Total (literal)</li> <li>■ Total charges</li> </ul>
<b>Business Rules</b>	<p>The bill period range (single period) selected on the Highest Spending Services Report applies on this drill-down report.</p>
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ Printer-friendly view</li> <li>■ Download CSV or XML</li> </ul>

Table 33. Highest Spending Services by Service Agreement

Function	Description
<b>Configuration Points</b>	<ul style="list-style-type: none"> <li>■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file:                             <ul style="list-style-type: none"> <li>■ <b>CSV.</b> The maximum number of output lines.</li> <li>■ <b>XML.</b> A percentage of the CSV threshold value (Default is 20%).</li> </ul>                             For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.                         </li> <li>■ All report detail table columns are sortable (except for service number, name, and account columns) and display in descending order (highest to lowest); you can change the default sort order to ascending.</li> </ul>
<b>Note</b>	This report uses paging elements if the number of results exceeds the threshold set for the page view.

## Main Path for Using Highest Spending Services by Service Agreement

The following path describes the Highest Spending Services by Service Agreement use case:

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

## Alternate Paths for Highest Spending Services by Service Agreement

Alternate paths can occur in this use case.

### The user selects the Download action (CSV or XML)

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

### The user selects the Printer Friendly action

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

## Exceptions for Highest Spending Services by Service Agreement

An exception can occur in this use case.

### The user encounters a system error

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

## Most Expensive Calls

This use case lets the user view a report showing the most expensive calls. [Table 34](#) lists and describes the use case functions.

Table 34. Most Expensive Calls

Function	Description
<b>Name</b>	Most Expensive Calls
<b>Feature Area</b>	Analytics
<b>Description</b>	The user views a report showing the most expensive calls.
<b>Primary User</b>	Administrator, manager, and subscriber; CSR administrator and user.
<b>Trigger</b>	<ul style="list-style-type: none"> <li>■ The user clicks the Analytics tab, and then clicks the Top X Reports subtab. A report list appears and the user selects the hyperlink for Most Expensive Calls.</li> <li>■ The user selects Most Expensive Calls from the Top X Report drop-down list.</li> </ul>
<b>Prompts</b>	<p>Report Selection Criteria</p> <p>Period Range (Default: Current period.)</p> <ul style="list-style-type: none"> <li>■ The user selects a start and end reporting period.</li> </ul> <p>Number of Results</p> <ul style="list-style-type: none"> <li>■ Default: 10</li> <li>■ The user can select the number of resulting report query rows to view from the following preconfigured values: 10, 25, 50, or 100.</li> </ul> <p>Drop-down List:</p> <ul style="list-style-type: none"> <li>■ Highest Spending Services</li> <li>■ Most Expensive Calls (Default)</li> <li>■ Longest Calls</li> <li>■ Most Frequently Called Numbers</li> <li>■ Most Frequently Called Destinations</li> <li>■ Most Frequently Called Countries</li> </ul>
<b>Page Tabs</b>	<ul style="list-style-type: none"> <li>■ Report (Active)</li> <li>■ Batch Request</li> </ul>
<b>Active Hyperlinks (Breadcrumbs)</b>	<ul style="list-style-type: none"> <li>■ <b>Analytics.</b> Displays the list of Standard reports.</li> <li>■ <b>Top X Reports.</b> Displays the list of Top X reports.</li> </ul>

Table 34. Most Expensive Calls

Function	Description
<b>Report Content</b>	<p>Page Title:</p> <ul style="list-style-type: none"> <li>■ Most Expensive Calls</li> </ul> <p>Header:</p> <ul style="list-style-type: none"> <li>■ Report Details</li> <li>■ Number of items</li> </ul> <p>Columns:</p> <ul style="list-style-type: none"> <li>■ Date</li> <li>■ Time</li> <li>■ Service Number</li> <li>■ Name</li> <li>■ Number Called</li> <li>■ Category (With hyperlink)</li> <li>■ Type (With hyperlink)</li> <li>■ Tariff</li> <li>■ Destination</li> <li>■ Volume</li> <li>■ Total Charges</li> </ul> <p>Total Row:</p> <ul style="list-style-type: none"> <li>■ Total</li> </ul>
<b>Business Rules</b>	<p>The current bill period range (single period) is used as the default criteria.</p>
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ Printer-friendly view</li> <li>■ Download CSV or XML</li> </ul>

Table 34. Most Expensive Calls

Function	Description
<b>Configuration Points</b>	<p>Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file:</p> <ul style="list-style-type: none"> <li>■ <b>CSV.</b> The maximum number of output lines.</li> <li>■ <b>XML.</b> A percentage of the CSV threshold value (Default is 20%).</li> </ul> <p>For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.</p>
<b>Note</b>	<ul style="list-style-type: none"> <li>■ If the report result set is less than the number of results selected, the available data set displays.</li> <li>■ Users can submit a batch request for this report.</li> </ul>

## Main Path for Using Most Expensive Calls

The following path describes the Most Expensive Calls use case:

- 1 The user selects the Most Expensive Calls report from the List of Top X Reports or from the drop-down list of reports.
- 2 Oracle Self-Service E-Billing displays the top ten records of the Most Expensive Calls report for the current period.

## Alternate Paths for Using Most Expensive Calls

Alternate paths can occur in this use case.

### The user specifies query parameters

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

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

### The user selects the Download action (CSV or XML)

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

### The user selects the Printer Friendly action

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

## Exceptions for Using Most Expensive Calls

An exception path can occur in this use case.

**The user encounters a system error**

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

# Longest Calls

The user can use this use case to view a report showing the longest calls. [Table 35](#) lists and describes the use case functions.

Table 35. Longest Calls

Function	Description
<b>Name</b>	Longest Calls
<b>Feature Area</b>	Analytics
<b>Description</b>	The user views a report showing the longest calls.
<b>Primary User</b>	Administrator, manager, and subscriber; CSR administrator and user.
<b>Triggers</b>	<ul style="list-style-type: none"> <li>■ The user clicks the Analytics tab, and then clicks the Top X Reports subtab. A report list appears and the user selects the hyperlink for Longest Calls.</li> <li>■ The user selects Longest Calls from the Top X Report drop-down list.</li> </ul>
<b>Prompts</b>	<p>Report Selection Criteria</p> <p>Period Range (Default: Current period.)</p> <ul style="list-style-type: none"> <li>■ The user selects a start and end reporting period.</li> </ul> <p>Number of Results</p> <ul style="list-style-type: none"> <li>■ Default: 10</li> <li>■ The user can select the number of resulting report query rows to view from the following preconfigured values: 10, 25, 50, or 100.</li> </ul> <p>Drop-down List:</p> <ul style="list-style-type: none"> <li>■ Highest Spending Services</li> <li>■ Most Expensive Calls</li> <li>■ Longest Calls (Default)</li> <li>■ Most Frequently Called Numbers</li> <li>■ Most Frequently Called Destinations</li> <li>■ Most Frequently Called Countries</li> </ul>
<b>Page Tabs</b>	<ul style="list-style-type: none"> <li>■ Report (Active)</li> <li>■ Batch Request</li> </ul>
<b>Active Hyperlinks (Breadcrumbs)</b>	<ul style="list-style-type: none"> <li>■ <b>Analytics.</b> Displays the list of Standard reports.</li> <li>■ <b>Top X Reports.</b> Displays the list of Top X reports.</li> </ul>

Table 35. Longest Calls

Function	Description
<p><b>Report Content</b></p>	<p>Page Title:</p> <ul style="list-style-type: none"> <li>■ Longest Calls</li> </ul> <p>Header:</p> <ul style="list-style-type: none"> <li>■ Report Details</li> <li>■ Number of items</li> </ul> <p>Columns:</p> <ul style="list-style-type: none"> <li>■ Date</li> <li>■ Time</li> <li>■ Service Number</li> <li>■ Name</li> <li>■ Number Called</li> <li>■ Category (With a hyperlink)</li> <li>■ Type (With a hyperlink)</li> <li>■ Tariff</li> <li>■ Destination</li> <li>■ Volume</li> <li>■ Total Charges</li> </ul> <p>Total Row:</p> <ul style="list-style-type: none"> <li>■ Total</li> </ul>
<p><b>Business Rules</b></p>	<p>The current bill period range (single period) is used as the default criteria.</p>
<p><b>Standard Features</b></p>	<ul style="list-style-type: none"> <li>■ Printer-friendly view</li> <li>■ Download CSV or XML</li> </ul>

Table 35. Longest Calls

Function	Description
<b>Configuration Points</b>	<p>Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file:</p> <ul style="list-style-type: none"> <li>■ <b>CSV.</b> The maximum number of output lines.</li> <li>■ <b>XML.</b> A percentage of the CSV threshold value (Default is 20%).</li> </ul> <p>For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.</p>
<b>Note</b>	<ul style="list-style-type: none"> <li>■ If the report result set is less than the number of results selected, the available data set displays.</li> <li>■ Users can submit a batch request for this report.</li> </ul>

## Main Path for Using Longest Calls

The following path describes the Longest Calls use case:

- 1 The user selects the Longest Calls report from the List of Top X Reports or from the drop-down list of reports.
- 2 Oracle Self-Service E-Billing displays the top ten records of the Longest Calls report for the current period.

## Alternate Paths for Using Longest Calls

Alternate paths can occur in this use case.

### The user specifies query parameters

- The user enters start and ending report dates.

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

### The user selects the Printer Friendly action

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

### The user selects the Download action (CSV or XML)

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

## Exceptions for Using Longest Calls

Exceptions can occur in this use case.

**The user encounters a system error**

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

## Most Frequently Called Numbers

The user can use this use case to view the most frequently called numbers. [Table 36](#) lists and describes the use case functions.

Table 36. Most Frequently Called Numbers

Function	Description
<b>Name</b>	Most Frequently Called Numbers
<b>Feature Area</b>	Analytics
<b>Description</b>	The end user views a list of the most frequently called numbers.
<b>Preconditions</b>	The user has successfully enrolled and authenticated in Oracle Self-Service E-Billing.
<b>Primary User</b>	Administrator, manager, and subscriber; CSR administrator and user.
<b>Triggers</b>	<ul style="list-style-type: none"> <li>■ The user clicks the Analytics tab, and then clicks the Top X Reports subtab. A report list appears and the user selects the hyperlink for Most Frequently Called Numbers.</li> <li>■ The user selects Most Frequently Called Numbers from the Top X Report drop-down list.</li> </ul>
<b>Prompts</b>	<p>Report Selection Criteria</p> <p>Period Range (Default: Current period.)</p> <ul style="list-style-type: none"> <li>■ The user selects a start and end reporting period.</li> </ul> <p>Number of Results</p> <ul style="list-style-type: none"> <li>■ Default: 10</li> <li>■ The user can select the number of resulting report query rows to view from the following preconfigured values: 10, 25, 50, or 100.</li> </ul> <p>Drop-down List:</p> <ul style="list-style-type: none"> <li>■ Highest Spending Services</li> <li>■ Most Expensive Calls</li> <li>■ Longest Calls</li> <li>■ Most Frequently Called Numbers (Default)</li> <li>■ Most Frequently Called Destinations</li> <li>■ Most Frequently Called Countries</li> </ul>

Table 36. Most Frequently Called Numbers

Function	Description
Page Tabs	<ul style="list-style-type: none"> <li>■ Report (Active)</li> <li>■ Batch Request</li> </ul>
Active Hyperlinks (Breadcrumbs)	<ul style="list-style-type: none"> <li>■ <b>Analytics.</b> Displays the list of Standard reports.</li> <li>■ <b>Top X Reports.</b> Displays the list of Top X reports.</li> </ul>
Report Content	<p>Page Title:</p> <ul style="list-style-type: none"> <li>■ Most Frequently Called Numbers</li> </ul> <p>Header:</p> <ul style="list-style-type: none"> <li>■ Report Details</li> <li>■ Number of items</li> </ul> <p>Columns:</p> <ul style="list-style-type: none"> <li>■ Number called (With a hyperlink to the Most Frequently Called Number by Service Agreement report)</li> <li>■ Number of calls (Sorted highest to lowest)</li> <li>■ Volume</li> <li>■ Total Charges.</li> </ul> <p>Total Row:</p> <ul style="list-style-type: none"> <li>■ Total (literal)</li> <li>■ Number of calls</li> <li>■ Total charges</li> </ul>
Business Rules	The current bill period (single period) is the default range.
Standard Features	<ul style="list-style-type: none"> <li>■ Printer-friendly view</li> <li>■ Download CSV or XML</li> </ul>

Table 36. Most Frequently Called Numbers

Function	Description
<p><b>Configuration Points</b></p>	<ul style="list-style-type: none"> <li>■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file:                             <ul style="list-style-type: none"> <li>■ <b>CSV.</b> The maximum number of output lines.</li> <li>■ <b>XML.</b> A percentage of the CSV threshold value (Default is 20%).</li> </ul> <p>For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.</p> </li> <li>■ All report detail table columns are sortable and display in descending order (highest to lowest); you can change the default sort order to ascending.</li> </ul>
<p><b>Notes</b></p>	<ul style="list-style-type: none"> <li>■ Drill-down links are for the selected number called.</li> <li>■ Oracle Self-Service E-Billing calculates the total number of calls made to a number called and returns the number of results selected.</li> <li>■ If the report result set is less than the number of results selected, the available data set displays.</li> <li>■ If there are ties in the total number of calls to a called number, Oracle Self-Service E-Billing returns service agreements from lowest to highest until it equals the total number requested (10, 25 50, or 100).</li> <li>■ The user can submit a batch request for this report.</li> </ul>

## Main Path for Using Most Frequently Called Numbers

The following path describes the Most Frequently Called Numbers use case:

- 1 The user selects the Most Frequently Called Numbers report from the List of Top X Reports or from the drop-down list of reports.
- 2 Oracle Self-Service E-Billing displays the top ten records of the Most Frequently Called Numbers report for the current period.

## Alternate Paths for Most Frequently Called Numbers

Alternate paths can occur in this use case.

### The user specifies query parameters

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

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

**The user selects the Download action (CSV or XML)**

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

**The user selects the Printer Friendly action**

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

**Exceptions for Most Frequently Called Numbers**

Exceptions can occur in this use case.

**The user encounters a system error**

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

# Most Frequently Called Number by Service Agreement

The user can use this use case to view a list of most frequently called number by service agreement. [Table 37](#) lists and describes the use case functions.

Table 37. Most Frequently Called Number by Service Agreement

Function	Description
<b>Name</b>	Most Frequently Called Number by Service Agreement
<b>Feature Area</b>	Analytics
<b>Description</b>	The end user views a list of service agreements by the selected (most frequently) called number.
<b>Preconditions</b>	The user has successfully enrolled and authenticated in Oracle Self-Service E-Billing.
<b>Primary User</b>	Administrator, manager, and subscriber; CSR administrator and user.
<b>Trigger</b>	The user clicks a number called hyperlink on the Most Frequently Called Numbers report.
<b>Page Tabs</b>	Report (Active)
<b>Active Hyperlinks (Breadcrumbs)</b>	<ul style="list-style-type: none"> <li>■ <b>Analytics.</b> Displays the list of Standard reports.</li> <li>■ <b>Top X Reports.</b> Displays the list of Top X reports.</li> <li>■ <b>Most Frequently Called Numbers.</b> Displays the Most Frequently Called Numbers report.</li> </ul>

Table 37. Most Frequently Called Number by Service Agreement

Function	Description
<b>Report Content</b>	<p>Page Title:</p> <ul style="list-style-type: none"> <li>■ Most Frequently Called Number by Service Agreement</li> </ul> <p>Paging Elements (If needed)</p> <ul style="list-style-type: none"> <li>■ Page X of Total</li> <li>■ Paging arrow buttons</li> </ul> <p>Header:</p> <ul style="list-style-type: none"> <li>■ Report Details</li> <li>■ Number of items</li> </ul> <p>Columns:</p> <ul style="list-style-type: none"> <li>■ Number Called</li> <li>■ Service Number (With a hyperlink to the Most Frequently Called Number by Service Agreement Details report)</li> <li>■ Number of calls (Sorted highest to lowest)</li> <li>■ Volume</li> <li>■ Total Charges.</li> </ul> <p>Total Row:</p> <ul style="list-style-type: none"> <li>■ Total (literal)</li> <li>■ Number of calls</li> <li>■ Volume</li> <li>■ Total charges</li> </ul>
<b>Business Rules</b>	<p>The bill period range (single period) selected on the Most Frequently Called Numbers report applies on this drill-down report.</p>
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ Printer-friendly view</li> <li>■ Download CSV or XML</li> </ul>

Table 37. Most Frequently Called Number by Service Agreement

Function	Description
<b>Configuration Points</b>	<ul style="list-style-type: none"> <li>■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file:                             <ul style="list-style-type: none"> <li>■ <b>CSV.</b> The maximum number of output lines.</li> <li>■ <b>XML.</b> A percentage of the CSV threshold value (Default is 20%).</li> </ul>                             For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.                         </li> <li>■ All report detail table columns are sortable and display in descending order (highest to lowest); you can change the default sort order to ascending.</li> </ul>
<b>Notes</b>	Drill-down links are for the selected number called and service agreement.

## Main Path for Using Most Frequently Called Number by Service Agreement

The following path describes the Most Frequently Called Number by Service Agreement use case:

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

## Alternate Paths for Most Frequently Called Number by Service Agreement

Alternate paths can occur in this use case.

### The user selects the Download action (CSV or XML)

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

### The user selects the Printer Friendly action

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

## Exceptions for Most Frequently Called Number by Service Agreement

Exceptions can occur in this use case.

**The user encounters a system error**

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

## Most Frequently Called Number by Service Agreement Details

The user can use this use case to view service details for an individual service agreement selected on the Most Frequently Called Number by Service Agreement report. [Table 38](#) lists and describes the use case functions.

Table 38. Most Frequently Called Number by Service Agreement Details

Function	Description
<b>Name</b>	Most Frequently Called Number by Service Agreement Details
<b>Feature Area</b>	Analytics
<b>Description</b>	The end user views service details for an individual service agreement.
<b>Preconditions</b>	The user has successfully enrolled and authenticated in Oracle Self-Service E-Billing.
<b>Primary User</b>	Administrator, manager, and subscriber; CSR administrator and user.
<b>Trigger</b>	The user clicks a service number hyperlink on the Most Frequently Called Number by Service Agreement report.
<b>Page Tabs</b>	Report (Active)
<b>Active Hyperlinks (Breadcrumbs)</b>	<ul style="list-style-type: none"><li>■ <b>Analytics.</b> Displays the list of Standard reports.</li><li>■ <b>Top X Reports.</b> Displays the list of Top X reports.</li><li>■ <b>Most Frequently Called Numbers.</b> Displays the Most Frequently Called Numbers report.</li><li>■ <b>Service Agreement.</b> Displays the Most Frequently Called Number by Service Agreement report.</li></ul>

Table 38. Most Frequently Called Number by Service Agreement Details

Function	Description
<b>Report Content</b>	<p>Page Title:</p> <ul style="list-style-type: none"> <li>■ Most Frequently Called Number by Service Agreement Details</li> </ul> <p>Paging Elements (If needed)</p> <ul style="list-style-type: none"> <li>■ Page X of Total</li> <li>■ Paging arrow buttons</li> </ul> <p>Header:</p> <ul style="list-style-type: none"> <li>■ Report Details</li> <li>■ Number of items</li> </ul> <p>Columns:</p> <ul style="list-style-type: none"> <li>■ Number Called</li> <li>■ Service Number</li> <li>■ Date</li> <li>■ Time</li> <li>■ Volume</li> <li>■ Destination</li> <li>■ Tariff</li> <li>■ Total Charges.</li> </ul> <p>Total Row:</p> <ul style="list-style-type: none"> <li>■ Total (literal)</li> <li>■ Volume</li> <li>■ Total charges</li> </ul>
<b>Business Rules</b>	<p>The bill period range (single period) selected on the Most Frequently Called Numbers report applies on this drill-down report.</p>

Table 38. Most Frequently Called Number by Service Agreement Details

Function	Description
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ Printer-friendly view</li> <li>■ Download CSV or XML</li> </ul>
<b>Configuration Points</b>	<ul style="list-style-type: none"> <li>■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file:                             <ul style="list-style-type: none"> <li>■ <b>CSV.</b> The maximum number of output lines.</li> <li>■ <b>XML.</b> A percentage of the CSV threshold value (Default is 20%).</li> </ul> <p>For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.</p> </li> <li>■ All report detail table columns are sortable except for the Number Called Column and Service Number.</li> </ul>

## Main Path for Using Most Frequently Called Number by Service Agreement Details

The following path describes the Most Frequently Called Number by Service Agreement Details use case:

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

## Alternate Paths for Most Frequently Called Number by Service Agreement Details

Alternate paths can occur in this use case.

### The user selects the Download action (CSV or XML)

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

### The user selects the Printer Friendly action

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

## Exceptions for Most Frequently Called Number by Service Agreement Details

Exceptions can occur in this use case.

**The user encounters a system error**

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

## Most Frequently Called Destinations

The user can use this use case to view a report showing a list of the most frequently called destinations. [Table 39](#) lists and describes the use case functions.

Table 39. Most Frequently Called Destinations

Function	Description
<b>Name</b>	Most Frequently Called Destinations
<b>Feature Area</b>	Analytics
<b>Description</b>	The user views a list of the destinations most frequently called.
<b>Preconditions</b>	The user has successfully enrolled and authenticated in Oracle Self-Service E-Billing.
<b>Primary User</b>	Administrator, manager, and subscriber; CSR administrator and user.
<b>Triggers</b>	<ul style="list-style-type: none"> <li>■ The user clicks the Analytics tab, and then clicks the Top X Reports subtab. A report list appears and the user selects the hyperlink for Most Frequently Called Destinations.</li> <li>■ The user selects Most Frequently Called Destinations from the Top X Report drop-down list.</li> </ul>
<b>Prompts</b>	<p>Report Selection Criteria</p> <p>Period Range (Default: Current period.)</p> <ul style="list-style-type: none"> <li>■ The user selects a start and end reporting period.</li> </ul> <p>Number of Results</p> <ul style="list-style-type: none"> <li>■ Default: 10</li> <li>■ The user can select the number of resulting report query rows to view from the following preconfigured values: 10, 25, 50, or 100.</li> </ul> <p>Drop-down List:</p> <ul style="list-style-type: none"> <li>■ Highest Spending Services</li> <li>■ Most Expensive Calls</li> <li>■ Longest Calls</li> <li>■ Most Frequently Called Numbers</li> <li>■ Most Frequently Called Destinations (Default)</li> <li>■ Most Frequently Called Countries</li> </ul>

Table 39. Most Frequently Called Destinations

Function	Description
Page Tabs	<ul style="list-style-type: none"> <li>■ Report (Active)</li> <li>■ Batch Request</li> </ul>
Active Hyperlinks (Breadcrumbs)	<ul style="list-style-type: none"> <li>■ <b>Analytics.</b> Displays the list of Standard reports.</li> <li>■ <b>Top X Reports.</b> Displays the list of Top X reports.</li> </ul>
Report Content	<p>Page Title:</p> <ul style="list-style-type: none"> <li>■ Most Frequently Called Destinations</li> </ul> <p>Header:</p> <ul style="list-style-type: none"> <li>■ Report Details</li> <li>■ Number of items</li> </ul> <p>Columns:</p> <ul style="list-style-type: none"> <li>■ Destination (With a hyperlink to the Most Frequently Called Destination by Service Number report)</li> <li>■ Country</li> <li>■ Number of Calls (sorted highest to lowest)</li> <li>■ Volume</li> <li>■ Total Charges.</li> </ul> <p>Total Row:</p> <ul style="list-style-type: none"> <li>■ Total (literal)</li> <li>■ Number of Calls</li> <li>■ Total charges</li> </ul>
Business Rules	The current bill period (single period) is the default range.
Standard Features	<ul style="list-style-type: none"> <li>■ Printer-friendly view</li> <li>■ Download CSV or XML</li> </ul>

Table 39. Most Frequently Called Destinations

Function	Description
<b>Configuration Points</b>	<ul style="list-style-type: none"> <li>■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file:                             <ul style="list-style-type: none"> <li>■ <b>CSV.</b> The maximum number of output lines.</li> <li>■ <b>XML.</b> A percentage of the CSV threshold value (Default is 20%).</li> </ul> <p>For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.</p> </li> <li>■ All report detail table columns are sortable and display in descending order (highest to lowest); you can change the default sort order to ascending.</li> </ul>
<b>Notes</b>	<ul style="list-style-type: none"> <li>■ Drill-down links are for the destination selected.</li> <li>■ Oracle Self-Service E-Billing calculates the total number of calls made to a destination and returns the number of results selected.</li> <li>■ If the report result set is less than the number of results selected, the available data set displays.</li> <li>■ If there are ties in the total number of calls to a destination, Oracle Self-Service E-Billing returns service agreements from lowest to highest until it equals the total number requested (10, 25 50, or 100).</li> <li>■ The user can submit a batch request for this report.</li> </ul>

## Main Path for Using Most Frequently Called Destinations

The following path describes the Most Frequently Called Destinations use case:

- 1 The user selects the Most Frequently Called Destinations report from the List of Top X Reports or from the drop-down list of reports.
- 2 Oracle Self-Service E-Billing displays the top ten records of the Most Frequently Called Destinations report for the current period.

## Alternate Paths for Most Frequently Called Destinations

Alternate paths can occur in this use case.

### The user specifies query parameters

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

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

**The user selects the Download action (CSV or XML)**

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

**The user selects the Printer Friendly action**

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

**Exceptions for Most Frequently Called Destinations**

An exception can occur in this use case.

**The user encounters a system error**

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

# Most Frequently Called Destination by Service Agreement

The user can use this use case to view a report showing a list of service agreements for the most frequently called destination. [Table 40](#) lists and describes the use case functions.

Table 40. Most Frequently Called Destination by Service Agreement

Function	Description
<b>Name</b>	Most Frequently Called Destination by Service Agreement
<b>Feature Area</b>	Analytics
<b>Description</b>	The user views a list of service agreements associated with the most frequently called destination.
<b>Preconditions</b>	The user has successfully enrolled and authenticated in Oracle Self-Service E-Billing.
<b>Primary User</b>	Administrator, manager, and subscriber; CSR administrator and user.
<b>Trigger</b>	The user clicks the hyperlink for a destination on the Most Frequently Called Destinations report.
<b>Page Tabs</b>	Report (Active)
<b>Active Hyperlinks (Breadcrumbs)</b>	<ul style="list-style-type: none"> <li>■ <b>Analytics.</b> Displays the list of Standard reports.</li> <li>■ <b>Top X Reports.</b> Displays the list of Top X reports.</li> <li>■ <b>Most Frequently Called Destinations.</b> Displays the Most Frequently Called Destinations report.</li> </ul>

Table 40. Most Frequently Called Destination by Service Agreement

Function	Description
<b>Report Content</b>	<p>Page Title:</p> <ul style="list-style-type: none"> <li>■ Most Frequently Called Destination by Service Agreement</li> </ul> <p>Paging Elements (If needed)</p> <ul style="list-style-type: none"> <li>■ Page X of Total</li> <li>■ Paging arrow buttons</li> </ul> <p>Header:</p> <ul style="list-style-type: none"> <li>■ Report Details</li> <li>■ Number of items</li> </ul> <p>Columns:</p> <ul style="list-style-type: none"> <li>■ Destination</li> <li>■ Country</li> <li>■ Service Number (With a hyperlink to the Most Frequently Called Destination by Service Number Details report)</li> <li>■ Number of Calls (sorted highest to lowest)</li> <li>■ Volume</li> <li>■ Total Charges.</li> </ul> <p>Total Row:</p> <ul style="list-style-type: none"> <li>■ Total (literal)</li> <li>■ Number of Calls</li> <li>■ Volume</li> <li>■ Total charges</li> </ul>
<b>Business Rules</b>	<p>The period range selected on the Most Frequently Called Destinations report applies on this drill-down report.</p>
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ Printer-friendly view</li> <li>■ Download CSV or XML</li> </ul>

Table 40. Most Frequently Called Destination by Service Agreement

Function	Description
<b>Configuration Points</b>	<ul style="list-style-type: none"> <li>■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file:                             <ul style="list-style-type: none"> <li>■ <b>CSV.</b> The maximum number of output lines.</li> <li>■ <b>XML.</b> A percentage of the CSV threshold value (Default is 20%).</li> </ul> <p>For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.</p> </li> <li>■ All report detail table columns are sortable (except for the number called column) and display in descending order (highest to lowest); you can change the default sort order to ascending.</li> </ul>
<b>Notes</b>	Drill-down links are for the destination and selected service agreement.

## Main Path for Using Most Frequently Called Destination by Service Agreement

The following path describes the Most Frequently Called Destination by Service Agreement use case:

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

## Alternate Paths for Most Frequently Called Destination by Service Agreement

Alternate paths can occur in this use case.

### The user selects the Download action (CSV or XML)

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

### The user selects the Printer Friendly action

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

## Exceptions for Most Frequently Called Destination by Service Agreement

An exception can occur in this use case.

**The user encounters a system error**

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

## Most Frequently Called Destination by Service Agreement Details

The user can use this use case to view a report showing service details for an individual service agreement. [Table 41](#) lists and describes the use case functions.

Table 41. Most Frequently Called Destination by Service Agreement Details

Function	Description
<b>Name</b>	Most Frequently Called Destination by Service Agreement Details
<b>Feature Area</b>	Analytics
<b>Description</b>	The user views service details for a list of service agreements.
<b>Preconditions</b>	The user has successfully enrolled and authenticated in Oracle Self-Service E-Billing.
<b>Primary User</b>	Administrator, manager, and subscriber; CSR administrator and user.
<b>Trigger</b>	The user clicks a service number hyperlink on the Most Frequently Called Destination by Service Agreement report.
<b>Page Tabs</b>	Report (Active)
<b>Active Hyperlinks (Breadcrumbs)</b>	<ul style="list-style-type: none"> <li>■ <b>Analytics.</b> Displays the list of Standard reports.</li> <li>■ <b>Top X Reports.</b> Displays the list of Top X reports.</li> <li>■ <b>Most Frequently Called Destinations.</b> Displays the Most Frequently Called Destinations report.</li> <li>■ <b>Service Agreement.</b> Displays the Most Frequently Called Destination by Service Agreement report.</li> </ul>

Table 41. Most Frequently Called Destination by Service Agreement Details

Function	Description
<b>Report Content</b>	<p>Page Title:</p> <ul style="list-style-type: none"> <li>■ Most Frequently Called Destination by Service Agreement Details</li> </ul> <p>Paging Elements (If needed)</p> <ul style="list-style-type: none"> <li>■ Page X of Total</li> <li>■ Paging arrow buttons</li> </ul> <p>Header:</p> <ul style="list-style-type: none"> <li>■ Report Details</li> <li>■ Number of items</li> </ul> <p>Columns:</p> <ul style="list-style-type: none"> <li>■ Destination</li> <li>■ Country</li> <li>■ Service Number</li> <li>■ Date</li> <li>■ Time</li> <li>■ Number Called</li> <li>■ Volume</li> <li>■ Tariff</li> <li>■ Total Charges</li> </ul> <p>Total Row:</p> <ul style="list-style-type: none"> <li>■ Total (literal)</li> <li>■ Number of Calls</li> <li>■ Volume</li> <li>■ Total charges</li> </ul>
<b>Business Rules</b>	<p>The current period range selected on the Most Frequently Called Destinations report applies on this drill-down report.</p>

Table 41. Most Frequently Called Destination by Service Agreement Details

Function	Description
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ Printer-friendly view</li> <li>■ Download CSV or XML</li> </ul>
<b>Configuration Points</b>	<ul style="list-style-type: none"> <li>■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file:                             <ul style="list-style-type: none"> <li>■ <b>CSV.</b> The maximum number of output lines.</li> <li>■ <b>XML.</b> A percentage of the CSV threshold value (Default is 20%).</li> </ul> <p>For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.</p> </li> <li>■ All report detail table columns are sortable (except for the Destination, Country, and Service Number columns) and display in descending order (highest to lowest); you can change the default sort order to ascending.</li> </ul>

## Main Path for Using Most Frequently Called Destination by Service Agreement Details

The following path describes the Most Frequently Called Destination by Service Agreement Details use case:

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

## Alternate Paths for Most Frequently Called Destination by Service Agreement Details

Alternate paths can occur in this use case.

### The user selects the Download action (CSV or XML)

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

### The user selects the Printer Friendly action

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

## Exceptions for Most Frequently Called Destination by Service Agreement Details

An exception can occur in this use case.

### The user encounters a system error

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

## Most Frequently Called Countries

The user can use this use case to view a list of countries called most often. [Table 42](#) lists and describes the use case functions.

Table 42. Most Frequently Called Countries

Function	Description
<b>Name</b>	Most Frequently Called Countries
<b>Feature Area</b>	Analytics
<b>Description</b>	The user views a list of the countries most frequently called.
<b>Preconditions</b>	The user has successfully enrolled and authenticated in Oracle Self-Service E-Billing.
<b>Primary User</b>	Administrator, manager, and subscriber; CSR administrator and user.
<b>Triggers</b>	<ul style="list-style-type: none"> <li>■ The user clicks the Analytics tab, and then clicks the Top X Reports subtab. A report list appears and the user selects the hyperlink for Most Frequently Called Countries.</li> <li>■ The user selects Most Frequently Called Countries from the Top X Report drop-down list.</li> </ul>

Table 42. Most Frequently Called Countries

Function	Description
<b>Prompts</b>	<p>Report Selection Criteria</p> <p>Period Range (Default: Current period.)</p> <ul style="list-style-type: none"> <li>■ The user selects a start and end reporting period.</li> </ul> <p>Number of Results</p> <ul style="list-style-type: none"> <li>■ Default: 10</li> <li>■ The user can select the number of resulting report query rows to view from the following preconfigured values: 10, 25, 50, or 100.</li> </ul> <p>Drop-down List:</p> <ul style="list-style-type: none"> <li>■ Highest Spending Services</li> <li>■ Most Expensive Calls</li> <li>■ Longest Calls</li> <li>■ Most Frequently Called Numbers</li> <li>■ Most Frequently Called Destinations</li> <li>■ Most Frequently Called Countries (Default)</li> </ul>
<b>Page Tabs</b>	<ul style="list-style-type: none"> <li>■ Report (Active)</li> <li>■ Batch Request</li> </ul>
<b>Active Hyperlinks (Breadcrumbs)</b>	<ul style="list-style-type: none"> <li>■ <b>Analytics.</b> Displays the list of Standard reports.</li> <li>■ <b>Top X Reports.</b> Displays the list of Top X reports.</li> </ul>

Table 42. Most Frequently Called Countries

Function	Description
<b>Report Content</b>	<p>Page Title:</p> <ul style="list-style-type: none"> <li>■ Most Frequently Called Countries</li> </ul> <p>Header:</p> <ul style="list-style-type: none"> <li>■ Report Details</li> <li>■ Number of items</li> </ul> <p>Columns:</p> <ul style="list-style-type: none"> <li>■ Country (With a hyperlink to the Most Frequently Called Country by Service Number report)</li> <li>■ Number of Calls (sorted highest to lowest)</li> <li>■ Volume</li> <li>■ Total Charges.</li> </ul> <p>Total Row:</p> <ul style="list-style-type: none"> <li>■ Total (literal)</li> <li>■ Number of Calls</li> <li>■ Total charges</li> </ul>
<b>Business Rules</b>	The current bill period (single period) is the default range.
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ Printer-friendly view</li> <li>■ Download CSV or XML</li> </ul>

Table 42. Most Frequently Called Countries

Function	Description
<p><b>Configuration Points</b></p>	<ul style="list-style-type: none"> <li>■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file:                             <ul style="list-style-type: none"> <li>■ <b>CSV.</b> The maximum number of output lines.</li> <li>■ <b>XML.</b> A percentage of the CSV threshold value (Default is 20%).</li> </ul> <p>For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.</p> </li> <li>■ All report detail table columns are sortable and display in descending order (highest to lowest); you can change the default sort order to ascending.</li> </ul>
<p><b>Notes</b></p>	<ul style="list-style-type: none"> <li>■ Drill-down links are for the country selected.</li> <li>■ Oracle Self-Service E-Billing calculates the total number of calls made to a country and returns the number of results selected.</li> <li>■ If the report result set is less than the number of results selected, the available data set displays.</li> <li>■ If there are ties in the total number of calls to a country, Oracle Self-Service E-Billing returns service agreements from lowest to highest until it equals the total number requested (10, 25 50, or 100).</li> <li>■ The user can submit a batch request for this report.</li> </ul>

### Main Path for Using Most Frequently Called Countries

The following path describes the Most Frequently Called Countries use case:

- 1 The user selects the Most Frequently Called Countries report from the List of Top X Reports or from the drop-down list of reports.
- 2 Oracle Self-Service E-Billing displays the top ten records of the Most Frequently Called Countries report for the current period.

### Alternate Paths for Most Frequently Called Countries

Alternate paths can occur in this use case.

- The user enters start and ending report dates or selects a new number of results.  
Oracle Self-Service E-Billing retrieves the report data based on the selected criteria and displays the Most Frequently Called Countries report.

**The user selects the Download action (CSV or XML)**

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

**The user selects the Printer Friendly action**

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

**Exceptions for Most Frequently Called Destinations**

An exception can occur in this use case.

**The user encounters a system error**

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

# Most Frequently Called Country by Service Agreement

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

Table 43. Most Frequently Called Country by Service Agreement

Function	Description
<b>Name</b>	Most Frequently Called Country by Service Agreement
<b>Feature Area</b>	Analytics
<b>Description</b>	The user views a list of service agreements associated with the most frequently called country.
<b>Preconditions</b>	The user has successfully enrolled and authenticated in Oracle Self-Service E-Billing.
<b>Primary User</b>	Administrator, manager, and subscriber; CSR administrator and user.
<b>Trigger</b>	The user clicks a country hyperlink on the Most Frequently Called Countries report.
<b>Page Tabs</b>	Report (Active)
<b>Active Hyperlinks (Breadcrumbs)</b>	<ul style="list-style-type: none"> <li>■ <b>Analytics.</b> Displays the list of Standard reports.</li> <li>■ <b>Top X Reports.</b> Displays the list of Top X reports.</li> <li>■ <b>Most Frequently Called Countries.</b> Displays the Most Frequently Called Countries report.</li> </ul>

Table 43. Most Frequently Called Country by Service Agreement

Function	Description
<b>Report Content</b>	<p>Page Title:</p> <ul style="list-style-type: none"> <li>■ Most Frequently Called Country by Service Agreement</li> </ul> <p>Paging Elements (If needed)</p> <ul style="list-style-type: none"> <li>■ Page X of Total</li> <li>■ Paging arrow buttons</li> </ul> <p>Header:</p> <ul style="list-style-type: none"> <li>■ Report Details</li> <li>■ Number of items</li> </ul> <p>Columns:</p> <ul style="list-style-type: none"> <li>■ Country</li> <li>■ Service Number (With a hyperlink to the Most Frequently Called Country by Service Number Details report)</li> <li>■ Number of Calls (sorted highest to lowest)</li> <li>■ Volume</li> <li>■ Total Charges.</li> </ul> <p>Total Row:</p> <ul style="list-style-type: none"> <li>■ Total (Literal)</li> <li>■ Number of Calls</li> <li>■ Volume</li> <li>■ Total charges</li> </ul>
<b>Business Rules</b>	<p>The period range selected on the Most Frequently Called Countries report applies on this drill-down report.</p>
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ Printer-friendly view</li> <li>■ Download CSV or XML</li> </ul>

Table 43. Most Frequently Called Country by Service Agreement

Function	Description
<b>Configuration Points</b>	<ul style="list-style-type: none"> <li>■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file:                             <ul style="list-style-type: none"> <li>■ <b>CSV.</b> The maximum number of output lines.</li> <li>■ <b>XML.</b> A percentage of the CSV threshold value (Default is 20%).</li> </ul> <p>For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.</p> </li> <li>■ All report detail table columns are sortable (except for the country column) and display in descending order (highest to lowest); you can change the default sort order to ascending.</li> </ul>
<b>Notes</b>	Drill-down links are for the country and the selected service agreement.

## Main Path for Using Most Frequently Called Country by Service Agreement

The following path describes the Most Frequently Called Country by Service Agreement use case:

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

## Alternate Paths for Most Frequently Called Country by Service Agreement

Alternate paths can occur in this use case.

### The user selects the Download action (CSV or XML)

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

### The user selects the Printer Friendly action

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

## Exceptions for Most Frequently Called Country by Service Agreement

An exception can occur in this use case.

**The user encounters a system error**

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

## Most Frequently Called Country by Service Agreement Details

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

Table 44. Most Frequently Called Country by Service Agreement Details

Function	Description
<b>Name</b>	Most Frequently Called Country by Service Agreement Details
<b>Feature Area</b>	Analytics
<b>Description</b>	The user views a list of service details for an individual service agreement.
<b>Preconditions</b>	The user has successfully enrolled and authenticated in Oracle Self-Service E-Billing.
<b>Primary User</b>	Administrator, manager, and subscriber; CSR administrator and user.
<b>Triggers</b>	The user clicks a service number hyperlink on the Most Frequently Called Country by Service Agreement report.
<b>Page Tabs</b>	Report (Active)
<b>Active Hyperlinks (Breadcrumbs)</b>	<ul style="list-style-type: none"> <li>■ <b>Analytics.</b> Displays the list of Standard reports.</li> <li>■ <b>Top X Reports.</b> Displays the list of Top X reports.</li> <li>■ <b>Most Frequently Called Countries.</b> Displays the Most Frequently Called Countries report.</li> <li>■ <b>Service Agreement.</b> Displays the Most Frequently Called Country by Service Agreement report.</li> </ul>

Table 44. Most Frequently Called Country by Service Agreement Details

Function	Description
<b>Report Content</b>	<p>Page Title:</p> <ul style="list-style-type: none"> <li>■ Most Frequently Called Country by Service Agreement</li> </ul> <p>Paging Elements (If needed)</p> <ul style="list-style-type: none"> <li>■ Page X of Total</li> <li>■ Paging arrow buttons</li> </ul> <p>Header:</p> <ul style="list-style-type: none"> <li>■ Report Details</li> <li>■ Number of items</li> </ul> <p>Columns:</p> <ul style="list-style-type: none"> <li>■ Country</li> <li>■ Service Number</li> <li>■ Date</li> <li>■ Time</li> <li>■ Number Called</li> <li>■ Volume</li> <li>■ Tariff</li> <li>■ Destination</li> <li>■ Total Charges</li> </ul> <p>Total Row:</p> <ul style="list-style-type: none"> <li>■ Total (Literal)</li> <li>■ Volume</li> <li>■ Total charges</li> </ul>
<b>Business Rules</b>	<p>The period range selected on the Most Frequently Called Countries report applies on this drill-down report.</p>
<b>Standard Features</b>	<ul style="list-style-type: none"> <li>■ Printer-friendly view</li> <li>■ Download CSV or XML</li> </ul>

Table 44. Most Frequently Called Country by Service Agreement Details

Function	Description
<b>Configuration Points</b>	<ul style="list-style-type: none"> <li>■ Report Threshold Value for Batch Mode. Determines the number of result set lines above which a report must process in batch mode instead of as an online download. You can set values for each type of download file:                             <ul style="list-style-type: none"> <li>■ <b>CSV.</b> The maximum number of output lines.</li> <li>■ <b>XML.</b> A percentage of the CSV threshold value (Default is 20%).</li> </ul> <p>For example, if the CSV report threshold is set to 3,000 result set lines, then an XML threshold value set at 20% must process in batch mode when it has 600 or more result set lines.</p> </li> <li>■ All report detail table columns are sortable (except for the country and service number columns) and display in descending order (highest to lowest); you can change the default sort order to ascending.</li> </ul>
<b>Notes</b>	Drill-down links are for the country and the selected service agreement.

## Main Path for Using Most Frequently Called Country by Service Agreement Details

The following path describes the Most Frequently Called Country by Service Agreement Details use case:

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

## Alternate Paths for Most Frequently Called Country by Service Agreement

Alternate paths can occur in this use case.

### The user selects the Download action (CSV or XML)

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

### The user selects the Printer Friendly action

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

## **Exceptions for Most Frequently Called Country by Service Agreement Details**

An exception can occur in this use case.

### **The user encounters a system error**

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

# 7

## Customer Service Representative Use Cases

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

- [CSR Overview on page 109](#)
- [Enrolling Initial CSR Administrator on page 111](#)
- [Enrolling a CSR on page 113](#)
- [Setting a CSR Password and Security Question on page 116](#)
- [Resetting a CSR Password on page 118](#)
- [Searching for Users on page 120](#)
- [Impersonating a User on page 122](#)
- [Searching and Modifying a CSR User on page 123](#)
- [Adding CSR Users on page 125](#)
- [Editing a CSR User on page 126](#)
- [Managing a CSR Profile on page 128](#)
- [Setting a Preferred Language \(CSR\) on page 130](#)
- [Adding a CSR Administrator on page 131](#)
- [Setting CSR Account Lockout Status on page 134](#)
- [Viewing the Account Lockout Report on page 135](#)
- [Reactivating a Locked Account on page 137](#)

### CSR Overview

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

## CSR Application

Figure 1 shows the functions a CSR performs.

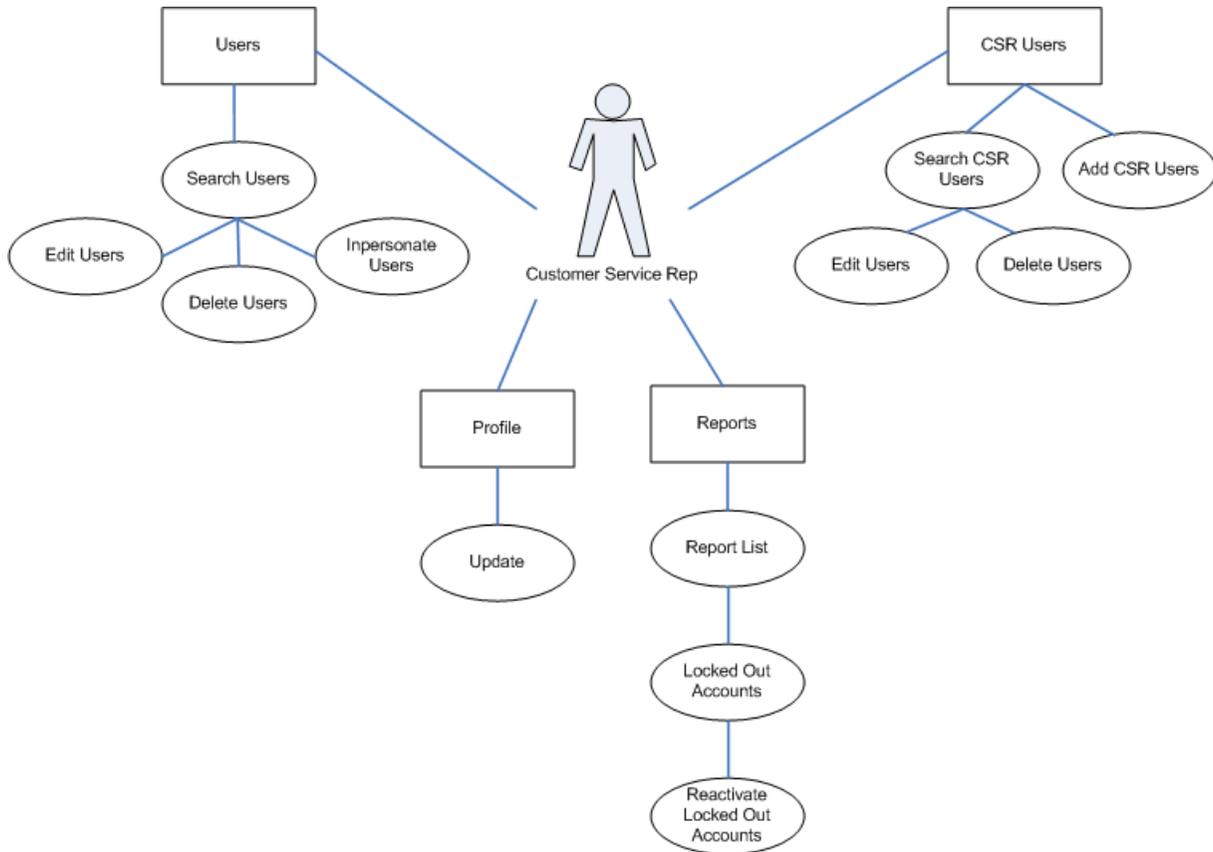


Figure 1. CSR Application Architecture

## CSR Default User Login

To maintain security, Oracle Self-Service E-Billing forces a password reset when the account generated by Oracle Self-Service E-Billing is first logged in using the master CSR user ID.

## CSR Roles

Figure 2 illustrates the CSR roles.

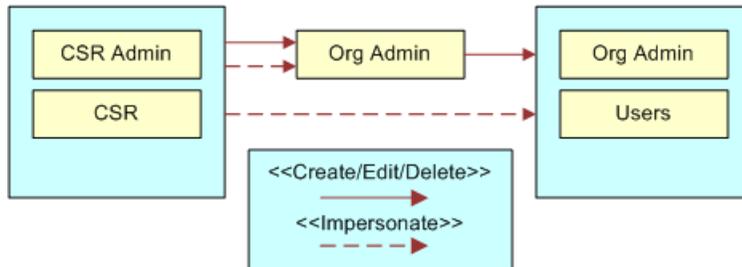


Figure 2. CSR Roles

## Enrolling Initial CSR Administrator

Oracle Self-Service E-Billing provides a master CSR user ID and password. This use case describes how a CSR administrator enrolls initially.

Table 45 lists and describes the use case functions.

Table 45. Enrolling Initial CSR Administrator

Functions	Description
<b>Name</b>	Enrolling Initial CSR Administrator
<b>Feature Area</b>	Enrollment
<b>User</b>	CSR administrator (hosting)
<b>Trigger</b>	The CSR administrator displays the CSR Login page.

Table 45. Enrolling Initial CSR Administrator

Functions	Description
<b>Configuration Points</b>	The number of characters in the temporary password. Oracle Self-Service E-Billing generates the temporary password.
<b>Notes</b>	<ul style="list-style-type: none"> <li>■ Oracle Self-Service E-Billing-generated validation codes cannot contain the following characters: a, A, e, E, 3, o, O, 0, i, l, 1, u, U, y, Y, \$, @, !, *</li> <li>■ The account that has been created and set to inactive state expires within four hours, and only a CSR administrator can reset the account.</li> <li>■ Oracle Self-Service E-Billing cannot reuse the validation code for 30 days after initially being created.</li> <li>■ Oracle provides a master CSR user ID, which is usable only for creating new CSR administrator users. Every time the master CSR user ID is entered, Oracle Self-Service E-Billing requires the employee to immediately specify a personal CSR user ID and password (which cannot be the value of the master CSR user ID or the master password). That way when a CSR user does not complete the enrollment fast enough or forgets his or her password before creating another CSR administrator, there is still a way to access Oracle Self-Service E-Billing.</li> <li>■ The master CSR user name and the master CSR user password must be preserved and can never be changed.</li> </ul>

### Main Path for Enrolling Initial CSR Administrator

- 1 The CSR administrator enters the master CSR user ID and password. For help with this security information, see your Oracle sales representative.
- 2 Oracle Self-Service E-Billing determines this is the default user ID and password and displays the CSR administrator's form. The CSR administrator must provide a new value for each field:
  - CSR Admin User Name - Cannot be the same as the master CSR user ID.
  - CSR Admin First Name
  - CSR Admin Last Name
  - CSR Admin Role: CSR administrator (Read Only CSR administrator)
  - CSR Admin Email Address
- 3 The CSR administrator clicks Submit.
- 4 Oracle Self-Service E-Billing validates the information on the form for:
  - Formatting
  - Completeness

- 5 Oracle Self-Service E-Billing sends an email to the CSR administrator's email address.

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

- Uses an abbreviated list of characters
- Contains of at least one uppercase character, one lowercase character, and one number

- 6 Oracle Self-Service E-Billing enters the Validation code in the database.

- 7 Oracle Self-Service E-Billing sets a status flag in the database indicating this CSR account is inactive.

- 8 Oracle Self-Service E-Billing displays the Login screen the following message:

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

## Alternate Paths for Enrolling Initial CSR Administrator

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

## Exceptions for Enrolling Initial CSR Administrator

Exceptions can occur with this use case.

### One of the form fields is an empty string when submitted

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

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

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

# Enrolling a CSR

This use case lets the initial CSR (and other CSR users with an administrative role) create additional CSR users after the initial CSR administrator enrollment has been completed.

Table 46 lists and describes the use case functions.

Table 46. Enrolling (CSR)

Functions	Description
Name	Enrolling (CSR)
Feature Area	Enrollment
User	CSR administrator

Table 46. Enrolling (CSR)

Functions	Description
<b>Trigger</b>	A CSR with an administrator's role clicks CSR Users and Create CSRs.
<b>Prerequisites</b>	Oracle Self-Service E-Billing CSR application has been deployed and the initial CSR administrator has been created.
<b>Configuration Points</b>	<ul style="list-style-type: none"> <li>■ The length of the CSR user name</li> <li>■ The number of characters in the temporary password. Oracle Self-Service E-Billing generates the temporary password.</li> </ul>
<b>Business Rules</b>	When a CSR user enters the master CSR user ID and password, Oracle Self-Service E-Billing requires the employee to immediately set a personal CSR user ID and password using different values.
<b>Notes</b>	<ul style="list-style-type: none"> <li>■ Oracle Self-Service E-Billing-generated validation codes cannot contain the following characters: a, A, e, E, 3, o, O, 0, i, l, 1, u, U, y, Y, \$, @, !, *</li> <li>■ The account that has been created and set to inactive state expires within four hours, and only a CSR administrator can reset the account.</li> <li>■ Oracle Self-Service E-Billing cannot reuse the validation code for 30 days after initially being created.</li> </ul>

## Main Path for Enrolling (CSR)

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

- CSR Email and CSR Confirm Email match
- 4 Oracle Self-Service E-Billing sends an email to the end user's email address.  
The email must contain an HTTPS link with a unique validation code. The validation code
  - Uses an abbreviated list of characters
  - Contains at least one uppercase character, one lowercase character, and one number
- 5 Oracle Self-Service E-Billing enters the Validation code in the database.
- 6 Oracle Self-Service E-Billing sets a status flag in the database indicating this account is inactive.
- 7 Oracle Self-Service E-Billing displays the Create CSR User screen populated with the information entered, in a read-only state, with the following message:  
*A message has been sent to the email address of the CSR user you have just created.*

### Alternate Paths for Enrolling (CSR)

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

### Exceptions for Enrolling (CSR)

Exceptions can occur with this use case.

#### One of the form fields is an empty string when submitted

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

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

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

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

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

#### The CSR user enters the master CSR user ID as a personal CSR user ID

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

# Setting a CSR Password and Security Question

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

Table 47 lists and describes the use case functions.

Table 47. Setting a CSR Password and Security Question

Functions	Description
<b>Name</b>	Setting a CSR Password and Security Question
<b>Feature Area</b>	Enrollment
<b>User</b>	CSR administrator
<b>Trigger</b>	The CSR user clicks the HTTPS request that was sent to him or her in an email.
<b>Configuration Points</b>	<ul style="list-style-type: none"> <li>■ The number of characters in a password, PCI requirements state that seven characters is the minimum allowed.</li> <li>■ The complexity of the password.</li> <li>■ The number of questions for the security question.</li> <li>■ The list of security questions.</li> </ul>

## Main Path for Setting a CSR Password and Security Question

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

- CSR User Name
- Password

When a user enters a password, the default is eight (configurable) characters and contains at least (configurable):

- One uppercase character
- One lowercase character
- One Number
- No Spaces
- Special characters are valid.

The following rules also apply to the password:

- The password cannot be the same as the user name.
- The password cannot be the same as the previously entered password.
- The password cannot be the same as the master CSR user ID.
- Confirm Password - Must be the same as the password entered in the previous field.

- Select a Security Question - Pre-Populated Drop Down (Configurable)
  - Best friend's name from childhood
  - The name of the boy or girl you first kissed
  - The place where you first met your spouse or significant other
  - What is the make or model type of your first car
  - What was the name of the school you attended in first grade
- Security Answer
  - Form box size of 30 characters for consistency.
  - The minimum length of a security question is one (configurable) character and cannot be the space character.
  - The maximum length of the answer is 100 characters.
  - Oracle Self-Service E-Billing trims leading and trailing spaces and does not include these in the calculation of minimum and maximum lengths.
  - Spaces within the answer are valid.
  - Special characters are valid and enhance the security level of the answer.
- 2 The end user clicks Submit.
- 3 Oracle Self-Service E-Billing validates the information on the form for:
  - Formatting
  - Completeness
  - CSR user name and validation code within HTTPS request match within Oracle Self-Service E-Billing
  - The account has not expired, four hour (configurable) time limit
  - Password requirements
- 4 Oracle Self-Service E-Billing sets the status flag in the database indicating this is an active CSR user.
- 5 Oracle Self-Service E-Billing displays the following message with a link to the CSR Login page:  
*Your security credentials have been accepted, please click here [csr\\_login](#) to access your billing information.*

## Alternate Paths for Setting a CSR Password and Security Question

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

## Exceptions for Setting a CSR Password and Security Question

Exceptions can occur with this use case.

**One of the form fields is an empty string when submitted**

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

**The password or confirm password does not meet the requirements**

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

**The password and confirm passwords are not exactly the same**

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

## Resetting a CSR Password

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

Table 48 lists and describes the use case functions.

Table 48. Resetting a CSR Password

Functions	Description
<b>Name</b>	Resetting a CSR Password
<b>Feature Area</b>	Enrollment
<b>User</b>	CSR administrator
<b>Trigger</b>	The CSR user clicks the HTTPS request that was sent in an email.
<b>Prerequisites</b>	The CSR user is currently enrolled in Oracle Self-Service E-Billing and the CSR application is deployed behind the corporate firewall.
<b>Configuration Points</b>	<ul style="list-style-type: none"> <li>■ The number of times the user can enter an incorrect CSR user, security question, or security answer.</li> <li>■ The number of characters in a password; PCI requirements state that seven characters is the minimum allowed.</li> <li>■ The complexity of the password.</li> </ul>

### Main Path for Resetting a CSR Password

- 1 Oracle Self-Service E-Billing displays a form to the end user who enters the following information:
  - CSR User ID - Required
  - CSR Email Address - Required
  - Select a Security Question - Pre-Populated Drop Down (Configurable)

- ❑ Best friend's name from childhood
  - ❑ The name of the boy or girl you first kissed
  - ❑ The place where you first met your spouse or significant other
  - ❑ What is the make or model type of your first car
  - ❑ What was the name of the school you attended in first grade
  - Security Answer - The end user must provide the correct answer he or she supplied during the enrollment process.
    - ❑ The answer has to be an exact match.
    - ❑ The answer is case-sensitive.
- 2 The end user clicks Submit.
- 3 Oracle Self-Service E-Billing validates the information on the form for:
- Completeness
  - CSR User ID
  - Email Address
- 4 Oracle Self-Service E-Billing validates the security question and answer. After five (configurable) tries by the end user, the account locks and an error message appears.
- 5 Oracle Self-Service E-Billing displays a Reset Password form with the following values:
- Password - Default is eight (configurable) characters and contains at least (configurable):
    - ❑ One uppercase character
    - ❑ One lowercase character
    - ❑ One Number
    - ❑ No Spaces
    - ❑ Special characters are valid.
- The password cannot be the same as the user name.
- The password cannot be the same as the previously entered password.
- Confirm Password - Must be the same as the password entered in the previous field.
- 6 The user clicks Next.
- 7 Oracle Self-Service E-Billing validates the form for:
- Formatting
  - Completeness
  - Password Requirements
- 8 Oracle Self-Service E-Billing displays the CSR Login page with a the following message: *Please log into the application using your new personal password you have just created.*

## Alternate Paths for Resetting a CSR Password

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

## Exceptions for Resetting a CSR Password

Exceptions can occur with this use case.

### One of the form fields is an empty string when submitted

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

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

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

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

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

### The password or confirm password does not meet the requirements

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

### The password and confirm passwords are not exactly the same

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

# Searching for Users

The goal of this use case is to identify a consumer user. A CSR can search for a consumer user using any account information, such as ZIP Codes, Tax ID, and so on. [Table 49](#) lists and describes the use case functions.

Table 49. Searching for Users

Functions	Description
Name	Searching for Users
Feature Area	CSR

Table 49. Searching for Users

Functions	Description
User	CSR, CSR administrator
Trigger	The CSR or CSR administrator logs in to the CSR application default page or the user clicks the Search for User subtab of the Search tab from any other page.
Precondition	Login
Configuration	None
Search Screen	<ul style="list-style-type: none"> <li>■ User First Name - Only characters and apostrophes, hyphens, and spaces are allowed.</li> <li>■ User Last Name - Only characters and apostrophes, hyphens and spaces are allowed.</li> <li>■ User ID - Only characters and numbers are allowed.</li> <li>■ Service Agreement - Only Numbers, spaces, and dashes are allowed.</li> <li>■ Account Number - Only Numbers, spaces, and dashes are allowed.</li> <li>■ E-mail Address - Only alpha characters, numbers, underscores, and the ampersand (@) are allowed.</li> </ul>
Notes	<ul style="list-style-type: none"> <li>■ Oracle Self-Service E-Billing displays the users (userid) associated at either the account level or the service agreement level in the search results page.</li> <li>■ The user can configure the number of rows returned for each page.</li> <li>■ Result set columns are configurable for each implementation.</li> </ul>

## Main Path for Searching for Users

A CSR selects search criteria from the Search Accounts screen.

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

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

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

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

- User ID
- Name
- E-mail Address (useful for two users with same name)
- Action: Edit or Delete, and Impersonate.

### Alternate Paths for Searching for Users

The following alternate paths can occur when searching for users.

#### Action selected on wrong user from the result list.

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

#### The user clicks the Impersonate link in the search results.

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

#### The CSR user selects to edit a user.

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

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

## Impersonating a User

In this use case, a CSR impersonates a consumer user to view specific account information. [Table 50](#) lists and describes the use case functions.

Table 50. Impersonating a User

Functions	Description
Name	Impersonating a User.
Feature Area	CSR

Table 50. Impersonating a User

Functions	Description
User	CSR, CSR administrator
Trigger	The user clicks the Impersonate link in the search results.
Precondition	The CSR can use either search result to locate users and use the Impersonate link to impersonate the user.
Notes	<ul style="list-style-type: none"> <li>■ A CSR user inherits the same rights and privileges as the user he or she is impersonating.</li> <li>■ The recommended method to end impersonation sessions is to log out from the Impersonation session.</li> </ul>

### Main Path for Impersonating a User

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

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

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

## Searching and Modifying a CSR User

In this use case, a CSR administrator modifies the profiles of other CSRs, so that other CSRs can access Oracle Self-Service E-Billing. [Table 51](#) lists and describes the use case functions.

Table 51. Searching and Modifying a CSR User

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

Table 51. Searching and Modifying a CSR User

Functions	Description
<b>Note</b>	A wildcard (*) can be added to the end of any value.
<b>Configuration</b>	Search CSR Profile: <ul style="list-style-type: none"> <li>■ First Name</li> <li>■ Last Name</li> <li>■ CSR ID</li> </ul> Modify CSR Profile: <ul style="list-style-type: none"> <li>■ First Name</li> <li>■ Last Name</li> <li>■ CSR ID - Only characters and numbers allowed.</li> <li>■ Password</li> <li>■ Confirm Password</li> <li>■ Email Address</li> <li>■ Role - Either CSR or CSR administrator.</li> </ul>

## Main Path for Searching and Modifying a CSR User

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

## Alternate Paths for Searching and Modifying a CSR User

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

### There are no matching accounts found for the given criteria.

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

**The CSR administrator chooses to edit CSR details.**

The CSR administrator selects a user from the list and invokes the Edit User option. The UI displays the Edit User page with the following data:

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

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

**The CSR administrator selects the Delete operation.**

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

- First Name
- Last Name
- User Name

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

## Adding CSR Users

In this use case, a CSR administrator adds other CSRs. [Table 52](#) lists and describes the use case functions.

Table 52. Adding CSR Users

Functions	Description
<b>Name</b>	Adding CSR Users
<b>Feature Area</b>	CSR
<b>User</b>	Customer service representative administrator
<b>Trigger</b>	The CSR clicks the Create CSR tab.
<b>Precondition</b>	<ul style="list-style-type: none"> <li>■ The CSR administrator user has been created.</li> <li>■ An organization and accounts exist.</li> </ul>

Table 52. Adding CSR Users

Functions	Description
<b>Notes</b>	<ul style="list-style-type: none"> <li>■ Only administrator CSRs have the ability to manage other CSR users.</li> <li>■ User name and password have same limits as end users.</li> </ul>
<b>Standard Features</b>	Form validation
<b>Configuration Points</b>	<ul style="list-style-type: none"> <li>■ The number of characters in a password; PCI requirements state that seven characters is the minimum allowed.</li> <li>■ The complexity of the password.</li> <li>■ The number of questions for the security question.</li> <li>■ The list of security questions.</li> </ul>

## Main Path for Adding CSR Users

A CSR administrator chooses to Add Internal Users. The user selects the Add function for a chosen CSR User and enters the CSR User's details:

- First Name
- Last Name
- User ID
- Email
- Role
- Password
- Confirm Password

The admin internal user enters information and submits the form. Oracle Self-Service E-Billing confirms the successful creation of the CSR user.

## Alternate Paths for Adding CSR Users

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

## Editing a CSR User

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

Table 53 lists and describes the Editing a CSR User use case functions.

Table 53. Editing a CSR User

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

### Main Path for Editing a CSR User

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

### Alternate Path for Editing a CSR User

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

## Managing a CSR Profile

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

Table 54 lists and describes the Managing a CSR Profile use case functions.

Table 54. Managing a CSR Profile

Functions	Description
<b>Name</b>	Managing a CSR Profile
<b>Feature Area</b>	CSR User Management.
<b>User</b>	CSR administrator
<b>Trigger</b>	The user clicks the My Profile tab in Oracle Self-Service E-Billing.
<b>Prerequisites</b>	The end user is currently enrolled in Oracle Self-Service E-Billing.
<b>Configuration Points</b>	<ul style="list-style-type: none"> <li>■ The number of characters in a password; PCI requires a minimum of seven characters</li> <li>■ The complexity of the password</li> <li>■ The number of questions for the security question</li> <li>■ The list of security questions</li> </ul>

### Main Path for Managing a CSR Profile

- 1 Oracle Self-Service E-Billing displays the Update Profile view
  - CSR User ID - Hard coded (cannot be changed)
  - Users can change their profile information:
    - First Name - Prepopulated form box - Required
    - Last Name - Prepopulated form box - Required
    - Email address - Prepopulated form box - Required
  - Role - Hard coded (cannot be changed)
  - New Password - Displays an empty form field. Default is eight characters and must contain at least:
    - One uppercase character
    - One lowercase character
    - One Number
    - No Spaces
    - Special characters are valid.
  - Confirm Password - Displays an empty form field.

- Security question - CSR selects a security question:
    - Best friend's name from childhood
    - The name of the boy or girl you first kissed
    - The place where you first met your spouse or significant other
    - What is the make or model type of your first car
    - What was the name of the school you attended in first grade
  - Security Answer
    - Form box size of 30 characters for consistency.
    - The minimum length of a security question is one (configurable) character and cannot be the space character.
    - The maximum length of the answer is 100 characters.
    - Oracle Self-Service E-Billing trims leading and trailing spaces and does not include these in the calculation of minimum and maximum lengths.
    - Spaces within the answer are valid.
    - Special characters are valid and enhance the security level of the answer.
- 2 The end user clicks Update.
  - 3 Oracle Self-Service E-Billing validates the information on the form for:
    - Formatting
    - Completeness
  - 4 Oracle Self-Service E-Billing displays the CSR My Profile confirmation screen with the following success message: *Your changes have been saved.*

## Alternate Paths for Managing a CSR Profile

Alternate paths can occur with this use case.

### The user clicks **Cancel** on the **Manage Profile** page.

The page refreshes with the original settings.

### The user clicks **Cancel** on the **Change Password** page.

The Manage Profile page appears.

### The user clicks **Cancel** on the **Change Security Question** page.

The Manage Profile page appears.

## Exceptions for Manage CSR Profile

Exceptions can occur with this use case.

**One of the form fields is an empty string when submitted**

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

**The password or confirm password does not meet the requirements**

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

**The password and confirm passwords are not exactly the same**

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

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

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

## Setting a Preferred Language (CSR)

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

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

Table 55 lists and describes the Setting a Preferred Language use case functions.

Table 55. Setting a Preferred Language (CSR)

Function	Description
<b>Name</b>	Setting a Preferred Language (CSR)
<b>Feature Area</b>	CSR User Management.
<b>User</b>	CSR administrator or user
<b>Preconditions</b>	The CSR user is currently enrolled and logged into Oracle Self-Service E-Billing.
<b>Trigger</b>	End user clicks the My Account tab and then the Preferences subtab, or clicks Language.

Table 55. Setting a Preferred Language (CSR)

Function	Description
<b>Page Content</b>	Page title: Change Language Attribute: Language Buttons <ul style="list-style-type: none"> <li>■ Submit</li> <li>■ Cancel</li> </ul>
<b>Subtabs</b>	<ul style="list-style-type: none"> <li>■ Profile</li> <li>■ Preferences</li> </ul>
<b>Configuration Points</b>	Oracle Self-Service E-Billing is preconfigured with U.S. English only; you must localize your implementation to provide additional languages.

### Main Path for Setting a Preferred Language (CSR)

The following path describes this use case:

- 1 The CSR user clicks the My Accounts tab and the Preferences subtab, or clicks Language.
- 2 On the Preferences page, the CSR user selects a language and clicks Submit.
- 3 Oracle Self-Service E-Billing displays the Billing and Payment application in the chosen language and stores this preference as part of the CSR user's profile.

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

### Alternate Paths for Setting a Preferred Language (CSR)

The following alternate path can occur in this use case.

#### The user clicks Cancel

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

### Exceptions for Setting a Preferred Language (CSR)

None.

## Adding a CSR Administrator

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

Table 56 lists and describes the Adding a CSR Administrator use case functions.

Table 56. Adding a CSR Administrator

Functions	Description
<b>Name</b>	Adding a CSR Administrator
<b>Feature Area</b>	Enrollment.
<b>User</b>	CSR administrator
<b>Prerequisites</b>	A CSR user is set up.
<b>Trigger</b>	CSR administrator clicks the Organizations tab, performs a search, clicks View Admins, and then clicks New Admin.
<b>Configuration Points</b>	<ul style="list-style-type: none"> <li>■ The number of characters in a user name.</li> <li>■ The number of characters in the temporary password. Oracle Self-Service E-Billing generates the temporary password.</li> </ul>
<b>Notes</b>	<ul style="list-style-type: none"> <li>■ Oracle Self-Service E-Billing-generated validation codes cannot contain the following characters: a, A, e, E, 3, o, O, 0, i, l, 1, u, U, y, Y, \$, @, !, *</li> <li>■ The account that has been created and set to inactive state expires within four hours, and only a CSR administrator can reset the account.</li> <li>■ Oracle Self-Service E-Billing cannot reuse the validation code for 30 days after initially being created.</li> </ul>

## Main Path for Adding a CSR Administrator

- 1 Oracle Self-Service E-Billing displays a form where the CSR administrator fills out the following values:
  - First Name - Required
  - Last Name- Required
  - Email Address - Required
  - Confirm Email - Required
  - Role - Required
    - Admin
    - Manager
    - Subscriber
  - User Name - Required
    - The Length of the User Name, default is a minimum of eight characters (configurable).
- 2 The CSR administrator user clicks Next

- 3 Oracle Self-Service E-Billing validates the information on the form for:
  - Formatting
  - Completeness
  - Email and confirm email match
  - User Name Requirements
- 4 Oracle Self-Service E-Billing displays the user enrollment verification form.
- 5 The admin user clicks submit.
- 6 Oracle Self-Service E-Billing sends an email to the end user email address.

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

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

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

## Alternate Paths for Adding a CSR Administrator

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

## Exceptions for Adding a CSR Administrator

Exceptions can occur with this use case.

### One of the form fields is an empty string when submitted

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

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

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

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

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

## Setting CSR Account Lockout Status

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

Table 57 lists and describes the Setting CSR Account Lockout Status use case functions.

Table 57. Setting CSR Account Lockout Status

Functions	Description
<b>Name</b>	Setting CSR Account Lockout Status
<b>Feature Area</b>	Login and Authentication
<b>User</b>	CSR administrator
<b>Trigger</b>	<ul style="list-style-type: none"> <li>■ On the Login page a user tries logging in more than five (configurable) times.</li> <li>■ During the Forgot Password and Reset Password use case, when a user tries more than five (configurable) times to enter his or her User Name, Account Number, or Service Number.</li> <li>■ During the Forgot Password and Reset Password use case, when a user tries more than five (configurable) times to enter his or her security question or security answer.</li> <li>■ The end user or CSR has not clicked on the HTTPS link within four hours of being sent.</li> </ul>
<b>Prerequisites</b>	The CSR user is currently enrolled in Oracle Self-Service E-Billing.
<b>Configuration Points</b>	<ul style="list-style-type: none"> <li>■ Number of incorrect entries on the Login page.</li> <li>■ Number of incorrect entries on the Forgot Password use case - Password.</li> <li>■ Number of incorrect entries on the Forgot Password use case - Security Question.</li> <li>■ Number of hours before the account locks during the HTTPS validation request.</li> </ul>
<b>Notes</b>	The value set in the database is unique for each trigger point.

## Main Path for Setting CSR Account Lockout Status

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

## Viewing the Account Lockout Report

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

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

Table 58 lists and describes the Viewing the Account Lockout Report use case functions.

Table 58. Viewing the Account Lockout Report

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

## Main Path for Viewing the Account Lockout Report

- 1 Oracle Self-Service E-Billing displays a view listing the available reports:
  - Locked Out Customer Accounts link
  - Locked Out Customer Service Representatives link
  - Locked Out Accounts Reactivated
- 2 The CSR administrator clicks the Locked Out Customer Accounts Link. Oracle Self-Service E-Billing displays a report that shows:
  - User ID
  - Business Account Number - If the end user is tied directly to the ETL Business Account Number, otherwise leave it blank.
  - Service Number - If the end user is tied directly to a Service Number, otherwise leave it blank.

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

### Exceptions for Viewing the Account Lockout Report

Exceptions can occur with this use case.

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

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

## Reactivating a Locked Account

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

Table 59 lists and describes the Reactivating a Locked Account use case functions.

Table 59. Reactivating a Locked Account

Functions	Description
<b>Name</b>	Reactivating a Locked Account
<b>Feature Area</b>	Login and Authentication
<b>User</b>	CSR administrator
<b>Trigger</b>	The CSR administrator logs into Oracle Self-Service E-Billing and clicks the Reports (New) link next to My Profile, clicks the Locked Out Accounts link, and then clicks the reactivate link within the report.
<b>Prerequisites</b>	<ul style="list-style-type: none"> <li>■ The CSR administrator user is currently enrolled in Oracle Self-Service E-Billing.</li> <li>■ The CSR administrator receives a call from the end user or CSR user who is locked out.</li> <li>■ The CSR administrator validates the email address entered in Oracle Self-Service E-Billing.</li> </ul>
<b>Notes</b>	Oracle Self-Service E-Billing-generated validation code cannot contain the characters: a, A, e, E, 3, o, O, 0, i, I, 1, u, U, y, Y, \$, @, !, *

### Main Path for Reactivating a Locked Account

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



# Index

## A

- Account Billing Overview report, viewing** 49
- Account Billing Trend report** 58
- Account Lockout report**
  - viewing 135
- account lockout status**
  - setting for CSR 134
- Account Summary report**
  - viewing 33
- ACH return codes** 46
- ACH Return Payment job processing** 44
- adding a CSR administrator** 131
- adding CSR user** 125
- administrator**
  - adding CSR 131
- analytic reporting use cases** 47

## B

- billing reports**
  - viewing list of standard 47

## C

- CSR**
  - enrolling 113
- CSR account lockout status**
  - setting 134
- CSR administrator**
  - adding 131
- CSR default user login** 110
- CSR overview** 109
- CSR profile**
  - managing 128
- CSR roles** 111
- CSR users**
  - adding 125
  - editing 126
  - searching and modifying 123

## D

- default CSR user login** 110
- disputing a transaction** 42

## E

- editing a CSR user** 126
- enrolling a CSR** 113

- enrolling initial CSR administrator** 111
- enrolling, self** 12
- Enrollment** 11

## H

- highest spending services** 67
- highest spending services by service agreement** 71

## I

- impersonating a user** 122
- initial CSR administrator**
  - enrolling 111

## L

- language**
  - setting preferred 25
  - setting preferred (CSR user) 130
- locked account**
  - reactivating 137
- lockout status**
  - setting 27
  - setting CSR 134
- logging in** 20
- logging out** 28
- login**
  - default CSR 110
- longest calls** 77

## M

- managing a CSR profile** 128
- managing a profile** 22
- modifying a CSR user** 123
- most expensive calls** 74
- most frequently called countries** 98
- most frequently called country by service agreement** 102
- most frequently called country by service agreement details** 105
- most frequently called destination by service agreement** 92
- most frequently called destination by service agreement details** 95
- most frequently called destinations** 89
- most frequently called number by service agreement** 83

most frequently called number by service agreement details 86, 95  
 most frequently called numbers 80

**O**

overview of CSR 109

**P**

**password**  
 resetting 17  
 resetting for a CSR 118  
 setting 15  
 setting for CSR 116  
**payment processing use cases** 43  
**payments**  
 synchronizing to A/R 45  
**preferred language**  
 setting 25  
 setting (CSR user) 130  
**processing of the ACH Return Payment job** 44  
**processing of the Recurring Payment job** 45  
**processing of the Scheduled Payment job** 43  
**processing payments on a server** 43  
**profiles**  
 managing 22  
 managing CSR 128

**R**

**reactivating a locked account** 137  
**Recurring Payment job processing** 45  
**resetting a CSR password** 118  
**resetting a password** 17  
**return codes, ACH** 46  
**roles**  
 CSR 111

**S**

**Scheduled Payment job processing** 43  
**searching and modifying a CSR user** 123  
**searching for users** 120  
**security question**  
 setting 15  
 setting for CSR 116  
**self-enrolling an authorized user of an existing customer account** 12  
**Service Billing Overview report**  
 viewing 55  
**Service Billing Trend report**  
 viewing 60  
**Service Details report**

viewing 63

**Service Summary report**

viewing 34

**setting a CSR password and security question** 116

**setting a password and security question** 15

**setting a preferred language** 25

CSR user 130

**setting account lockout status** 27

**setting CSR account lockout status** 134

**Statement Billing Overview report**

viewing 52

**statement presentation use cases** 31

**Statement Summary report**

viewing 31

**synchronizing payments to A/R** 45

**T**

**timeout** 29

**top x reporting use cases** 67

**Transaction Detail report**

viewing 40

**transactions**

disputing 42

**U**

**Usage Detail report**

viewing 38

**Usage Summary** 34

**Usage Summary report**

viewing 35

**User Characteristics** 11

**User Self Enrollment for an Existing Account** 29

**users**

adding CSR 125

editing CSR 126

impersonating 122

searching 120

**V**

**viewing the Account Billing Overview report** 49

**viewing the Account Billing Trend report** 58

**viewing the Account Lockout report** 135

**viewing the Account Summary report** 33

**viewing the list of standard billing reports** 47

**viewing the Service Billing Overview report** 55

**viewing the Service Billing Trend report** 60

**viewing the Service Details report** 63

**viewing the Service Summary report** 34

viewing the Statement Billing Overview  
report 52  
viewing the Statement Summary report 31

viewing the Transaction Detail report 40  
viewing the Usage Detail report 38  
viewing the Usage Summary report 35

