Bill Analyzer User Guide

Version 2.26

July 30, 2013

Contents

Getting Started

Bill Analyzer is a comprehensive online bill presentment, reporting, and analysis tool designed to provide users with insight into their communications billing and usage. By viewing your invoices online and running simple reports, you can easily analyze all of your costs and usage to help you run your business more efficiently.

Getting started is easy. From the moment you log in, you will have the ability to manage your invoices, view standard reports and graphs, and create your own custom reports. You can assign your accounts and services to your organization's departments for quick cost allocation each month.

Navigation

The main navigation bar lets you quickly access all of the tools available in the application.

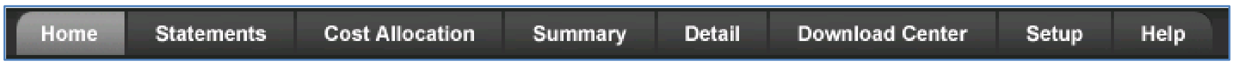


Figure 1: The Navigation Bar

Home

The home page contains important messages regarding Bill Analyzer functionality, support, and additional messages from CenturyLink.

Statements

The Statements page allows you to easily manage all of your CenturyLink invoices from one convenient location. You can compare invoices to previous months and group invoices by specific criteria. Use the **Order Statements** feature to set up recurring orders for all of your statements and related data.

Cost Allocation

Use an organizational hierarchy to allocate account and service charges by department or cost center in just seconds.

Summary

Summary reports give an overview of your telecommunications usage displayed as tables or graphs. Use standard reports or create custom reports to meet your specific needs.

Detail

Detail reports contain individual data records that can include a variety of information including call usage, equipment, and other charges or credits. You can choose from a number of predefined reports or create custom reports to meet your specific needs.

Download Center

Ordered reports, statements and raw data may be downloaded to your desktop from the download center.

Setup

Setup is the control center of the application. Create hierarchies to allocate costs, create account groups for statement data orders, set up tools such as the Condition Builder, the Orgiginal filters, and add descriptions to commonly called numbers.

Help

The Help tab includes step-by-step instructions for performing a variety of tasks within the application.

Helpful Tips

Throughout Bill Analyzer, there are several features to help you quickly find the information you are looking for.

Column sorting

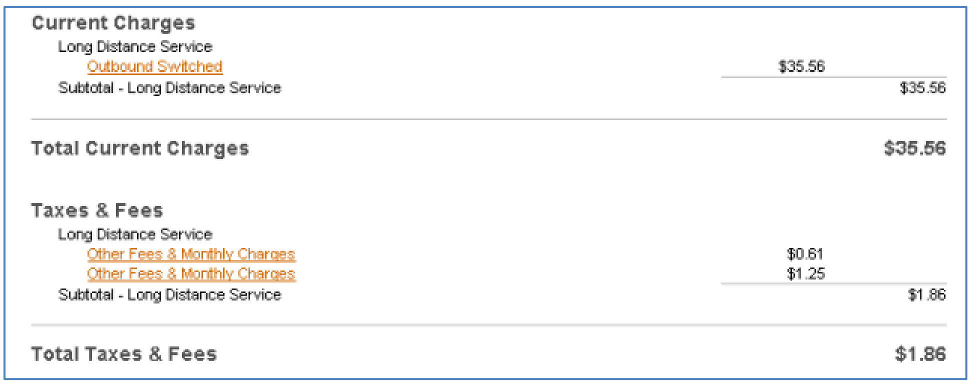
While viewing the Statements page or **Summary** and **Detail** reports, you can click on any of the column headers to sort the information according to that column.

Billing Account Number	Statement Date	Item Date	Item Description	Amount
K3031117610948	04/22/2011	04/22/2011	The $65.30 balance has been transferred to your 303 231-3165 account.	$65.30
K3031117610948	04/22/2011	04/22/2011	The $65.30 balance has been transferred to your 303 231-3166 account.	$65.30

Figure 2: Column sorting

Detail information

While viewing your **Invoices** or **Summary** reports, you can click on the summarized information link to quickly access the associated detail data.



Current Charges		
Long Distance Service		
Outbound Switched	$35.56	
Subtotal - Long Distance Service		$35.56
Total Current Charges		**$35.56**
Taxes & Fees		
Long Distance Service		
Other Fees & Monthly Charges	$0.61	
Other Fees & Monthly Charges	$1.25	
Subtotal - Long Distance Service		$1.86
Total Taxes & Fees		**$1.86**

Figure 3: Summary links

Using levels

Once you have created a hierarchy (refer to Hierarchies section), you can use the Level drop down menu on the **Statements**, **Summary**, and **Detail** pages to view information specific to the selected Node.

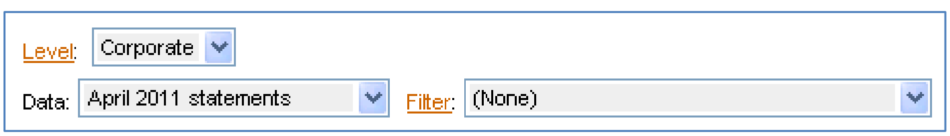


Figure 4: Levels

Statements

The Statements page allows you to easily manage all of your CenturyLink invoices from one convenient location. You can view consolidated invoices, compare to historical invoices, and group invoices by specific criteria.

Statement columns and definitions

- **Billed Date:** Date the invoice was created.
- **Account:** CenturyLink billing account number.
- **Source:** Type of service.
- **Invoice Number:** Number assigned to a specific invoice.
- **Amount Billed:** Amount billed on selected invoice.
- **Days Until Due:** Number of days until payment due date. If a dash (-) is displayed, this indicates the due date for that invoice has passed.

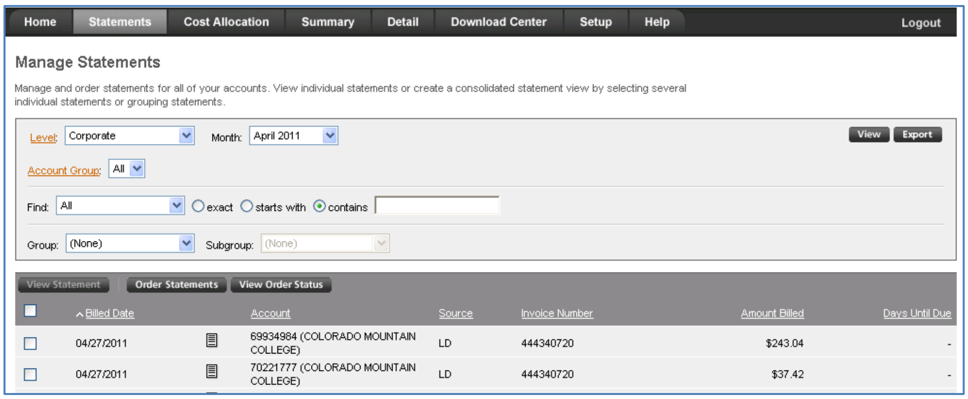


Figure 5: Statements tab

Viewing a single statement

View the summary or detailed information for one statement.

1. Click the **Statements** tab.
2. Select the month you want to view from the drop down menu.
3. Click **View**.
4. Check the box of the statement you want to view from the list.
5. Click **View Statement**.
6. Select **Expand Statement**.
7. Click **View** to see additional details.
8. Click an **individual charge** to see the associated charge details.

While viewing the charge details, columns display such as Account Number, Service Number, Billed Date etc.

- Click **Edit** to edit how the information is displayed.
- Click **Order** to have this information generated into a report.

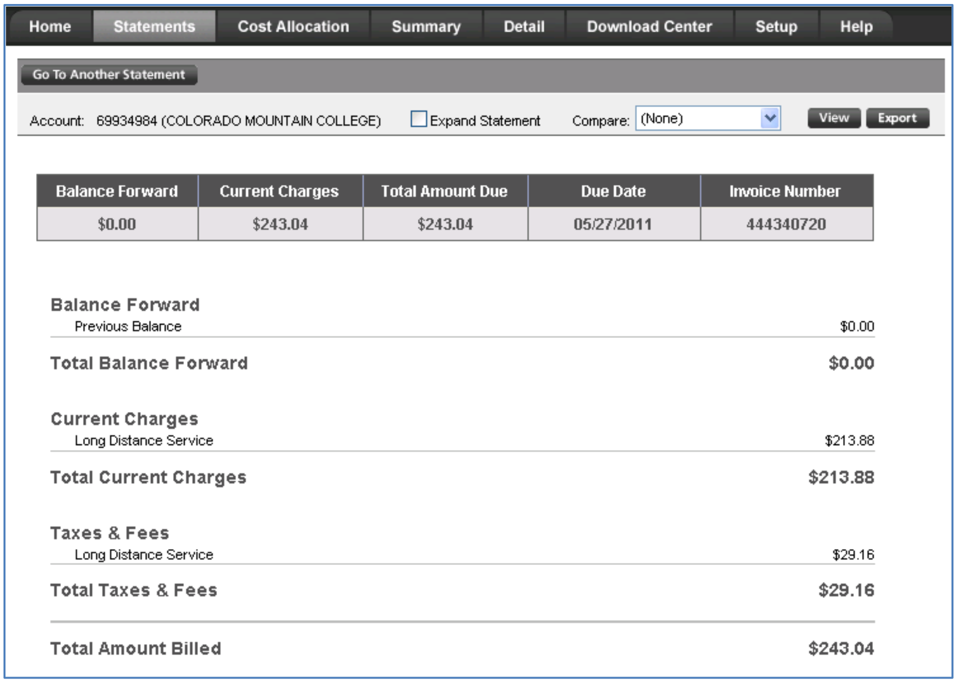


Figure 6: Viewing a single statement

Viewing a consolidated statement

Consolidate all or a group of statements to quickly see the total amount due.

1. When viewing a list of statements, check the boxes for the statements you want to see in a consolidated view.
2. Click **View Statement**.
3. Check **Expand Statement** and **View Account Details** to see additional details.
4. Click **View**.

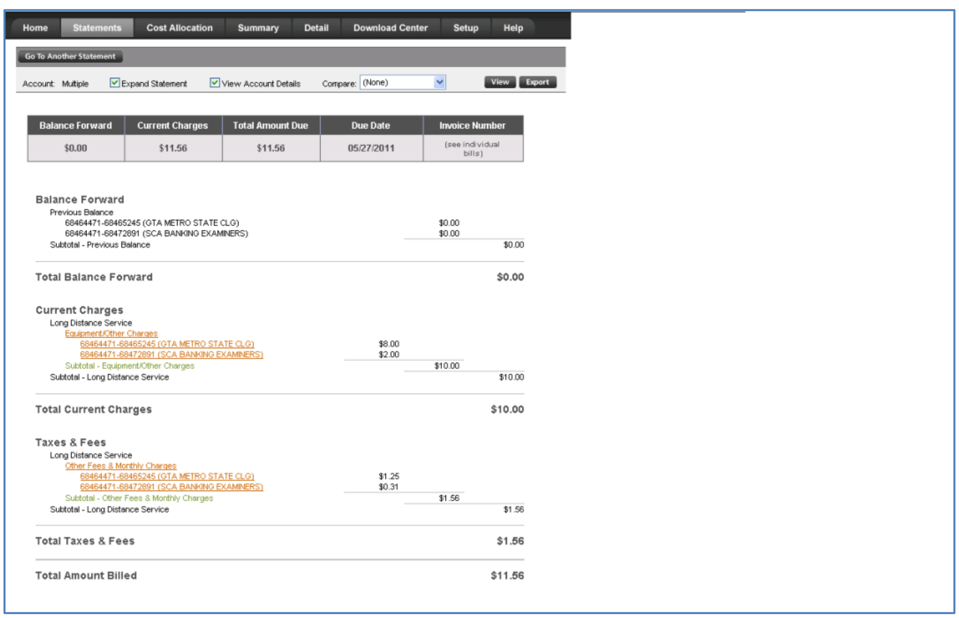


Figure 7: Viewing a consolidated statement

Comparing statements

Compare your current statement to 12 months of historical statements to quickly identify unanticipated variances and analyze cost and usage trends.

1. When viewing a statement, select the period of comparison from the **Compare** drop-down list.
2. Click **View**.

Grouping statements

Quickly find statements that fall into a specific category (Day of Month Due, Payment Status, etc).

1. Select the grouping options from the **Group** and **Subgroup** lists.
2. Click **View**.

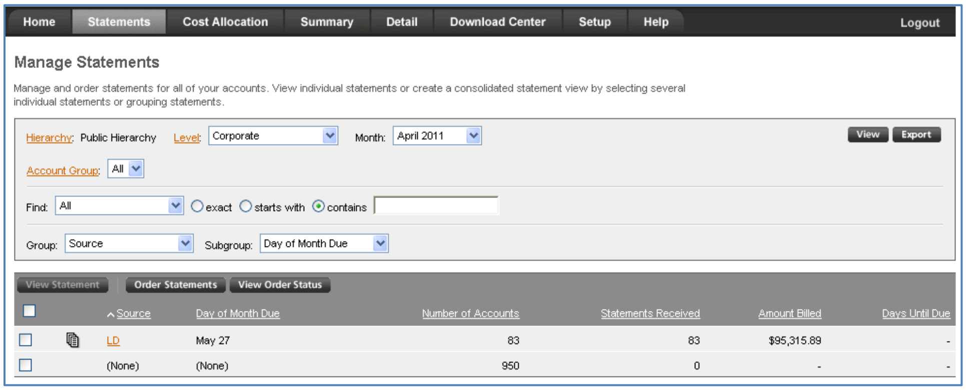


Figure 8: Grouping statements

Exporting and printing statements

Choose a PDF, CSV, or XML file format and save or print for offline use.

1. While viewing a statement, click **Export**.
2. Select the file type.
3. Select **Landscape** or **Portrait**.
4. Click **OK**.

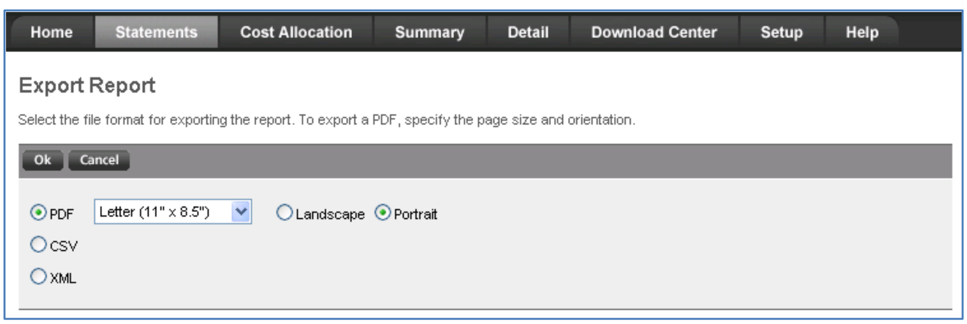


Figure 9: Exporting and printing statements

Ordering statements and related information

Order statements, statement detail reports or raw data files. With automated statement and data orders, you can schedule recurring reports to be prepared on a monthly basis.

1. When viewing a list of statements, click **Order Statements**.
2. In the **Report** section, select an account group from the Account field (see the **Setup** section) or **All Accounts**. Select the **Bill Date**.
3. In the **Frequency** section, select how often you want the statement or data to be created. Options include One-time and Monthly. Select the day of the month you would like the data generated.
4. In the File Type section, select the **type of files** and the **formats** for the statements or data. Select between Recurring, Custom, Statement Detail Report Package, or Raw Data Files.
5. Select if you would like to be **notified by email** when report is complete. You can also select to send the report to a **selected SFTP location**.
6. Enter any additional email addresses or locations in the **Send Additional Notifications to:** field. This field is only available if you select a valid SFTP location.
7. Click **Submit Order**.

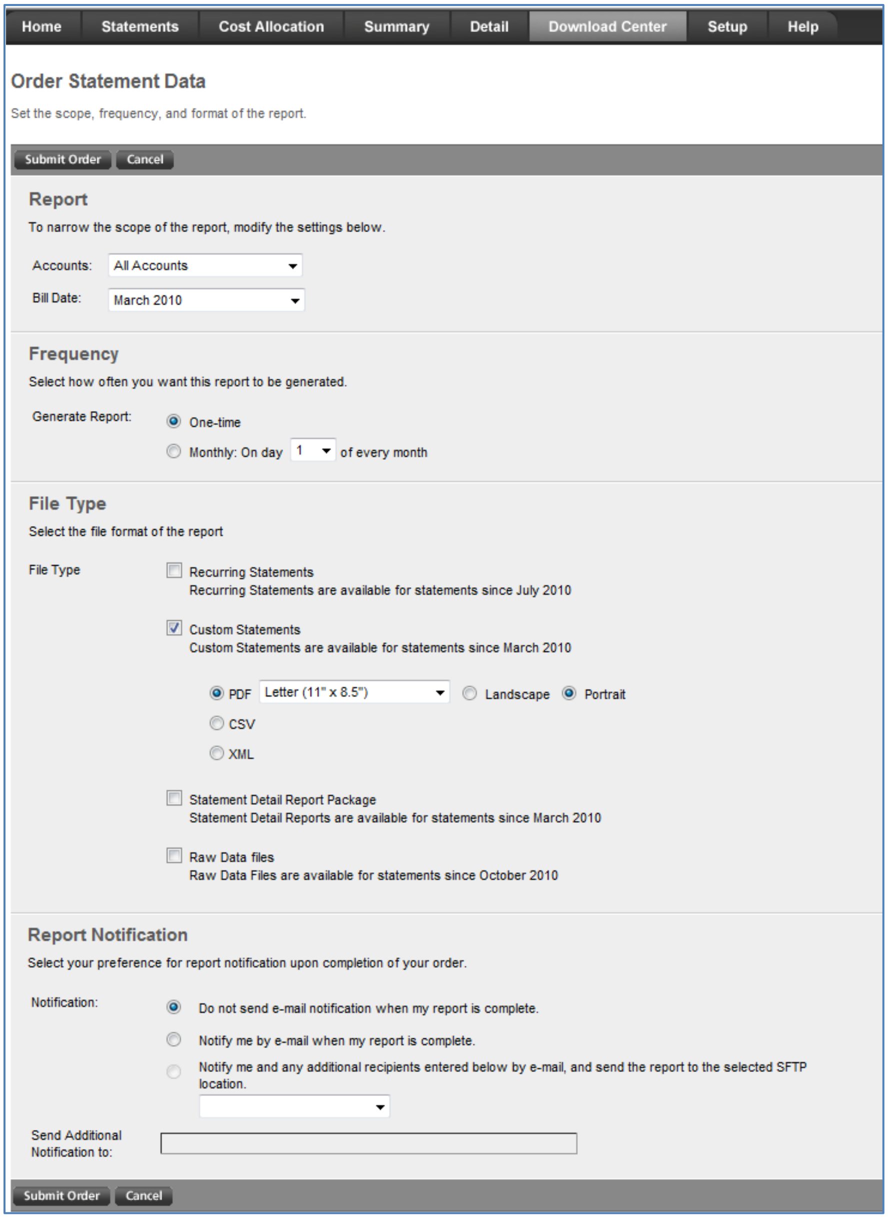


Figure 10: Ordering statements and related information

Check the status and edit order

Check the status and edit your orders on the Pending Reports page.

1. Select **View Order Status** on the **Manage Statements** page.
2. Select **Pending Orders** to display a list of statement and related report orders that have not yet been processed.
3. Select a report order listed here and click **Edit Order** to open the order and edit the order fields.

Retrieve and manage order files

Retrieve and manage your completed order files.

1. Select **View Order Status** on the **Manage Statements** page. A list of completed statement and related report orders is displayed.
4. Click on the name of a completed report in the **Report** column to download it.
5. Once the report has been downloaded, remove the report by selecting it and clicking the **Remove Orders** button.

Remove report orders already downloaded to ensure storage limits are not exceeded as described on the **Completed Orders** page. Report orders will be automatically removed according to the **Expiration** statement described at the top of the **Completed Orders** page.

Summary Reports

When you first log in, you will have access to a number of standard reports and graphs to help you better understand your billing data. You can view Summary reports to get an overview of your telecommunications usage and costs. Edit the reports that are provided, or create new ones that are specific to your business needs.

Standard summary reports

Standard summary reports may include but are not limited to:

- Adjustments and Payments Summary
- RSB Summary
- BTN Summary
- Directory Assistance Summary
- Audio Conference Calls by Moderator
- Calls by Call Type for LS
- Calls by Day of the Week for LS
- Calls by Service Type
- Calls by LATA Name
- Calls by Day of the Week for LD
- Calls by Call Type for LD
- Calls by Call Area

Table View

Table View provides a one page summary with totals and averages that you specify. Clicking a summary item will display the data associated with it.

Billing Account Number	Call Date	Time	Originating Number	Originating State	Originating City	Terminating Number	Terminating State	Terminating City	Call Duration (mm:ss)	Total Amount
69934984	04/08/2011	11:47	6463654099	NY	NWYRCYZN01	9709458691	CO	GLENWD SPG	01:12	$0.03
69934984	04/08/2011	11:51	8163327603	MO	RAYTOWN	COLR6562PI01	CO	GLENWD SPG	00:18	$0.00
69934984	04/08/2011	11:54	8163327603	MO	RAYTOWN	9709458691	CO	GLENWD SPG	05:30	$0.15
69934984	04/08/2011	12:10	7149444317	CA	ANAHEIM	9709458691	CO	GLENWD SPG	01:12	$0.03
69934984	04/08/2011	12:22	9709478349	CO	GLENWD SPG	6055827800	SD	BRANDON	00:42	$0.01
69934984	04/08/2011	12:38	9709478387	CO	GLENWD SPG	5616248439	FL	WPALMBEACH	01:36	$0.02
69934984	04/08/2011	12:52	6097309544	NJ	PENNINGTON	9709458691	CO	GLENWD SPG	04:24	$0.12
69934984	04/08/2011	13:03	9709478349	CO	GLENWD SPG	7739316866	IL	CHICGOZN10	01:36	$0.02
69934984	04/08/2011	13:04	9709478333	CO	GLENWD SPG	7149444317	CA	ANAHEIM	00:54	$0.01
69934984	04/08/2011	13:20	9709478400	CO	GLENWD SPG	5125139193	TX	AUSTIN	01:12	$0.02

Figure 11: Table View

Graph View

Graph View depicts your data as a bar, pie, or line graph. Clicking a bar or pie segment will display the associated data.

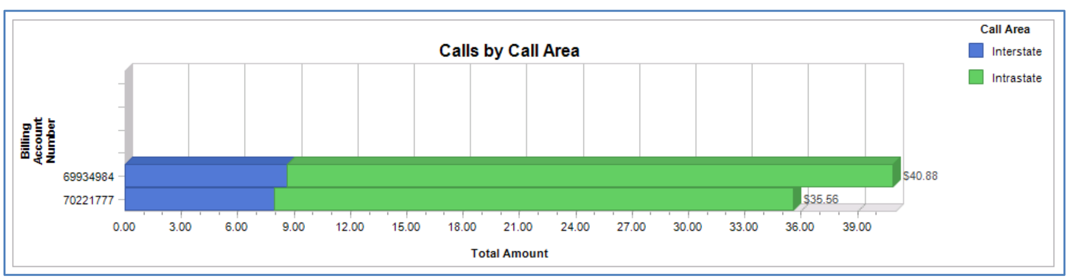


Figure 12: Graph View

Viewing a summary report

1. Click the **Summary** tab.
2. Select the **statements** or **time period** you want to view from the **Data** list.
3. Select the **report** you want to view.
4. Click **View Report**.
5. Once the report is displayed, click on a **summary item link** to view the associated detail data. If you prefer to see the report as a Graph, click the **Graph** button.
6. Click **View**.

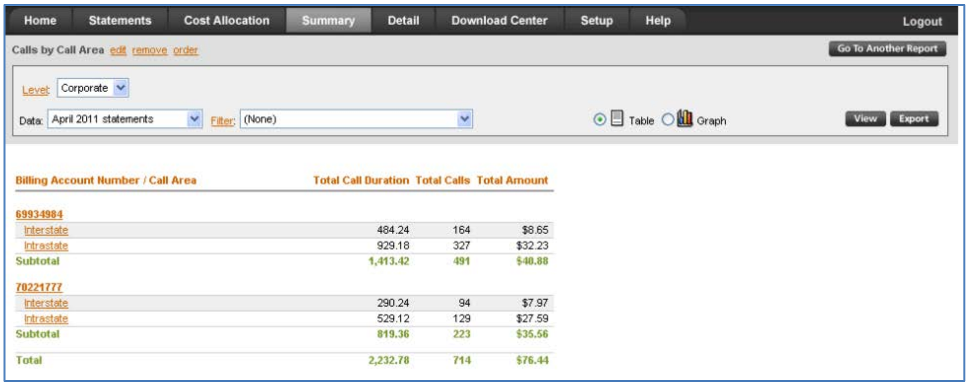


Figure 13: Summary reports

Creating a summary report

With unlimited, customizable reports, you can create reports that are relevant to your business model and organizational structure. For example, you may be interested to charges by PO number, usage by a certain service, or when the usage is occurring (day of week, after hours, etc).

1. Click the **Summary** tab.
2. Click **Add Report**.
3. Select the type of report to create. You can select to use a report type as a template by selecting **Start a new report of type** (Adjustments and Payments, BTN Summary etc) or **Start with a copy of an existing report**.
4. Click **OK**.
5. Enter a name for your report.
6. If preferred, select a **Default Filter**.
7. Select **Table** or **Graph**.

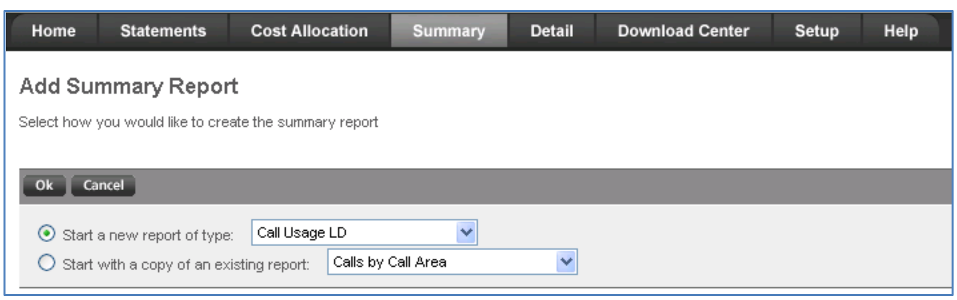


Figure 14: Creating a summary report

Grouping and subgrouping

Group allows you to designate the primary data field by which to group and display your report data.

1. Select the field to group by from the **Group** list.
2. Select the field to sort by from the **Sort By** list.
3. Select **Ascending** or **Descending** to designate the sort order.
4. To exclude data that falls below a minimum, select an item from the **Minimum Value** list and enter an amount.

Subgroup provides the option to designate a secondary data field by which to subgroup and display your report data.

1. Select the field to subgroup by from the Subgroup drop-down list. If you do not want to subgroup your data, select **None**.
2. Select the field to sort by from the **Sort By** list.
3. Select **Ascending** or **Descending** to designate the sort order.
4. To exclude data that falls below a minimum, select an item from the **Minimum Value** drop-down list and enter an amount.

Table View

The Table View section allows you to designate which totals and averages will appear in the columns of your report.

1. Select the field of the column to add from the **Exclude** list.
2. Click the > button to move a single field or click the >> button to move all fields.

To remove columns from your report:

1. Select the field of the column to remove from the **Include** list.
2. Click the **<** button to move a single field or click the **<<** button to move all fields.

Graph View

The Graph View section allows you to select whether the graph will be a bar, line, or pie graph and what calculation will be used to display the graph.

1. Select **Bar**, **Line**, or **Pie** graph and specify display preferences such as Bar Width and Separation, Color Palette, and other display values.
2. Select the **calculation** method.
3. To include the data that was not a part of the group or subgroup as its own increment in the graph, select the **None Group** and **Subgroup** check box.
4. To include the data that did not meet the minimum as its own increment in the graph, select the **Below Minimum Group** and **Subgroup** check box, or select **None**.

Sharing

Select if you would like to share this report or only have it visible to you. If you select **Share this report** all users in your organization will have the ability to view this report upon log-in.

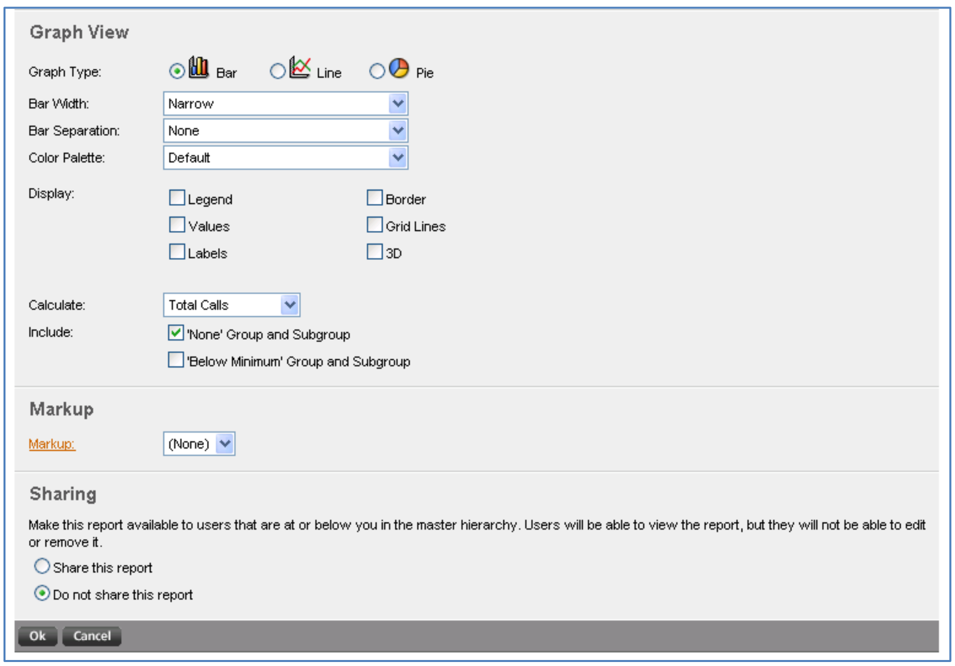


Figure 15: Graph and Sharing

Removing a report

If a report is removed, you will not be able to retrieve this report again without creating a new report.

1. Select the report you would like to remove.
2. Click **Remove Report**.
3. The **Remove Summary Report** page appears. Click **Ok** to remove the report.

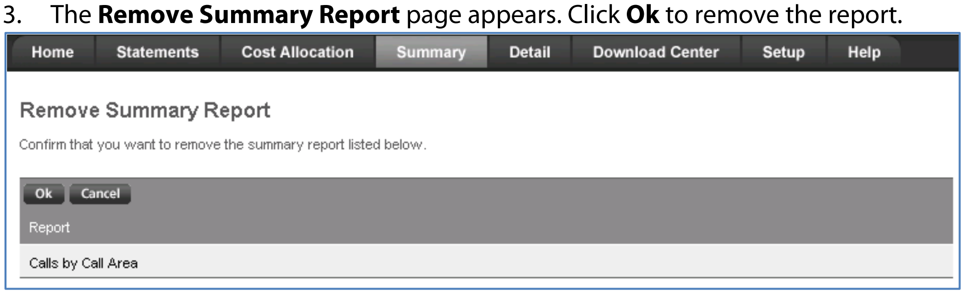


Figure 16: Removing a report

Ordering a report

With automated reporting, you can schedule email notifications. You will receive a link to download the report. All files over 2MB will be automatically compressed. This feature reduces the time and resources required to run reports on a recurring basis.

1. Click the **Summary** or **Detail** tab.
2. Select the **report** you want to order.
3. Click **Order Report**.
4. Select the **Level** (node within the hierarchy) for the report.
5. Select a **date range** and **filter** to narrow the scope of your report.
6. Select the **frequency** that the report will be created.
7. Select the **format** for the report.
8. Select **Compress report into Zip file** to reduce the file size of the order. You will need an operating system that supports Zip files or a utility to unzip them.
9. Select if you would like to be **notified by email** when report is complete. You can also select to send the report to a **selected SFTP location**.
10. Enter any additional email addresses or locations in the **Send Additional Notifications to:** field. This field is only available if you select a valid SFTP location.
11. Click **Submit Order**.

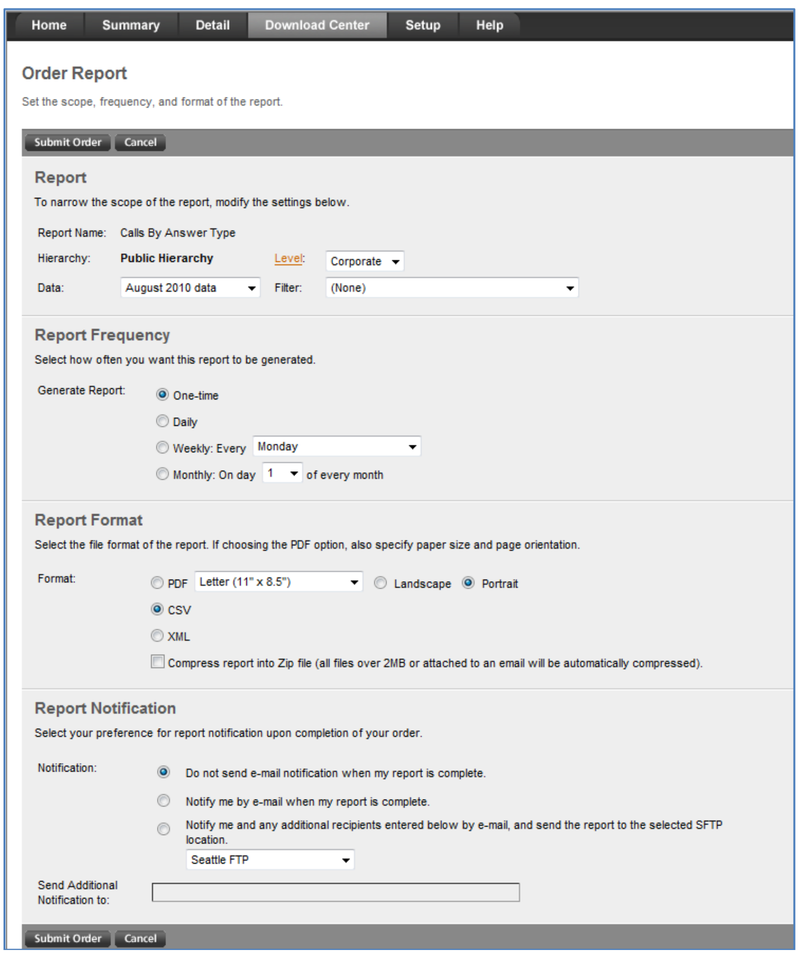


Figure 17: Ordering a report

Viewing the status of an ordered report

Quickly see if any ordered reports are Completed or Pending.

1. Click on **Summary** or **Detail** tab.
2. Click **View**.

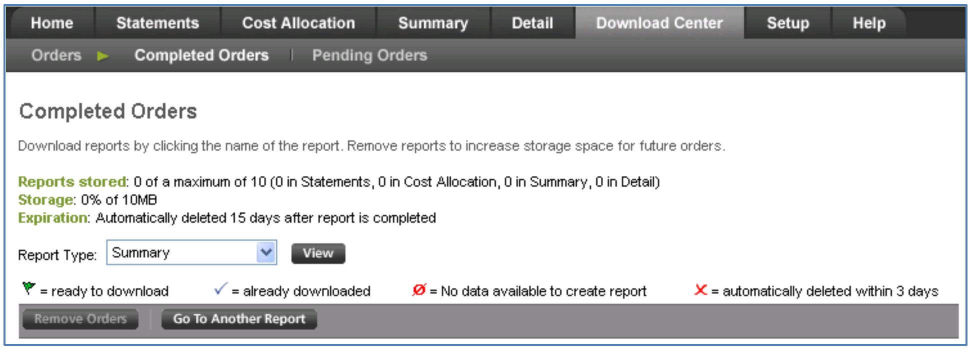


Figure 18: Viewing report status

Exporting and printing a report

Table reports can be exported and printed as a PDF, CSV, or XML file. Graph reports can be exported or printed as a .png or .jpg file.

1. While viewing report, click **Export**.
2. Select the preferred format.
3. Click **OK**. The Opening Report dialog appears. Select to **Open** or **Save** the file.

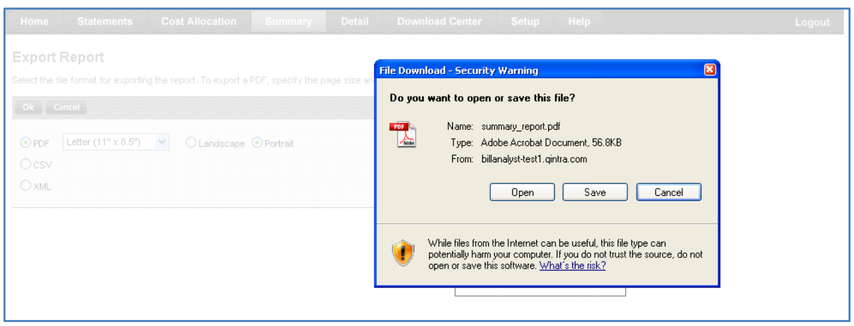


Figure 19: Exporting and printing reports

Using filters on a report

With unlimited, customizable filters, you can quickly extract specific information from your reports.

1. From a summary or detail report, select a filter from the **Filter** list. The following filter example uses a **Dedicated Access** filter.
2. Select a report, the following example uses **Call Record Details by VOIP** report.
3. Click **View Report**. The filtered results appear. In addition to the filters provided, you can create custom filters in the **Setup** section.

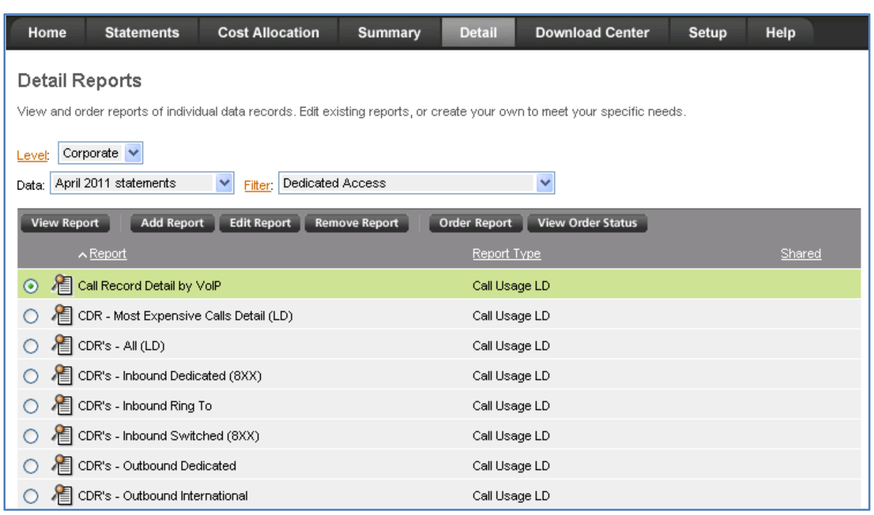


Figure 20: Selecting a Filter

Detail Reports

When you first log in, you will have access to a number of standard reports to help you better understand your billing data. You can use **Detail** reports to view individual data records. Edit the reports that are provided, or create new ones that are specific to your business needs.

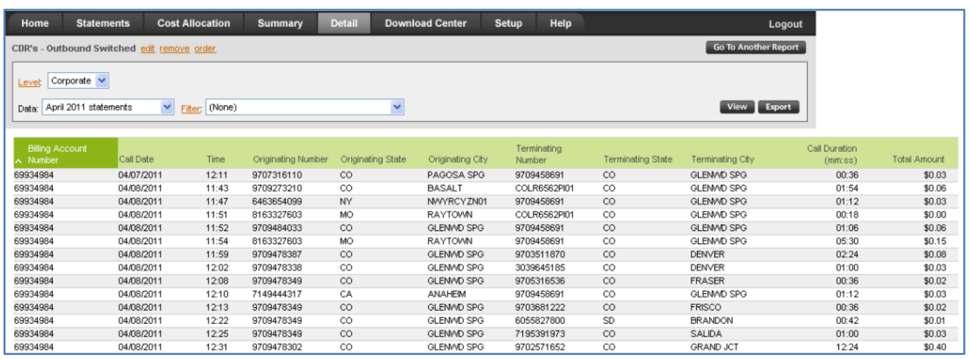
Standard detail reports

Standard detail reports include but are not limited to:

- Toll free and Long distance
- Intrastate Calling
- Interstate Calling
- Inbound Dedicated
- Inbound Ring To
- Inbound Switched
- Outbound Dedicated
- Outbound Switched
- World Card
- Daily Detail for LD
- Most Expensive Calls Detail for LD

Viewing a detail report

1. Click the **Detail** tab.
2. Select the **statements** or **time period** you want to view from the **Data** list.
3. Select the report you want to view.
4. Click **View Report**.



Billing Account Number	Call Date	Time	Originating Number	Originating State	Originating City	Terminating Number	Terminating State	Terminating City	Call Duration (mm:ss)	Total Amount
69934984	04/07/2011	12:11	9707316110	CO	PAGOSA SPG	9709458691	CO	GLENWD SPG	00:36	$0.03
69934984	04/08/2011	11:43	9709273210	CO	BASALT	COLR6562PI01	CO	GLENWD SPG	01:54	$0.06
69934984	04/08/2011	11:47	6463654099	NY	NWYRCYZN01	9709458691	CO	GLENWD SPG	01:12	$0.03
69934984	04/08/2011	11:51	8163327603	MO	RAYTOWN	COLR6562PI01	CO	GLENWD SPG	00:18	$0.00
69934984	04/08/2011	11:52	9709484033	CO	GLENWD SPG	9709458691	CO	GLENWD SPG	01:06	$0.06
69934984	04/08/2011	11:54	8163327603	MO	RAYTOWN	9709458691	CO	GLENWD SPG	05:30	$0.15
69934984	04/08/2011	11:59	9709478387	CO	GLENWD SPG	9703511870	CO	DENVER	02:24	$0.08
69934984	04/08/2011	12:02	9709478338	CO	GLENWD SPG	3039645185	CO	DENVER	01:00	$0.03
69934984	04/08/2011	12:08	9709478349	CO	GLENWD SPG	9705316536	CO	FRASER	00:36	$0.02
69934984	04/08/2011	12:10	7149444317	CA	ANAHEIM	9709458691	CO	GLENWD SPG	01:12	$0.03
69934984	04/08/2011	12:13	9709478349	CO	GLENWD SPG	9703681222	CO	FRISCO	00:36	$0.02
69934984	04/08/2011	12:22	9709478349	CO	GLENWD SPG	6055827800	SD	BRANDON	00:42	$0.01
69934984	04/08/2011	12:25	9709478349	CO	GLENWD SPG	7195391973	CO	SALIDA	01:00	$0.03
69934984	04/08/2011	12:31	9709478302	CO	GLENWD SPG	9702571652	CO	GRAND JCT	12:24	$0.40

Figure 21: Viewing a detail report

Creating a detail report

With unlimited, customizable reports, you can create reports that are relevant to your business model and organizational structure.

1. Click the **Detail** tab.
2. Click **Add Report**.
3. Select the type of report to create. You can select to use a report type as a template by selecting **Start a new report of type** (Adjustments and Payments, BTN Summary etc) or **Start with a copy of an existing report**.
4. Click **Ok**.
5. Enter a name for your report.
6. If preferred, select a **Default Filter**.

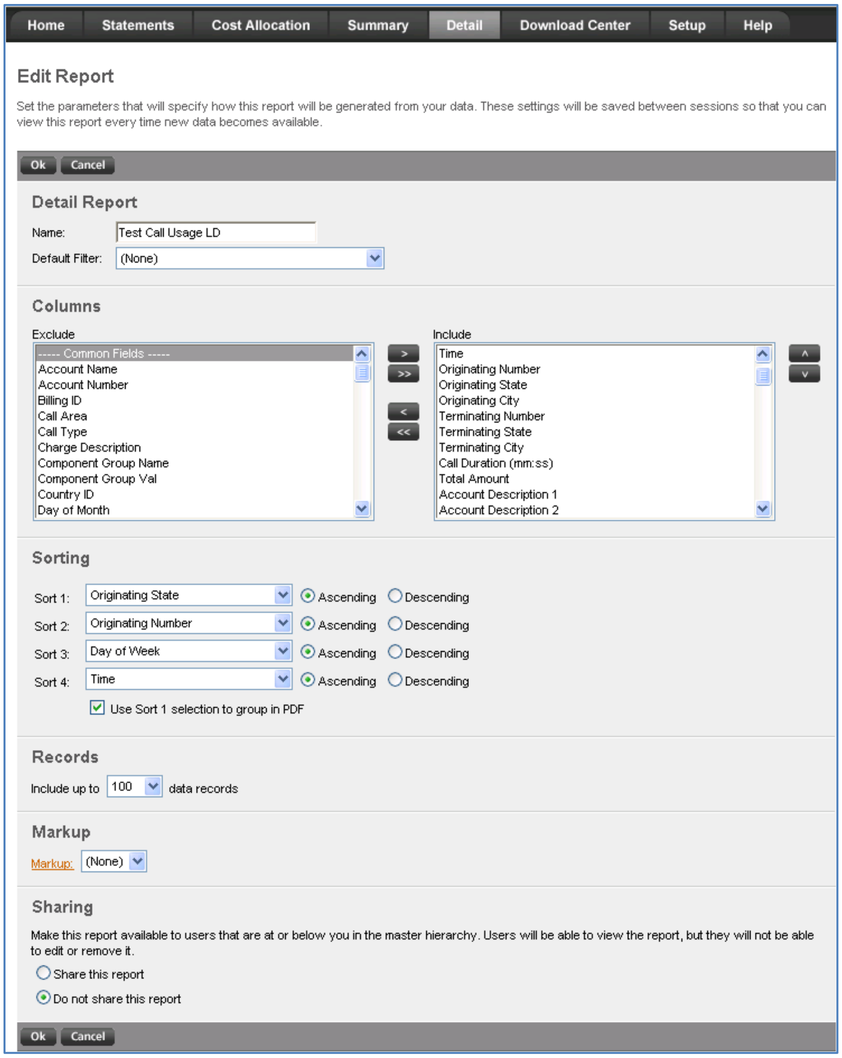


Figure 22: Adding columns, sorting, records, and sharing to a detail report

Columns

The Columns section allows you to designate which fields will be displayed as the columns of your report. Use the SHIFT and CTRL keys to select multiple fields.

To add columns to your report:

- Select the field of the column to add from the Exclude list.
- Click the > button to move a single field or click the >> button to move all fields.

To remove columns from your report:

- Select the field of the column to remove from the **Include** list.
- Click the **<** button to move a single field or click the **<<** button to move all fields.

Sorting

Sorting allows you to designate the order in which your data will appear. In detail reports that have a group designated, the report will be sorted primarily by group and then further sorted within that group by up to three additional sorting fields that you specify. If no group has been selected, the detail report will be sorted by the sorting options specified.

1. Select the field to sort by from the **Sorting** list.
2. Click **Ascending** or **Descending** to designate the sort order.
3. To select secondary and tertiary sorting options.
4. Select the amount of data records you would like returned in the detail report. The list is prepopulated and includes increments of 25, 50, 100, 250, 500 and 1000.

Download Center

In order to more easily manage a wide array of possible download formats and a variety of files created in an offline manner for the customer, the new Download Center tab is available. This module is available via a combination of permissions and custom values that can be configured during implementation.

You can view both **completed** and **pending orders**.

Download and access reports by clicking the name of the report. Remove reports to increase storage space for future orders. You can view both complete and pending orders. The main page of download center reflects completed orders and contains the following fields:

Field	Description
Reports Stored	Reflects the number of reports stored in Bill Analyzer, and the module/component they are located in. For example, **7 of a maximum of 10 (7 in Statements, 0 in Cost Allocation, 0 in Summary, 0 in Detail**).
Storage	The total storage percentage out of the available MBs. For example **6% of 10MB**.
Expiration	The expiration period of the report, reflects deletion time in days. For example **Automatically deleted 2 days after report is completed**.
Report Type	The available report type. Options include: **Summary, Detail, Cost Allocation,** and **All Statements** (Recurring statements, Custom Statements, Statement Detail, and Raw Data).

Completed orders

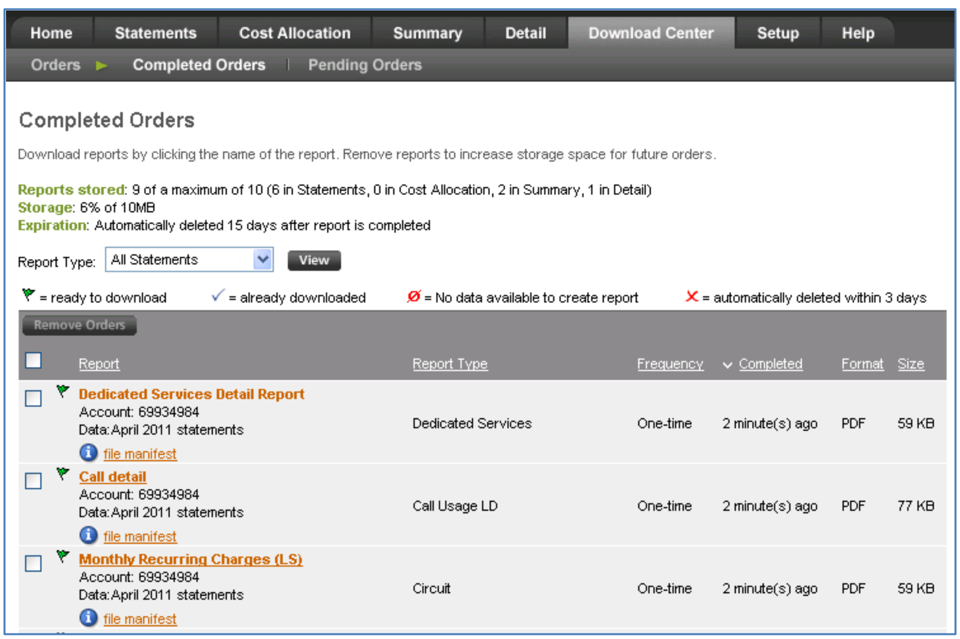


Figure 23: Download Center completed orders

Viewing completed report orders

1. Click the **Download Center** tab.
2. Select **Completed Orders**.
3. Select the type of report to view, choose from **Summary, Detail, Cost Allocation,** and **All Statements.**
4. Click **View**.
5. A list of reports is returned and the status of each report appears next to the **Report** column.
   Status types include:

Field	Description

	Ready to download
	Already downloaded
	No data available to create report
	Automatically deleted within 3 days

Opening completed reports

You can select individual orders to open and view details about the report files.

1. Click the **Download Center** tab.
2. Select **Completed Orders**.
3. Select the type of report to view, choose from **Summary, Detail, Cost Allocation,** and **All Statements.**
4. Click **View**.

A list of reports is returned and the status of each report appears next to the **Report** column.

5. Select an individual report by clicking on the **Report Name** link in the Report column.
6. Select to **Open** or **Save** the file.
7. Click **OK**. The file or location appears.

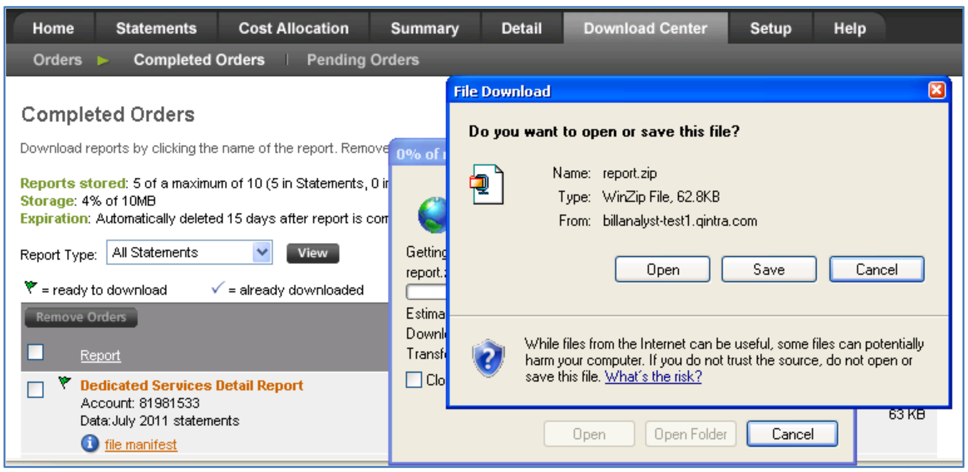


Figure 24: Opening reports

Removing completed report orders

You can select to remove individual orders or select to remove all orders.

1. Click the **Download Center** tab.
2. Select **Completed Orders**.
3. Select the type of report to view, choose from **Summary, Detail, Cost Allocation,** and **All Statements.**
4. Click **View**.
5. A list of reports is returned and the status of each report appears next to the **Report** column.
6. Select an individual report or select all by populating the box next to the Report column header. If you select to remove all orders, the reports table changes color.
7. Click **Remove Orders**.
8. The **Remove Reports** page appears. Confirm that you want to remove the orders on the page.
9. Click **Ok**.

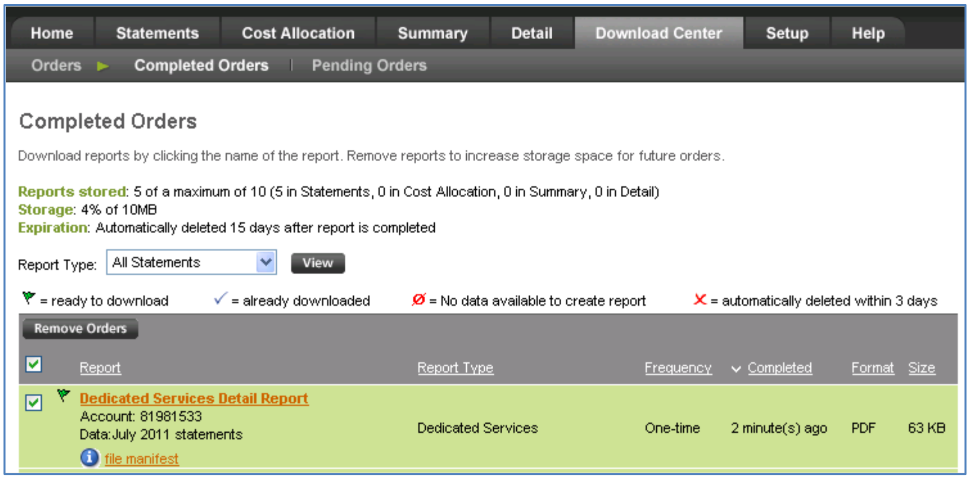


Figure 25: Removing orders

File manifest

You can view a manifest file that contains details of which accounts were included in the completed/ordered report.

1. Click the **Download Center** tab.
2. Select **Completed Orders**.
3. Select the type of report to view, choose from **Summary, Detail, Cost Allocation,** and **All Statements.**
4. Click **View**.

A list of reports is returned and the status of each report appears next to the **Report** column.

5. Select to view the manifest/result of an individual report by clicking on the **file manifest** in the Report column.
6. The **Opening Manifest** dialog appears. Select to open and view in a browser, or save the file to an appropriate location.

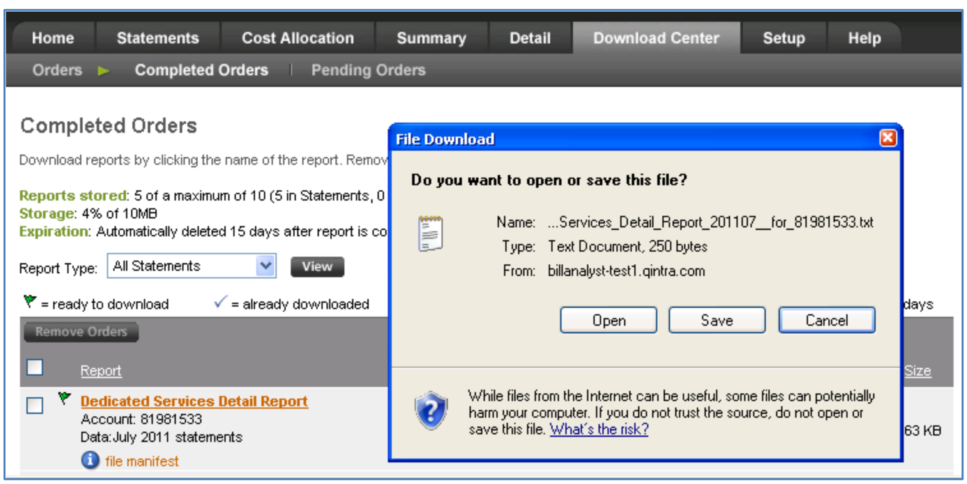


Figure 26: File manifest

SFTP delivery/completed orders

Delivered reports remain available in the Completed Orders area of the Download tab until they are manually removed or automatically deleted. If SFTP delivery fails for an order, the Completed Orders page display a status message indicating that the report could not be delivered to the specified SFTP location. The system will not make any subsequent attempts to redeliver reports. You can download the failed report directly from Completed Orders, or re-order the report if SFTP delivery is required. All pending and recurring reports using that failed SFTP location are put on hold (status displays as pending) until the SFTP location is validated again.

Click here to learn more about **SFTP locations** in the Account Information section.

Pending orders

Edit or remove orders that have not yet been processed.

1. Click the **Download Center** tab.
2. Select **Pending Orders**.
3. Select the type of report to view, choose from **Summary, Detail, Cost Allocation,** and **All Statements.**
4. Click **View**.
5. A list of pending reports is returned and the status of each report appears next to the **Report** column. The frequency, schedule time, and report format display.
6. Select an individual report to edit or remove, or select all by populating the box next to the **Report** column header.
   - Click **Edit Orders** to modify any pending order information. Click **Ok**.
   - Click **Remove Orders** to remove one or more pending orders. The **Remove Reports** page appears. Confirm that you want to remove the orders on the page. Click **Ok**.

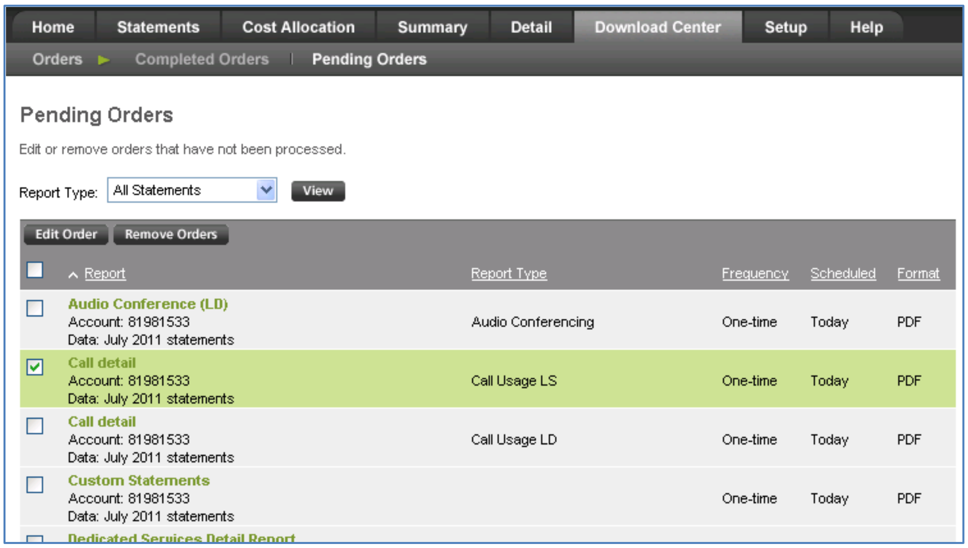


Figure 27: Pending orders

Setup

Hierarchies

You can allocate costs by division, department, or cost center by using Tree Builder to create an organizational hierarchy of your company. After your organizational tree is built, you can assign accounts and services to individual departments. This hierarchy can be used every month to allocate costs across your organization in just seconds. The following is an example of a Hierarchy:

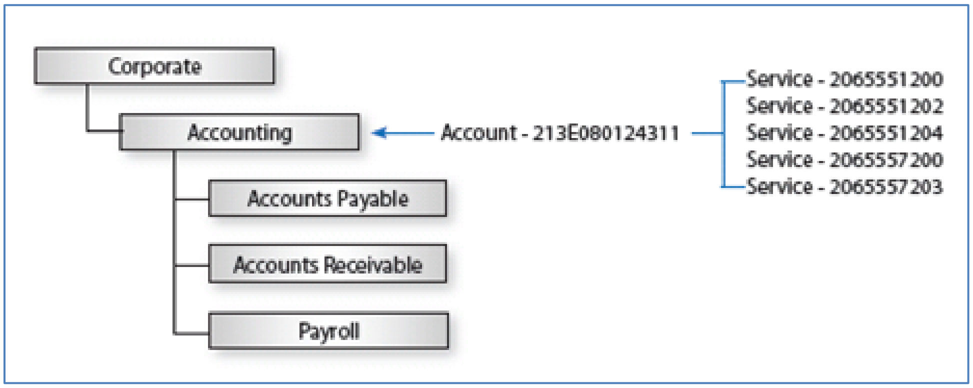


Figure 28: Hierarchies

Set hierarchy

The default hierarchy is the Master Hierarchy. Users can be granted access to a branch or the entire hierarchy by the administrative user. Multiple hierarchies can be created to experiment with different scenarios without affecting the Master Hierarchy. You can use an existing hierarchy as the starting point or create one from scratch.

The Active Hierarchy

When you create a new hierarchy, it becomes the Active Hierarchy and any changes to nodes, account assignments, and service assignments will only affect that hierarchy.

When more than one hierarchy has been created, the Active Hierarchy is displayed on pages in the hierarchy section and in the reporting bar of summary and detail reports.

Administrative users or users assigned to the top node can easily change which hierarchy is the Active Hierarchy at any time.

Public and Private Hierarchies

A hierarchy can be designated as Public or Private. Public Hierarchies can be accessed by any users which have access to the root node of the Master Hierarchy. Private Hierarchies can be seen only by you. They can be changed to Public Hierarchies at any time, but once a hierarchy is made Public it cannot be changed back to Private.

The Master Hierarchy

Any Public Hierarchy can be set to be the Master Hierarchy. Since users are assigned access rights to branches of the Master Hierarchy, selecting a hierarchy to be the new Master Hierarchy will unassign all users not assigned to the top node. These users will have to be reassigned to the nodes of the new Master Hierarchy.

Creating a new hierarchy

1. Click the **Setup** tab.
2. Click **Set Hierarchy**.
3. Click **Add Hierarchy**.
4. Enter a name for your hierarchy.
5. Select whether the hierarchy will be a **Public Hierarchy** or **Private Hierarchy**.
6. Select whether to begin with a blank hierarchy or to use an existing hierarchy as a starting point.
7. Click **Save**.

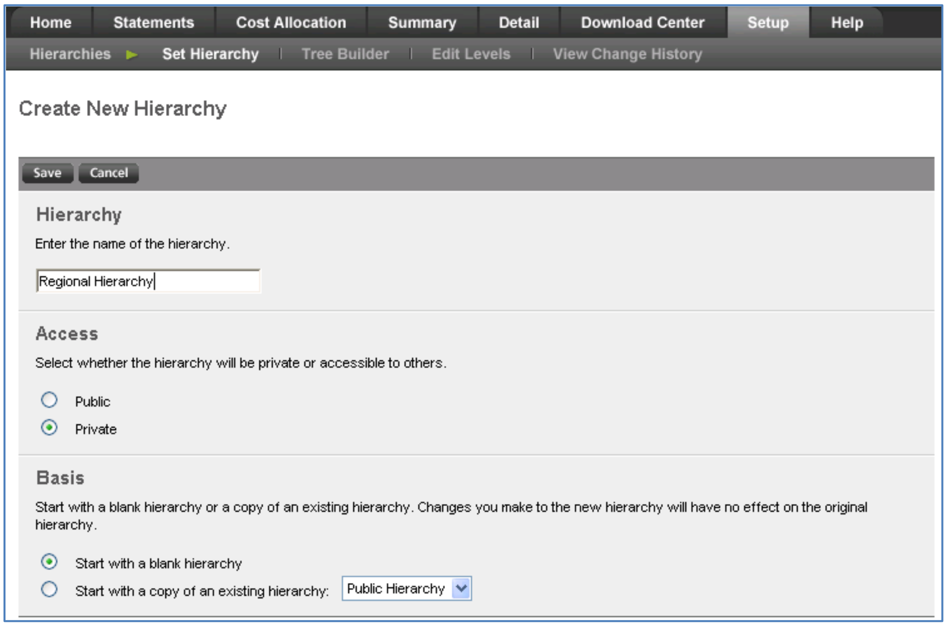


Figure 29: Creating a hierarchy

Setting the active hierarchy

1. Select the Setup tab.
2. Select the **Hierarchy**.
3. Click **Set Active Hierarchy**.

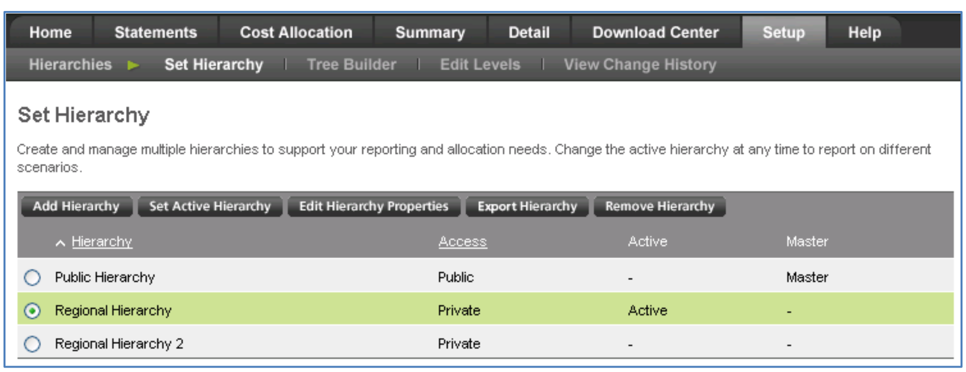


Figure 30: Setting an active hierarchy

Renaming or editing a hierarchy

1. Select the hierarchy to rename or edit.
2. Click **Edit Hierarchy Properties**.
3. Modify the Hierarchy, Access, and Master information.

Converting a hierarchy from private to public

1. Select the hierarchy to convert.
2. Click **Edit Hierarchy Properties**.
3. Select the **Public** check box in the Access section.
4. Click **Ok**.

Setting the master hierarchy

1. Select the hierarchy to convert.
2. Click **Edit Hierarchy Properties**.
3. Select the **Set as master hierarchy** check box.
4. Click **Ok**.

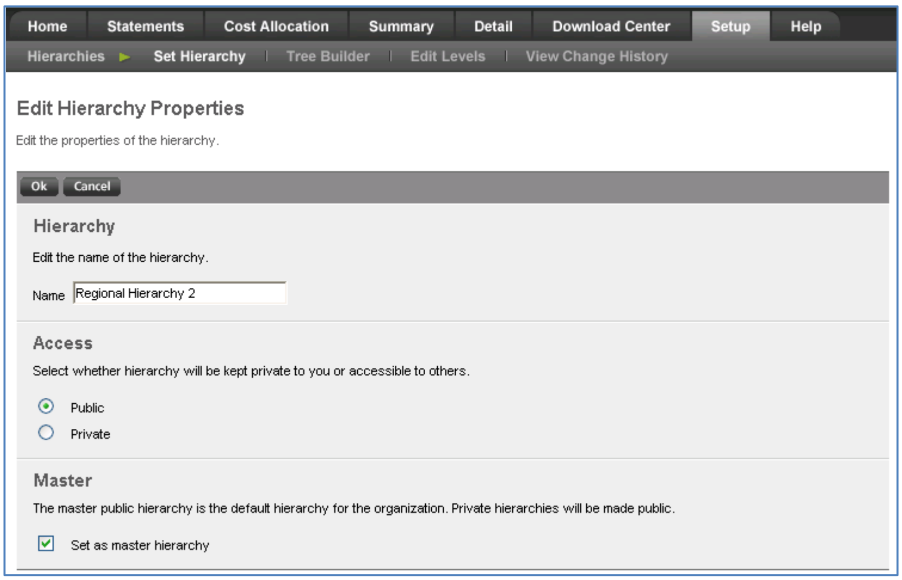


Figure 31: Modifying hierarchy information

Tree Builder

The Tree Builder page is where the basic structure of your hierarchy takes shape. This page allows you to add nodes and GL codes that represent divisions and departments. Depending on the permissions granted to you, you also have the ability to move nodes, edit node descriptions, and remove nodes.

Adding nodes and GL codes

When you begin your hierarchy, it will consist of the default corporate node. You can build your hierarchy by adding the divisions or departments that will be the children of the topmost node.

1. Click the **Setup** tab.
2. Click the **Tree Builder** link in the **Hierarchies** section.
3. Add your top level departments and their GL codes in the grid and click **Add Nodes**.
4. Continue building your organizational tree by selecting a parent node for additional departments.
5. Click **Add Nodes**.

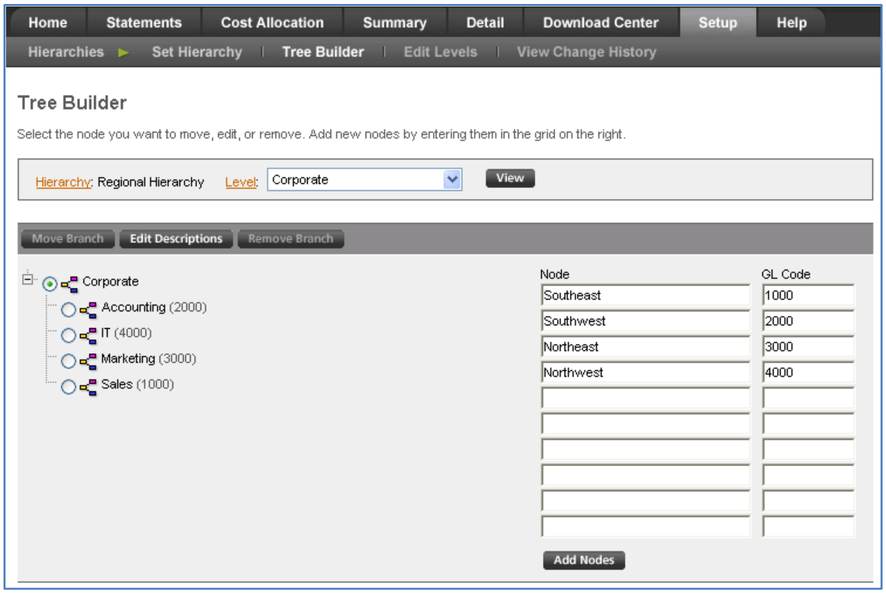


Figure 32: Adding nodes

Moving nodes

You can move a parent node and its children; the topmost node that a user has access to cannot be moved, but its description and GL code can be changed.

1. Select the **parent node** of the nodes you wish to move and click **Move Branch** in the top menu or click for menu options.
2. Select the destination for the nodes.
3. Click **Ok**.

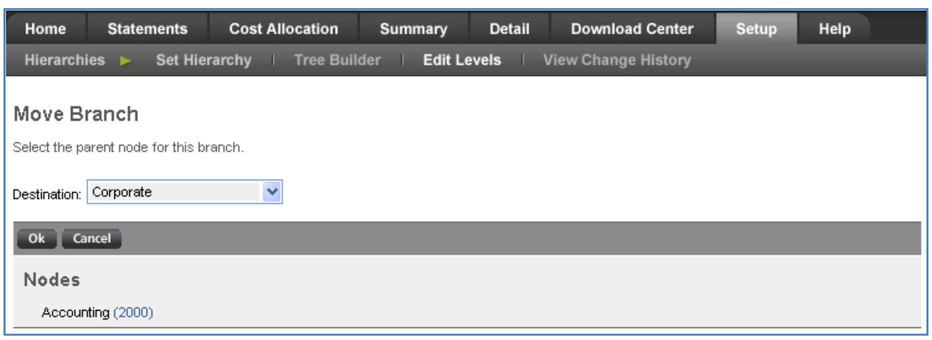


Figure 33: Moving nodes

Editing node descriptions

The names of nodes and their respective GL codes can be edited at any point.

1. Select the nodes you wish to change and click **Edit Descriptions** in the top menu or click for menu options.
2. Edit the **Descriptions** and **GL codes**.
3. Click **Save**.

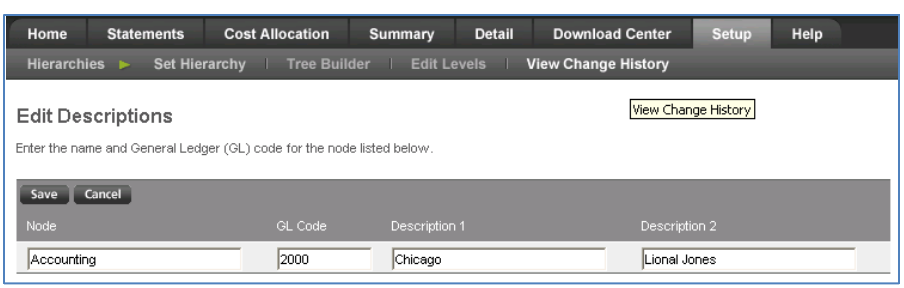


Figure 34: Editing nodes

Removing a branch

You can permanently remove a branch of the hierarchy by selecting its topmost parent node and clicking **Remove Branch**.

Edit Levels

Once you have added nodes to your hierarchy, you can assign accounts to them. Accounts are initially assigned to the unassigned node. You can view the accounts assigned to any node in the hierarchy by selecting the node from the drop-down list and clicking **View**. The account number, two descriptions, and the assignment date will be displayed. You can click the sort button on any of these columns to sort the accounts by that column.

Assigning accounts

1. After your hierarchy structure is built, click the **Edit Levels** tab in the navigation bar.
2. In the **Level** list, select the location of the accounts you want to move. Leave this set to the top node when you first set up your hierarchy as your accounts have not yet been assigned.
3. Click the **Accounts** button.
4. Click **View**.
5. Select the accounts that you want to assign to a cost center.
6. Click **Move Accounts**.
7. On the **Move Accounts** page, select the **Destination** for the accounts.
8. Click **Ok**.

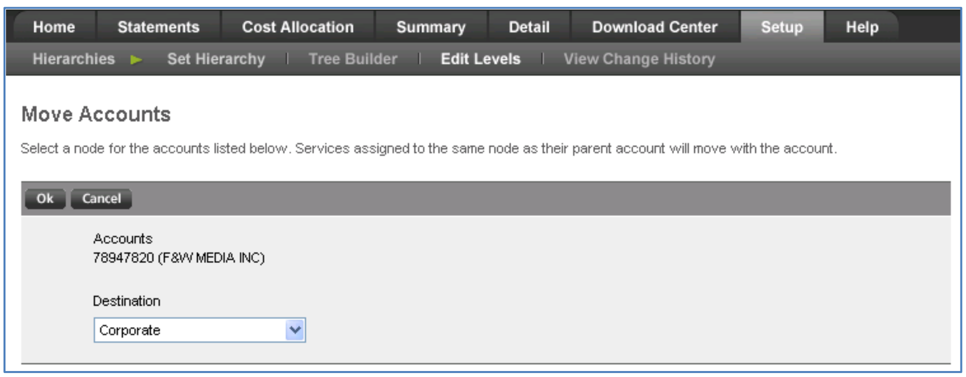


Figure 35: Assigning accounts

Editing account descriptions

Account numbers can have two descriptions to make them easier to identify.

1. Select the accounts you wish to edit.
2. Click **Edit Descriptions**.
3. Edit **Description 1** and **Description 2**.
4. You can also select to **add** or **replace** the description in all hierarchies.
5. Click **Save**.

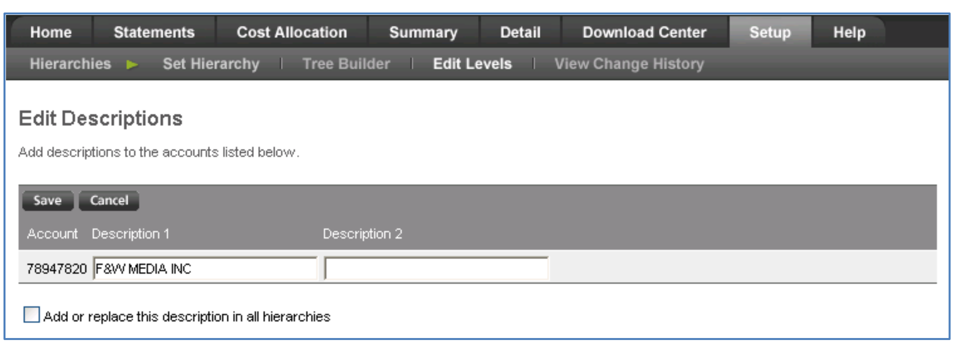


Figure 36: Editing accounts

Assigning services

When you initially assign an account to a node in the hierarchy, all of the services belonging to that account such as account codes and subscriber numbers are assigned to that node as well. You can move these services further down the hierarchy to any nodes beneath the node where their account is assigned.

Moving services

1. In the **Level** list, select the location of the services you want to move.
2. Click the **Services** button.
3. Click **View**.
4. Select the services you wish to move.
5. Click **Move Services**.
6. Select the **Destination** from the list.
7. Click **Ok**.

Editing service descriptions

Services can have two descriptions to make them easier to identify.

1. Select the services you wish to edit.
2. Click **Edit Descriptions**.
3. Edit **Description 1** and **Description 2**.

Splitting services

You can allocate a service between nodes in the hierarchy that are at or below where the parent account is assigned. This makes it easy to share resources among different offices or departments.

1. Select the services you wish to split.
2. Click **Split Services**.
3. Enter a percentage for each node you wish to allocate and click **Ok**. Your total allocation must total 100%.
4. Confirm and click **Ok**.

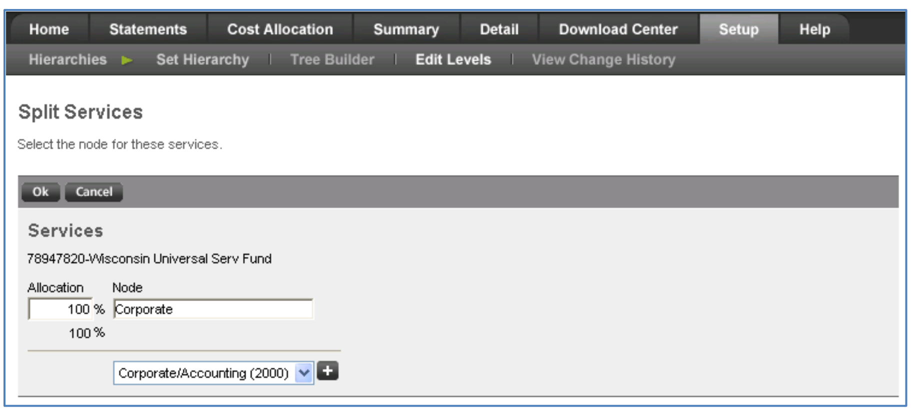


Figure 37: Modifying services (Move, Edit, Split)

Viewing change history

This allows you to see any changes made with your hierarchy structure.

1. Click **View Change History** from **Hierarchies** section in **Setup** tab.
2. Click one of the hierarchy actions to view.

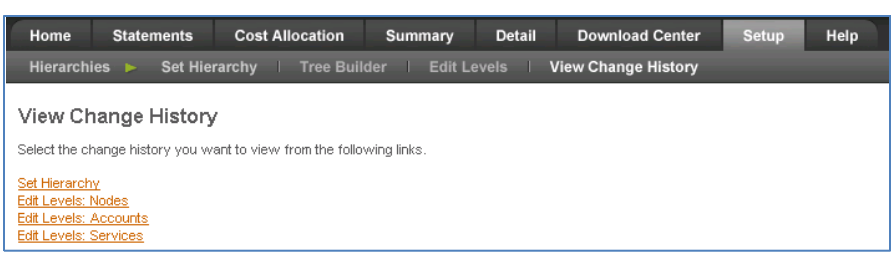


Figure 38: Viewing change history

Tools

Condition Builder

About filters using the Condition Builder

Filters allow you to designate certain criteria to narrow the results of your reports. They are especially useful when filtering data to locate a specific group of calls (e.g., calls to clients, after-hours calls, calls made by branch offices). A filter can be as simple as “Call length is greater than 20 minutes” or as sophisticated as you want with multiple lines and comparison operators. Using the Condition Builder, filters can also allow your organization to track the effectiveness of telemarketing campaign. Filters you define in **Setup** will appear in **Filter** drop-down list on report pages.

You can access the Filters page in two ways:

- Clicking the **Add Filter** button on the **Filter** page in **Setup**.
- Clicking on a **Filter** link on **Summary** or **Detail** pages. When a filter is selected you can edit the existing filter.

Based on your permissions, you can create a new filter from the original filter builder, or use the **Condition Builder**. You can create a filter from a report type, or use a copy of an existing filter.

The **Condition Builder** contains features allows for:

- Extensive abilities for multiple lines and nesting
- Easily grouping items using the “ANY” and "ALL" options from the list.
- Indenting filters for intuitive hierarchical grouping
- Simply and efficiently inserting items

NOTE: You cannot combine an AND and OR at one particular level.

To create and customize filter criteria, use the control buttons and menu.

Condition Builder rows and groups

Figure 39: Condition Builder Rows & Groups

Grouping rows

Group rows are used to connect individual condition into AND and OR Condition groups. Grouping to form the condition is determined by:

- the number and order of group rows
- the nesting level of the condition rows
- At least one group is required in the Condition Builder form. The first row of the filter (group row) cannot be deleted.

Grouping criteria to form a condition

The criteria and groups are joined to create a condition. A group ends when:

- A row below the group is outdented
- All remaining open groups end at the final row in the Filter.
- All rows except for the first row (and any row at the 5 position limit) may be indented or outdented.
- Positions of rows verified when you are saving a filter. This ensures the filter condition is valid.

Moving and removing rows

- You cannot move rows up and down. Rows may be added and removed between one another to change the row order.
- The last row cannot be a group.
- Each group needs a condition.
- Rows may be removed with the control (-) on each row. Each row is moved individually.

Adding filter conditions

For each condition row, select the **Field** and **Comparison Operator** and input a value in the row's text box. When either **Is Empty** or **Is Not Empty** are the selected **Comparison Operator**, the **Value** entry box is hidden - no value entry is required. Changing the **Comparison Operator** back to anything other than **Is Empty** or **Is Not Empty** restores an empty value for the row.

Creating a filter using the Condition Builder

The following procedure allows you to create a filter using the Condition Builder. Use the Condition Builder to create a filter where multiple lines of conditions can be connected in a hierarchy of ANDs and ORs.

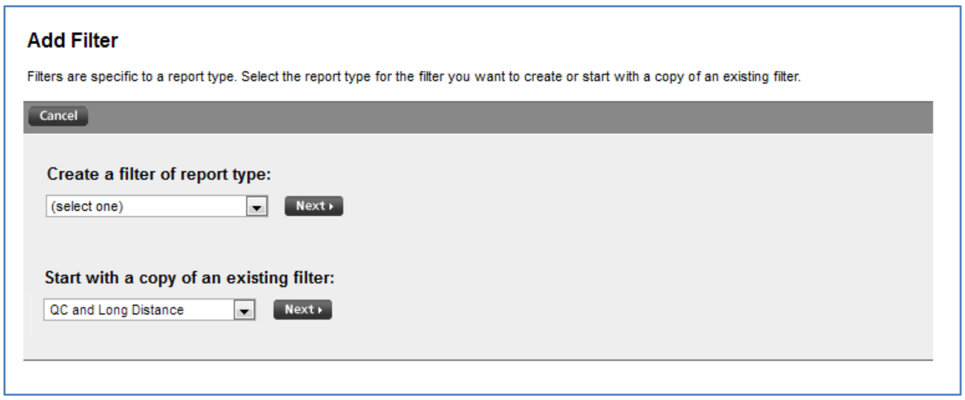


Figure 40: Adding a filter

1. Click the **Setup** button.
2. Within the **Tools** section, click the **Filters** link.
3. Click the **Add Filter** button.
4. Select **Next** under **Condition Builder**.
5. To start a new filter from scratch, select the **Create a filter of report type** option, and specify a filter type if available.
6. To base the filter on a copy of an existing filter, select the **Start with a copy of an existing filter** option, and select the filter.
7. Click the **Next** button.
8. Enter the name in the **Name** text box.
9. Select between the two group options all the following or any of the following are true.
10. Add/configure additional filters that you wish to apply to a particular report. Examples include filter options such as **Account Description**, **Day of the Week**, **Total Amount**, and more. These options vary based on your implementation.
11. Select the condition to filter from the **Field List** drop-down list.
12. Select the comparison operator (e.g., contains, is equal to, is greater than) from the **Comparison Operator** drop-down list.
13. Enter a value (e.g., 1000, Day, Denver) in the **Comparison Value** text box. These values cannot contain apostrophes, percent signs or asterisks.
14. If additional fields are required, you can add more rows and group these rows accordingly. You can enter up to 50 conditions for each filter. **NOTE**: The last row cannot be a group. Each group needs a condition.
15. Select **Share this Filter** if you want to make this filter available to other users within your organization. Other users that are assigned at or below where you are assigned in the master hierarchy will be able to apply the filter to reports that they view, but will not be able to edit or remove it.
16. Click **Save**. A filter cannot be saved if a group ends without a condition row. If a group contains no condition and ends (because a row is outdented below it), a message appears. You need to modify the filter.

The Filters page appears and the new filter you created or copied appears in the list. If the filter is shared, the Shared column is populated and a link appears. Select the link and new email message will appear to Customer Service.

IMPORTANT NOTE: You can start with a copy when you create a filter from the Filters page, or create a filter from the filter link on the **Summary** or **Detail** list pages. If you click the link from a specific report, you bypass the select report type (start with copy) selection page since the report type is already determined.

Editing a filter using the Condition Builder

1. Click the **Setup** button.
2. Within the **Tools** section, click the **Filters** link.
3. Select the filter to edit.
4. Click the **Edit Filter** button.
5. Enter the name in the Name text box.
6. Select between the two group options all the following or any of the following are true.
7. Add/configure additional filters that you wish to apply to a particular report. Examples include filter options such as Account Description, Day of the Week, Total Amount, and more. These options vary based on your implementation.
8. Select the condition by which to filter from the Field List drop-down list.
9. Select the comparison operator (e.g., contains, is equal to, is greater than) from the **Comparison Operator** drop-down list.
10. Enter a value (e.g., 1000, Day, Denver) in the **Comparison Value** text box. These values cannot contain apostrophes, percent signs or asterisks.
11. If additional fields are required, you can add more rows and group these rows accordingly. You can enter up to 50 conditions for each filter**. NOTE: The last row cannot be a group. Each group needs a condition**.
12. Select **Share this Filter** if you want to make this filter available to other users within your organization. Other users that are assigned at or below where you are assigned in the master hierarchy will be able to apply the filter to reports that they view, but will not be able to edit or remove it.
13. Click Save.
    The Filters page appears and the filter you updated or modified appears in the list.

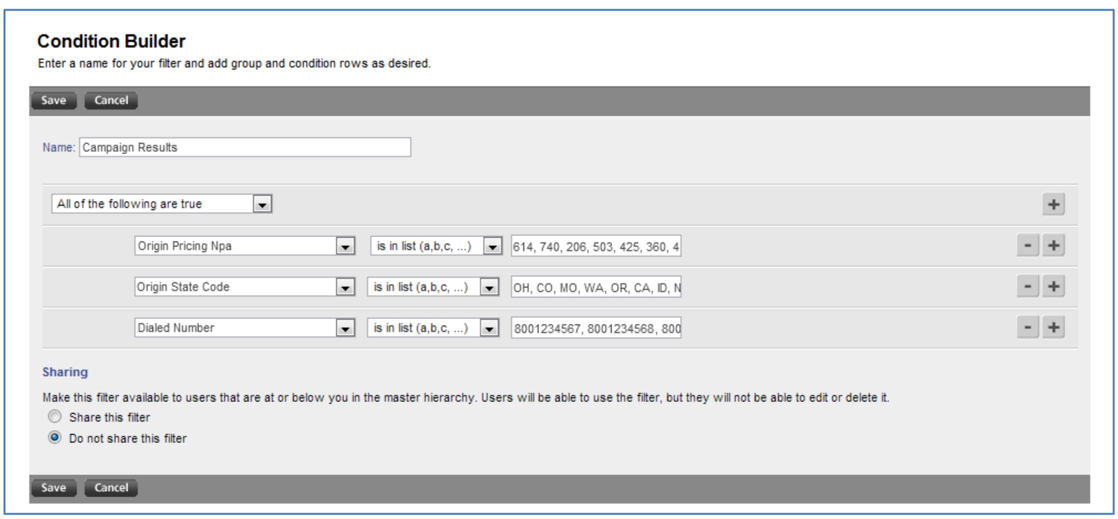


Figure 41: Editing a filter

Removing a filter using the Condition Builder

1. Click the Setup button.
2. Within the Tools section, click the Filters link.
3. Select the filter you want to remove.
4. Click the Remove Filter button.
5. Confirm the filter to be removed, and then click the OK button.

Original Filter Builder

Using the **Original Filter Builder** allow you to quickly find specific information in your reports and graphs. (e.g., calls to clients, after hour calls, calls made by branch offices, specific service types, calls over a certain value or duration). Multiple lines of filter criteria are joined with the logical operators **And** or **Or**. Filters defined in Profiles can be selected from the Filter drop-down list on report pages. By selecting **And**, the data must match both criteria. By selecting **Or**, the data must match only one of the criteria.

Adding or editing a filter

1. Click the **Setup** tab.
2. Under **Tools**, click **Filters**.
3. Click **Add Filter** or **Edit Filters**.
4. Select the type of filter to create.
5. Click **Ok**.
6. Enter an appropriate name in the **Name** text box.
7. Select the criteria to filter by from the **Criteria** list.
8. Select the equator (e.g., contains, is equal to, starts with) from the **Comparison Operator** list.
9. Enter a value (e.g., 1000, Day, Denver) in the **Comparison Value** text field.
10. If additional fields are required, select **And** or **Or** from the beginning of each new line of filter criteria and repeat Steps 3, 4, and 5.
11. Click **Save**.

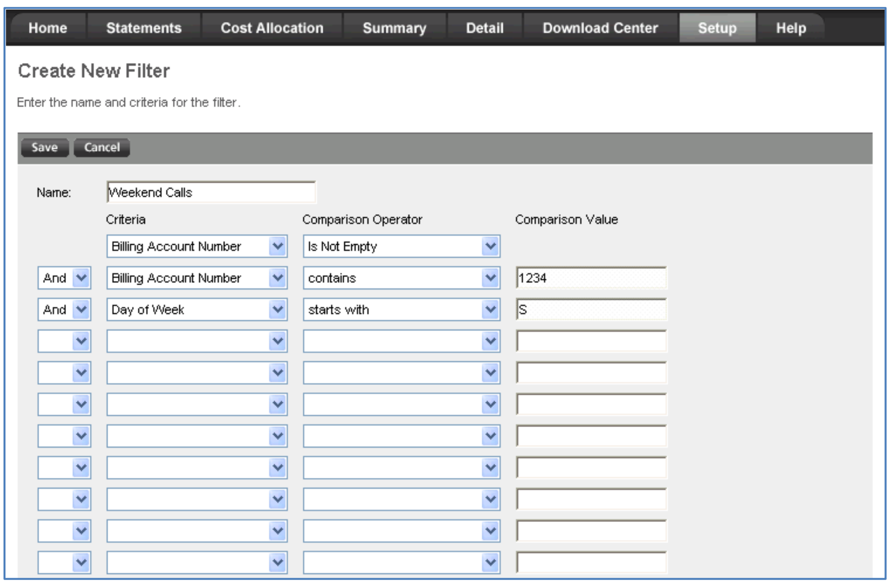


Figure 42: Adding and editing a filter

Alerts

Alerts allow you to be notified by e-mail when conditions that you specify are triggered. The notification will be sent to the e-mail address in your user profile.

The primary trigger of an alert consists of a criteria field, a comparison equator, and a comparison value. These are entered with a time period (e.g. hour, day, week, or month) during which the event can occur. For example, a primary trigger would be **Total USOC Charge is greater than (or is equal to) 25**.

In addition to the primary trigger, you can also set up a filter to narrow the scope of the alert.

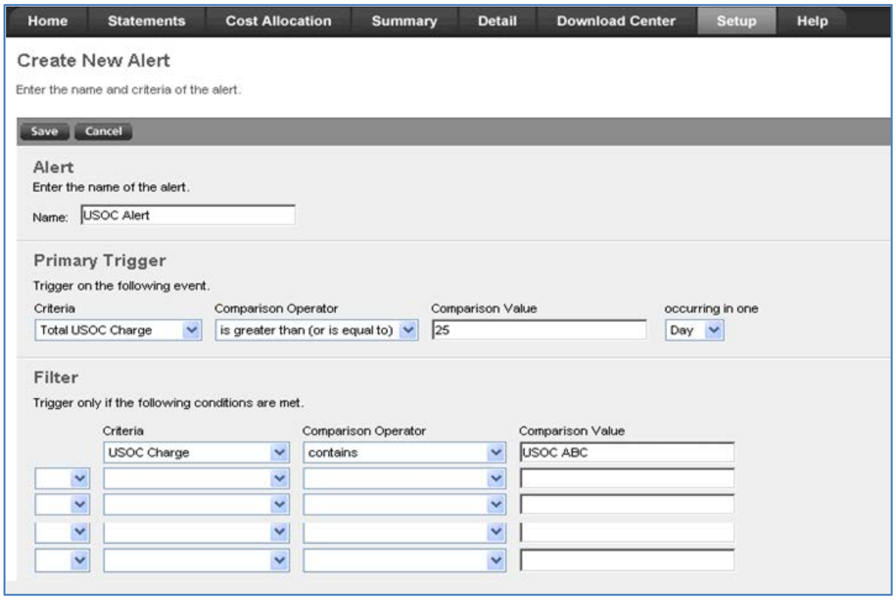


Figure 43: Alerts

Adding an alert

1. Click the **Setup** tab.
2. Within the Tools section, click the Alerts link.
3. Click the **Add Alert** button.
   - To start a new alert from scratch, select the **Start a new alert** option, and specify an alert type if available.
   - To base the alert on a copy of an existing alert, select the **Start with a copy of an existing alert** option, and select the alert.
4. Click **Ok**.
5. Enter a name for the alert.
6. Select the **criteria**, the **comparison operator**, and enter **a comparison value** for the primary trigger.
7. Select the **time period** (e.g. hour, day, week, or month) during which the event can occur.
8. To narrow down the scope of the alert, select **filter criteria**.
9. Click **Save**.

Editing an alert

1. Click the **Setup** tab.
2. Within the Tools section, click the **Alerts** link.
3. Click the **Edit Alert** button.
4. Enter a name for the alert.
5. Select the **criteria**, the **comparison operator**, and enter **a comparison value** for the primary trigger.
6. Select the **time period** (e.g. hour, day, week, or month) during which the event can occur.
7. To narrow down the scope of the alert, select **filter criteria**.
8. Click **Save**.

Removing an alert

1. Click the **Setup** tab.
2. Within the Tools section, click the **Alerts** link.
3. Select the alert that you want to remove, and then click the **Remove Alert** button.
4. Confirm the alert to be removed, and then click the **OK** button.

User Profiles

Preferences

This section allows you to select your preferences for currency display, email display and notifications, and report pagination.

- You can select to the email format, choose between HTML or Text emails.
- You can select the number of items that display per page.

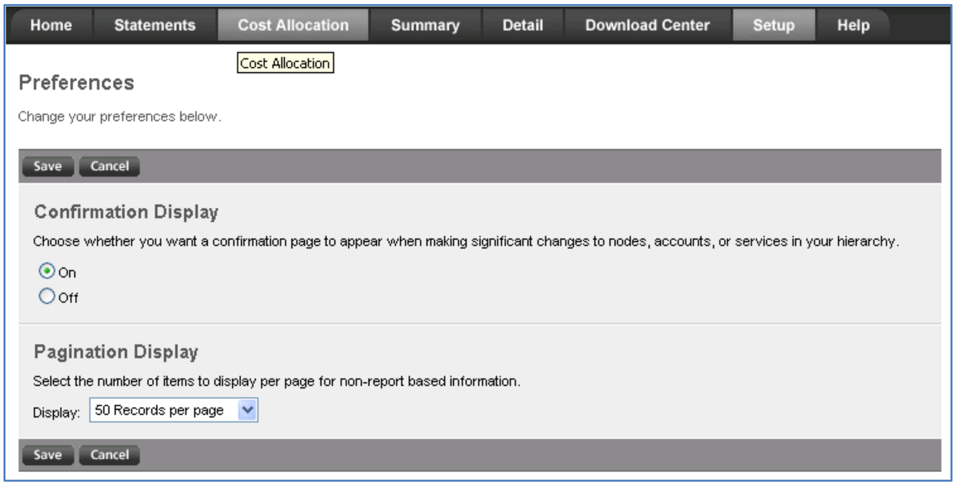


Figure 44: Preferences

Descriptions

Phone Numbers

Phone Numbers allow you to designate descriptions for phone numbers. This makes reports easier to read and eliminates the hassle of having to remember or look up numbers on your bill. Two Phone Number Descriptions are available for each number which can be used together or independent of each other when selecting the Group and Subgroups of your reports. Phone Number descriptions are shared among all the users of your organization.

Adding phone numbers

1. Click the **Setup** tab.
2. Within the **Descriptions** section, click the **Phone Numbers** link.
3. Click **Add Phone Numbers**.
4. Enter the phone number (e.g., 123-456-7890) in the **Phone Number** column. Phone numbers may be a maximum of 25 characters, and must contain at least one numeric character.
5. Enter the **primary description** (e.g., Davidson Associates) in the **Description 1** column.
6. Enter the **secondary description** (e.g., Supplier) in the **Description 2** column.
7. Click **Save**.

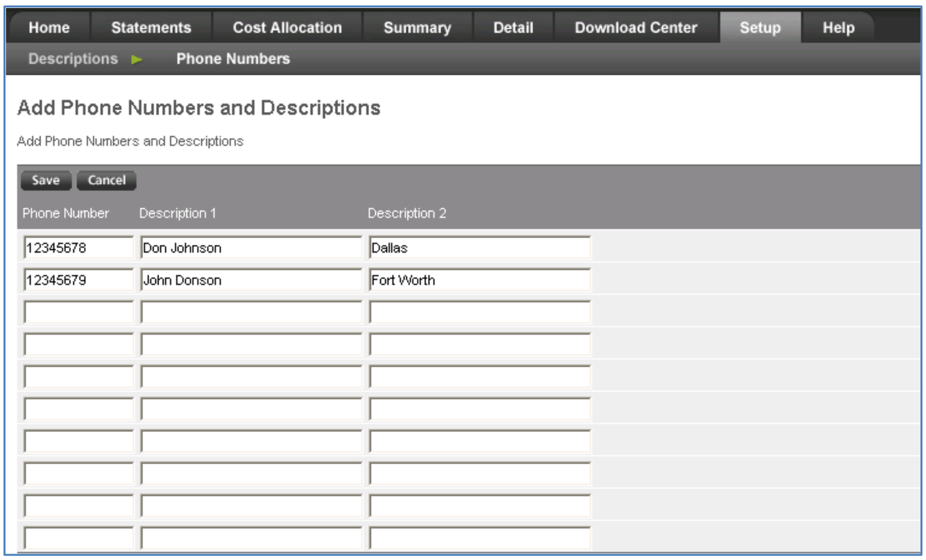


Figure 45: Adding phone numbers

Account Information

Account Groups

Account Groups allow you to create groups of your CenturyLink accounts you can use to consolidate data when viewing and ordering statements. Account groups are shared among all the users of your organization.

Adding account groups

1. Click the **Setup** tab.
2. Within the **Account Information** section, click the **Account Groups** link.
3. Click **Add Group**, enter a **Group Name** and click **Save**.
4. Select the accounts to add to the group.
5. Use the **Copy to account group** control or drag the selected accounts into the group.

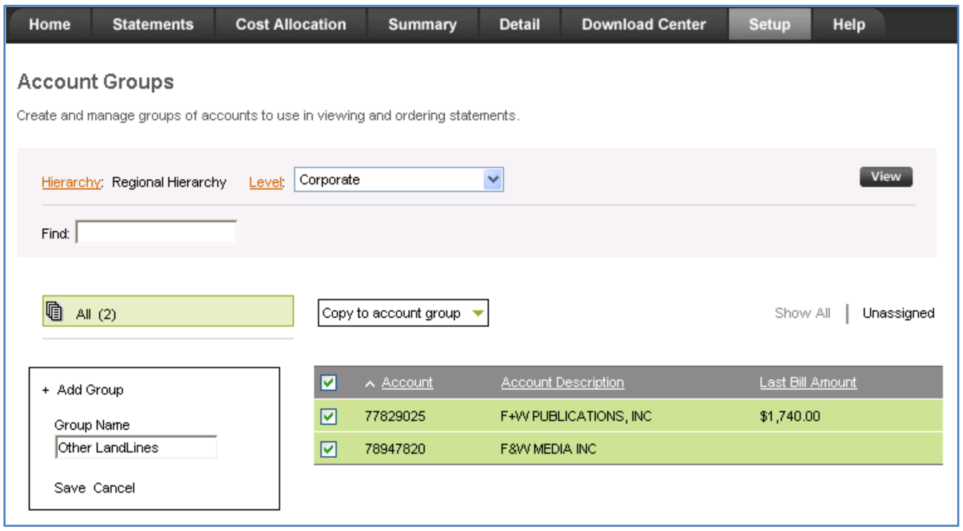


Figure 46: Adding account groups

Editing an account group name

1. On the **Account Groups** page, select the name of the account group you wish to modify.
2. Select the account name to edit.
3. Click the **Edit** icon. The **Account Group** box appears.
4. Modify the name and click **Save**. The new name appears on the Account Groups page.

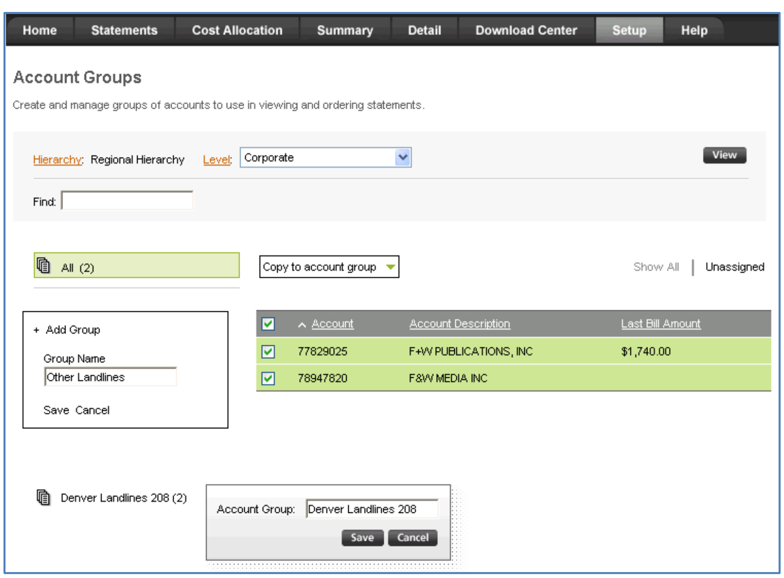


Figure 47: Editing an account group name

Copy accounts to an account group

1. On the **Account Groups** page, select the name of the account group you wish to remove.
2. Select the accounts to remove from the group by populating the box.
3. Click **X Remove from Group.**
4. Click **Edit** or **Remove** from group icons.

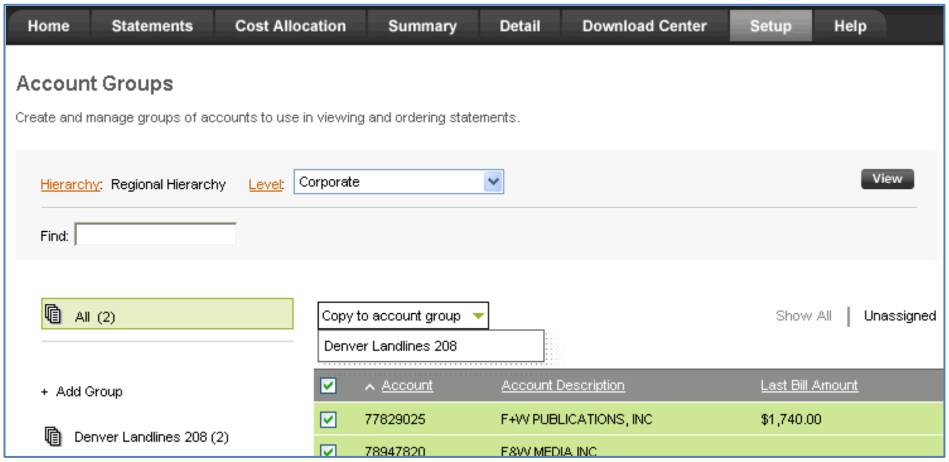


Figure 48: Copy an account group

To remove an account in an account group

1. On the **Account Groups** page, select the name of the account group you wish to remove.
2. Select the accounts to remove from the group by populating the box.
3. Click **X Remove from Group.**
4. The account is removed from the group and no longer appears on the page.

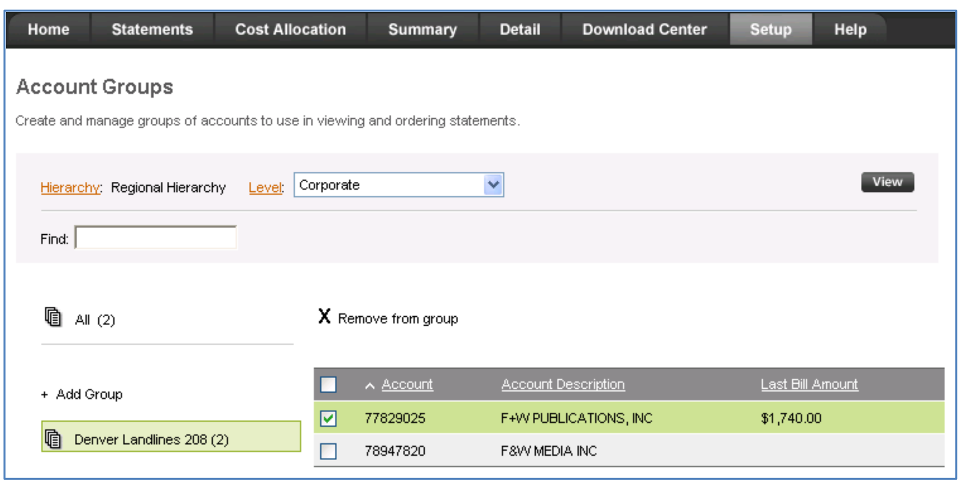


Figure 49: Remove an account from account groups

To remove an account group

1. On the **Account Groups** page, select the name of the account group you wish to remove.
2. Click **X** to Remove the Group.
   The Delete Account Group box appears.
3. Click **Ok**.

The group is removed and no longer appears on the Account Groups page.

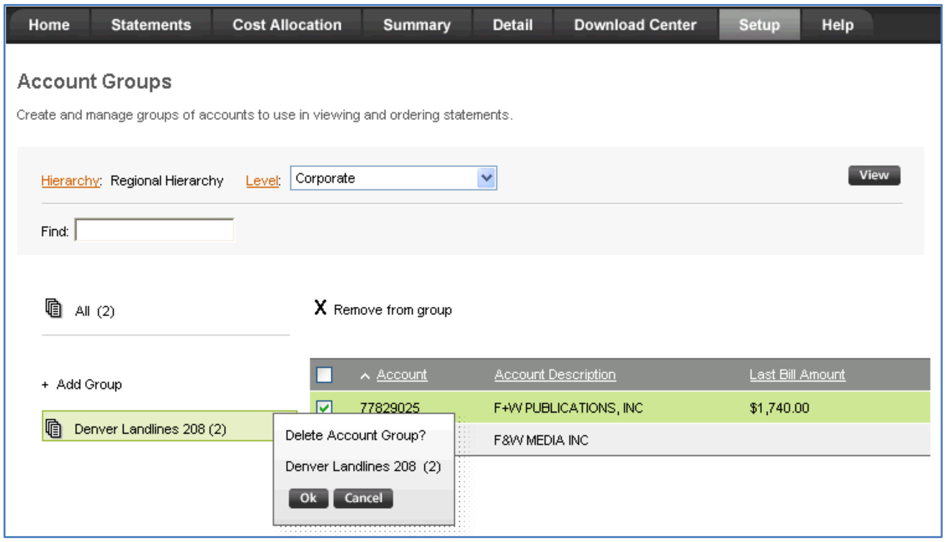


Figure 50: Remove an account group

SFTP Locations

SFTP Locations allows you to create, manage and remove SFTP locations for report orders. New locations are automatically validated in the background of the application. Upon completion of a new report with the SFTP delivery option selected, Bill Analyzer:

- copies the report to a configured folder location
- connects to the specified SFTP location
- uploads the report.

A list of SFTP locations displays on the main page, and shows the name and status of the locations. Status options include **Pending**, **Unable to validate - revalidate**, and **Validated**.

Adding SFTP locations

1. Click the **Setup** tab.
2. Within the **Account Information** section, click the **SFTP Locations** link.
3. Click **Add Location**.
4. Populate the following:
   - The SFTP location name in the **SFTP location display name** field.
   - The Host or IP address in the **Host name or IP address** field.
   - The Login or name of user in the **Login** or **Username** field.
   - The **Password** for the SFTP location.
   - The **Port Number**.
   - The **Remote Directory** (optional).
5. Click **Save**. The SFTP location appears on the main page, and the status displays as pending until the page is refreshed.

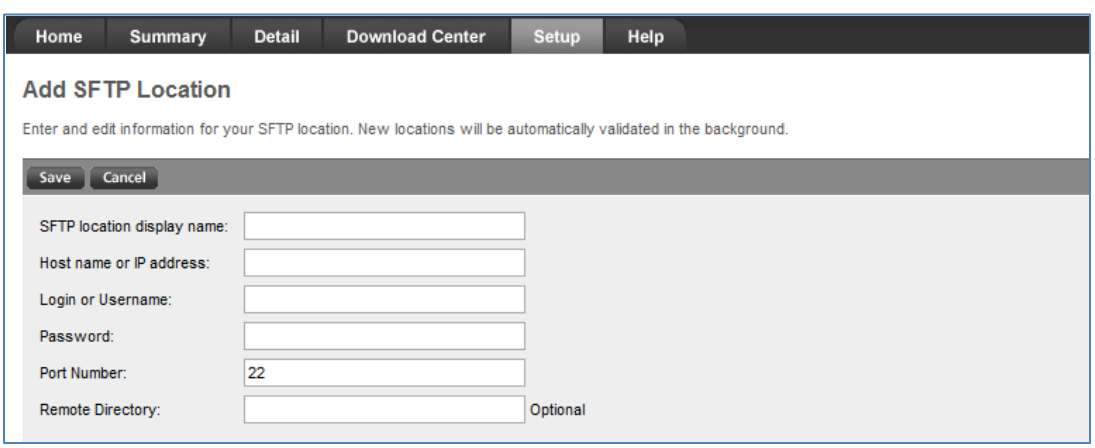


Figure 51: Adding SFTP locations

Edit SFTP locations

1. Click the **Setup** tab.
2. Within the **Account Information** section, click the **SFTP Locations** link.
3. Click **Edit Location**.
4. Modify the following:
   - The SFTP location name in the SFTP location display name field.
   - The Host or IP address in the Host name or IP address field.
   - The Login or name of user in the Login or Username field.
   - The Password for the SFTP location.
   - The Port Number.
   - The Remote Directory (optional).
5. Click **Save**.

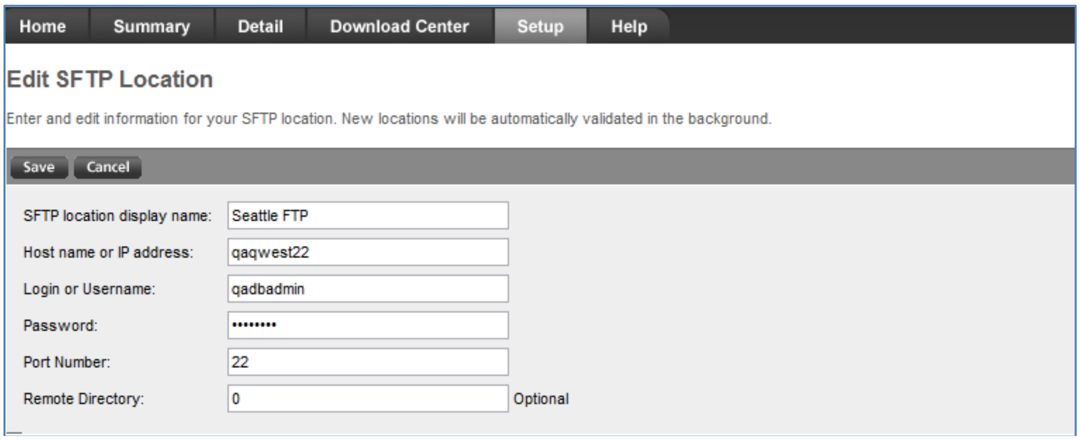


Figure 52: Editing SFTP locations

Validating/revalidating SFTP locations

When you create or modify an SFTP location, the location must be validated. The status will appear pending until it is validated.

1. If you save changes for new or existing locations and the location is not valid, a revalidate link appears in the Status column.
2. Click **revalidate** and another attempt will be made to validate the location.

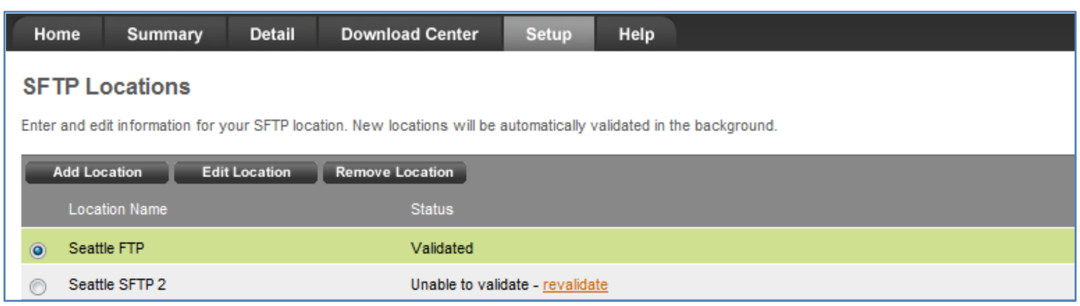


Figure 53: Validating SFTP locations

Removing SFTP locations

Delete a location from the SFTP locations list.

1. Select a location to delete.
2. Click **Remove Location**.

A confirmation message appears asking you to verify the deletion of the location.

3. Click **OK**.

The SFTP location is removed and no longer appears in the list on the **SFTP locations** page.

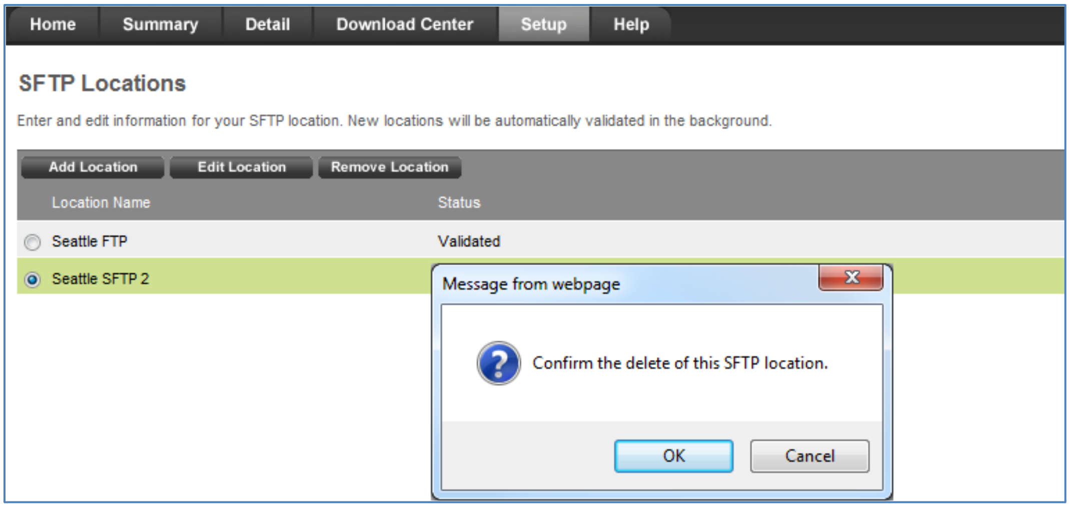


Figure 54: Removing SFTP locations

Cost Allocation

Once your hierarchy is built and accounts have been assigned, you can perform your monthly cost allocation process in just seconds.

Running a cost allocation report

1. Click the **Cost Allocation** tab.
2. Select the month of statements you want to view.
3. Click **View Report**.
4. To export, click **Export** and select **PDF** or **CSV**.

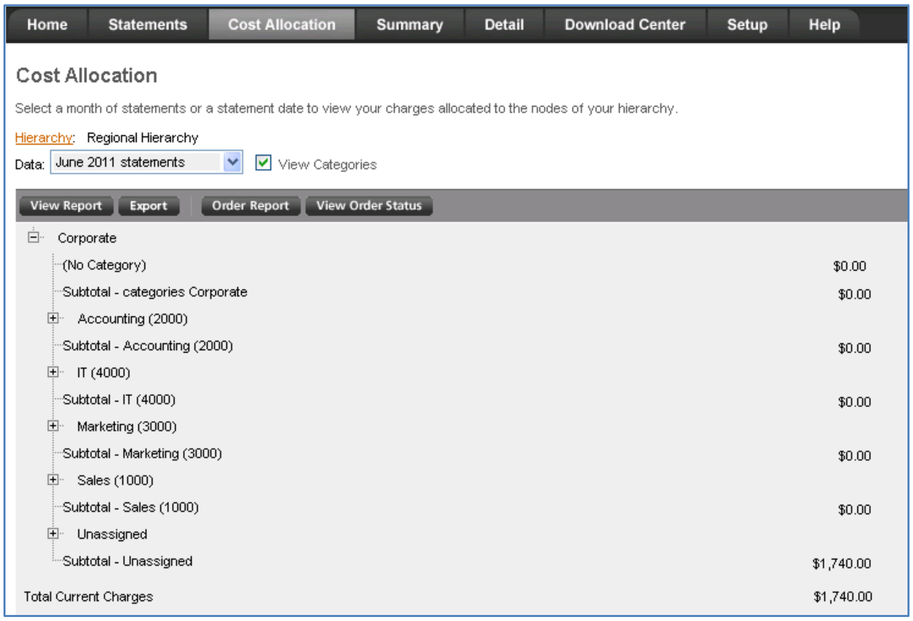


Figure 55: Running a cost allocation

Email Notifications

Bill Analyzer uses email notifications to communicate important messages, including the following:

- Statements
  - First invoice ready (for new customers)
  - New invoice ready
  - New account added

- Reports
  - Ordered reports available

Glossary

Account
Lines and services grouped together for billing. Accounts are usually billed on a monthly basis with a statement or invoice which details fixed costs and usage based charges.

Active Hierarchy
When you create more than one hierarchy, the Active Hierarchy is the hierarchy that is currently selected for cost allocation and reporting. You can switch between hierarchies on the Set Hierarchy page in Setup.

Branch
A part of a hierarchy that includes a node, its children nodes, and all the accounts and services assigned to those nodes.

Completed Order
Completed Orders are compressed report files available in the Download Center to download and save to your computer or network. Once a report order has been completed, it is available on the Completed Order page until the report expires according to the Expiration period described on the Completed Order page.

Detail Report
Detail reports contain individual data records that can include usage, equipment, and other charges or credits. View detail reports by clicking the Detail tab in the main navigation bar.

Download Center
Use the Download Center to quickly navigate to your pending and completed report orders. Use the Report Type selection to move between Summary, Detail, Cost Allocation and Statement reports.

Favorites
You can add hierarchy nodes, accounts, or services to your Favorites so that it's easy to run reports at those levels each time you log in. Add Favorites on the Edit Levels page in Setup.

Filter
Filters allow you to designate certain criteria by which to narrow the results of your reports. They are especially useful for locating a specific group of calls such as calls to clients, after-hours calls, or calls made by branch offices. You define filters in Setup which can be used when running Summary and Detail reports.

GL Code
A number used by accountants to identify expenses associated with a particular department. You can add a GL Code to each of the nodes of your hierarchy and use them for allocating costs and other reporting.

Hierarchy
A tree structure describing the relationship of your accounts and services to your divisions, departments, or cost centers. Hierarchies consist of individual nodes connected together in parent-child relationships.

Level
A hierarchy gives you the ability to view reports at the node, account, or service level.

- Viewing at the node level returns all the data from that branch of the hierarchy. The data from the accounts or services assigned to that department and any departments under it will be returned.
- Viewing at the account level returns the data from all the services that belong to the account.
- Viewing at the service levels returns just the data from the selected service.

Manifest
Manifests list the files, accounts and bill dates of the materials included in each Statement Completed Order.

Master Hierarchy
A special hierarchy used to grant users specific access privileges to view only the accounts that belong to the branches of the hierarchy that you specify. If you have created only one hierarchy, it is by default the Master Hierarchy.

Node
A structural element of the hierarchy which represents a division, department, or cost center. Accounts and services are assigned to nodes so that you can allocate costs. Nodes are connected to each other in parent-child relationships which form a tree structure of your organization.

Pending Orders
Pending Orders are orders for summary, detail, cost allocation or statement reports that have been scheduled, but are not yet ready to be downloaded. Report orders can be scheduled to recur on a daily, weekly or monthly schedule – these schedules, along with the format and data included in a report, can be edited by selecting the order in Pending Orders.

Service
A voice line, account code, fax line, pager, data circuit, or other recurring transmission of information. Services are grouped together and billed by account.

SFTP Locations
The secure file transfer protocol location allows you to create, manage and remove SFTP locations for report orders. You can also select to send statements to a selected SFTP location.

Splitting Services
A service can be split between two or more nodes to allocate a shared resource between different departments. You can split services from the Edit Levels page in Setup.

Statement Detail
Statement Detail is a collection of reports that provide the same detailed information you can access by clicking on the charge groupings (such as Dedicated Services, Call Usage, Equipment and Other Charges, etc.) in an expanded statement. When you select Statement Detail as one of the report types for your statement order, all of these detail reports are automatically ordered.

Summary Report
Summary reports give an overview of your telecommunications usage with totals and averages. View summary reports by clicking the Summary tab in the main navigation bar.

Unassigned Node
Before accounts and services have been assigned to a node of a hierarchy, they are assigned to the unassigned node.