

Billing disputes

User guide

In 2008 we started to use TED (tell me, educate me, describe to me) to manage interactions with our customers and improve visibility of the billing disputes you log with us.

With TED you are now able to check on the status of your query or dispute at any time by referring to the web-based customer portal.

This document is designed as a basic training document for the TED customer portal.

Versioning

Version Number	Date	Page number(s)	Changes
1	Nov 2008		Initial version
2	Mar 2013		Move to single platform
3	May 2017		Update for new Website

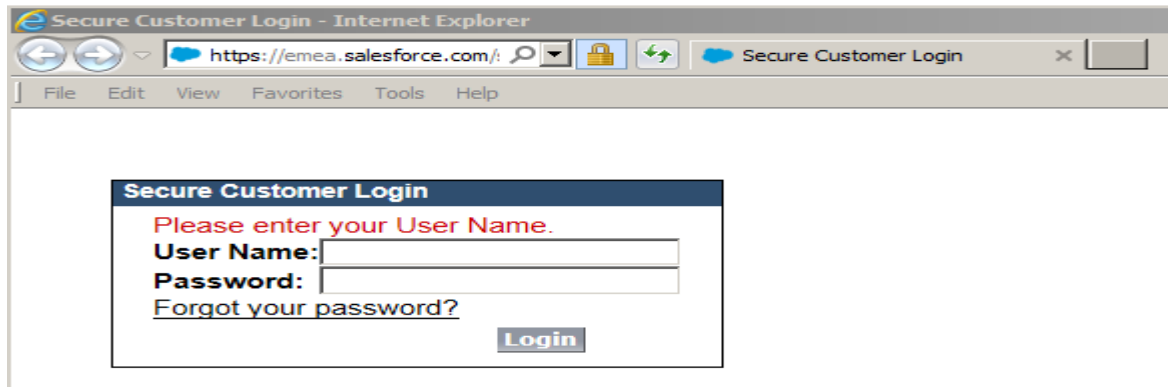
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1.1 Logging into the TED customer portal

TED is a web-based portal. To log in, click [here](#)

This will display the following window:



Your user name will generally be your email address:
name.name@serviceprovider.co.nz (eg frank.grear@chorus.co.nz)

1.1.1 LOGINS TO THE PORTAL

All logins are managed by the billing team. All requests for logins should be directed in the first instance to implementation@chorus.co.nz

When you have been set-up as a new user you will receive an email giving you your login and initial password:



Enter the login and password as per the email and click the 'login' button. You will immediately be prompted to change the password:

For security reasons, the password that was sent to you must now be changed.

Change My Password Required Information

User Name: frank.greart@telecom.co.nz

New Password: Acceptable (Tip: A strong password contains at least 12 alphanumeric characters, and includes uppercase and lowercase)

Verify New Password: ✓

When you have successfully changed your password you will be directed to the portal's home-page.

If you forget your password click on the 'forgot your password' hyperlink:

Secure Customer Login

Please enter your User Name.

User Name:

Password:

[Forgot your password?](#)

You will be presented with this screen. Enter your user name and click submit.

Did you forget your password? Please enter your username below.

Username:

[Return to login page](#)

TED will reset your password and you will receive an automatic email with a new one:

Subject: Your new Telecom Wholesale Customer Portal password
Importance: High

Dear Jim,

Thank you for contacting customer support. Your new Customer Portal password can be found below.

Thank you,
Telecom Wholesale Customer Support

Username: grehani@astadia.com
Password: hzd73

You will be asked to change your password (as above).

Note: for security reasons, from time to time we'll reset your password and you will receive an email prompting you to change it.

1.2 Tabs and sidebar

This is a summary of what you'll see and use on the homepage:



1.2.1 TABS

At the top of the screen there are four tabs that you'll use to navigate the site:

- Home
- Billing Metrics
- Cases
- Reports



The 'Billing Metrics' screen looks like this:

The screenshot shows the 'Billing Metrics' screen. At the top, there is a navigation bar with 'Home', 'Billing Metrics', 'Cases', and 'Reports'. The 'Billing Metrics' section is active. On the left, there is a search bar with 'Search All' and a 'Go!' button, and a 'Recent Items' list showing '01006666'. The main content area is titled 'Billing Metrics' and contains several sections:

- Open Cases Summary:** A table with columns: Case Class, Number of Cases, Average Age, and Dispute Value.
- Closed Cases Summary:** A table with columns: Time Period, Number of Cases, Average Time to Close, and Credits. The data shows 1 case for each of the last 30, 60, and 90 days, with an average time to close of 3 days.
- Open Cases:** A table with columns: Case Number and Contact Name.
- Closed Cases:** A table with columns: Case Number and Contact Name.

At the bottom of the page, there is a breadcrumb trail: [Home](#) | [Billing Metrics](#) | [Cases](#) | [Reports](#).

The 'Cases' screen looks like this:

The screenshot shows the 'Cases' screen. At the top, there is a navigation bar with 'Home', 'Billing Metrics', 'Cases', and 'Reports'. The 'Cases' section is active. On the left, there is a search bar with 'Search All' and a 'Go!' button, and a 'Recent Items' list showing '01006666'. The main content area is titled 'Cases Home' and contains the following elements:

- A message: "Select the cases you want to view from the dropdown."
- A 'View:' dropdown menu set to 'Recently Viewed Cases' and a 'Go!' button.
- A 'Recent Cases' section with a 'Create New Case' button and a 'My Open' dropdown menu.
- A message: "No recent records. Click Go or select a view from the dropdown to display records."

At the bottom of the page, there is a breadcrumb trail: [Home](#) | [Billing Metrics](#) | [Cases](#) | [Reports](#).

The 'Reports' screen looks like this:

salesforce

Logout

Home | Billing Metrics | Cases | Reports

Search

Search All

Go!

Advanced Search...

Create New...

Recent Items

01006566

Reports Home

Enter keywords to find matching custom reports.

Find Report

Report Folders

Folder: Customer Portal

Go!

All Reports | **Recent Reports** | Reorder Folders | Collapse All | Expand All

File and Content Reports

File and Content Downloads - Who downloaded what files?

File and Content Engagement - How many times have files been downloaded, shared, discussed, and liked?

File and Content Links - How many times have files been shared externally via a link?

Sales Ops - Manage Product Offers

Export Active Product Offers

Export Active Product Specifications

Export Active Products Price Book

Customer Portal

Export Cases by Query Sub-Type - Report details cases submitted by Query sub-Type

Export Cases by Query Type - Report details cases submitted by Query Type

Export Portal - Closed & On Hold - Reports on all cases which have been completed

Export Portal - Closed & On Hold - last 30 days - Reports on all cases which have been completed within the last 30 days

Export Portal - Open & Waiting - Report showing Billing cases that have not yet been resolved

Export Portal - Status = Service Provider - Report shows all cases which have been staged back to the Service Provider, for their action

Home | Billing Metrics | Cases | Reports

1.2.2 SIDEBAR - SEARCH FUNCTION:

Search

Search All

Go!

Advanced Search...

Basic search – type in a case number click the 'go' button to find your case:

The screenshot shows a web interface with a search bar on the left containing '1006666' and a 'Go!' button. Below it is a 'Create New...' dropdown and a 'Recent Items' section with 'No records to display'. The main area is titled 'Search Results' and shows a search bar with '1006666' and a 'Search' button. Below the search bar, it says 'Scope: All objects | Advanced Search'. A table titled 'Cases (1)' is displayed with the following data:

Action	Case Number	Subject	Status	Case Record Type	Date/Time Opened	Closed
Edit	01006666	IPP - Broadband Jan 15 Billing Error	Closed	Billing Management	27/02/2015 11:07 AM	<input checked="" type="checkbox"/>

In this example we searched for case number 1006666 and found the matching case.

To open the case simply click on either the case number or the subject.

Note 1 - The string must be at least two characters long.

Note 2 – There are two access levels in the Portal, and this governs what you can view:

- Portal customer user – can ONLY view cases that you create
- Portal customer manager – can view ALL cases created by any Portal user in your company.

Advanced search – The advanced search facility enables you to search for a case based on a word or words in the subject line or in the case comments:

The screenshot shows the 'Advanced Search' interface. On the left, there is a search bar with 'Search All' dropdown, a 'Go!' button, and a 'Create New...' dropdown. Below that is a 'Recent Items' section with two items: '00002430' and '00002429'. The main area is titled 'Advanced Search' and has a search bar with a 'Search' button. Below the search bar is the 'Advanced Options' section with the following settings:

- Use enhanced search capabilities ⓘ
- Exact phrase
- Scope: [Select All](#) | [Deselect All](#)
- Cases
- Case Comments
- Tado
- Notes
- Attachments
- Reports

[Home](#) | [Cases](#) | [Reports](#)

Entering the search key '2017' returns:

Advanced Search Results

Search: 2017

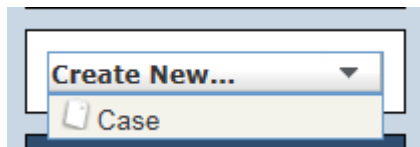
Scope: All objects | Advanced Search

Cases (2)

Action	Case Number	Subject	Status	Case Record Type	Date/Time Opened	Closed
Edit	01704762	(March17) WFB SLA performance REBATES for the month of March 2017	Closed	Billing Management	24/04/2017 10:19 AM	✓

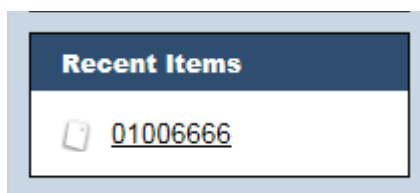
1.2.3 SIDEBAR - 'CREATE NEW' FUNCTION:

Click on the down arrow and this will present you with a quick link to create a new billing case.



1.2.4 SIDEBAR - 'RECENT ITEMS' FUNCTION:

This lists the recent cases (maximum 10) that you have either created or viewed. Clicking on any one of the case numbers will take you straight to that case, where you can view or edit it as required.



1.3 Billing Metrics

Home Billing Metrics Cases Reports

Search

Search All

Get

Advanced Search...

Create New...

Recent Items

- 01006666
- 01704752

Recent Billing Metrics

Open Cases Summary

Case Class	Number of Cases	Average Age	Dispute Value
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Closed Cases Summary

Time Period	Number of Cases	Average Time to Close	Credits
Last 30 Days	1	3 days	
Last 60 Days	1	3 days	
Last 90 Days	1	3 days	

Open Cases -

Case Number	Contact Name
-------------	--------------

Closed Cases -

Case Number	Contact Name
-------------	--------------

The Billing Metrics Tab shows a summary of the number of cases received, the average age, and the average time to close.

1.4 Cases

Select the cases you want to view from the dropdown.

View:

Recent Cases <input type="button" value="Create New Case"/> <input type="text" value="Recently Viewed"/>				
Case Record Type	Case Number	Contact Name	Subject	Status
Billing Management	00117604		Credit applied due to billing error for Abortive Site Visit (Customer Cancelled Truck Roll)	Closed
Billing Management	01588834		Jan-16 to Nov-16 UFB MDU Provisioning SLA credits - invoice credits please	Closed

There are various ways that you use the Cases – Home page:

1. View:
 - My Cases – All Open: cases that you have created whose status is other than 'closed'
 - My Cases – All Completed: cases that you have created that have been completed.
 - Recently viewed – displays cases you've recently viewed, irrespective of status.
2. 'Create New Case' – click this button to create a new billing case

View: <Previous Page | Next Page>

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

<input type="button" value="New Case"/> <input type="button" value="Mark As Billed"/> <input type="button" value="Action Next Plan Case"/>							
<input type="checkbox"/> Action	<u>Case Number</u>	<u>Contact Name</u>	<u>Subject</u>	<u>Status</u>	<u>Date/Time Opened</u>	<u>Case Owner</u>	<u>Alias</u>
<input type="checkbox"/> Edit	01317094		Billing Dispute	Closed	6/04/2016 8:59 AM	..	
<input type="checkbox"/> Edit	01118387	Notifications, DTS	Boost VDSL - Boost Tail Extension Charging - Step B	Closed	23/07/2015 12:58 PM		
<input type="checkbox"/> Edit	01254742	..	Boost VDSL Tail Extension	Closed	26/01/2016 8:15 AM		
<input type="checkbox"/> Edit	01227569		Boost VDSL WVS Tail Extension	Closed	9/12/2015 11:47 AM	..	

3. Headings: You can sort by any of the underlined headings. In the above view it is sorted by subject in ascending order (see the gold arrow). Change the sort by clicking on the appropriate heading.
 - Each user has been set-up in the portal so that they can see all cases relating to their organisation, ie both those that they created and those created by other Portal users set-up under their organisation.
 - To narrow-down the cases shown in window use the Alpha selector "S" for instance if you only wanted to view cases created by South (ie exclude all other cases) click on the 'S' of the alpha selector:

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All							
New Case Mark As Billed Action Next Plan Case							
<input type="checkbox"/> Action	<u>Case Number</u>	<u>Contact Name</u>	<u>Subject</u>	<u>Status</u>	<u>Date/Time Opened</u>	<u>Case Owner Alias</u>	
<input type="checkbox"/> Edit	00117861	South	UCLL/UBA: Re-benchmarking Review of UCLL effective 3 December 2012	Closed	25/02/2013 4:48 PM		
<input type="checkbox"/> Edit	00153780	South	Weekly Assure Reports	Closed	29/08/2013 3:44 PM		
<input type="checkbox"/> Edit	00742068	South	NGA Billing from Chorus	Closed	13/03/2014 2:47 PM		

- Another use for this type of sort would be to narrow down the view to just 'Open' cases – sort the screen by status, then select 'O' (for open) and you will just see those cases with an open status.
- To return to the full view just click 'all' in the alpha selector.
- Click on any of the individual cases (either case number or subject) that you wish to view in more detail.

1.4.1 CREATE A NEW CASE:

Click on the 'Create New Case' button or use the 'Create New' from the sidebar.

Case Edit
New Case

Case Edit

Case Information | = Required Information

Case Owner		Case Record Type	Billing Management
Contact Name [?]		Status	Open
Value NZ\$	<input type="text"/>	Case Priority	Normal
Credit NZD		External Reference NUMBER	<input type="text"/>
Adjustment Type		External Reference SYSTEM	<input type="text"/>
Adjustment Value [?]		Other Contact	<input type="text"/>
Circuit Number	<input type="text"/>		
Line Number	<input type="text"/>		
Wireline/OOT	<input type="text"/>		

ETR

Responsibility	Unassigned	ETR	9/05/2017 4:03 PM
Classification	Default	Progress update date	9/05/2017 4:03 PM
Back Office Classification		Reminder date	9/05/2017 4:03 PM
		Escalation date	9/05/2017 4:03 PM

Additional Information

Query Type	--None--	Query sub-type	--None--
Subject	<input type="text"/>		
Description	<input type="text"/>		

Case Stats

Lines	--None--
Number of Lines	<input type="text"/>

- The case owner shows as your name (ie the person logged into the Portal)
- All fields marked with a red bar are mandatory fields - the case cannot be submitted unless these fields are completed.
- The status will always show as open when creating a case.
- Value – this is your estimate of the value of your dispute.
 - If the case is a query rather than a dispute please show 0 as the value
- External Reference Number – this is a free-text field that you can use in any way that you want. You may choose to use it for your own customer reference number.
- Other Contact – another Free-Text field that you can use if you wish.
- Query Type – select from one of the following options:
 - E-Bill
 - Other
 - Local Call Detail / Vision Report
 - Tools and Scheduling
 - Pricebook
- Query sub-type – this is a dependant pick list based upon the choice that you made in the query type selection box:

E-Bill	Broadband
	Voice Rentals
	Data
	Calling (inc NCA)
	Daily Call Report
	Data - Legacy
	L1 Copper
	Fibre
Local Call Detail / Vision Report	Local Call Detail Report
	Vision Report
Tools and Scheduling	Enhancement Suggestions
	Process Issue
	Super User Training Request
	System Issue

Pricebook	Pricebook query
	Log-on request

Note – over time additional values may be added to these pick-lists.

- Subject: free-text field - enter a one-line description of the nature of the query / dispute.
- Description: free-text field - a fully detailed description of the nature of the query / dispute. You're not constrained by space! The more detail that you can give the better able we will be to resolve the case in a timely manner.
- Lines: there are two options in the pick-list
 - 1 – 20
 - Over 20
 - If you select the 2nd option 'over 20' then the next field 'number of lines' becomes a mandatory field and you must indicate how many lines are included in the case.

Once all fields have been completed click the 'submit' button.

Submitting the case without one of the mandatory fields completed will result in an error message that indicates what the problem is:

Case Edit Submit Submit & Add Attachment Cancel

Error: Invalid Data.
Review all error messages below to correct your data.

Case Information | = Required Information

Case Owner		Case Record Type	Billing Management
Contact Name		Status	Open
Value NZ\$	<input type="text"/>	Case Priority	Normal
	Error: You must enter a value	External Reference NUMBER	<input type="text"/>
Credit NZD		External Reference SYSTEM	<input type="text"/>
Adjustment Type		Other Contact	<input type="text"/>
Adjustment Value			
Circuit Number	<input type="text"/>		
Line Number	<input type="text"/>		
Wireline/OOT	<input type="text"/>		

ETR

Responsibility	Unassigned	ETR	9/05/2017 4:05 PM
Classification	Default	Progress update date	9/05/2017 4:05 PM
Back Office Classification		Reminder date	9/05/2017 4:05 PM
		Escalation date	9/05/2017 4:05 PM

Additional Information

Query Type	--None--	Query sub-type	--None--
	Error: You must enter a value		
Subject	<input type="text"/>		
	Error: You must enter a value		
Description	<input type="text"/>		
	Error: You must enter a value		

Case Stats

Lines	--None--
	Error: You must enter a value
Number of Lines	<input type="text"/>

Submit Submit & Add Attachment Cancel

Attachments – In exactly the same way that you can attach a file (eg a spreadsheet) to an email you can attach a file to a case:

Note – for storage capacity reasons we may remove the file from a case and store it separately – generally this will only be done once a case has been resolved and closed.



Case number - When you submit a case TED will automatically allocate it a unique reference number. This number can be used to revisit the case.

To view an existing case either select the particular case from the 'cases' home screen or enter the unique case number into the search section of the sidebar.

01006666

WILLIAMS VIEW

< Back to List: Cases

Case Detail

[Edit](#) [Close Case](#) [Clone](#)

Case Owner	[Change]	Case Record Type	Billing Management
Case Number	01006666	Status	Closed
Contact Name		Case Priority	Normal
Value NZ\$	\$3	External Reference NUMBER	
Credit NZD		External Reference SYSTEM	
Adjustment Type	Credit	Other Contact	
Adjustment Value	\$3.52		
Circuit Number			
Line Number			
Wireline/OOT			

ETR

Responsibility	Billing	ETR	11/03/2015 11:07 AM
Classification	Dispute	Progress update date	4/03/2015 11:07 AM
Back Office Classification	Chorus	Reminder date	9/03/2015 11:07 AM
		Escalation date	12/03/2015 11:07 AM

Additional Information

Query Type	E-Bill	Query sub-type	Broadband
Subject	IPP - Broadband Jan 15 Billing Error		
Description	As per the informer sent our earlier this month, an adjustment has been incorrectly processed twice on your account. This has now been credited.		

Case Stats

Lines	% Complete	0%
Number of Lines		
Lines Left		0

System Information

Created By	27/02/2015 11:07 AM	Last Modified By	27/02/2015 11:34 AM
------------	---------------------	------------------	---------------------

[Edit](#) [Close Case](#) [Clone](#)

Case Comments

[Add Comment](#)

No records to display

Attachments

[Attach File](#)

No records to display

Case History

Date	User	Action
27/02/2015 11:34 AM		Changed Status from Open to Closed. Closed.
27/02/2015 11:07 AM		Changed Progress update date from 4/03/2015 11:06 AM to 4/03/2015 11:07 AM. Changed ETR from 11/03/2015 11:06 AM to 11/03/2015 11:07 AM. Created.

Cases

[New Case](#)

No records to display

Cases (Decomposed Case)

[New Case](#)

No records to display

1

Always show me [more](#) records per related list

The case screen is divided into a number of different sections:

Case detail:

Case Detail		Edit	Close Case	Clone
Case Owner	[Change]	Case Record Type	Billing Management	
Case Number	01006666	Status	Closed	
Contact Name		Case Priority	Normal	
Value NZ\$	\$3	External Reference NUMBER		
Credit NZD		External Reference SYSTEM		
Adjustment Type	Credit	Other Contact		
Adjustment Value	\$3.52			
Circuit Number				
Line Number				
Wireline/OOT				

- The case owner shows as the 'queue' that this case has gone to within TED.
 - When the case was being created the case owner is shown as the name of the person who was creating the case.
 - When the case is submitted, TED automatically changes the case ownership, initially assigning the case to a queue.
 - When it is picked up from a queue by our billing specialist, they will change the ownership from the queue to their name. They will then generally retain ownership of the case through until resolution.
 - You'll always be able to see who is looking after your case.
- Note – the name of the person originally creating the case is maintained in the case record and shows on the main case screen as the Contact Name.
- Case number – the unique case reference number.
- Case record type – Will always show as Billing Management.

Additional Information:

Additional Information	
Query Type	E-Bill
Query sub-type	Broadband
Subject	IPP - Broadband Jan 15 Billing Error
Description	As per the informer sent our earlier this month, an adjustment has been incorrectly processed twice on your account. This has now been credited.

- Query type and subtype – based upon what you originally entered when the case was submitted.
- Subject and description – this is what you originally entered when the case was submitted.

Case Stats:

Case Stats	
Lines	% Complete
Number of Lines	0%
Lines Left	0

- Lines – this is what you originally entered, based upon the pick-list (1 – 20, or over 20)
- Number of Lines – If 'over 20' was selected from the lines pick-list, this field will then show the actual number of lines.

Lines left and % complete - This shows, for a multiple line case, how far advanced we are in dealing with it. As we work through a multiple line case we'll update it with how many lines we've completed. You will be able to see how we are progressing.

System Information:

System Information			
Created By	27/02/2015 11:07 AM	Last Modified By	27/02/2015 11:34 AM
Edit Close Case Clone			

This section shows who originally created the case, and when. (automatically time/date stamped). It also shows who last modified the case, and when.

Case Comments:

Case Comments		Add Comment
Comment		
Created By:	(16/08/2016 4:53 PM)	
Hi		
Credit of \$	has been issued on	Acct#: this will appear on the next statement invoice
Case will now be closed		
Thanks		

Subject: Your case 00002429 has been updated
Your case # 00002429: Another training case has been updated. Please click on the link below

- Whenever our billing specialist updates the case they will enter a comment.
- Each and every comment is date and time stamped.
- When the comment is entered TED will automatically send the case originator an email to advise them that the case has been updated

You can update the case by entering a comment.

- Click on the 'case comment' button

The following screen will display:

The screenshot shows a web interface for editing a case comment. At the top, there's a header 'Comments Case 01006666'. Below that is a 'Case Comment Edit' section with 'Save' and 'Cancel' buttons. The 'Case Details' section includes a 'Subject' field with the text 'IPP - Broadband Jan 15 Billing Error' and a 'Description' field with the text 'As per the informer sent our earlier this month, an adjustment has been incorrectly processed twice on your account. This has now been credited.' Below this is a 'Comment Details' section with a large text area for entering a comment, also with 'Save' and 'Cancel' buttons. At the bottom, there's a footer that says 'Always show me more records per related list'.

- Enter your comments in the free-text comment box and click 'save' to submit.
- Our billing specialist will be alerted to the update and will review your comments
- For convenience, the subject and description of the case and any previous comments, are displayed on this screen.
- All comments are date and time stamped.
- Once added, a comment cannot be altered or deleted except under exceptional circumstances by our billing system administrator.

Attachments:

The screenshot shows an 'Attachments' section with a table. The table has columns for 'Action', 'File Name', 'Size', 'Last Modified', and 'Created By'. There are buttons for 'Attach File' and 'View All' at the top. The table contains one row with the following data:

Action	File Name	Size	Last Modified	Created By
Edit View Del	TED : Abortive Site Visit_Customer Cancelled Truck Roll.xlsx	10KB	2/03/2013 4:11 PM	

Any files for the case will show in the attachments section of the case. To attach another file click the 'attach file' button.

To view an attached file, click the 'View All' button:

View All Attachments	
Cancel	
File Name	TED Abortive Site Visit_Customer Cancelled Truck Roll.xlsx
Size	10KB
Ownership	
View	View file
Last Modified	2/03/2013 4:11 PM

To open the specific attachment click on the 'View file' hyperlink and the file will be downloaded from TED.

Case history:

Changes to the case that are not covered under case comments are recorded (and date / time stamped) under the case history section:

Case History		
Date	User	Action
27/02/2015 11:34 AM		Changed Status from Open to Closed.
		Closed.
27/02/2015 11:07 AM		Changed Progress update date from 4/03/2015 11:06 AM to 4/03/2015 11:07 AM .
		Changed ETR from 11/03/2015 11:06 AM to 11/03/2015 11:07 AM .
		Created.

This will show:

- When the case was created, and by whom.
- Whenever the status has been changed (eg from open to on hold).
- When the case was pick-up from a queue and ownership transferred to a billing specialist.

Portal cases created by Chorus

There may be times when our billing specialist will create a case in TED and also make it available to you via the portal.

For these cases, both the system information and the case history sections of the case screen will show the billing specialist's name under 'created by'. An example of when we might do this is:

- You've sent in a large, multiple line dispute that actually covers a number of different areas. We'll break down the dispute into a number of smaller disputes, each one covering a distinct area. We'll then resolve each one separately, feeding information back to you as we go, rather than try and resolve the whole case in one go.

1.5 Reports

The fourth tab gives you access to a basic reporting facility.

The screenshot displays the 'Reports Home' interface. At the top, there is a search bar with the text 'Enter keywords to find matching custom reports.' and a 'Find Report' button. Below this is a 'Report Folders' section with a dropdown menu set to 'Customer Portal' and a 'Go!' button. The main content area is divided into two tabs: 'All Reports' (selected) and 'Recent Reports'. To the right of these tabs are links for 'Reorder Folders', 'Collapse All', and 'Expand All'. The 'All Reports' tab lists several report categories:

- File and Content Reports**
 - [File and Content Downloads](#) - Who downloaded what files?
 - [File and Content Engagement](#) - How many times have files been downloaded, shared, discussed, and liked?
 - [File and Content Links](#) - How many times have files been shared externally via a link?
- Sales Ops - Manage Product Offers**
- Customer Portal**
 - [Export Cases by Query Sub-Type](#) - Report details cases submitted by Query sub-Type
 - [Export Cases by Query Type](#) - Report details cases submitted by Query Type
 - [Export Portal - Closed & On Hold](#) - Reports on all cases which have been completed
 - [Export Portal - Closed & On Hold - last 30 days](#) - Reports on all cases which have been completed within the last 30 days
 - [Export Portal - Open & Waiting](#) - Report showing Billing cases that have not yet been resolved
 - [Export Portal - Status = Service Provider](#) - Report shows all cases which have been staged back to the Service Provider, for their action

The system contains a number of pre-defined reports that let you view your cases.

File and Content Reports will allow you to see:

- File and Content Downloads: who has downloaded a file,
- File and Content Engagement: how many times, and
- File and Content Links: if the file has been shared

Customer Portal reports are 6 reports based around the status of cases:

- Cases by Sub-Type
- Cases by Query Type
- Closed and On Hold
- Closed and On Hold – last 30 days
- Open and waiting
- Status = Service Provider

To run a particular report, simply click on the report hyperlink:

Portal - Open & Waiting

Report Generation Status: Complete

Report Options:
[Run Report](#) [Hide Details](#)

Generated Report:

Filtered By:
Type equals **Billing Management**
AND Status equals **Open,Waiting**

<u>Case Owner</u>	<u>Case Number</u>	<u>Subject</u>	<u>Date/Time Opened</u>	<u>Age (Days)</u>	<u>Status</u>	<u>Value NZ\$</u>
Company Name: TelstraClear Ltd (6 records)						
				avg 7		
Created Alias: fgrea (1 record)						
				avg 0		
Frank Gear	<u>00002628</u>	<u>outgoing test</u>	25/01/2009 10:44	0	Open	-
Created Alias: Jim2 (1 record)						
				avg 19		
TelstraClear Ltd	<u>00002430</u>	<u>vet another training case</u>	6/01/2009 11:48	19	Open	\$45,678
Created Alias: Jim M (4 records)						
				avg 5.75		
TelstraClear Ltd	<u>00002623</u>	<u>testing testing testing</u>	23/01/2009 14:07	2	Open	\$2,000
TelstraClear Ltd	<u>00002431</u>	<u>test case</u>	6/01/2009 12:32	19	Waiting	\$45
TelstraClear Ltd	<u>00002622</u>	<u>test case</u>	23/01/2009 14:06	2	Open	\$10,000
Frank Gear	<u>00002627</u>	<u>test</u>	25/01/2009 09:58	0	Open	\$123
Grand Totals (6 records)						
				avg 7		

This report, which shows all unresolved cases, is split by the alias of the person creating the report and shows the average age of each report, summarising this by alias with an overall summary for you.

To hide the details of the report and just get a summary total click the 'hide details' button:

Portal - Open & Waiting

Report Generation Status: Complete

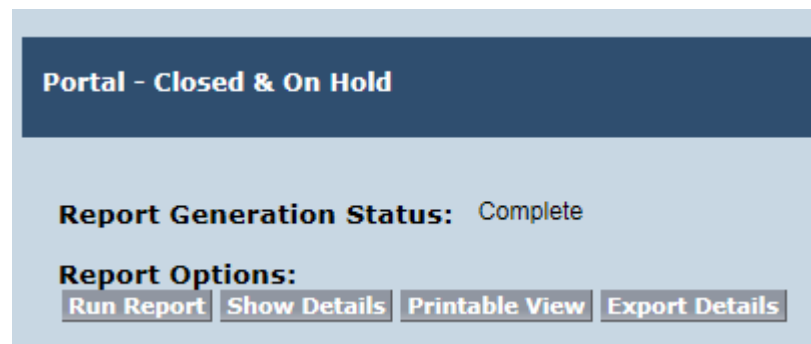
Report Options:
[Run Report](#) [Show Details](#)

Generated Report:

Filtered By:
Type equals **Billing Management**
AND Status equals **Open,Waiting**

	Age (Days)
Company Name: TelstraClear Ltd (6 records)	avg 7
Created Alias: fgrea (1 record)	avg 0
Created Alias: Jim2 (1 record)	avg 19
Created Alias: Jim M (4 records)	avg 5.75
Grand Totals (6 records)	avg 7

To export the details of the report to a CSV or XLS format, click the 'export details' button. To print the report, click the 'printable view' button.



The screenshot shows a report interface with a dark blue header bar containing the text "Portal - Closed & On Hold". Below the header, the text "Report Generation Status: Complete" is displayed. Underneath, the section "Report Options:" is followed by four buttons: "Run Report", "Show Details", "Printable View", and "Export Details".

Note: You cannot design and run your own reports. All reports are controlled from within TED. If there is a something that you would like to see in a report please contact chorus_billing@chorus.co.nz and we will see what we can do.