

Examples, Viewing Tips & Navigation Help

There are many different ways users are able to sort, filter and group data using the new bill viewer. Moreover, the interface has similar functionality as Excel and allows users much more flexibility.

When the user logs in, this is the screen/components that appear:

The screenshot shows the 'Report Portal' interface with a table of reports. Callouts provide the following information:

- USER CALL SUMMARY = BILL SUMMARY REPORT** and **EXTENSION DETAIL REPORT = BILL**: Labels for the report types.
- BY DEFAULT, THE LIST OF REPORTS IS SORTED BY DATE DESCENDING STARTING WITH THE CURRENT BILL PERIOD.**: A callout pointing to the 'Bill Period' column.
- COST CENTER(S) THE USER IS AUTHORIZED TO VIEW.**: A callout pointing to the 'Cost Center' column.
- THIS ALLOWS THE USER TO SHARE REPORTS VIA EMAIL.**: A callout pointing to the 'Email Re...' column.
- COLUMN HEADERS**: A callout pointing to the table's header row.

Delete?	Report	Bill Group	Bill Period	Accounting Period	Cost Center	File Type	File Date	Email Re...
	User Call Summary	ACCTS	1/31/14		103031-533041-40 - PAUL L FOSTER SOM A...	PDF	02/07/201...	
	User Call Summary	ACCTS	1/31/14		133018-533063-40 - DEVELOPMENT PAUL L...	PDF	02/07/201...	
	User Call Summary	ACCTS	1/31/14		103048-533061-10 - CLINIC AND BASIC SCI...	PDF	02/07/201...	
	User Call Summary	ACCTS	1/31/14		533101 - GME ELP	PDF	02/07/201...	
	User Call Summary	ACCTS	1/31/14		103085-533048-20 - BIOMEDICAL SCIENCE...	PDF	02/07/201...	
	User Call Summary	ACCTS	1/31/14		103074-533302-20 - CTR OF EXC IN CANC...	PDF	02/07/201...	
	User Call Summary	ACCTS	1/31/14		103061-203201-60 - BUSINESS AFFAIRS ELP	PDF	02/07/201...	
	User Call Summary	ACCTS	1/31/14		183054-533101-40 - GME ELP	PDF	02/07/201...	
	User Call Summary	ACCTS	1/31/14		133018-533041-40 - PAUL L FOSTER SOM A...	PDF	02/07/201...	
	User Call Summary	ACCTS	1/31/14		103077-533317-20 - CTR OF EXC DISEASE/...	PDF	02/07/201...	
	User Call Summary	ACCTS	1/31/14		103037-533371-10 - EL PASO MEDICAL	PDF	02/07/201...	
	Extension Detail Report	ACCTS	1/31/14		103051-203201-60 - BUSINESS AFFAIRS ELP	HTML	02/07/201...	
	Extension Detail Report	ACCTS	1/31/14		183054-533101-40 - GME ELP	HTML	02/07/201...	
	Extension Detail Report	ACCTS	1/31/14		103037-533371-10 - EL PASO MEDICAL	HTML	02/07/201...	
	Extension Detail Report	ACCTS	1/31/14		103085-533048-20 - BIOMEDICAL SCIENCE...	HTML	02/07/201...	
	Extension Detail Report	ACCTS	1/31/14		133018-533063-40 - DEVELOPMENT PAUL L...	HTML	02/07/201...	
	Extension Detail Report	ACCTS	1/31/14		103048-533061-10 - CLINIC AND BASIC SCI...	HTML	02/07/201...	
	Extension Detail Report	ACCTS	1/31/14		103031-533041-40 - PAUL L FOSTER SOM A...	HTML	02/07/201...	
	Extension Detail Report	ACCTS	1/31/14		103074-533302-20 - CTR OF EXC IN CANC...	HTML	02/07/201...	
	Extension Detail Report	ACCTS	1/31/14		103077-533317-20 - CTR OF EXC DISEASE/...	HTML	02/07/201...	

More Buttons of Interest:

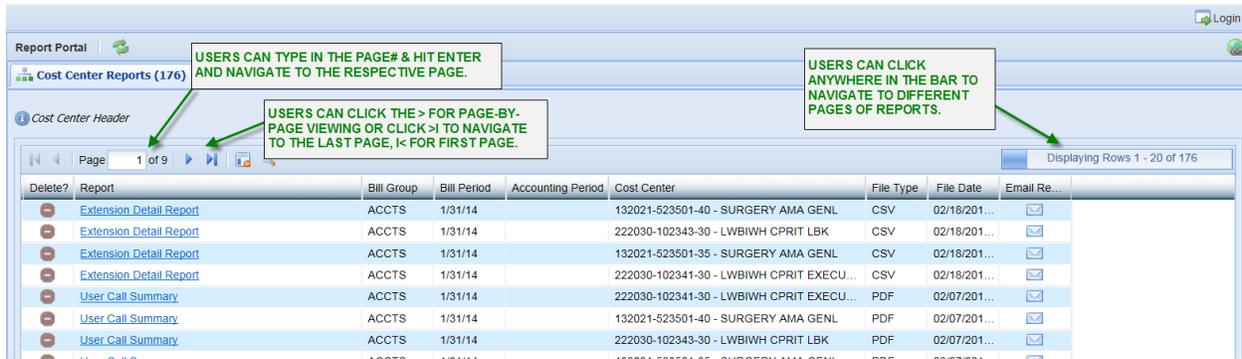
The screenshot shows the 'Report Portal' interface with callouts highlighting specific buttons:

- REFRESH BUTTON USED TO RELOAD/LOAD SCREEN WITH DATA.**: A callout pointing to the refresh icon in the top left.
- ALTHOUGH THIS BUTTON ALWAYS SAYS "Login", IT LOGS USERS OUT IF CLICKED ON**: A callout pointing to the 'Login' button in the top right.
- QUICK LINK BUTTON IS DISABLED ON USER INTERFACE.**: A callout pointing to a disabled button in the top right.

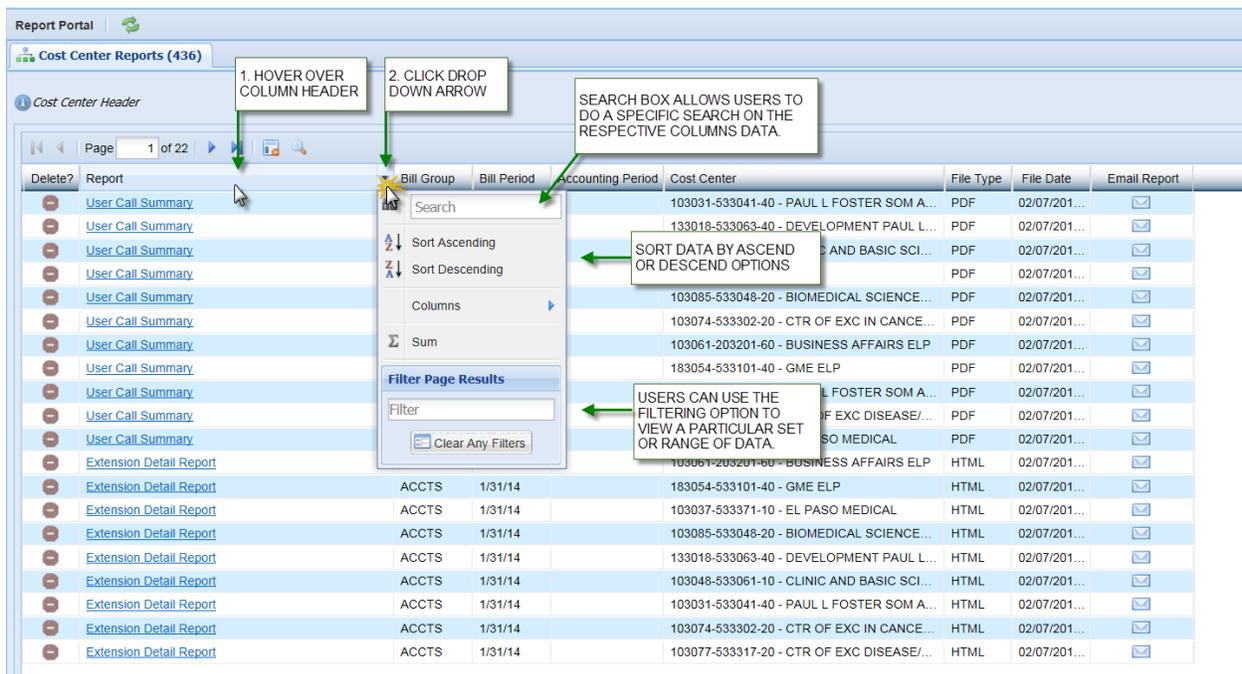
Delete?	Report	Bill Group	Bill Period	Accounting Period	Cost Center	File Type	File Date	Email Re...
	Extension Detail Report	ACCTS	1/31/14		132021-523501-40 - SURGERY AMA GENL	CSV	02/18/201...	
	Extension Detail Report	ACCTS	1/31/14		222030-102343-30 - LWBIWH CPRIT LBK	CSV	02/18/201...	
	Extension Detail Report	ACCTS	1/31/14		132021-523501-35 - SURGERY AMA GENL	CSV	02/18/201...	

Scrolling/Navigating through pages: Keep in mind the monthly data will be sorted with the current month listed first in descending order. However, if the user wants to sort through the pages there are different ways of doing so:

Examples, Viewing Tips & Navigation Help



Each Column Header can be expanded or minimized and when the user hovers over any one of the headers, a drop-down arrow will appear. Click to access a search, sort & filter box:



NOTE: USERS CAN ALSO SORT ASCEND/DESCEND DATA BY CLICKING ON ANY COLUMN HEADER:



Here are some techniques/tips (Using previous displayed data for examples):

- *User x wants to see both the Bill Summary and Bill Detail's reports for Cost Center (FOP) 133018-533063-40 for the month of January 2013 only:*

Examples, Viewing Tips & Navigation Help

- 1) Hover mouse over the "Cost Center" Column, 2) click on drop-down arrow, 3) type in FOP (Cost Center) in "Filter Page Results", 4) hit "Tab" on keyboard.

Report Portal

Cost Center Reports (436)

Cost Center Header

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Delete?	Report	Bill Group	Bill Period	Accounting Period	Cost Center	File Type	File Date	Email Re...
	User Call Summary	ACCTS	1/31/14		103031-533041-40 - PAUL L FOSTER SOM A...			
	User Call Summary	ACCTS	1/31/14		133018-533063-40 - DEVELOPMENT PAUL L...			
	User Call Summary	ACCTS	1/31/14		103048-533061-10 - CLINIC AND BASIC SCI...			
	User Call Summary	ACCTS	1/31/14		533101 - GME ELP			
	User Call Summary	ACCTS	1/31/14		103085-533048-20 - BIOMEDICAL SCIENCE...			
	User Call Summary	ACCTS	1/31/14		103074-533302-20 - CTR OF EXC IN CANCER...			
	User Call Summary	ACCTS	1/31/14		103061-203201-60 - BUSINESS AFFAIRS ELF...			
	User Call Summary	ACCTS	1/31/14		103054-533101-40 - GME ELP			
	User Call Summary	ACCTS	1/31/14		183054-533101-40 - GME ELP	HTML	02/07/201...	
	User Call Summary	ACCTS	1/31/14		103037-533371-10 - EL PASO MEDICAL	HTML	02/07/201...	
	User Call Summary	ACCTS	1/31/14		103085-533048-20 - BIOMEDICAL SCIENCE...	HTML	02/07/201...	
	User Call Summary	ACCTS	1/31/14		133018-533063-40 - DEVELOPMENT PAUL L...	HTML	02/07/201...	
	User Call Summary	ACCTS	1/31/14		103048-533061-10 - CLINIC AND BASIC SCI...	HTML	02/07/201...	
	User Call Summary	ACCTS	1/31/14		103031-533041-40 - PAUL L FOSTER SOM A...	HTML	02/07/201...	
	User Call Summary	ACCTS	1/31/14		103074-533302-20 - CTR OF EXC IN CANCER...	HTML	02/07/201...	
	User Call Summary	ACCTS	1/31/14		103077-533317-20 - CTR OF EXC DISEASE/...	HTML	02/07/201...	
	Extension Detail Report	ACCTS	1/31/14		103061-203201-60 - BUSINESS AFFAIRS ELF...			
	Extension Detail Report	ACCTS	1/31/14		183054-533101-40 - GME ELP	HTML	02/07/201...	
	Extension Detail Report	ACCTS	1/31/14		103037-533371-10 - EL PASO MEDICAL	HTML	02/07/201...	
	Extension Detail Report	ACCTS	1/31/14		103085-533048-20 - BIOMEDICAL SCIENCE...	HTML	02/07/201...	
	Extension Detail Report	ACCTS	1/31/14		133018-533063-40 - DEVELOPMENT PAUL L...	HTML	02/07/201...	
	Extension Detail Report	ACCTS	1/31/14		103048-533061-10 - CLINIC AND BASIC SCI...	HTML	02/07/201...	
	Extension Detail Report	ACCTS	1/31/14		103031-533041-40 - PAUL L FOSTER SOM A...	HTML	02/07/201...	
	Extension Detail Report	ACCTS	1/31/14		103074-533302-20 - CTR OF EXC IN CANCER...	HTML	02/07/201...	
	Extension Detail Report	ACCTS	1/31/14		103077-533317-20 - CTR OF EXC DISEASE/...	HTML	02/07/201...	

Results will display:

Report Portal

Cost Center Reports (436)

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Delete?	Report	Bill Group	Bill Period	Accounting Period	* Cost Center	File Type	File Date	Email Re...
	User Call Summary	ACCTS	1/31/14		133018-533063-40 - DEVELOPMENT PAUL L...	PDF	02/07/201...	
	Extension Detail Report	ACCTS	1/31/14		133018-533063-40 - DEVELOPMENT PAUL L...	HTML	02/07/201...	

NOTE: Since user x has access to view multiple FOPs (Cost Centers), the CSV type files are on latter pages respective to the FOP used in the example. If the user wants to view the CSV files for FOP 133018-533063-40, there are many ways this can accomplished: Simply navigate through pages and find the FOP and "file type" to be viewed; or Create a "CSV" filter in the "File Type" Column, then find the respective FOP to be viewed; or Scroll to the page with "CSV" file types and search for the respective FOP by either eye or using the Search box via Column Header drop-down.

NOTE: Keep in mind that the search and filter options only applies to the page that is displayed.

Techniques/tips (Using another user's accessed FOPs/Cost Centers):

- New user x just wants to view December 2013 Bill Summaries and Bill Details only:

Examples, Viewing Tips & Navigation Help

- 1) Hover over the “Bill Period” Column Header, 2) click on the drop-down arrow, 3) type in Bill Period (12/31/13) in “Filter Page Results”, 4) hit “Tab” on keyboard.

Report Portal |

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Delete?	Report	Bill Group	Bill Period	Accounting Period	Cost Center	File Type	File Date	Email Re...
	User Call Summary	ACCTS	1/31/14		56004-200 - CHEMICAL ENGINEER...	PDF	02/07/201...	
	User Call Summary	ACCTS	1/31/14		56004-100 - CHEMICAL ENGINEER...	PDF	02/07/201...	
	Extension Detail Report	ACCTS	1/31/14		56004-100 - CHEMICAL ENGINEER...	HTML	02/07/201...	
	Extension Detail Report	ACCTS	1/31/14		56004-200 - CHEMICAL ENGINEER...	HTML	02/07/201...	
	User Call Summary	ACCTS	1/31/14		56004-200 - CHEMICAL ENGINEER...	CSV	02/07/201...	
	User Call Summary	ACCTS	1/31/14		56004-100 - CHEMICAL ENGINEER...	CSV	02/07/201...	
	testBillDetail	ACCTS	1/31/14		56004-100 - CHEMICAL ENGINEER...	CSV	02/07/201...	
	testBillDetail	ACCTS	1/31/14		56004-200 - CHEMICAL ENGINEER...	CSV	02/07/201...	
	testBillDetail	ACCTS	1/31/14		56004-100 - CHEMICAL ENGINEER...	CSV	01/17/201...	
	Extension Detail Report	ACCTS	1/31/13		56004-100 - CHEMICAL ENGINEER...	PDF	01/07/201...	
	User Call Summary	ACCTS	1/31/13		56004-100 - CHEMICAL ENGINEER...	PDF	01/07/201...	
	User Call Summary	ACCTS	12/31/13		56004-100 - CHEMICAL ENGINEER...	CSV	01/07/201...	
	Extension Detail Report	ACCTS	11/30/13		16A050-B56004-100 - CHEMICAL ENGINEER...	PDF	12/05/201...	
	testBillDetail	ACCTS	11/30/13		16A050-B56004-100 - CHEMICAL ENGINEER...	CSV	12/05/201...	
	User Call Summary	ACCTS	11/30/13		16A050-B56004-100 - CHEMICAL ENGINEER...	PDF	12/05/201...	
	User Call Summary	ACCTS	11/30/13		16A050-B56004-100 - CHEMICAL ENGINEER...	CSV	12/05/201...	
	Extension Detail Report	ACCTS	10/31/13		16A050-B56004-100 - CHEMICAL ENGINEER...	PDF	11/04/201...	
	testBillDetail	ACCTS	10/31/13		16A050-B56004-100 - CHEMICAL ENGINEER...	CSV	11/04/201...	
	User Call Summary	ACCTS	10/31/13		16A050-B56004-100 - CHEMICAL ENGINEER...	PDF	11/01/201...	
	User Call Summary	ACCTS	10/31/13		16A050-B56004-100 - CHEMICAL ENGINEER...	CSV	11/01/201...	

Results will display:

Report Portal |

Cost Center Reports (68)

Cost Center Header

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Delete?	Report	Bill Group	Bill Period	Accounting Period	Cost Center	File Type	File Date	Email Re...
	testBillDetail	ACCTS	12/31/13		16A050-B56004-100 - CHEMICAL ENGINEER...	CSV	01/17/201...	
	Extension Detail Report	ACCTS	12/31/13		56004-100 - CHEMICAL ENGINEER...	PDF	01/07/201...	
	User Call Summary	ACCTS	12/31/13		56004-100 - CHEMICAL ENGINEER...	PDF	01/07/201...	
	User Call Summary	ACCTS	12/31/13		16A050-B56004-100 - CHEMICAL ENGINEER...	CSV	01/07/201...	

- User x wants to send via email the Bill Details Report for FOP 16A050-B56004-100 directly from the interface:

- 1) Find the FOP and file type, and then click the envelope icon in the “Email Report” Column:

Examples, Viewing Tips & Navigation Help

Delete?	Report	Bill Group	* Bill Period	Accounting Period	Cost Center	File Type	File Date	Email Report
	testBillDetail	ACCTS	12/31/13		16A050-B56004-100 - CHEMICAL ENGINEER...	CSV	01/17/201...	
	Extension Detail Report	ACCTS	12/31/13		16A050-B56004-100 - CHEMICAL ENGINEER...	PDF	01/07/201...	1.
	User Call Summary	ACCTS	12/31/13		16A050-B56004-100 - CHEMICAL ENGINEER...	PDF	01/07/201...	
	User Call Summary	ACCTS	12/31/13		16A050-B56004-100 - CHEMICAL ENGINEER...	CSV	01/07/201...	

2) Enter email of person(s) to send it to, 3) click send button at bottom of pop-up window.

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From: USER X

2. To: Personnel receiving

Cc:

Bcc:

Subject: Report: Extension Detail Report

Attachment File: 75130_ext.pdf

Tahoma

The report you requested is attached.

3. Send Close

Email Sent-----