

**Oracle Utilities Customer Care and Billing
Release 2.3.1**

Utility Reference Model

5.6.3.2 Manage Items

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Oracle Utilities Customer Care and Billing Utility Resource Model 5.6.3.2, Release 2.3.1

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Chapter 1

Overview

This chapter provides a brief description of the Manage Items business process and associated process diagrams. This includes:

- **Brief Description**
 - **Actors/Roles**

Brief Description

Business Process: 5.6.3.2 Manage Items

Process Type: Sub Process

Parent Process: 5.6.3 Manage Supplies (CCB)

Sibling Processes: 5.6.3.1 Manage Meters, 5.1.5.1 Manage Meter Site, 5.1.5.2 Manage Un-Metered Site.

Items are uniquely identified devices considered badged or those without a unique identity considered unbadged. Items do not measure consumption however estimated consumption can be defined for an item such as a lamp. Items may impact billing or require fieldwork maintenance. Item records are also used to describe equipment that is linked to meters, service points, and other items. Items may be billed or placed at a Service Point for reference only.

When an organization purchases Items for inventory and installation the Items are recorded in CC&B. This process describes how Items are entered in CC&B inventory as well as maintenance of the Item Record in the system.

The CSR or Authorized User can add a single Item record or add multiple Item records at one time using a replication feature. The item's history can be tracked while in service as well as stock location while in inventor.

Actors/Roles

The Manage Items business process involves the following actors and roles:

- **CSR:** CSR or Authorized User of the Customer Care and Billing application.
- **CC&B:** The Customer Care and Billing application. Steps performed by this actor/role are performed automatically by the application, without the need for user initiation or intervention.
- **Third Party:** Third Party application or User that can request to add and /or maintain meter or item data

Chapter 2

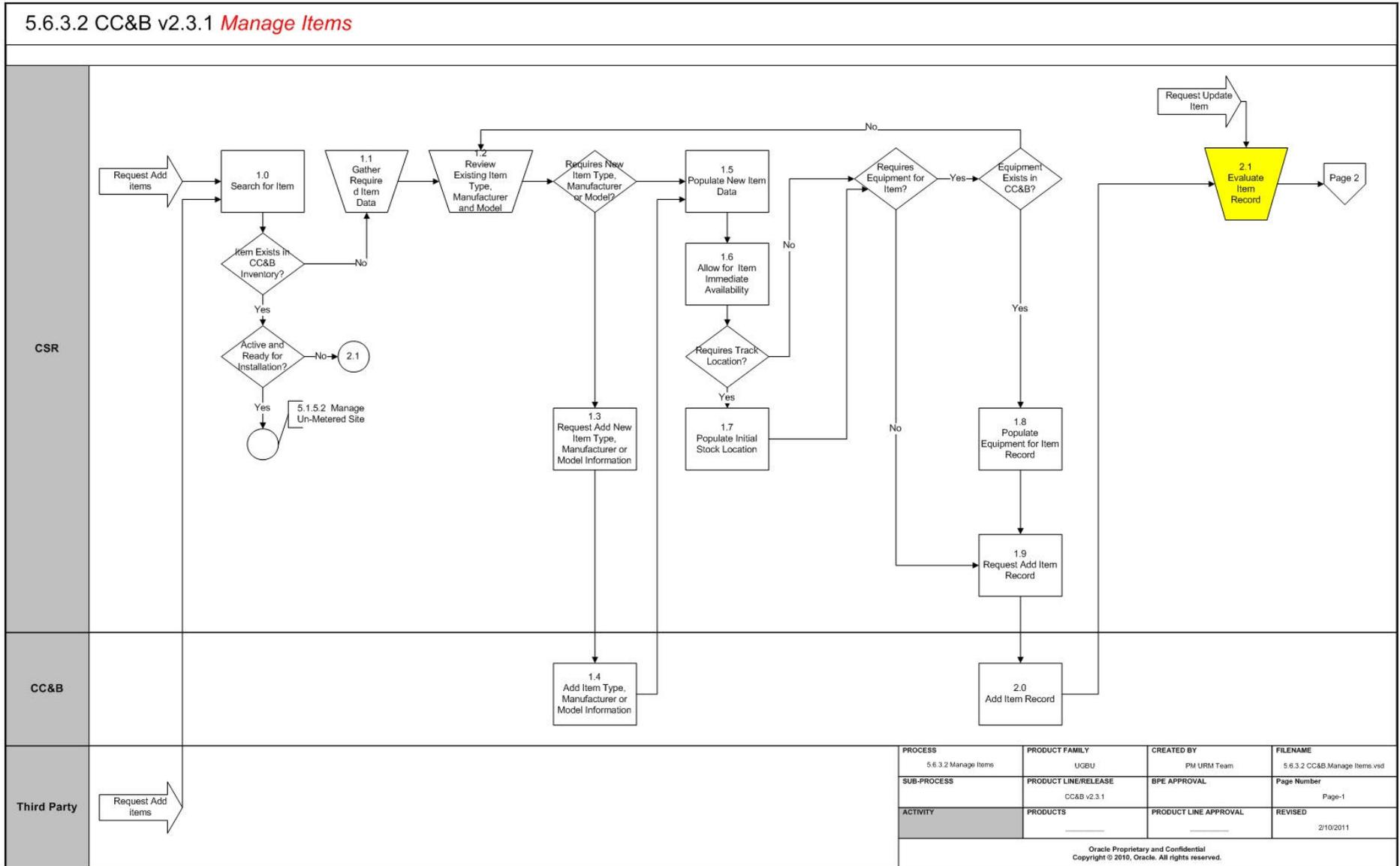
Detailed Business Process Model Description

This chapter provides a detailed description of the Manage Items business process. This includes:

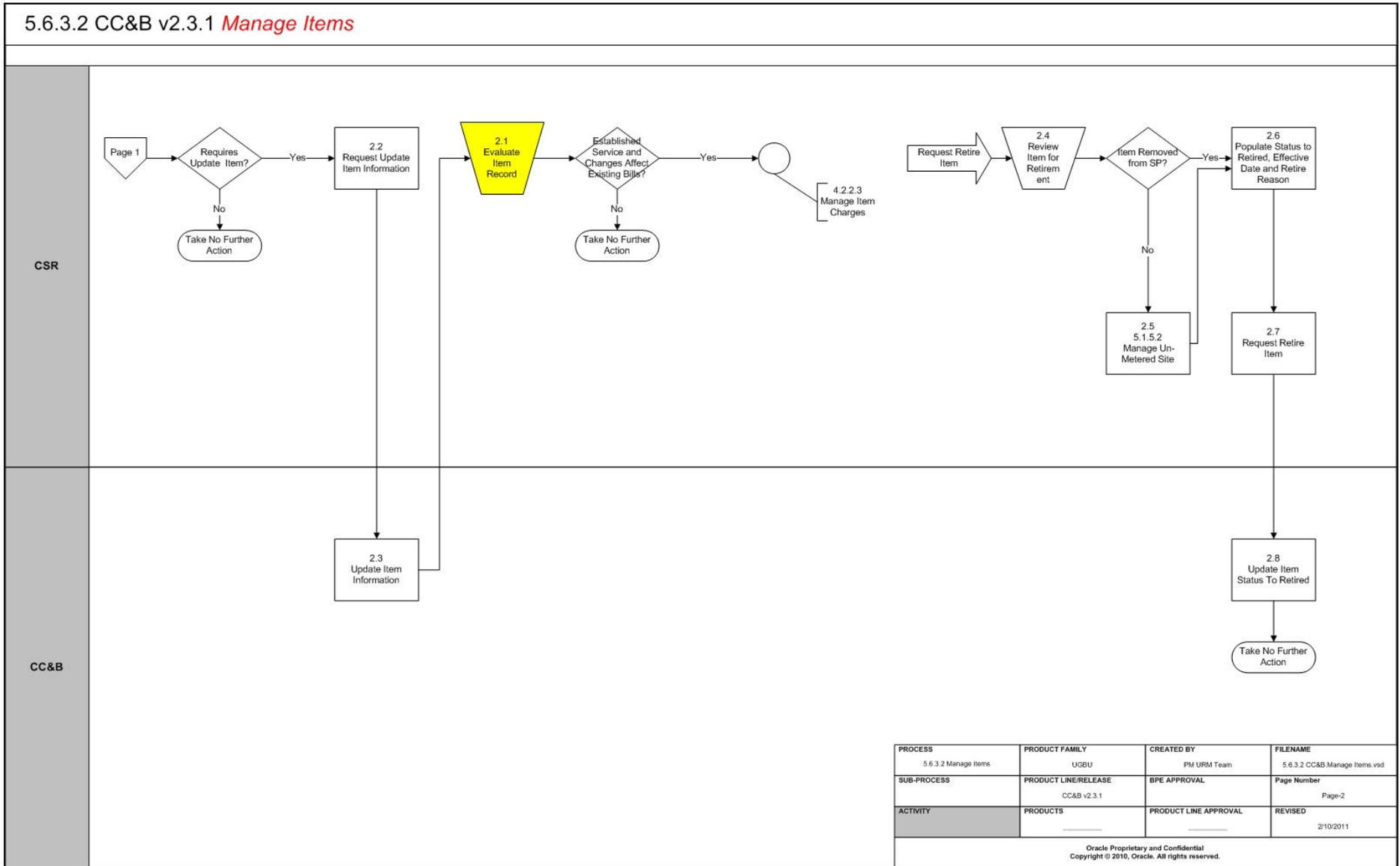
- **Business Process Diagrams**
 - **Manage Items (Page1)**
 - **Manage Items (Page2)**
- **Manage Items Description**
- **Related Training**

Business Process Diagrams

Manage Items (Page1)



Manage Items (Page2)



Manage Items Description

This section includes detailed descriptions of the steps involved in the Manage Items business process, including:

- 1.0 Search for Item
- 1.1 Gather Required Item Data
- 1.2 Review Existing Item Type, Manufacturer and Model
- 1.3 Request Add New Item Type, Manufacturer or Model Information
- 1.4 Add Item Type, Manufacturer or Model Information
- 1.5 Populate New Item Data
- 1.6 Allow of Immediate Item Availability
- 1.7 Populate Initial Stock Location
- 1.8 Populate Equipment for Item Record
- 1.9 Request Add Item Record
- 2.0 Add Item Record
- 2.1 Evaluate Item Record
- 2.2 Request Update Item Information
- 2.3 Update Item Information
- 2.4 Review Item for Retirement
- 2.5 5.1.5.2 Manage Un-Metered Site
- 2.6 Populate Status to Retired, Effective Date and Retire Reason
- 2.7 Request Retire Item
- 2.8 Update Item Status to Retired

1.0 Search for Item

See for **Manage Items (Page1)** the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User searches for the given Item in CC&B to determine if it is in existing inventory. Searching for the Item can be accomplished through Meter/Item Search using various search criteria.

:

Entities to Configure

Geo Type
Installation Options
Stock Location

Available Algorithm

CI_ITMI-DFLT- This Installation Options algorithm formats the item Information for display throughout CC&B. This algorithm formats the "Item Info" that appears throughout the system. This routine concatenates the following information, Item Type, Badge Number, Serial Number, Item Status, Location.

1.1 Gather Required Item Data

See for **Manage Items (Page1)** the business process diagram associated with this activity.

Actor/Role: CSR

Description: Using a purchase order, packing slip or other Item receipt information, the CSR or Authorized User reviews and collects needed information for entering Items in CC&B. Information includes Item type, badge numbers, serial numbers, manufacturer and model.

Entities to Configure

Item Type
Manufacturer
Model

1.2 Review Existing Item Type, Manufacturer and Model

See for **Manage Items (Page1)** the business process diagram associated with this activity.

Actor/Role: CSR

Description: The Items may be from a new vendor or be a new type of Item. The CSR or Authorized User determines if the new Items require any new set up information configured in CC&B. Item Type defines the type of service associated with this Item. It also defines characteristics common to all Items of a given type and the type of equipment that can be linked to the Item.

Entities to Configure

Item Type
Manufacturer
Model

1.3 Request Add New Item Type, Manufacturer or Model Information

See for **Manage Items (Page1)** the business process diagram associated with this activity.

Actor/Role: CSR

Description: If new setup information is required, the CSR or Authorized User enters this information in CC&B.

Entities to Configure

Item Type
Manufacturer
Model

1.4 Add Item Type, Manufacturer or Model Information

See for **Manage Items (Page1)** the business process diagram associated with this activity.

Actor/Role: CC&B

Description: Item Type, Manufacturer, or Model Information is added in CC&B.

Entities to Configure

Item Type
Manufacturer
Model

1.5 Populate New Item Data

See for **Manage Items (Page1)** the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User enters the new Item Information for the Item to be placed in inventory. If this is a badged item a Badge Number is assigned. Typically this is the stamped number from the manufacturer. Serial Number, Date Received as well as Item Type, Manufacturer, and Model are identified.

Entities to Configure

Item Type
Manufacturer
Model
Service Type
Characteristic Type

1.6 Allow of Immediate Item Availability

See for **Manage Items (Page1)** the business process diagram associated with this activity.

Actor/Role: CSR

Description: The Item must be considered Active to be installed at a Service Point. Sometimes organizations track Items in inventory prior to receipt of the Items. In this case the Items are assigned an Ordered status and changed to Active when received.

1.7 Populate Initial Stock Location

See for **Manage Items (Page1)** the business process diagram associated with this activity.

Actor/Role: CSR

Description: If this Item's location is being tracked, a physical stock location is identified.

Entities to Configure

Stock Location

1.8 Populate Equipment for Item Record

See for **Manage Items (Page1)** the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User adds Equipment information to be included with the Item record.

Entities to Configure

Item Type

1.9 Request Add Item Record

See for **Manage Items (Page1)** the business process diagram associated with this activity.

Actor/Role: CSR

Description: When all information is added for the Item, the CSR or Authorized User saves the record.

2.0 Add Item Record

See for **Manage Items (Page1)** the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Item record is added in CC&B.

Entities to Configure

Item Type
Manufacturer
Model
Characteristic Type

2.1 Evaluate Item Record

See for **Manage Items (Page2)** the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User reviews and verifies the accuracy of the newly entered Item record. The CSR or Authorized User may use the Replication feature to enter a full shipment or group of Items at the same time. The CSR or Authorized User reviews the Item information prior to making any changes for an existing Item. Changes may or may not impact existing Bills. Something about the Item record has changed or was entered incorrectly at the time it was placed in CC&B inventory.

2.2 Request Update Item Information

See for **Manage Items (Page2)** the business process diagram associated with this activity.

Actor/Role: CSR

Description: At times it may be necessary to update the Item information. Information may be missing or incomplete. The CSR or Authorized User enters the required information for the change.

2.3 Update Item Information

See for **Manage Items (Page2)** the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Item information is updated in CC&B.

2.4 Review Item for Retirement

See for **Manage Items (Page2)** the business process diagram associated with this activity.

Actor/Role: CSR

Description: At times it is determined an Item cannot be repaired or requires removal due to age of the Item. Some organizations' business rules require removal of Items when they reach a certain age. Once an Item is removed from the Service Point it is changed to Retired in CC&B.

2.5 5.1.5.2 Manage Un-Metered Site

See for **Manage Items (Page2)** the business process diagram associated with this activity.

Actor/Role: CSR

Description: Refer to 5.1.5.2 Manage Un-Metered Site for steps to remove an Item.

2.6 Populate Status to Retired, Effective Date and Retire Reason

See for **Manage Items (Page2)** the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User updates the Item Status to Retired. A retire date and retire reason is entered.

Entities to Configure

Retire Reason

2.7 Request Retire Item

See for **Manage Items (Page2)** the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User saves the Item Record with the updated retirement information.

Entities to Configure

Retire Reason

2.8 Update Item Status to Retired

See for **Manage Items (Page2)** the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Item is updated to Retired Status in CC&B.

Related Training

The following User Productivity Kit (UPK) modules provide training related to this business process:

- Oracle Utilities UPK for Customer Care and Billing, User Tasks