Oracle® Utilities Work and Asset Management

Customer User Guide

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Contents

Chapter 1
Overview

The Customer subsystem is your organization's resource for storing and maintaining customer data. The subsystem includes the Customer module and the Service Request module.

The Customer module stores customer contact information such as address, telephone, e-mail address, and web site. The module is equipped to hold an unlimited number of addresses for each customer, keep track of customer tax id number if necessary, and identify whether the address is a rented or owned property.

The Service Request module stores information related to service calls made by customers. The customer must already be entered in the Customer module so that when the name or Customer ID is entered on a new Service Request record, the system can populate the remainder of the contact information automatically. If the customer does not exist in the Customer database, they can be added from the Service Request module.

The Service Request module references the data contained in the Customer module when a new record is created. The Customer module then keeps track of all of the Service Requests that have been entered for a particular customer.

Chapter 2
Customer

The Customer module stores customer contact information such as address, telephone, e-mail address, and web site. The module is equipped to hold an unlimited number of addresses for each customer, keep track of customer tax id number if necessary, and identify whether the address is a rented or owned property.

When creating a new customer record, the user enters all pertinent customer information on the main record. When this record is saved, the customer record is created, the address information is copied to the first record in the Address (Detail) view, and the CONTACT INFOR check box is checked to indicate that this is the primary contact information for the customer. After the first record is entered all subsequent addresses must be entered in the Address (Detail) view directly. Later, you can change the primary contact information indicated if necessary.

The information entered in the Customer module is used by the Service Request module when a new record is created. The Customer module then keeps track of all of the Service Requests that have been entered for a particular customer in the Service Request view.

Customer record

The following fields are included:

Customer ID - This is the unique identifier for the customer. The system will create a number for you when the record is saved or the number can be manually assigned, depending on your system configuration. If the number is assigned manually, the system verifies that the number is not a duplicate before the record is saved.

Note: Note: If you create this record ID manually, avoid the use of the special characters ', ", &, or % as they may result in processing errors.

Status - There are only two statuses for a Customer record; Active and Inactive indicate whether or not this is an active customer. If status is set to Inactive, the customer is not listed on the list of values for Customer ID selection on a new Service Request record.

Company Name and Customer Name - These fields indicate the primary contact person and company name. There is space for Last, First, and Middle name.

Contact Information - Enter the Address, Phone numbers, Fax, E-mail, and Website for the company. When the record is saved this information is copied to the first record on the Address (Detail) view and the system checks the Contact Info check box on that screen to indicate that this is the primary contact information for the customer. Any additional contact information can only be entered by creating a new Address (Detail) record.

The first Address field provides space for an address prefix. New York, Honolulu, and some areas in Southern California use a street prefix in their addresses. If the address does not have a prefix leave this field blank.

The primary contact information will be copied to any new Service Request records that are created for this customer.

CC&B Account Information - These fields are used to store information related to integrated records between Oracle Utilities Work and Asset Management and CC&B. Please contact your product representative for more information.

How to Enter a New Customer Record

1. **Open the Customer module in the Customer subsystem.**
2. **Click New.**
3. **Enter the Last Name and First Name.**
   Last and First name are the only required fields. There is also space to enter a middle name if applicable.

4. **Continue to enter contact information as appropriate.**
5. **Click Save.**
   The information is copied to the first record on the Address (Detail) view and the system checks the Contact Info check box on that screen to indicate that this is the primary contact information for this customer.

   Any changes to the information initially entered must be made in the Address (Detail) view. Any additional contact addresses that should be entered must also be entered in the Address (Detail) view.

Customer Views

In addition to standard notes, attachments, and approval views, the module includes the following:

Address (Detail)

When the first record is created for a Customer, the system copies that information to create the first Address (Detail) record.

The main functions of the Address (Detail) view are:

1. To designate the primary contact record for a customer so that the system knows what information to copy to new Service Request records when they are created for a customer.

2. To provide a space where additional customer contact information such as alternate addresses or phone numbers, can be created.

The Address (Detail) screen is very similar to the main customer record except that it provides the following additional fields:

Address ID - The Address ID field is a system generated identifier for the Address records. Each record has a unique number. The first Address field provides space for an address prefix.

Tax ID - Some customers require a Tax ID for billing.

Contact Info check box - The Contact Info check box designates which Address record should be used as the primary contact for this customer. The system uses the primary contact to populate the fields on new Service Request records for this customer.

Property Type - Designate whether the address on the record is rented or owned by the customer. The field can be left blank if necessary.

The Address records are ordered so that the primary contact (the record with the Contact Info check box checked) is first. Only one record can be checked as the primary contact.

CC&B Service Agreements - This section is used to record the service agreement IDs for customers that are shared between Oracle Utilities Work and Asset Management and CC&B. Please contact your product representative for more information on CC&B integration.

How to Change the Primary Contact Information for a Customer

The primary contact information for a customer is indicated by the Contact Info check box on the Address (Detail) view of a Customer record.

1. **Open the Customer record for the appropriate customer.**
2. **Select Address (List) from the Views list.**
   You will notice that the first line item has a check next to it.

3. **Locate the line containing the address that should be designated as the primary contact.**
4. **Click the arrow next to the line to open the record.**
5. **Select the Contact Info check box.**
6. **Click Save.**
   To verify that the new address has been designated as the primary contact, select Address (List) from the Views list again. The new address now has a check next to it, and it has been reordered to the top of the list to indicate that it is the primary contact record.

   The new address is also now displayed as the main Customer record.

Address (List)

This summary view shows a listing of all of the addresses entered for a particular customer. The first line item should be checked indicating that this address is the primary contact information for this customer.

Click the arrow next to a line item to open the Address (Detail) record for that line.

Service Requests

This view shows a listing of all of the Service Requests that have been entered for this customer.

Double-click a line item to open the Service Request record for that item.

The lower portion of the screen shows the customer's call history for the highlighted Service Request number. This information is entered and maintained in the Call History view of the Service Request module. It cannot be modified here.

Cost Summary

The Cost Summary view summarizes Actual Costs per Expense Code Category for the Customer. This information is calculated by batch processing and cannot be modified.

Period Costs

The Period Costs view summarizes Actual Costs for the Customer, broken down by Expense Code Category and Period. This information is calculated by batch processing and cannot be modified.

Chapter 3
Service Request

When customers contact your organization to identify a problem or work that needs to be performed, use the Service Request module to manage these requests. A Service Request record allows you to identify the problem, the location of the problem, and the customer/caller information.

The Service Request module is equipped to handle many different scenarios that may arise when a problem is reported. For example, there are times when the caller may be a customer but the problem is not located at the customer address. There may also be times when the caller is not a customer, and the problem is located at either a customer address or at an another address not associated to a customer. The module includes fields where you can log any kind of situation, as well as an area for notes and attachments in case you need to include further information.

The Service Request module also maintains a log of the activities of the crew assigned to the service request, applies labor, material, and direct charges to the appropriate accounts, associates multiple assets to the service request, allows input of closeout information, and creates follow-up work orders if necessary. The module is equipped to maintain multiple caller information entries per service request, and to keep a log of changes made to the service request from its creation to closeout.

This chapter covers the service request process from creation to closeout.

Service Request Records

When a new request is entered you can search for similar or duplicate Service Requests to maximize work efficiency. Standard Approval processing is also included to manage the work flow.

Service Request module

You are not required to use the Customer module with the Service Request module. You can also enter Service Request records that do not reference a particular Customer record.

If a customer number is entered into the Service Request module, the system automatically populates the related customer information fields based on the existing information in the Customer module. The customer must already be entered in the Customer module to enter a Customer ID.

Note: The Service Request module does not have permit or planning functionality. A related Work Order should be created for jobs requiring planning, scheduling, or purchase orders.

After service requests are entered into the system, work can begin and charges can be applied to the service request and monitored accordingly. You can create follow-up work orders if the service request work requires extensive planning, and the functionality in the Work Order module would be better suited for managing the project. The system also maintains a listing of each service request that is created referencing a Customer record. This information can be found in the Service Requests view of the Customer module.

The following fields are included:

Service Request - This is the unique identifier for the Service Request. The system will create a number for you when the record is saved or the number can be manually assigned, depending on your system configuration. If the number is assigned manually, the system verifies that the number is not a duplicate before the record is saved.

Type - Use the Type field to indicate what the Service Request is for. Code Table 240 controls the associated list of values. Examples are Maintenance or Inspection.

Status - The following statuses can be applied to the Service Request:

> **Created** - Defaulted when a Service Request is entered.

Allowed status changes: Created ➡ Pending Approval, Approved, Active, Canceled, or Held.

Pending Approval - Set the record status to Pending Approval to route the record to the approver.

Allowed status changes: Pending Approval ➡ Created, Approved, Canceled, or Held.

Approved - Records in Approved status have been reviewed and are ready to assign. All fields and details are still updateable when the record is in Approved status.

Allowed status changes: Approved ➡ Created, Pending Approval, Active, Canceled, or Held

Active - Indicates that the Service Request has been assigned. All fields and details are still updateable in Active status.

A valid account number must be entered before the status can be changed to Active.

Allowed status changes: Active ➡ Created, Canceled (if no costs have been entered in the account log), Held, or Finished.

Finished - Indicates that the work has been finished.

Allowed status changes: Finished ➡ Active or Closed. If the Asset list is not populated the system displays a warning when you try to change the status to Closed.

Work Order - This status indicates that a Work Order has been created from the Service Request. The user can change the status to Closed, set the Bill Customer Indicator, and enter Closeout, billing and Asset information at this point after the Work Order is created. Once a Work Order has been created the work should be managed in the Work Order module. When you set this status the system asks if you want to add the Service Request work to an existing Work Order or create a new Work Order. If you add to an existing Work Order the Service Request will be added and referenced in a new Work Order Task.

Users must have the function CREATE WO FROM SERVICE REQUEST in their responsibilities to be able to change the records status to Work Order.

Allowed status changes: Work Order ➡ Closed.

Closed - Indicates that the Service Request record has been filled out and that the Asset Costs can be posted and billing can be processed. After the status is changed to closed the record cannot be updated, however, the user can still enter Closeout, and Billing Information.

Allowed status changes: Closed ➡ Finished.

Canceled - Indicates that the Service Request has been canceled. Main form and detail data is locked.

Allowed status changes: Canceled ➡ Created.

Held - Indicates that the Service Request has been Held for some reason. All fields are updateable.

Allowed status changes: Held ➡ Created, Active (if the person changing status has the appropriate approval authority), Finished, or Canceled (if no costs have been entered in the account log).

Billed and Paid statuses are only used for interfaces and cannot be set manually.

Billed - (Interfaces only) Indicates that a Customer Invoice has been generated for the charges on the Service Request. Only the Billing Information view is updateable from this status.

Allowed status changes: Billed ➡ Paid.

Paid - (Interfaces only) Indicates that the Customer has paid the Invoice for the Service Request.

At this point no further changes can be made to the record.

Call Back Ready - This indicator can be checked to indicate that the Service Request is ready for a call back. This indicator is informational only.

Call Back Complete - This indicator can be checked by the person who called the customer to indicate that the call was made.

Dispatcher - When a new record is created, the system automatically populates this field with the name of the user logged on to the system, however it can be changed if necessary. The field has an associated list of values that shows Active employees.

Next Approver - The approval title for the person responsible for approving the record. The list of values for this field is controlled by the Approval Limits module in the Administration subsystem.

Next Approver must be entered before you can change the status to Pending Approval.

For more detailed information on approvals, please refer to the document entitled Approvals in the System Basics User Guide.

Created, Active, Schedule, Requested, and Finished Date - Enter the date that the work is Requested Date when the call is initially made. The system automatically enters the Created date when the a new record is saved, the Active date when the status is set to Active, and the Finished date when the status is changed to Finished. The Schedule Date can be entered manually when the service request is in Created, Pending, Approval, Approved or Active status. When the service request is in Work Order status, the field is automatically populated when the schedule date on the work order task referencing the service request is changed.

Customer Information - These fields are used to identify the customer if applicable.

Customer ID - Select a Customer ID from the list of values. The list shows all active customers in the Customer module. Once the Customer ID is selected the remainder of the contact fields are populated based on that customer's record in the module.

If the Customer ID that has multiple addresses associated to it is selected, the system displays a list of all of the addresses for the user to choose from.

If there is no Customer ID available for the customer, enter a last and first name, and select Create New Customer from the Actions list to add the customer to the Customer module.

Customer Contact fields - When the Customer ID is entered, the system enters the name, Tax ID, and Address ID. Descriptions of these fields can be found under the Customer module topic.

The street address field has a list of values so that you can ensure consistency of address entries.

Bill Customer - This indicator can be set when the user intends to have Customer Invoices generated for the costs of the Service Request. This indicator can only be set if the Customer ID field is populated.

Call Back - Place a check in this box if a follow-up call should be made to the customer. If any of the Call Back indicators on the Call History view are checked when the record status is set to finished, the system places a check in the Call Back Ready check box on the header screen.

Problem Information - These fields are used to indicate the location of the problem.

Same as Customer Information - Check this box if the caller is the Customer, and the system will automatically enter the customer contact information in the following fields.

Problem Contact Information - If the problem is not at the address of the customer you can use these fields to enter the address and other contact information for the location of the problem.

Problem Code and Description - Select a Problem Code from the list of values to identify the problem according to your organization's standards. Enter a detailed description of the problem in the provided field.

Reported By Information - These fields are used to indicate who reported the problem.

Same as Problem Information - Check this box if the caller is either the Customer or if the caller is associated with the same information as was entered for the Problem. For example, if a customer calls to report a problem at his or her location, you would simply enter the Customer ID and check the Same as Customer Information check box and the Same as Problem Information check box. For more complicated reports, such as an anonymous caller reporting a problem at one of your non-customer sites, you can use the Reported By, and Problem Information areas on the record to log the full information.

Reported By and Contact information - Use the Reported by and the following contact information fields to indicate who reported the problem and how you can get back in contact with them if needed.

When a Customer ID is entered, the system automatically enters that customer information Reported By fields. However, this information can be changed.

If any of this information is changed and the "Same as Problem Information" check box is checked, the system will automatically uncheck the box.

CC&B Fields - The fields labeled External Order and CCB Service Point are used to reference records in Oracle Utilities Customer Care and Billing that are integrated with the service request. Please contact your product representative for more information on integration with Oracle Utilities Customer Care and Billing.

How to Create a Service Request Record

You can also initiate the process of creating a new Service Request from within the Customer module by selecting the action from the Actions list.

1. **Open the Service Request module in the Customer subsystem.**
2. **Click the New icon.**
3. **Select a Service Request type from the list of values.**
   The Type field indicates what the service request is for. Examples are Maintenance or Inspection.

4. **Verify the Requested Date field.**
   This is the date that the customer requests to have the work done. The system automatically fills in this field with the current date and time, but you can change it if necessary.

5. **Enter or find the Customer ID number if applicable.**
   You may not need to enter a Customer ID if the caller is not your customer. Continue to Step 6.

   If you do need to enter the Customer ID, but you do not know the number, you can use the following procedure to locate it.

   Click the list of values button next to the last name field. Enter all or part of the name find field, then click the Find button.

   The system retrieves a list of the names matching the search criteria.

Select the appropriate name.

Remember the Primary address is listed first when there is more than one customer address. The primary address is identified on the Customer record with a check in the Contact Info check box.

If the Customer ID is has multiple addresses, the system opens a dialog box displaying all of the addresses with the customer's primary address listed first.

Select the appropriate address. The system fills in the remaining customer fields with information from the Customer module.

6. **Enter Problem Information.**
These fields are used to indicate the location of the problem.

See the section in this chapter entitled Find Duplicate Requests to find out how you can check for duplicate requests at this stage of record creation.

7. **Enter Reported By Information if needed.**
These fields are used to indicate who reported the problem.

When a Customer ID is entered, the system automatically enters that customer information Reported By fields. However, this information can be changed.

If any of this information is changed and the "Same as Problem Information" check box is checked, the system will automatically uncheck the box.

8. **Enter additional information as necessary.**
9. **Click the Save icon.**
After saving the record you should route it for approval by entering an approval title in the Next Approver field and setting the record status to Pending Approval.

Once the service request has been approved, you must set the status to Active to activate the record so that work can begin and hours and other charges can be posted accordingly.

Service Request Views

In addition to standard notes, attachments, and approval views, the module includes the following:

Address (Detail)

When the first record is created for a Customer, the system copies that information to create the first Address (Detail) record.

The main functions of the Address (Detail) view are:

1. To designate the primary contact record for a customer so that the system knows what information to copy to new Service Request records when they are created for a customer.

2. To provide a space where additional customer contact information such as alternate addresses or phone numbers, can be created.

The Address (Detail) screen is very similar to the main customer record except that it provides the following additional fields Address ID, Tax ID, Contact Info check box, Property Type.

The Address records are ordered so that the primary contact (the record with the Contact Info check box checked) is first. Only one record can be checked as the primary contact.

CC&B Service Agreements

This section is used to record the service agreement IDs for customers that are shared between Oracle Utilities Work and Asset Management and CC&B. Please contact your product representative for more information on CC&B integration.

In addition to standard notes, attachments, and approval views, the module includes the following:

Address List

Use the Address List view if you want to associate more problem addresses with the service request. Addresses on the Address List view are searchable from the Search Options page when both the Problem Address radio button and the Include Additional Addresses check box are selected.

The additional problem addresses entered on the Address List view do not copy to follow-up work orders created from the service request. Only the primary problem address listed on the main record copies to the work order.

The fields on the Address List view are identical to the address fields in the Problem Information section of the main record. When entering addresses, you must save the record after completing each address.

How to Add Multiple Addresses to a Service Request
1. **Open the appropriate service request.**
2. **Select Address List from the Views list.**
3. **Enter an address in the first available address block.**
   You can enter address, suite, cross street, and city/state/zip information as appropriate.

4. **Click Save.**
5. **Enter additional addresses as required.**
   You can enter as many addresses as necessary, so long as you save the record after completing each address.

   The addresses you enter are searchable from the Search Options page when both the Problem Address radio button and Include Additional Addresses check box are selected.

Asset List

Use the Asset List view to list the Assets that are related to the Service Request work and the percentage split of the associated costs. The Asset List cannot be modified once the Service Request status has been set to Closed.

When a Work Order is created from the Service Request the Asset List is copied to the Work Order Task Asset List.

Assets have been Posted - Once the Service Request is closed, the system processes the Assets listed and applies costs throughout the system appropriately. When the Assets are posted the system places a check in this box.

Asset Posted Date - The system automatically enters the date and time that the Asset(s) were posted by the system.

Asset ID - The Asset ID can be selected from the list of values associated to this field.

Description - The system automatically enters the description of the Asset as it appears on the Asset record. This information cannot be modified.

% - The system enforces a percent split total of 100% when new Assets are entered. Select Balance Asset Distribution from the Actions list to evenly distribute the percentage split across all assets listed on the service request.

Service History

Use the Service History view to maintain a service history for the Asset ID/ Component ID listed on the Service Request. Service History information is established via a two-step process:

1. Set up a Specification Template record for the type of service performed.

2. Reference it by entering Type and Category.

Once the information is established, users can enter the Specification Values for each applicable attribute. See the Specification Template sections of the Resource User Guide for further information.

For example, set up a Specification Template, then a Specification record where you customize the list of attributes for that specific type of work. The Specification Number and Category may then be used on Service History records, where users enter Specification Values for each attribute such as the mileage, date, tire pressure, number of quarts of oil used, oil filter replaced (yes/no), and so on.

Service History entered on service requests can be accessed from the Views list in the Asset, Component ID, Fleet Asset, Function, and Process modules.

Work Order Data

This view displays Work Order information related to the Service Request.

Department, Area, and Account - If there is a Department, Area, and Account that should be associated to the Service Request, that information can be selected from the lists of values associated to these fields. A valid account number must be entered before the Service Request can be activated.

Crew - Enter the Crew that is scheduled to work on the Service Request in this field.

Backlog Group - The Crew backlog group can be selected from the list of values associated to this field.

Work Order Number - This field is populated by the system for reference when a Work Order associated to the Service Request is created by selecting Create Follow-up Work Order from the Actions list. This field cannot be modified.

Associated Service Requests

The Associated Service Requests view provides a cross-reference to other service requests that are related to the same problem, customer, or any other common information.

The listing is built automatically as new Service Requests are created by selecting Create Associated Service Request from the Actions list on an existing Service Request. Associated Service Requests can be entered manually as well by selecting the Service Request number from the list of values in the Number field. The system populates the remaining fields automatically.

Note: Double-click the Service Request Number field to open the Service Request listed.

Once you create an association on one record, the system automatically creates the association in the view of the other Service Request.

How to Associate a Service Request using the Actions List
This action allows an existing service request to be used as a "template" for new service requests, and is available when the service request is in any status.

1. **Open the service request that you want to create the association to.**
2. **Select Create Assoc Service Request from the Actions list.**
   When you select the action, the system displays a dialog box prompting you to enter the new service request number. If your system is configured to create service request numbers automatically simply click the OK button. If your system is not configured in this way, enter the New service request number and click the OK button. The system then displays a message confirming creation of the service request and displaying the service request number.

   The system copies the current service request information (with all Notes, Attachments, Approvals, and Asset List) to a new service request with a newly generated service request number.

3. **Double-Click the service request number to open the new record and make any necessary modifications.**

How to Associate a Service Request Manually
This process allows you to link service requests that are related in some way and that you want to cross-reference.

1. **Open the service request that you want to create the association to.**
2. **Select Associated Service Requests from the Views list.**
3. **Place the cursor in the first empty line.**
4. **Enter the service request number for the service request you want to associate.**
5. **Click Save.**
   The system adds the association to this record as well as to the record for the service request that you just added to the list.

Associated Work Orders

This view provides a cross-referenced listing of Work Orders that are related to the same problem, customer, or any other common information.

The system automatically inserts the Work Order number in the Associated Work Orders view when the Create Follow-Up Work Order Action is used from the Service Request record. You can also associate Work Orders manually by selecting the Work Order number from the list of values in the Number field. The system populates the remaining fields automatically.

Once you create an association on one record, the system automatically creates the association in the view of the Work Order.

Double-click the Work Order Number field to open the Work Order listed.

How to Associate a Work Order Using the Actions List
1. **Open the service request that you want to create the association to.**
2. **Select Create Follow-Up Work Order from the Actions list.**
   When you select the action, the system displays a dialog box prompting you to select an existing Work Order or to leave the field blank to create a new Work Order. Make your selection and click the OK button. The system then displays a message confirming creation of the Work Order and displaying the Work Order number.

   The system copies the service request information to Task #1 on a new Work Order.

3. **Select Associated Work Orders from the Views list to review summary information on the Work Order or to drill-down on the work order number.**

How to Associate a Work Order Manually

This process allows you to link Work Orders that are related in some way and that you want to cross-reference.

1. **Open the service request that you want to create the association to.**
2. **Select Associated Work Orders from the Views list.**
3. **Place the cursor in the first empty line.**
4. **Enter the Work Order number for the Work Order you want to associate.**
5. **Click Save.**
    The system adds the association to this record as well as to the record for the Work Order that you just added to the list.

Call History

The Call History view can be used to maintain a history of calls that have been taken related to the Service Request.

Enter the Call Date, Caller Name, Phone Number, Comments, and Response manually. The system automatically assigns a Call Number, enters the Customer ID of the Customer indicated on the Service Request record, and updates the Created By and Last Updated By information when the record is saved. The Customer ID can be modified if necessary. Double-click this field to open the Customer record in the Customer module.

If a return call is required you can check the Call Back indicator and enter a date in the date field next to it.

The calls are ordered by the date of the call with the most recent calls listed at the top.

Closeout

Once work has been completed on the service request, or it has been migrated to a work order, it is time to close the record. Use the Closeout view to enter information related to the completion of the Service Request.

Start - The start date is populated by the system when the Active Date is entered on the Service Request record. Active Date is established when the record status is set to Active.

Finish, Duration - Enter the date that the work was Finished. The system calculates the Duration in hours.

Completed - Place a check in the Completed box to indicate whether or not the job was completed. An instance where you might close the Service Request when the job is not complete is if you create a Work Order from the Service Request because more in depth planning and scheduling is needed to complete the work.

Failure, Repair, and Further Action - Select Failure, Repair, and Further Action codes from the lists of values as is appropriate.

Component - The Component code indicates which component of the asset was worked on. This is not the same information as that used for tracking components in the Component ID module of the Resources Subsystem. You can update the field by selecting a code from the List of Vales controlled by Code Table 222 in the Code Table and Codes module.

Root Cause - Use of this field varies from organization to organization. The field has an associated List of Values that is controlled by Code Table 52 in the Code Table and Codes module.

Comments - Enter any necessary comments in this freeform field.

Inspected By, Signoff By, and Closed By - These are free form fields where the appropriate supervisors can enter their names and the dates that the work was inspected, signed off, and finally closed.

Cost Summary

The Cost Summary view displays a sum total of all charges for the Service Request, along with a listing of charges grouped by Expense Code Category Descriptions (i.e., Labor, Material, etc.). This information cannot be modified.

If you have the appropriate function responsibility in your user profile, you can also use this view to compare actual amounts from an external financial system with the estimates maintained by Oracle Utilities Work and Asset Management.

Activity Log

The system automatically records status changes made to the Service Request record as they are saved in the Activity Log. Users can also enter new line items in the log to record information such as when the crew arrived to work on the problem, start times, finish, or return. Code Table 120 controls the list of values.

Event Type - The Event Type field shows whether the event posted to the log was a system entered status change or a user entered job related event.

Event Date and Reported By - The system automatically enters the date and time of the entry as well as the name of the person logged on to the system. This information can be changed if necessary.

Crew and Backlog Group - The user can also enter Crew and Backlog Group information to monitor which crew worked on the job at a given status.

The Crew and Backlog entered on this view are not recorded on the main Service Request record.

How to Create an Entry in the Activity Log
1. **Open the appropriate Service Request record.**
2. **Select Activity Log from the Views list.**
3. **Click New.**
4. **Enter an Event Type**
   Examples are Arrive, Depart, Start, or Finish.

5. **Select the Crew that was involved with the work during the time of the selected event (if applicable).**
6. **Enter a Backlog group (if applicable).**
7. **Enter a description of the event.**
8. **Click Save.**

Meter Information

The Meter Information view is only used with CC&B integrated service requests. Please contact your product representative for more information on CC&B integration.

Select Meter Information from the Views list in the Service Request module to validate meter badge numbers. Enter a number in the Meter Badge Number field and click the Validate button.

The system initiates an outbound service that verifies whether or not the badge number exists on the service point of the Field Activity. If the badge number is valid, CC&B returns register information and meter readings to populate the Meter Information view. After Meter and

Readings are returned, the user can update the Read Date/Time, Status, Disconnect Location, and the actual reading.

The Service Request Status Trigger rule key in the Product Integration CCB Business Rule must be set to ON.

Billing Information

When the Service Request record is created, the system automatically enters the related customer contact information if applicable. If the Customer ID or Name is modified here, the system will update the remaining fields with the remaining contact information. The header record will also be updated with the new name and contact information. If the "Same as Customer Information" or the "Same as Problem Information" check boxes are checked, applicable updates will be made to the header record according to changes made in the Billing Information view.

Manually enter the billing dates and amounts in the Billing Information view. This information is updateable until the Service Request is in Paid status. This view is for informational purposes only and does not include processing with the Invoicing module.

Manufacturer Warranty

The Manufacturer Warranty view displays warranty information for assets and components referenced by the service request Each line identifies an asset or component, along with the associated warranty, including manufacturer, warranty ID and description, expiration date and status. You can use this information to identify work that may be under warranty.

Service Request Actions

In addition to various searching and printing options, the Service Request Actions list includes: Create Associated Service Request, Create Follow-up Work Order, Create New Customer, Timesheet, Direct Charges, Find Duplicate Requests, Address Search, and Account Log Transaction.

Create Assoc. Service Request

If you must have the appropriate responsibility in your User Profile, you can select Create Assoc. Service Request from the Actions list to quickly create a new Service Request based on the current Service Request. This allows an existing Service Request to be used as a "template" for new Service Requests.

The action copies the current Service Request information (with all Notes, Attachments, Approvals, and Asset List) to a new Service Request with a newly generated Service Request number.

This action is available regardless of the status of the existing Service Request.

When you select the action, the system displays a dialog box prompting you to enter the new Service Request number. If your system is configured to create Service Request numbers automatically simply click the OK button. If your system is not configured in this way, enter the New Service Request number and click the OK button. The system then displays a confirmation message notifying you that the new Service Request has been created and noting the Service Request number.

Open the new record to make any necessary modifications.

Create Follow-up Work Order

If the work required for the service request requires extensive planning or scheduling, it may be best to create a follow-up work order so that you can use the functionality in the Work Order module to perform functions such as breaking the work up into tasks, assigning the tasks, and/or scheduling the work.

How to Create a Follow-up Work Order

Note: You must have the appropriate responsibilities set up to use this action, and it is only available if the service request status is Approved, Active, or Finished.

1. **Select Create Follow-up Work Order from the Actions list.**
    The system prompts you to enter the necessary information to create a new work order or add a new task to an existing work order.

    If you are adding to an existing Work Order, the system adds the work required on the Service Request as the last task on the Work Order. All related charges are then posted to this task as well as to the originating Service Request.

2. **Follow the instructions in the dialog box and click Save.**
    You can click the Cancel button to cancel the work order.

    The system transfers as much information as possible from the service request to the work order such as the Dispatcher, Description, Accounts, and Assets. If the Set New Work Order to Auto Close? box is checked, the work order is created with the Auto Close indicator checked. The system also indicates the Work Order number on the Service Request record in the Work Order/Task fields, and sets the status of the service request to WORK ORDER. The work order is created with one task that cross references the service request. If the service request is added to an existing work order, a new task is added to the work order in the same status as the work order header.

Create New Customer

If you are certain that the customer you are looking for is not already in the system, you can select Create New Customer from the Actions list to quickly create a new Customer record.

Select Create New Customer from the Actions list to quickly create a Customer record related to a Service Request.

Note: To avoid entering duplicate customers, you should do a search using the Address Search action to make sure that the customer name and address does not already exist in the system. You must have the appropriate responsibilities set up to use this action.

Enter the Last and First Name of the new customer then select the Action from the list. The system then opens a new Customer record where you can enter the remaining contact information for that customer.

You can also enter contact information on the Service Request record then select the Action, and the system will transfer any information over to the new Customer record.

After the Customer record is saved, return to the Service Request module and select the newly created Customer ID.

This action is available when the Service Request record is in Created, Pending Approval, Approved, Active, and Finished status.

Timesheet

Select Timesheet from the Actions list for quick access to the Timekeeping module.

When you select the action the system opens the first of several screens where you can create a timesheet for a single employee or for a crew. You must have the appropriate authority in the Timekeeping Authority Business Rule to create timesheets for a crew.

The Timesheet action is available when the Service Request is in Active and Finished statuses.

How to Enter Time Charges

This action is available when the Service Request is in Active and Finished statuses.

1. **Select Timesheet from the Actions list.**
   The timesheet window opens with the current date in the Date field. The date can be modified if necessary.

2. **Click the Employee or Crew radio button.**
3. **Modify the Date if necessary.**
   You would need to change the date to enter time charges for work done in the past.

4. **Enter Employee or Crew information as appropriate.**
   If you are entering time for an individual employee, enter or select the Employee Number of the person who completed the work. The selections available from list of values associated with the Employee Number vary depending on your authority settings in the Timekeeping Authority Business Rule. When you enter or select an employee number, the system populates the name field.

   If you are a supervisor entering time for a crew, the system defaults the Crew from your employee record. If you are responsible for multiple crews, no default Crew is supplied and the list of values provides a listing of crews for you to select.

5. **Click the OK button.**
   The system opens the timekeeping record and creates a time entry with the Service Request number referenced.

6. **Make any additional modifications to the entry such as entering hours.**

Direct Charges

Select Direct Charges from the Actions list for quick access to the Direct Charges module.

When you select the action the system opens a screen with the current date and your employee number filled in. Both can be modified if necessary. Click the OK button to search for existing Direct Charge records where you can add additional charge items. If no records are found, the system asks if you want to create a new record.

This action is available when the service request is in Active and Finished statuses.

How to Enter Direct Charges

This action is available when the Service Request is in Active and Finished statuses.

1. **Select Direct Charges from the Actions list.**
   The system enters the current date in the Date field.

2. **Modify the Date if necessary.**
   You would need to change the date to enter charges for work done in the past.

3. **Enter the Employee Number of the person who completed the work.**
   The system automatically populates the name fields.

4. **Click the OK button.**

   The system opens the direct charges record and creates an entry.

5. **Enter the required information for the record.**
6. **Click Save.**

Find Duplicate Requests

You must at least fill in the Street Name field to search for duplicate requests. You can also enter more detail such a Service Request Type, Problem Code, or City; however you do not want to limit the search too much or else you might not be able to find the actual duplicates.

Select Find Duplicate Requests from the Actions list to retrieve a listing of possible duplicate requests based on the Service Request Type, the Problem Code, Street Address, and City. This information cannot be modified.

Double-click the Service Request Number to open that Service Request.

This action is available when the Service Request is in Created, Pending Approval, Approved, Active, Held, and Finished status.

How to Search for Duplicate Service Request Records

You should search for duplicate records after you enter the Problem Code and street name during the Service Request record creation.

1. **Select Find Duplicate Requests from the Actions list.**
2. **Fill in the Street Name field**

   You can also enter more detail such a service request type, problem code, or city; however you do not want to limit the search too much or else you may not find the actual duplicates.

3. **Double-click a service request number to open that request.**

   You cannot modify a Service Request record that was opened in this way.

Address Search

This action is available when the Service Request record is in Created, Pending Approval, Approved, Active, Held, and Finished status.

Many customers will not know their Customer ID number off-hand, or the person calling may be calling on behalf of a neighbor or a site near their own location. You can select Address Search from the Actions list to execute a search of the Customer module. This feature can be useful in aiding you to identify the location of a problem if the caller is not able to provide the exact information.

Select Address Search from the Actions list to execute a wizard to aid in identifying the location of a problem if the caller is not able to provide the exact information.

How to Search for Addresses

1. **Open the appropriate Service Request record.**
2. **Click Save.**

   This step should be completed when you are trying to identify the customer on the Service Request record. You have to save the record before the Address Search action appears on the Actions list.

3. **Select Address Search from the Actions list.**

   This screen functions much like the Search Options screen of every module. Enter search criteria, and click the Search button. The system then looks in the Customer module for matching records and returns a listing of matches.

4. **Enter search criteria.**
5. **Click the Search icon.**
    If you do not see a match, try entering different search criteria.

6. **Click the arrow next to the correct line to expand the information.**
    You can then click the Use On Service Request button to transfer the information back to the service request that you were working on.

Account Log Transaction

Select Account Log Transaction from the Actions list to display Account Log entries related to the Service Request.

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