

# **Oracle Utilities Load Profiling and Settlement**

User's Guide

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# Chapter 1

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## Oracle Utilities Load Profiling and Settlement Overview

This chapter provides an overview of the web-enabled Oracle Utilities Load Profiling and Settlement, including:

- **What is Oracle Utilities Load Profiling and Settlement?**
- **What is this book?**
- **Oracle Utilities Load Profiling and Settlement Components and Documentation**
- **International and Multiple Currency Support**
- **Working with Oracle Utilities Load Profiling and Settlement**

## What is Oracle Utilities Load Profiling and Settlement?

Oracle Utilities Load Profiling and Settlement is a web-enabled application that provides profiling and settlement functionality via an Intranet/Internet using Microsoft Internet Explorer. Because all Oracle Utilities web applications share a common framework, users can switch between different Oracle Utilities web applications (such as Oracle Utilities Billing Component and Oracle Utilities Quotations Management) without having to open multiple applications.

### **Important Note**

Before you can use this version of Oracle Utilities Load Profiling and Settlement, you must ensure that appropriate data and records have been created in the Oracle Utilities Data Repository. The instructions in this user guide assume that these records exist. For more information about creating, updating, or editing records, see the *Oracle Utilities Load Profiling and Settlement Installation and Configuration Guide* and the *Data Manager User's Guide*.

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## What is this book?

The *Oracle Utilities Load Profiling and Settlement User's Guide* describes the profiling and settlement functionality of the Oracle Utilities Energy Information Platform, including the following:

- **Chapter 1: What is Oracle Utilities Load Profiling and Settlement?** provides an overview of the Oracle Utilities Load Profiling and Settlement application and the documentation provided with it.
- **Chapter 2: Working with the Oracle Utilities Energy Information Platform** describes how users work with the Oracle Utilities Energy Information Platform web interface, including information about general navigation and common controls. This chapter also describes how run and view reports used with Oracle Utilities Load Profiling and Settlement.
- **Chapter 3: Viewing Settlement Data** describes how users search and view customer and account data.
- **Chapter 4: Running and Viewing Settlements** describes how users run and view settlements.

# Oracle Utilities Load Profiling and Settlement Components and Documentation

Oracle Utilities Load Profiling and Settlement comprises the following application components and documentation.

## Oracle Utilities Load Profiling and Settlement

This is the web-enabled Oracle Utilities Load Profiling and Settlement application.

The *Oracle Utilities Load Profiling and Settlement User's Guide* (this book) describes how to use this application.

The *Oracle Utilities Load Profiling and Settlement Installation and Configuration Guide* describes how to install and configure Oracle Utilities Load Profiling and Settlement, including database installation, setting up database records, and adding customized business logic to the application.

## Data Manager

Data Manager is the tool you use to view, edit, and update records in the Oracle Utilities Data Repository.

The *Data Manager User's Guide* explains how to use Data Manager to view and maintain data in the Oracle Utilities Data Repository.

## Oracle Utilities Rules Language

The Oracle Utilities Rules Language is a powerful command language that defines business rules and specific items such as rate tariffs.

The *Oracle Utilities Rules Language User's Guide* and *Oracle Utilities Rules Language Reference Guide* describe the Oracle Utilities Rules Language and how it is used with Oracle Utilities products.

# International and Multiple Currency Support

This section outlines international and multiple currency support in the Oracle Utilities Energy Information Platform, including:

- **Locales and Languages**
- **Date and Numeric Presentation**
- **Currency Presentation**
- **Multiple Currency Support**
- **File Formats**
- **Database Support**

## Locales and Languages

Two fundamental concepts underlying international support in Oracle Utilities applications are **languages and locales**. Languages determine the specific language in which text labels and controls of an application appear. Locales determine the specific region or country in which the user is working. Specifically, locales are used to specify display and input formatting for:

- Date/time and numeric presentation, and
- Currency presentation

How a user selects a language and/or locale is determined by the type of application being used.

### Web-enabled Products

For web-enabled products, a user's locale and language are selected from the **Locales** tab of the **Set Preferences** screen. The selected locale and language are stored in the user's security properties. The available locales on this screen are specified in the LOCALES.CFG.XML configuration file (see **Chapter 2: Configuration Files** in the *Oracle Utilities Energy Information Platform Configuration Guide* for more information). Locales included in the LOCALES.CFG.XML file must also be installed on the web server and be accessible from the Regional Settings Control Panel. If a selected locale is not installed on the web server, currency formatting and presentation may be incorrect.

If a user does not select a locale (or selects a locale of "None"), the default locale is the Server System Locale (defined by the operating system installed on the web server). Oracle Utilities recommends that all users specify a locale before using internationalized applications.

### Client/Server Products

For client/server products, the user's locale is determined by the Regional Settings of the client and/or application server machine.

### Languages

The language for client/server products is specified using a command line switch and/or a parameter in the LODESTAR.CFG file. See **Oracle Utilities Application Command Line Parameters** on page 4-11 in the *Oracle Utilities Energy Information Platform Installation Guide* for more information about command line parameters. See **LODESTAR.CFG** on page 2-2 in the *Oracle Utilities Energy Information Platform Configuration Guide* for more information about the LODESTAR.CFG file. At this time, available languages include English, French, German, and Italian.

## Reports

For client/server applications, the locale for reports is determined by the Regional Settings of the machine on which the report is run.

For web-enabled applications, the locale for reports is based on the Server System Locale (defined by the operating system installed on the web server)

## Languages

For client/server applications, the language that appears on reports is determined by the language of the application that generated the report, specified either by a command line parameter or a configuration file parameter.

For web-enabled applications, the language is specified by the Regional Settings of the machine on which the report is run, unless overridden by the LANGUAGE parameter in the LODESTAR.CFG file.

## Date and Numeric Presentation

The display and input of dates and numbers is based on the selected locale.

### Web-enabled products

Display formatting of both numbers and date/times is based on the user's selected locale.

Copy, cut, and paste operations are supported for all input controls. Required fields are identified by asterisks. Null values are represented by blank (empty) controls. Moving the mouse pointer over an input area displays sample formatting for that field.

Number input controls only accept formatting based on the user's selected locale. The only allowable characters include digits, decimal separator, and minus sign. Any other characters are filtered from input.

Date input controls only accept formatting based on the user's selected locale. Dates can either be keyed in or selected from a pop-up calendar control. All times are keyed in and based on 24 hour format (no AM or PM indicator).

Input validation occurs upon data entry.

### Client/Server Products

Formatting for numbers and date/times is based on the locale determined by the regional settings of the client and/or application server machine. Date/time formatting can be overridden from the General Options tab of the Default Options dialog.

### Reports

Display formatting of both numbers and date/times for reports is based on the Server System Locale on the machine on which the reports are run.

## Currency Presentation

Currency information is stored in the LSCurrency table in the Oracle Utilities Data Repository. This table contains one or more currencies, each defined by a currency code, currency symbol, and formatting rules (such as the number of decimal places). Currency codes in this table use ISO-4217 codes. The LSCurrency table also indicates the Default currency for the database. See **LSCurrency** on page 3-3 in the *Oracle Utilities Energy Information Platform Configuration Guide* for more information about setting up the LSCurrency table.

**Note:** Although records in the LSCurrency table are not required, Oracle Utilities strongly recommends that at least one record with all properties specified be created and set as "Default". This will ensure consistent display of currency information.

## Currency Presentation in Oracle Utilities Receivables Component and Oracle Utilities Quotations Management

Currency input and display is identical to that for numbers with two exceptions:

- A currency indicator is also displayed next to currency input controls and currency displays. The specific currency symbol displayed and the manner in which currency is formatted are determined in the following order:
  - a. The currency associated with the account being viewed (from the LSCurrency field in the Account table).
  - b. The default currency in the LSCurrency table. If there is no default currency, the first record in the LSCurrency table (sorted alpha-numerically by Currency Code).
  - b. If the LSCurrency table is not present or does not contain any records, the currency and formatting of the Server System Locale (defined by the operating system installed on the web server), specified in the **HKEY\_USERS\DEFAULT\Control Panel\International** key in the Windows Registry on the web server.
- Currency formatting rules for the user's selected locale are overridden if specific formatting rules for the currency are stored in the LSCurrency table. Typically, the only formatting rules that would be overridden at the currency level would be the ISO code, symbol, and number of decimal places. This applies to Oracle Utilities Receivables Component reports as well, except that the initial locale formatting rules come from the regional settings of the machine on which the report is run.

## Currency Presentation in Other Web-enabled Products

Currently, other web-enabled products do not require input of currency values.

Display of currencies is based on the formatting of the selected locale and of the default currency in the database (currency specific formatting always overrides locale specific formatting).

## Enabling Display of International Currency Symbols

Display of international currency symbols requires the appropriate Encoding option is selected on Internet Explorer.

### How to select encoding options:

1. Select **View->Encoding** from the Internet Explorer menu bar.
2. Select the appropriate option from the list. For example, to enable displaying of the Euro symbol and other Western European currency symbols, select the **Western European (Windows)** option.

## Currency Presentation in Client/Server Products

Client/server products do not require input of currency values.

Display of currencies is based on the formatting of the client machine's regional settings and of the default currency in the database. Currency specific formatting always overrides locale specific formatting. If the default currency in the database does not specify any formatting, the currency symbol is used for formatting. If the currency table does not exist or does not contain any records then the default currency is determined by the Regional Settings on the client/server machine. This applies to reports as well.

## Multiple Currency Support

Multiple Currency Support allows for accounts with different associated currencies. This is accomplished through the presence of the Currency Code column on the Account, Journal Account, and Checking Account tables in the Oracle Utilities Data Repository. This column references records in the LSCurrency table

### Multiple Currency and Oracle Utilities Receivables Component

All input screens which have amount fields on them indicate what currency type is expected as input.

All elements that represent a currency in Oracle Utilities Receivables Component XML structures have a CURRENCY attribute that indicates the corresponding currency type for the amount. The string values used for this attribute are the same as the Currency Code values in the LSCurrency table. On output, the CURRENCY attribute is set for the account as specified in the database. If the account's currency type is not specified in the database, the default currency is used.

A CURRENCY attribute (using the standard stem.tail notation) is supported for Oracle Utilities Receivables Component transaction identifiers to specify the currency type for the account.

On input, the CURRENCY attribute of all Oracle Utilities Receivables Component transactions is checked against the currency value of the account against which the transaction is being posted using the following rules:

1. If a currency type is specified for the account in the database, the transaction must indicate the same currency type or it is an error.
2. If a currency type is not specified for the account in the database, the transaction must indicate either no specific currency type or the default currency type for the database or it is an error.

All transactions that involve two or more accounts (such as Payment and Balance Transfers) validate that the currency types are the same for each account (no currency translation will occur). The credit/debit account pairs for each journal translation record are validated to ensure that they both have the same currency type. Only journal translation records that have credit/debit accounts with the same currency type as the account against which the transaction is being posted are used. Additional currency validations occur for payment files and refund checks.

### Multiple Currency and Oracle Utilities Receivables Component Reports

Where applicable, Oracle Utilities Receivables Component reports are grouped by Currency Code.

### Multiple Currency and Other Oracle Utilities Products

Oracle Utilities Billing Component, Oracle Utilities Rate Management and Data Manager reports display the Currency Code associated with each account where applicable. Reports that contain multiple currency types do not include the Summary Results page.

In Oracle Utilities Rate Management - Revenue Forecasting, the default currency type is used for all presentation of currency amounts, regardless of whether or not a specific currency has been indicated in the database for any accounts.



## File Formats

### Input/Output File Formats

Numbers and date/times in input and output files (such as files used with the PLIMPORT program) are independent from locale settings.

Non-English characters are supported in input/output files.

### XML Formats

All dates, times, and numbers contained in XML files are represented using the standard formatting rules as defined by the W3C XML Schema Recommendation. For backward compatibility, previously accepted formats for dates and times will continue to be accepted on input, however, all output will use the XML Schema representation.

**Note:** XML files created by the SAVE TO XML Rules Language statement are an exception. The date, time, and number formats in Rules Language generated XML files are based on the Rules Language configuration used to create them.

Non-English characters are supported in XML files

## Database Support

In addition to the LSCurrency table and related columns in the Account, Journal Account, and Checking Account tables, database support for internationalization includes the addition of the COUNTRY column in the Address table and the change from ZIP Code to Postal Code on user interfaces.

## Working with Oracle Utilities Load Profiling and Settlement

This section describes how you work with Oracle Utilities Load Profiling and Settlement, including the following available settlement-related functions:

- **Running Settlements**
  - **Scheduling Settlements**
- **Searching Settlements**
- **Viewing Settlement Results**

### Running Settlements

Though many Oracle Utilities Load Profiling and Settlement implementations are set up for automated settlement processing, Oracle Utilities Load Profiling and Settlement also allows you to run a settlement at any time by entering the appropriate criteria for the settlement (Market, Settlement Type, Start/Stop dates, etc.). See **Running Settlements** on page 4-2 for more information.

#### Scheduling Settlements

In addition to running settlements immediately, you can also schedule settlement runs to automatically occur at a user-specified time (or times) in the future. See **Scheduling Processes** on page 4-2 for more information.

### Searching Settlements

You can also search all settlement runs based on user-specified criteria. Settlement runs that match the supplied criteria appear on the Settlement List. See **Searching Settlements** on page 4-5 for more information.

### Viewing Settlement Results

You view settlement results from the Settlement List screen. From this screen you can view the aggregation results of the settlement run, generate additional aggregation results for a settlement, and graph and/or download aggregation results for a settlement. See **Settlement List** on page 4-6 for more information.

# Chapter 2

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## Working with the Oracle Utilities Energy Information Platform

This chapter describes how you work with the Oracle Utilities applications. This includes:

- **Starting the Application and Logging In**
- **Navigating The Oracle Utilities Energy Information Platform**
- **Searching, Viewing, and Entering Data in the Oracle Utilities Energy Information Platform**
- **Run Reports**
- **View Reports**

## Starting the Application and Logging In

You log on to Energy Information Platform using Microsoft Internet Explorer.

### How to log in:

1. Start the application by double-clicking the shortcut icon, or entering the URL for the Oracle Utilities Energy Information Platform in the **Address** field on the Internet Explorer window.

**Note:** Contact your system administrator for the URL for the Oracle Utilities Energy Information Platform.

2. The Login screen appears.
3. Enter your user ID in the **User ID** field, enter your password in the **Password** field, and click **Login**. The Energy Information Platform home dashboard screen appears in the browser.

# Navigating The Oracle Utilities Energy Information Platform

This section describes the framework of the Oracle Utilities Energy Information Platform and how to use the menus and icons to navigate between functions including:

- **Framework**
- **Menus**
- **Navigation**

## Framework

The Energy Information Platform is a web-based framework, consisting of the Top menu, the Left menu, and the Main Workspace.







### Top Menu

The Top menu displays a number of menu items, including:

- **Home:** Returns the user to the home dashboard screen.
- **Help:** Expands to display the following:
  - **Content and Index:** Opens **Online Help** window for the current option or function (if applicable).
  - **Online Support:** Opens the Oracle Utilities website in the Main Workspace.
  - **About:** Opens the About dialog, which displays the user’s current preferences and the software version installed.
- **Logout:** Logs the user out of the Energy Information Platform, ends the current session, and returns the user to the Login screen.

### Left Menu

The Left menu displays menu options available to the user. This menu can be set to one of two modes: the Main menu or the Data menu. The bottom of the Left menu displays a number of icons. The meanings of these icons are as follows:

Icon	Description
	<b>Default Menu:</b> Changes the Left menu from the <b>Main Menu</b> to the <b>Data Menu</b> .
	<b>Default Menu:</b> Changes the Left menu from the <b>Data Menu</b> to the <b>Main Menu</b> .
	<b>Current Data Base:</b> Opens the <b>Set Preferences</b> screen. When you hover the mouse over this icon, a tool tip opens, displaying currently selected data source.
	<b>Security Administration:</b> Opens the <b>Security Administration</b> screen.
	<b>Home:</b> Returns the user to the home dashboard screen.
	<b>Change Theme:</b> Opens the Change Theme dialog.

## Main Menu

The Main menu opens by default, and lists the functions available from the Energy Information Platform. Clicking on a menu item displays the corresponding screen in the Main Workspace on the right. A down-pointing arrow at the left of a menu choice indicates that the choice has associated submenu items below it. To open the submenu list, click on the arrow. The arrow becomes a right-pointing arrow, and the submenu options are displayed below the menu item.

**Note:** The options that appear on the Main menu are dependent on the specific set of products licensed and installed.

## Data Menu

The Data menu lists database tables accessible via the Data Navigator, which allows users to search, add, view, and edit database records and tables in the Oracle Utilities Data Repository. See **Chapter 8: Searching and Viewing Data in the Oracle Utilities Data Repository** in the *Oracle Utilities Energy Information Platform User's Guide* for more information about Data Navigator.

## Main Workspace

The center of the window is occupied by the Main Workspace, which holds the screen corresponding to the selected function.

## Menus

As noted above, the Main menu includes a number of submenus, each relating to a specific activity or product. Oracle Utilities Load Profiling and Settlement uses the following menus:

### Profiling and Settlement Menu

The Profiling and Settlement menu includes the following options:

- **Run Settlement:** Opens the Run Settlement screen.
- **Search Settlements:** Opens the Search Settlements screen.
- **WQ Items:** Opens the **Work Queue Item Search Result** screen displaying open work queue items with a Product code of "LPSS" (Profiling and Settlement).
- **My WQ Items:** Opens the **My Work Queue** screen (Groups tab).
- **Run Reports:** Opens the **Run Reports** screen, displaying reports associated with Profiling and Settlement (Product code "LPSS").
- **View Reports:** Opens the **View Reports** screen, listing previously run reports associated with Profiling and Settlement (Product code "LPSS").

## Navigation

Oracle Utilities recommends using links and menu options when moving between screens in the Energy Information Platform. Use of the Internet Explorer **Forward** and **Back** buttons can produce unexpected results.

# Searching, Viewing, and Entering Data in the Oracle Utilities Energy Information Platform

This section describes how users search, view, and enter data in the Energy Information Platform, and includes:

- **Searching and Viewing Data**
- **Entering Data**

## Searching and Viewing Data





This section provides specific information about searching and viewing data in the Energy Information Platform, including:


### Searching

When searching records, users enter data in each of the fields they wish to use in their search. See **Entering Data** below for more information about how to enter specific types of data. If a search returns only one record, the record itself is displayed instead of the list screen.


### Specifying How Results are Sorted

To specify how search results are sorted, click the **Sort by** plus (“+”) sign. This opens a pop-up window that lists the fields that can be used to sort the search results.

To sort by a specific field(s), check the corresponding checkbox(s). By default, records are sorted in ascending order (denoted by the  arrow). To sort records in descending order, click the  arrow. The  arrow will be replaced by the  arrow.

To change the order by which the search results are sorted, click on the  area and move the field to the appropriate position in the list.

After specifying how the results are to be sorted, click the **Sort by** minus (“-”) sign to close the list.

For example, if a user were searching accounts and wanted to sort the results first by Customer ID in ascending order, and then by Start Time in descending order, the user would first check the Customer ID checkbox, then check the Start Time checkbox and click the  arrow.

Note that sorting settings are reset each time you perform a search.

### Viewing Search Results

Search results appear on a list screen that displays the records that match the search criteria. Each item on the list contains the entire record. Use the horizontal scroll bar to view columns that appear to the right of the list screen.

### Sorting Search Results

Search results are sorted as specified by the user (see **Specifying How Results are Sorted** above). The direction (ascending or descending) in which each column is sorted is displayed at the top of each column.

Columns sorted in ascending order display a blue arrow pointing up.



Columns sorted in descending order display a red arrow pointing down.



To change the direction in which the results are sorted, click the up (ascending) or down (descending) arrow at the top of the appropriate column on the list screen.

To continue the above example, if a user had searched accounts and sorted the results first by Customer ID in ascending order, and then by Start Time in descending order, the Customer ID column would display a blue arrow pointing up (▲) and the Start Time column would display a red arrow pointing down (▼).

### Locking Columns

Some columns on search results list screens can be locked, or “pinned” in place, keeping the identity of the search results visible at all times. As the user scrolls to the right using the horizontal scroll bar, locked columns remain in place, while non locked columns scroll “beneath” the locked column(s).

Columns that can be locked have a pin button (📌) on them.



To lock a column, click the pin button (📌). This rotates the pin button, indicating that the column is locked.



To unlock a column, click the pin button (📌) again.

## Entering Data

This section provides specific information about entering data in the Energy Information Platform screens, including:

- **Entering Date and Date/Time Values**
- **Entering Lookup Values**
- **Selecting Values from Drop-Down Lists**
- **Specific Data Formats**

### Entering Date and Date/Time Values

Date and Date/Time fields store dates and/or datetimes, such as Start Date, Start Time, and Bill Month values. To enter date/time values, either type the date and time manually, or click the arrow button (▼) to the right of the field and select the date using the calendar control.

The calendar control displays the current month when opened. Click the appropriate day to select it. To change the month, click the arrows on either side of the month displayed. To change the year, click the arrows on either side of the year displayed. To select the current date, click **Today**. To clear the date value, click **Clear**.

**Note:** When entering dates manually, use the four digit format (i.e. “2004”).

**Note:** When you select a date using the calendar control, the time defaults to 00:00:00.

### Entering Lookup Values

Lookup values are references to records in other tables in the Oracle Utilities Data Repository, including both lookup records such as Operating Company and Jurisdiction records, and parent records such as Customer or Account records. When populated, lookup fields display the identity of the referenced record. To select a lookup, click the **Browse** button (...). This opens a dialog window that lists all the records in the corresponding table in the Oracle Utilities Data Repository.

If there is more than one page of records, you can move between pages using the ◀ and ▶ buttons. Use the ⏪ button to return the first page, and the ⏩ button to navigate to the last



page. To change the number of results that appears on each page, enter the number in the **Rows** field and press the **Enter** key.

To search for a specific record, click **Search**. The dialog displays a search screen.

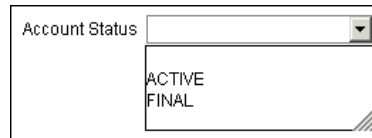
Enter the appropriate parameters for your search and click **Search**. The dialog will display a list of records that match the search criteria.

Click the [...] link to select the appropriate record. The lookup field is automatically populated.

### Selecting Values from Drop-Down Lists

Drop-down lists allow users to select a value from a pre-populated list, and can contain either pre-set values or values from tables in the Oracle Utilities Data Repository.

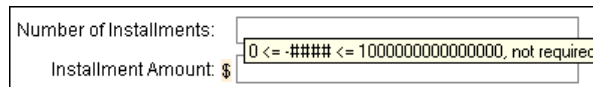
To select a value from a drop-down list, click the arrow next to the field. This opens a lists that includes all the values available.



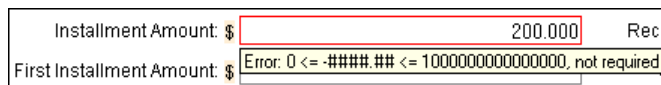
If one or more of the values is longer than the default size of the list, click the lower right corner of the list and resize the list as necessary.

### Specific Data Formats

Some fields on some screens of the Energy Information Platform require that data be entered in a specific format. This most often applies to currency and date fields, but can also apply to other number fields and other types of data. Moving the mouse pointer over the icon displays a tooltip that contains the correct format for the field.



If data is entered in an incorrect format, the border of the field turns red indicating that there is an error in the data in the field. Moving the mouse pointer over the field displays a tooltip that describes the correct format for the field.



### Required Fields

Fields that are required are indicated by an asterisk (\*).

### Currency Fields

Currency fields are indicated by a currency symbol to the left of the field.

# Run Reports

The **Run Reports** option displays reports available through the Energy Information Platform Reporting Framework. From this screen, users can select and run reports. Each product has its own **Run Reports** option that displays reports associated with that product. For example, the Oracle Utilities Billing Component list displays billing reports, while the Oracle Utilities Receivables Component reports list displays its reports.

## How to run reports:

1. Select the **Run Reports** option from the appropriate menu (Tools and Utilities, Work Queues, Billing, Financials, etc.). The Run Reports screen opens.

The Run Reports screen displays the following information for each report:

- **Report Name:** The name of the report.
- **Description:** A description of the report.
- **Priority:** The priority of the report (High, Medium, or Low).
- **Type:** The type of report (PLBX, LSRate (Oracle Utilities Rules Language), Active, or BIPublisher).
- **Output Format:** The output format for the report (applies to reports of type “BIPublisher” only).
- **Creation Date:** The date the report template was created.
- **User:** The User ID who created the report template.
- **Generate ASP:** A flag that indicates if the report framework generates an ASP parameters page for the report.

2. Select the report you wish to run by clicking the **Report Name** link from the list.

The **Enter Report Parameters** screen opens displaying the report parameters for the selected report.

3. Enter the parameters for the report as appropriate.

The **Report Title** field is the title that appears on the **View Reports** screen when the report is run.

4. Select the **Priority** for the report. This determines the priority (High, Medium, or Low) in which the report will be generated.
5. Uncheck the **Shared Report** checkbox if you wish to make the results of the report private. If you leave this checkbox checked, the report results will be available to all users.
6. Click **Run** to run the report. Click **Schedule Report** to schedule the report using the Schedule Process screen (see **Scheduling Reports** below, for more information). When the report is complete, the report opens in the appropriate viewer (Active, etc.). In addition, the report is also listed on the **View Reports** screen.

## How to search reports:

1. Click **New Search** on the Run Reports screen. The Run Reports search screen appears.

You can search based on the Report Name, Report Type, User ID (who created the report or who last updated the report), Output Format, Creation Date, Priority, Report Category, Product, or the report Description.

You can search for reports whose creation dates are Less Than (<), Greater Than (>), Less Than or Equal To (<=), or Greater Than or Equal To (>=) the supplied date by selecting the appropriate operand from the drop-down list.

You can use the percent sign (“%”) as a wildcard character when entering values in any of the text fields. For instance, if you want to search for all reports whose name begins with the letter G, you could enter “G%” in the Name field. You can use this wildcard before or after specified letters or numbers (i.e. you would use %t to search for all reports whose names end with the letter t, etc.).

Note that account Report Names, User IDs, and Descriptions are **case-insensitive**. For example, there is no difference between the “WQAgging” and “wqaging” report names.

2. Specify how the search results are displayed.
  - Select the manner in which the results are sorted from the **Sort By:** drop-down list. You can sort the results by Creation Date, Description, Report Name, Report Type, or User ID.
  - Specify how many results should appear on each page in the **Page Length** field.
3. Click **Search** to perform the search. To clear all the search fields, click **Reset**.
4. The search results appear on the Run Reports screen.

## Scheduling Reports

The Schedule Process screen allows users to define a schedule for running processes unattended.

### How to schedule a process:

1. Click **Schedule** (or **Schedule Report**). The Schedule Process screen opens.
2. Enter the **Start Time** for the scheduled process by entering the date and time manually or clicking the arrow and select the date using the calendar control and typing the time manually. See **Entering Date and Date/Time Values** on page 2-8 for more information about using the calendar control.

**Note:** The **Server Time** displayed above the Start Time field is the current time of the web server running the scheduler, including both the location and Time Zone where the server is located. Scheduled processes run based on the server time, not the time on the client machine.

3. Select a **Recurrence Pattern** for the scheduled process. You can select one of the following:

**None:** The scheduled process runs only once at the specified start time. **Note:** Scheduled processes with a recurrence pattern of None ignore Business Calendars and will run on non-business days.

**Intra Daily:** The scheduled process runs multiple times, from as frequent as once every 15 minutes to once every several hours. To base the recurrence on a number of minutes, select the **Every x minutes** radio button and select the number from the **Minutes** drop-down list. To base the recurrence on a number of hours, select the **Every x hours** radio button and enter the number of hours in the text box. Intra Daily processes may run throughout a single day or may span multiple days.

**Daily:** The scheduled process runs once per day or once per number of days. To base the recurrence on a number of days, select the **Every x days** radio button and enter the number of days in the text box. To set the scheduled process to run every weekday, check the **Every weekday** radio button.

**Weekly:** The scheduled process runs once or more per week (or number of weeks) on specified days. Enter the number of weeks in the **Recur every x week(s) on** text box, and check the specific days of the week on which the process should run. For example, to schedule a process to run on Monday and Wednesday every two weeks, you would enter 2 in the **Recur every x week(s) on** text box and check the Monday and Wednesday checkboxes.

**Monthly:** The scheduled process runs once per month or once per number of months. A monthly recurrence can be based on either a specific day of the month (such as the the 10th

day of the month), or a specific type of day (such as the 2nd Friday of the month). To base the recurrence on a specific day, select the **Day x of every x month(s)** radio button and enter the specific day and number of months in the text boxes. To base the recurrence on a specific type of day, select the **The x x of every x month(s)** radio button and select the appropriate number (First, Second, Third, Fourth, or Last) and day (Sunday through Saturday) from the drop-down lists and enter the number of months in the text box.

**Important Note:** Each execution of a recurring scheduled process uses the original parameters entered for the process.

4. Set the **Range of Recurrence** for the scheduled process. This specifies how many times the scheduled process will run (based on the specified recurrence pattern). There are three options:
  - **No end date:** To specify no ending date for the recurrence, select the **No end date** radio button.
  - **End after occurrence:** To specify that the recurrence ends after a predetermined number, select the **End after occurrence** radio button and enter the number of recurrences in the text box.
  - **End by:** To specify a date on which to end the recurrences, select the **End by** radio button and enter the date and time by which the recurrence should end. Enter the date and time manually or click the arrow and select the date using the calendar control and type the time manually. See **Entering Date and Date/Time Values** on page 2-8 for more information about using the calendar control.
5. Set any applicable **Recurrence Exceptions** for the scheduled process. Recurrence exceptions define which business calendar, if any, is used in scheduling and how to handle processes scheduled to run on non-business days. There are two options:
  - **Business Calendar:** To schedule the process using a business calendar, click the Browse button (...). This opens a dialog window that lists all the available Business Calendars. Click the [...] link to select the appropriate calendar. The field is automatically populated.
  - **Roll to next business day:** Check this checkbox to specify that a process scheduled to run on a non-business day is rolled forward to the next business day. If the process is already scheduled to run on the next business day, a new process is NOT scheduled.

**Note:** When using a Business Calendar, if the Start Time entered for a process is later than the last date in the Business Calendar, an error will be returned. Also, for scheduled processes with the No End Date option selected, occurrences that would have occurred on dates later than the last date in the Business Calendar will not occur, and do not appear on the View Reports screen.

## View Reports

The **View Reports** option displays previously run reports available through the Energy Information Platform Reporting Framework, including other processes such as uploading data via the Upload Usage option. From this screen, users can view and delete reports. Each product has its own **View Reports** option that displays reports associated with that product. For example, the Oracle Utilities Billing Component View Reports screen displays billing reports, while the Oracle Utilities Receivables Component View Reports screen displays its reports.

### How to view reports:

1. Select the **View Reports** option from the appropriate product menu (Tools and Utilities, Work Queues, Billing, Financials, etc.) The View Reports screen opens.

The View Reports screen displays the following information for each report:

- **Status Icon:** An icon that displays the status of the report. If an output format was specified for the report, the icon indicates the output format. See **Report Icons** for more information.
  - **Run/Schedule Time:** The time the report was run or is scheduled to run.
  - **Report Title:** The title of the report, specified when the report was run. For LSRate (Oracle Utilities Rules Language) reports, this column will display the name of the Report Template used to generate the report, unless specified using the SETREPORTTITLE Rules Language function.
  - **Priority:** The priority of the report (High, Medium, or Low).
  - **Type:** The type of report (PLBX (Oracle Utilities Billing Component), LSRate (Oracle Utilities Rules Language), Active, or BIPublisher).
  - **User:** The user ID of the user who ran the report.
  - **Progress:** The current percentage of the report instance that has been generated, from 0 to 100 percent.
  - **Shared:** A flag that indicates if the report is shared by all users or is accessible only by the user who ran the report.
  - **Base:** A flag that indicates if the report is provided by Oracle Utilities or is a custom report.
  - **Process:** The (machine) name of the server on which the report was executed.
  - **Account Name:** The name of the account associated with the report, if applicable.
  - **Account ID:** The ID of the account associated with the report, if applicable.
2. To view a specific report, click the **Report Title** link for the report. The selected report opens in the appropriate viewer.
  3. To refresh the contents of the screen, click **Refresh Periodically**. To have the screen continually refresh its contents, check the **Refresh Periodically** checkbox.

**Note:** The current state of the Refresh Periodically checkbox (selected or not) is stored in the user's settings, and is used as the default setting when subsequently opening this screen.

### How to delete reports:

1. Check the checkbox next to the reports(s) to delete. To select all reports, check the top check box.
2. Click **Delete**.

### How to search reports:

1. Click **New Search** on the View Reports screen. The View Reports search screen appears.

You can search based on the Report Title, Report Type, User ID (who created the report), Output Format, Creation Date, Report Category, or Product.

You can search for reports whose creation dates are Less Than (<), Greater Than (>), Less Than or Equal To (<=), or Greater Than or Equal To (>=) the supplied date by selecting the appropriate operand from the drop-down list.












You can use the percent sign (“%”) as a wildcard character when entering values in any of the text fields. For instance, if you want to search for all reports whose name begins with the letter G, you could enter “G%” in the Name field. You can use this wildcard before or after specified letters or numbers (i.e. you would use %t to search for all reports whose names end with the letter t, etc.).


Note that account Report Titles, User IDs, and Descriptions are **case-insensitive**.

2. Specify how the search results are displayed.
  - Select the manner in which the results are sorted by clicking the **Sort by** plus (“+”) sign. See **Specifying How Results are Sorted** on page 2-7 for more information.
  - Specify how many results should appear on each page in the **Page Length** field.
3. Click **Search** to perform the search. To clear all the search fields, click **Reset**.
4. The search results appear on the View Reports screen.

## Report Icons

The icon listed next to each report indicates the status of the report. The meanings of these icons are as follows:

Icon	Description
	<b>Report Starting:</b> Report processing is starting.
	<b>Report in Process:</b> Report processing
	<b>Report Complete:</b> Report processing is complete.
	<b>Report Complete (Adobe Acrobat format):</b> Report processing is complete.
	<b>Report Complete (Microsoft Excel format):</b> Report processing is complete.
	<b>Report Complete (Microsoft Word format):</b> Report processing is complete.
	<b>Report Complete (Rich Text format):</b> Report processing is complete.
	<b>Report Complete (Comma Separated Values format):</b> Report processing is complete.
	<b>Report Scheduled:</b> Report is scheduled to run at a future time. To view scheduling details, click the  arrow in the far right column. To edit the schedule, click <b>Edit</b> .
	<b>Report Reminder:</b> Indicates that a scheduled report is due to run in 15 minutes or less.

Icon	Description
	<b>Report Error:</b> One or more errors or warnings associated with the report. To view the error, click the Error icon.

## Viewing Oracle BI Publisher Reports

When you select an Oracle BI Publisher Report, the report opens in a viewer based on the output format defined for the report. For the default output formats, this includes:

- Adobe Acrobat
- Microsoft Excel
- Microsoft Word (for MS Word and Rich Text Format reports. If Microsoft Word is not installed, Rich Text Format reports open in the installed application (if any) associated with the \*.rtf file extension).

## Viewing Oracle Utilities Rules Language Reports

When you select a Oracle Utilities Rules Language Report (one with a Type of LSRate), the report opens in the Report view screen.

The **State** section above the top left corner of the report displays the state of the report, including the number of Errors, the number of Pages expected and ready, and the elapsed time (in seconds) it took for the report to run.

State: Errors: 0 Pages: 32 expected, 32 ready, 15 elapsed

The **From:** and **To:** fields above the top right corner of the report show the current pages displayed. The **From:** field displays the current page. The ◀ and ▶ buttons and the field between them are used to navigate the report. The field between the buttons defines how many pages display in the report window at a time. The default is 1. To display more than one page at a time, enter the number of pages you wish to view in the field.

## Emailing Reports

You can also email reports from the View Reports screen. This allows users to distribute reports to other parties via email.

**Note:** The Send Email function requires the presence of the LSRELAY.CFG.XML file in the C:\LODESTAR\CFG directory on the web server computer. Contact your system administrator for more information about this file.

### How to email a report:

1. Select the report (or reports) you wish to send via email and click **Send Email** on the View Reports screen.

The Send Email screen opens.

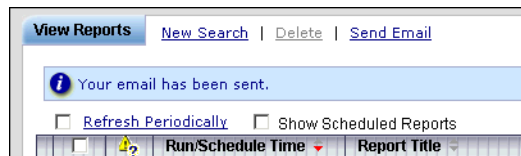
2. Select a **From** address from the drop-down list. This list is based on available records in the From Addresses table. If there are no available records in the From Addresses table, the current user's email address is populated (if provided on the User Overview screen on the Security Administration user interface).
3. Enter an email address in the **To** field, or click Address Book (or the "+" sign) to add a contact or group name. See **Using the Address Book** on page 2-14 for more information about using the Address Book.

4. *Optional.* Enter an email address in the **CC** field, or click **Address Book** (or the “+” sign) to add a contact or group name. See **Using the Address Book** on page 2-14 for more information about using the Address Book.

To remove the CC field, click **Remove CC**.

5. *Optional.* To add the BCC field, click **Add BCC**, and enter an email address in the **BCC** field, or click **Address Book** (or the “+” sign). See **Using the Address Book** on page 2-14 for more information about using the Address Book.
6. Enter a subject for the email in the **Subject** field.
7. Enter the email message in the **Message** field.
8. To send the email, click **Send**. To clear all the fields, click **Reset**.

A message will appear at the top of the View Reports screen after your email has been sent.



## Using the Address Book

In addition to entering email addresses manually, you can use the Address Book feature to select email recipients from those defined in the Oracle Utilities Data Repository. The Address Book contains listings of:

- **Contacts**
- **Groups**

### Contacts

Contacts are specific individuals related to parties (such as Service Points or Market Participants) defined in the Oracle Utilities Data Repository.

#### How to select an existing contact from the Address Book:

1. Click **Address Book** (or the “+” sign) on the Send Email screen.  
The Address Book dialog opens on the Contacts tab.
2. Enter the search criteria for the contacts you wish to send email to. You can search by Last Name, First Name, Middle Name, or Company.
3. Specify how the search criteria are to be combined by selecting the appropriate **Combine with** option (**AND** or **OR**), located in the upper right corner of the search screen. The default combine option is **AND**.
4. Specify whether or not the search is Case-sensitive by checking or unchecking the **Case-sensitive** checkbox, located in the upper right corner of the search screen. The default setting is case-sensitive.
5. Specify how the search results are displayed.
  - Select the manner in which the results are sorted by clicking the **Sort by** plus (“+”) sign. See **Specifying How Results are Sorted** on page 2-7 for more information.
  - Specify how many results should appear on each page in the **Page Length** field.
6. Click **Search** to perform the search. To reset the search fields to their previous values, click **Reset**. To clear all the search fields, click **Clear**. To add a new contact to the Address Book, click **Add**.
7. The search results appear on the Address Book dialog.



8. Select the contact(s) you wish to send the email to and click **To**. The selected contact(s) will appear in the To field on the Send Email screen.  
To remove a contact from the To, CC, or BCC field, select the contact and click the Delete Key, or click the right mouse, and select **Remove**.
9. *Optional.* To add a contact to the CC (or BCC) field, select the contact(s) you wish to send the email to and click **CC** (or **BCC** as appropriate). The selected contact(s) will appear in the CC (or BCC) field on the Send Email screen.

#### **How to add a contact using the Address Book:**

1. Click **Add** on the Contacts tab of the Address Book dialog.  
The Edit Contact screen opens.
2. Enter personal information for the contact (First, Middle, and Last Names, Title, etc.) in the **Personal Information** pane.
3. Enter contact methods (phone numbers, email addresses, etc.) for the contact in the **Contact Method** pane.
4. Enter optional address(es) for the contact in the **Address Information** pane.
5. Click **Save** to save the contact.
6. Click **Return to Email** to return to the Send Email screen and Address Book dialog.
7. Select the new contact and click **To**, **CC**, or **BCC** to add the contact to the appropriate field.

See **Contacts** on page 7-2 in the *Oracle Utilities Energy Information Platform User's Guide* for more information about creating contacts.

## **Groups**

Groups are groupings of contacts in the Oracle Utilities Data Repository.

#### **How to select an existing group from the Address Book:**

1. Click **Address Book** (or the “+” sign) on the Send Email screen.  
The Address Book dialog opens on the Contacts tab. Click the **Groups** tab.
2. Enter the search criteria for the contacts you wish to send email to. You can search by Group Name or Description.
3. Specify how the search criteria are to be combined by selecting the appropriate **Combine with** option (**AND** or **OR**), located in the upper right corner of the search screen. The default combine option is **AND**.
4. Specify whether or not the search is Case-sensitive by checking or unchecking the **Case-sensitive** checkbox, located in the upper right corner of the search screen. The default setting is case-sensitive.
5. Specify how the search results are displayed.
  - Select the manner in which the results are sorted by clicking the **Sort by** plus (“+”) sign. See **Specifying How Results are Sorted** on page 2-7 for more information.
  - Specify how many results should appear on each page in the **Page Length** field.
6. Click **Search** to perform the search. To reset the search fields to their previous values, click **Reset**. To clear all the search fields, click **Clear**. To add a new group to the Address Book, click **Add**.
7. The search results appear on the Address Book dialog.
8. Select the group(s) you wish to send the email to and click **To**. The selected group(s) will appear in the To field on the Send Email screen.

To remove a group name from the To, CC, or BCC field, select the group name and press the Delete key, or click the right mouse, and select **Remove**.

9. *Optional.* To add a group to the CC (or BCC) field, select the group(s) you wish to send the email to and click **CC** (or **BCC** as appropriate). The selected group(s) will appear in the CC (or BCC) field on the Send Email screen.

**How to add a group using the Address Book:**

1. Click **Add** on the Groups tab of the Address Book dialog.  
The Edit Group screen opens.
2. Enter a name for the group in the **Group Name** field.
3. Enter a description of the group in the **Description** field.
4. *Optional.* Check the **Is Private** checkbox to indicate that the group is private. Private groups can be only be viewed by the user who created the group. Public groups (Is Private unchecked) can be viewed by all users.
5. To add a contact to the group, click **Add** on the Membership title bar, and select the contact from the **Contact ID** drop-down list. Repeat this step for each contact you wish to add to the group.
6. Click **Save** to save the group.
7. Click **Return to Email** to return to the Send Email screen and Address Book dialog.
8. Select the new group and click **To**, **CC**, or **BCC** to add the group to the appropriate field.

See **Groups** on page 7-5 in the *Oracle Utilities Energy Information Platform User's Guide* for more information about creating contact groups.

# Chapter 3

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## Viewing Settlement Data

The Oracle Utilities Energy Information Platform allows users to search for and view information about selected customers and accounts. When Oracle Utilities Load Profiling and Settlement is installed, this information includes account-specific settlement data. This chapter describes how to view settlement data from the Splash Screen and Account View, including:

- **Settlements Dashboard Screen Clip**
- **Viewing Settlement Data**

## Settlements Dashboard Screen Clip

The Settlement clip on the dashboard screen (see **Dashboard** on page 3-2 in the *Oracle Utilities Energy Information Platform User's Guide*) displays links to the settlement and aggregation results for the most recent settlement performed.

Clicking on the **Settlements** link opens the **Settlement List** screen.

Clicking the **Aggregations** link opens the **Settlement Aggregation Results** screen.

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## Viewing Settlement Data

The Aggregation clip on the Account dashboard displays the Start Date, Stop Date, and link to Aggregation results for the most recent settlement performed for the account.

To view additional settlement data for the account, click **Details**. The Settlement screen opens.

The Settlement screen displays all aggregations run against settlements completed for the account. This screen displays the following information about each set of aggregation results:

- **Actions:** the available actions for the aggregation. Available actions include **Graph/Download**. See **Actions** on page 4-7 in the *Oracle Utilities Load Profiling and Settlement Web User's Guide* for more information.
- **Start Time:** the start time of the aggregation.
- **Stop Time:** the stop time of the aggregation.
- **Aggregation:** the type of aggregation performed.
- **Custom Flag:** A flag that indicates if the aggregation was Custom or Default.
- **User:** the user who generated the aggregation.

If there is more than one page of results, you can move between pages using the ◀ and ▶ buttons. To change the number of results that appears on each page, enter the number in the **Rows** field. To refresh the contents of the Settlement screen, click the **Refresh** icon (↻).



# Chapter 4

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## Running and Viewing Settlements

This chapter describes how to run and view settlements with Oracle Utilities Load Profiling and Settlement, including:

- **Running Settlements**
  - **Scheduling Processes**
- **Searching Settlements**
- **Settlement List**
  - **Run Aggregation**
  - **View Aggregation**
  - **View Report**
  - **Graph/Download**
  - **Edit Schedule**
  - **Delete**

## Running Settlements

The **Run Settlement** option allows users to run and schedule settlement processes for different combinations of markets, settlement types, and date ranges.

### How to run a settlement:

1. Select **Profiling and Settlement->Run Settlement**.

The Run Settlement screen opens.

This screen displays the parameters available for running settlement processes. Oracle Utilities Load Profiling and Settlement comes with a pre-defined set of parameters that appear on the Run Settlement screen. This screen and the parameters available for running settlement processes can be changed as needed to meet specific market requirements. See the *Oracle Utilities Load Profiling and Settlement Installation and Configuration Guide* for more information.

2. Select the **Market Code** for the settlement by clicking the **Browse** button (...). This opens a dialog window that lists all the available Market Codes.

Click the [...] link to select the appropriate record. The Market Code field is automatically populated.

3. Select the **Settlement Type** for the settlement by clicking the **Browse** button (...). This opens a dialog window that lists all the available Settlement Types.

Click the [...] link to select the appropriate record. The Settlement Type field is automatically populated.

4. Enter the **Settlement Start Time** by entering the date and time manually or clicking the arrow and selecting the date using the calendar control and entering the time manually.
5. Enter the **Settlement Stop Time** by entering the date and time manually or clicking the arrow and selecting the date using the calendar control and entering the time manually.
6. Enter the settlement's **Target Date** by entering the date and time manually or clicking the arrow and selecting the date using the calendar control and entering the time manually.
7. Enter the settlement's **Last Date** by entering the date and time manually or clicking the arrow and selecting the date using the calendar control and entering the time manually.
8. Click **Run Settlement** to run the settlement. Click **Schedule Settlement** to set up a scheduled time to run the settlement (see **Scheduling Processes** on page 4-2 for more information). Click **Reset** to clear all the fields.
9. The settlement appears on the **Settlement List**. From that screen you can view the results of the settlement.

## Scheduling Processes

The Schedule Process screen allows users to define a schedule for running processes unattended.

### How to schedule a process:

1. Click **Schedule** (or **Schedule Report**). The Schedule Process screen opens.
2. Enter the **Start Time** for the scheduled process by entering the date and time manually or clicking the arrow and select the date using the calendar control and typing the time manually. See **Entering Date and Date/Time Values** on page 2-8 for more information about using the calendar control.

**Note:** The **Server Time** displayed above the Start Time field is the current time of the web server running the scheduler, including both the location and Time Zone where the server is



located. Scheduled processes run based on the server time, not the time on the client machine.

3. Select a **Recurrence Pattern** for the scheduled process. You can select one of the following:

**None:** The scheduled process runs only once at the specified start time. **Note:** Scheduled processes with a recurrence pattern of None ignore Business Calendars and will run on non-business days.

**Intra Daily:** The scheduled process runs multiple times, from as frequent as once every 15 minutes to once every several hours. To base the recurrence on a number of minutes, select the **Every x minutes** radio button and select the number from the **Minutes** drop-down list. To base the recurrence on a number of hours, select the **Every x hours** radio button and enter the number of hours in the text box. Intra Daily processes may run throughout a single day or may span multiple days.

**Daily:** The scheduled process runs once per day or once per number of days. To base the recurrence on a number of days, select the **Every x days** radio button and enter the number of days in the text box. To set the scheduled process to run every weekday, check the **Every weekday** radio button.

**Weekly:** The scheduled process runs once or more per week (or number of weeks) on specified days. Enter the number of weeks in the **Recur every x week(s) on** text box, and check the specific days of the week on which the process should run. For example, to schedule a process to run on Monday and Wednesday every two weeks, you would enter 2 in the **Recur every x week(s) on** text box and check the Monday and Wednesday checkboxes.

**Monthly:** The scheduled process runs once per month or once per number of months. A monthly recurrence can be based on either a specific day of the month (such as the the 10th day of the month), or a specific type of day (such as the 2nd Friday of the month). To base the recurrence on a specific day, select the **Day x of every x month(s)** radio button and enter the specific day and number of months in the text boxes. To base the recurrence on a specific type of day, select the **The x x of every x month(s)** radio button and select the appropriate number (First, Second, Third, Fourth, or Last) and day (Sunday through Saturday) from the drop-down lists and enter the number of months in the text box.

**Important Note:** Each execution of a recurring scheduled process uses the original parameters entered for the process.

4. Set the **Range of Recurrence** for the scheduled process. This specifies how many times the scheduled process will run (based on the specified recurrence pattern). There are three options:
  - **No end date:** To specify no ending date for the recurrence, select the **No end date** radio button.
  - **End after occurrence:** To specify that the recurrence ends after a predetermined number, select the **End after occurrence** radio button and enter the number of recurrences in the text box.
  - **End by:** To specify a date on which to end the recurrences, select the **End by** radio button and enter the date and time by which the recurrence should end. Enter the date and time manually or click the arrow and select the date using the calendar control and type the time manually. See **Entering Date and Date/Time Values** on page 2-8 for more information about using the calendar control.
5. Set any applicable **Recurrence Exceptions** for the scheduled process. Recurrence exceptions define which business calendar, if any, is used in scheduling and how to handle processes scheduled to run on non-business days. There are two options:
  - **Business Calendar:** To schedule the process using a business calendar, click the Browse button (...). This opens a dialog window that lists all the available Business Calendars. Click the [...] link to select the appropriate calendar. The field is automatically populated.

- **Roll to next business day:** Check this checkbox to specify that a process scheduled to run on a non-business day is rolled forward to the next business day. If the process is already scheduled to run on the next business day, a new process is NOT scheduled.

**Note:** When using a Business Calendar, if the Start Time entered for a process is later than the last date in the Business Calendar, an error will be returned. Also, for scheduled processes with the No End Date option selected, occurrences that would have occurred on dates later than the last date in the Business Calendar will not occur, and do not appear on the View Reports screen.

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## Searching Settlements

The **Search Settlement** option allows users to search for previously run settlements in the Oracle Utilities Data Repository based on user-specified search criteria.

### How to search settlements:

1. Select **Profiling and Settlement->Search Settlements**.

The **Search Settlements** screen opens.

2. Enter the search criteria in the appropriate field.

You can search based on the Market, Settlement Type, Status, Save Channel, or Profile Channel. You can also search by Run Time, Start Time, or Stop Time. To search on one of these, enter the date and time manually or click the arrow and select the date using the calendar control.

You can use the percent sign (“%”) as a wildcard character when entering values in any of the text fields. For instance, if you want to search for all settlements whose Save Channel begins with the letter G, you could enter “G%” in the Save Channel field. You can use this wildcard before or after specified letters or numbers (i.e. you would use %t to search for all settlements whose Save Channel end with the letter t, etc.).

3. Specify how the search results are displayed.
  - Select the manner in which the results are sorted by clicking the **Sort by** plus (“+”) sign. See **Specifying How Results are Sorted** on page 2-5 for more information.
  - Specify how many results should appear on each page in the **Page Length** field.
4. Click **Search** to perform the search. To clear all the search fields, click **Reset**.
5. The search results appear on the **Settlement List** screen.

## Settlement List

Settlement runs are listed on the Settlement List screen.

The Settlement List screen displays the following information for each settlement:

- **Status Icon:** the current status of the settlement run. See **Status Icons** on page 4-6 for more information.
- **Actions:** the available actions for the settlement run. See **Actions** on page 4-7 for more information.
- **Run/Schedule Time:** the time the settlement was run or was scheduled to run.
- **Settlement Type:** the type of settlement.
- **Market:** the market for which the settlement was run.
- **Start Time:** the start time of the settlement run.
- **Stop Time:** the stop time of the settlement run.
- **Save Channel:** the channel to which settlement data was saved.
- **Profile Channel:** the channel from which profile data used in the settlement comes.
- **Status:** the current status of the settlement run.
- **Progress:** the current progress of the settlement run.







If there is more than one page of results, you can move between pages using the ◀ and ▶ buttons. To change the number of results that appears on each page, enter the number in the **Rows** field.

To refresh the contents of the Settlement list, click the Refresh icon (↻).

To delete a settlement, check the checkbox in the far left column and click **Delete**.

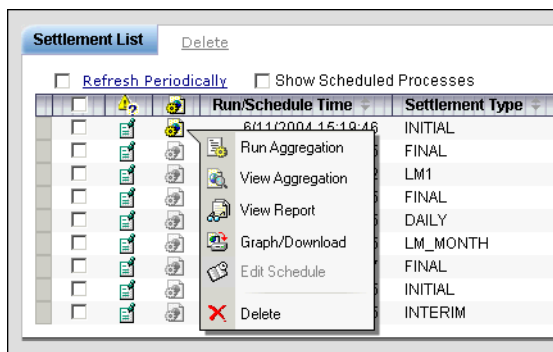
## Status Icons

The icon listed next to each settlement indicates its current status. The meanings of these icons are as follows:

Icon	Description
	<b>Report Starting:</b> Report processing is starting.
	<b>Report in Process:</b> Report processing
	<b>Report Complete:</b> Report processing is complete.
	<b>Report Scheduled:</b> Report is scheduled to run at a future time. To view scheduling details, click the ▶ arrow in the far right column. To edit the schedule, click <b>Edit</b> . See <b>Scheduling Processes</b> on page 4-2 for more information about scheduling processes.
	<b>Report Reminder:</b> Indicates that a scheduled report is due to run in 15 minutes or less.
	<b>Report Error:</b> One or more errors or warnings associated with the report. To view the error, click the Error icon.

## Actions

You can perform a number of actions on each settlement in the Settlement List. To view a list of available actions, move the mouse over the Actions icon for the settlement you wish to work with. A pop-up menu will appear listing the available actions for that settlement.



Available actions include:

- **Run Aggregation**
- **View Aggregation**
- **View Report**
- **Graph/Download**
- **Edit Schedule**
- **Delete**

## Run Aggregation

The **Run Aggregation** action allows you to aggregate the settlement data based on user-specified aggregation levels (Retailer, Zone, Profile Class, etc.) and results (Load, Loss, UFE, etc.).

### How to run an aggregation for a settlement:

1. Select **Run Aggregation** from the Actions list for the selected settlement. The **Settlement Aggregation** screen opens.
2. Check one or more aggregation levels from **Aggregation Level** list and one or more result types from the **Results** list and click **Add Aggregation View**. The selected combination of aggregation levels and results appears on the **Aggregation Level/Results** list on the right side of the screen.

**Note:** Each additional aggregation added increases the time required to perform the aggregation calculations. User should not attempt to perform more than five (5) sets of custom aggregations at one time.

3. To delete a combination, check the appropriate checkbox from the **Currently selected settlement result(s)** list and click **Delete**.
4. To aggregate the data based on one or more aggregation level/results combinations, check the checkbox for the desired combination(s) and click **Create Aggregation Results**.

The selected aggregation appears on the **Settlement Aggregation Results** screen.

## View Aggregation

The **View Aggregation** action opens the **Settlement Aggregation Results** screen, which lists the default aggregation for the settlement. To view all the aggregations run for the selected settlement run, check the **Show All Aggregations** checkbox.

This screen displays the following information about each set of aggregation results:

- **Status Icon:** the current status of the aggregation. See **Status Icons** on page 4-6 for more information.
- **Actions:** the available actions for the aggregation. Available actions include **View Report**, **Graph/Download**, and **Delete**.
- **Start Time:** the start time of the aggregation.
- **Stop Time:** the stop time of the aggregation.
- **Aggregation Criteria:** the criteria used to generate the aggregation.
- **Custom Flag:** A flag that indicates if the aggregation was Custom or Default.
- **User:** the user who generated the aggregation.
- **Status:** the current status of the aggregation.
- **Progress:** the current progress of the aggregation.

If there is more than one page of results, you can move between pages using the ◀ and ▶ buttons. To change the number of results that appears on each page, enter the number in the **Rows** field.

To refresh the contents of the screen, click the Refresh icon (↻) or click **Refresh Periodically**. Check the **Refresh Periodically** checkbox to automatically refresh the screen every few seconds.

To delete an aggregation, check the checkbox in the far left column and click **Delete**.

## View Report

The **View Report** action opens the Report View screen and displays the report generated by the Oracle Utilities Rules Language used to perform the settlement or aggregation. See **View Reports** 1-18 for more information about working in this screen.

## Graph/Download

The **Graph/Download** action allows you to view, graph, and/or download interval data generated by the settlement and/or related aggregation. When you select the Graph/Download action, interval data generated by the selected settlement or aggregation appear on the Usage results screen. See **Viewing and Exporting Interval Data** on page 6-5 in the Oracle Utilities Energy Information Platform User's Guide for more information about viewing and exporting interval data.

## Edit Schedule

The **Edit Schedule** action allows you to change the scheduling of the selected settlement. See **Scheduling Processes** on page 4-2 for more information about scheduling processes to run unattended.

## Delete

The **Delete** action deletes the selected settlement or aggregation from the Settlement List or Aggregation Results screen (respectively).

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