

Oracle Utilities Quotations Management

User's Guide

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Primary Author: Lou Proseri

Contributor: Steve Pratt

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Chapter 1

Oracle Utilities Quotations Management Overview

This chapter provides an overview of the web-enabled Oracle Utilities Quotations Management application, including:

- **What is Oracle Utilities Quotations Management?**
- **What is this book?**
- **Oracle Utilities Quotations Management Components and Documentation**
- **International and Multiple Currency Support**
- **Working with Oracle Utilities Quotations Management**

What is Oracle Utilities Quotations Management?

Oracle Utilities Quotations Management is a web-enabled version of Oracle Utilities Quotations Management product. As part of the web-enabled Oracle Utilities Energy Information Platform, Oracle Utilities Quotations Management provides access to pricing functionality via an Intranet/Internet using Microsoft Internet Explorer. Because all applications of the Oracle Utilities Energy Information Platform 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 Quotations Management, 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 Quotations Management Installation and Configuration Guide* and the *Data Manager User's Guide*.

What is this book?

The *Oracle Utilities Quotations Management User's Guide* describes the pricing functionality of the Oracle Utilities Energy Information Platform, including the following:

- **Chapter 1: Oracle Utilities Quotations Management Overview** provides an overview of the Oracle Utilities Quotations Management 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, common controls, and running and viewing reports.
- **Chapter 3: Working with Forecasts** describes how users work with forecasts.
- **Chapter 4: Validating Usage** describes how users enter and validate usage used in pricing calculations.
- **Chapter 5: Setting Up Contract Terms, Contract Products, and Contract Types** describes how users work with contract types.
- **Chapter 6: Working with Contracts** describes how users work with pricing contracts.

Oracle Utilities Quotations Management Components and Documentation

Oracle Utilities Quotations Management comprises the following application components and documentation.

Oracle Utilities Quotations Management

This is the web-enabled Oracle Utilities Quotations Management application.

The *Oracle Utilities Quotations Management Web User's Guide* (this book) describes how to use this application. The *Oracle Utilities Quotations Management Installation and Configuration Guide* describes how to install and configure Oracle Utilities Quotations Management.

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 Quotations Management

This section describes how you work with Oracle Utilities Quotations Management, describing a typical process for creating a pricing contract for a group of accounts or service points.

Enter Account Data

The first step in creating a pricing contract is to enter data for the accounts or service points for which you're creating the pricing contract. This is usually done by importing a file to the Oracle Utilities Data Repository that contains the appropriate customer and account data, including:

- Customer IDs
- Account IDs
- Service Point IDs
- Historical Usage Data for Accounts (see **Enter Usage**)
- Contact Information

See **Adding Scalar Usage** on page 6-18 of the *Oracle Utilities Energy Information Platform User's Guide* for more information.

Create List of Accounts for Pricing Contract

If creating a contract based on accounts, the next step is to create a list of the accounts to be included in the pricing contract. Most Oracle Utilities Quotations Management functions work with accounts or account lists. See **Lists** on page 7-63 of the *Oracle Utilities Energy Information Platform User's Guide* for more information.

Enter Usage

The next step is to enter historical usage data, either scalar usage or interval data, for each account or service point to be included in the pricing contract. This data is used by Oracle Utilities Quotations Management when calculating the pricing contract.

You can load scalar usage data and interval data by importing a file that contains the usage for each account or service point. See **Adding Scalar Usage** on page 6-18 of the *Oracle Utilities Energy Information Platform User's Guide* for more information about importing scalar usage and interval data files.

You can also manually enter scalar usage for accounts or service points. See **Validating Usage** on page 4-2 for more information about manually adding scalar usage data.

Validate Usage

The next step is to validate the usage for the accounts or service points. This step verifies that the data is valid based on user-specified business rules. For example, data may be considered invalid for pricing if it falls outside a threshold of some sort, such as more than 20% higher or lower than an average usage value. See **Validating Usage** on page 4-2 for more information.

Enter Forecast Data (Optional)

The next optional step is to enter forecast data, either scalar usage or interval data, for each account or service point to be included in the pricing contract. This data is used by Oracle Utilities Quotations Management when calculating the pricing contract.

You can load forecast data (scalar or interval data) by importing a file that contains the forecast data for each account or service point. See **Adding Scalar Usage** on page 6-18 of the *Oracle Utilities Energy Information Platform User's Guide* for more information about importing forecast data.

You can also manually enter forecasts for accounts or service points. See **Creating Forecasts** on page 3-3 for more information about creating forecasts and adding forecast data.

Create Pricing Contract

The next step is create the pricing contract itself. This process creates all the records necessary to calculate your pricing contract in the Oracle Utilities Data Repository. See **Creating Contracts** on page 6-4 for more information.

Enter Pricing Contract Details

After creating the pricing contract, the next step is to review the details of the pricing contract and make any necessary changes. Some specific tasks to be performed at this step include:

- Reviewing basic information concerning the pricing contract on the **Basics Tab**
- Reviewing details for the pricing contract's accounts, customer, or service points on the **Items Tab**
- Selecting the appropriate Terms for the pricing contract on the **Terms Tab**
- Selecting the appropriate documents for the pricing contract on the **Documents Tab**
- Reviewing the pricing contract approvals (once the Contract's Status is In Approval) on the **Approvals Tab**
- Reviewing the history of the pricing contract on the **History Tab**
- Reviewing any related pricing contracts on the **Related Contracts Tab**
- Viewing any events or exceptions related to the pricing contract on the **Work Queue Detail Tab**

Calculate Pricing Contract

The next step is to actually calculate the pricing contract. This step uses the usage (and optionally, the forecast) data entered for each account or service point, along with the pricing contract details (products, product terms, and other terms) to calculate the pricing contract for the accounts or service points.

After the pricing contract has been calculated, you can review the results and revise the pricing contract as necessary. See **View Calculations** on page 6-21 for more information.

Generate Pricing Contract

The last step is to generate the actual pricing contract itself. This step creates a formal contract that can be sent to the prospective client. See **View Contract** on page 6-21 for more information

Chapter 2

Working with the Oracle Utilities Energy Information Platform

This chapter describes how you work with the Oracle Utilities Energy Information Platform 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
	Default Menu: Changes the Left menu from the Main Menu to the Data Menu .
	Default Menu: Changes the Left menu from the Data Menu to the Main Menu .
	Current Data Base: Opens the Set Preferences screen. When you hover the mouse over this icon, a tool tip opens, displaying currently selected data source.
	Security Administration: Opens the Security Administration screen.
	Home: Returns the user to the home dashboard screen.
	Change Theme: 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 from the Oracle Utilities Energy Information Platform. Oracle Utilities Quotations Management uses the following menus:

Pricing and Contracts Menu

The Pricing and Contracts menu includes the following options:

- **Contracts:** Opens **Contracts** screen, from which users can search and add contracts
- **Forecasts:** Opens **Forecasts** screens, from which users can search and add forecasts.
- **Validate Usage:** Opens the **Validation** screen.
- **Contract Setup:** Expands to display the **Contract Setup** menu, which includes the following options:
 - **Contract Types:** Opens the Oracle Utilities Quotations Management **Contract Type** screen.
 - **Contract Products:** Opens the Oracle Utilities Quotations Management **Contract Product** screen.
 - **Terms:** Opens the Oracle Utilities Quotations Management **Term** screen.
 - **Term Categories:** Opens the Oracle Utilities Quotations Management **Term Category** screen.
 - **Templates:** Opens the Oracle Utilities Quotations Management **Template** screen.
 - **Term Templates:** Opens the Oracle Utilities Quotations Management **Term GUI XSD** screen.
- **Run Reports:** Opens the **Run Reports** screen, displaying reports associated with Pricing (Product code "PE").
- **View Reports:** Opens the **View Reports** screen, listing previously run reports associated with Pricing (Product code "PE").

Navigation

Oracle Utilities recommends using links and menu options when moving between screens in the Oracle Utilities 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 (▼).

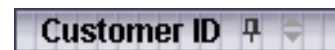
Locking Columns

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.

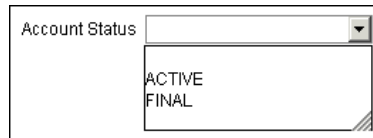
Enter the appropriate parameters for your search and click **Search**. The dialog will display a list of records that match the search criteria.

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.

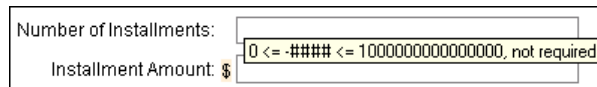
To select a value from a drop-down list, click the arrow next to the field. This opens a list that includes all the values available.



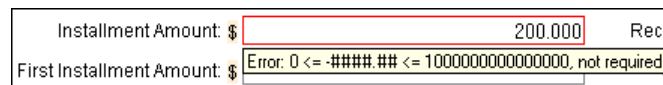
If one or more of the values is longer than the default size of the list, click the lower right corner of the list and resize the list as necessary.

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
	Report Starting: Report processing is starting.
	Report in Process: Report processing
	Report Complete: Report processing is complete.
	Report Complete (Adobe Acrobat format): Report processing is complete.
	Report Complete (Microsoft Excel format): Report processing is complete.
	Report Complete (Microsoft Word format): Report processing is complete.
	Report Complete (Rich Text format): Report processing is complete.
	Report Complete (Comma Separated Values format): Report processing is complete.
	Report Scheduled: 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 Edit .
	Report Reminder: Indicates that a scheduled report is due to run in 15 minutes or less.

Icon	Description
	Report Error: 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.

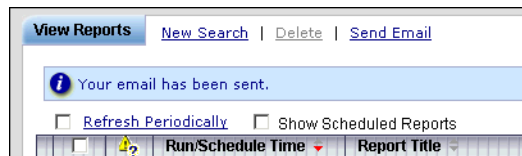
2. Select a **From** address from the drop-down list. This list is based on available records in the From Addresses table. If there are no available records in the From Addresses table, the current user's email address is populated (if provided on the User Overview screen on the Security Administration 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 2-15 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 2-15 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 2-15 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

Working with Forecasts

Forecasts are estimated and forecasted usage data for accounts and/or lists of accounts used in generating contracts. This chapter describes how to work with forecasts with Oracle Utilities Quotations Management, including:

- **Searching Forecasts**
- **Creating Forecasts**
- **Adding Forecast Values**

Forecasts are optional. Oracle Utilities Quotations Management can create forecasts for accounts based on historical usage data. See **Chapter 4: Validating Usage** for more information about entering usage.

Searching Forecasts

The **Forecasts** option allows users to search for forecasts in the Oracle Utilities Data Repository based on user-specified search criteria.

How to search forecasts:

1. Select **Pricing and Contracts**→**Forecasts**.

The Forecast Search screen opens.

2. Enter the search criteria in the appropriate field.

You can search based on the Account ID, Forecast ID, and Forecast Description, Group, Status, or External Status associated with the forecast. You can also search based on Start Time (Valid After) and Stop Time (Valid Until). To search on one of these, enter the data 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 forecasts whose ID begins with the letter G, you could enter “G%” in the Forecast ID field. You can use this wildcard before or after specified letters or numbers (i.e. you would use %t to search for all forecasts whose ID end with the letter t, etc.).

Note that Account IDs, Forecast IDs, and Forecast Descriptions are **case-insensitive**. For example, there is no difference between the “Acct_1” and “acct_1” account IDs.

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 2-6 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 Forecast List screen.


The Forecast List window displays the following information for each forecast:

- Forecast ID
 - Account ID
 - Account Name
 - Forecast Description
 - Valid Dates
 - Status
 - External Status
 - Group
6. To sort the results by one of the columns, click the appropriate column heading. For example, to sort the results by Account ID, click the Account ID column heading. 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.
 7. To perform another search, click **New Search**. To delete a forecast, check the checkbox in the far left column and click **Delete**. To create a new forecast, click **Create**.
 8. To view a forecast, click on the Forecast ID. The selected forecast appears in the Forecast Input screen. You can then add forecast values to the forecast (see **Adding Forecast Values** on page 3-6 for more information).

Creating Forecasts

Oracle Utilities Quotations Management also allows users to create new forecasts for single accounts or lists of accounts.

How to create a new forecast for a single account:

1. Click **Create** on the **Forecast List** screen. The Forecast window opens.
2. Select the account for the forecast by clicking the **Browse** button (). The Accounts window opens.
3. Enter the search criteria in the appropriate field.

You can search based on the Account Name, Customer ID, or an Account ID associated with the account. You can also search based on Account Status, Operating Company, and/or Jurisdiction. To search on one of these, select it from the drop-down lists. In addition, you can search based on contact information such as phone number, address, city/state, etc.

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 accounts 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 accounts whose names end with the letter t, etc.).

Note that Account Names, Customer IDs, and Account IDs are **case-insensitive**. For example, there is no difference between the “Acct_1” and “acct_1” account IDs.

4. 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 2-6 for more information.
 - Specify how many results should appear on each page in the **Page Length** field.
5. Click **Search** to perform the search. To clear all the search fields, click **Reset**.
6. The search results appear on the Accounts screen.

The Accounts screen displays the following information for each account:

- Customer ID
 - Account ID
 - Account Name
 - Account Status
 - Start Date/Stop Date
 - Contact Information (includes Contact Type, Name, Operating Company, Jurisdiction, Address, City, and State).
7. To sort the results by one of the columns, click the appropriate column heading. For example, to sort the results by Customer Name, click the Customer Name column heading. 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.
 8. To perform another search, click **New Search**.
 9. To select an account, click on the Account ID. The Account ID for the selected account will appear in the Forecast screen.
 10. Enter a unique ID for the forecast in the **Forecast ID** field.
 11. Enter a description for the forecast in the **Forecast Description** field.

-
12. *Optional.* Enter the dates for which the forecast will be valid in the **Valid From** and **To** fields. To enter dates, enter the date manually or click the arrow and select the date using the calendar control.
 13. *Optional.* Select an external status for the forecast from the **External Status** drop-down list.
 14. *Optional.* Select a group for the forecast from the **Group** drop-down list.
 15. Click **Add** to create the forecast record.

Once the record has been created, you can add forecast values.

How to create a forecast for a list of accounts:

1. Open an existing forecast as described under **Searching Forecasts** on page 3-2.
2. Select List from the Account drop-down list and click the **Browse** button (...). The Lists window opens.
3. Enter the search criteria in the appropriate field.

You can search based on the Name, Type, Description, Status Code, Public/Private flag, Create Time, Start Time, or Stop Time associated with the 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 lists 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 lists whose names end with the letter t, etc.).

Note that Names are **case-insensitive**. For example, there is no difference between the “List_1” and “list_1” list names.

4. 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 2-6 for more information.
 - Specify how many results should appear on each page in the **Page Length** field.
5. Click **Search** to perform the search. To clear all the search fields, click **Reset**.
6. The search results appear in the Account Lists screen.

The Account Lists window displays the following information for each list:

- List Name
 - Description
 - Type
 - Status Code
 - Public/Private
 - User
 - Start Time (Valid After)/Stop Time (Valid Until)/Create Time
7. To sort the results by one of the columns, click the appropriate column heading. For example, to sort the results by Name, click the Name column heading. 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.
 8. To perform another search, click **New Search**.
 9. To select a list, click the **List Name** link. The selected list name will appear at the top of the screen. The first account in the list will appear in the Account List field on the Forecast Input screen.

-
10. Select the account you wish to create the forecast for from the drop-down list.
 11. Click the **Browse** button (**...**) next to the Forecast ID field. The Forecast List window opens displaying a list of all Forecasts for the current account.
 12. To select one of the existing forecasts, click the **Forecast ID** link. The selected forecast opens on the Forecast Input screen.
 13. To create a new forecast, click **Create**. The **Forecast** window opens.
 14. Create the forecast as described under **Creating Forecasts** on page 3-3. Click **Add** to create the forecast. The forecast appears on the Forecast Input screen.
 15. Repeat steps 10 through 14 for each account in the list.

Adding Forecast Values

Oracle Utilities Quotations Management also allows users to add usage values to forecasts. You can add forecast values manually or via file import.

How to manually add usage values to a forecast:

1. From the Forecast Input screen, select the account you wish to add the forecast item to. If you opened the forecast based on an account search, the account should be listed in the **Account ID** field.

If you selected the forecast based on a list of accounts, the List Name will appear at the top of the screen, and the first account in the list should appear in the **Account List** field. Select the appropriate account from the **Account List** drop-down list.

2. Select a forecast by clicking the **Browse** button (...). The Forecast List window opens displaying all the forecasts for the selected account.

To create a new forecast, click **Create**.

To select a forecast, click the **Forecast ID** link. The selected forecast will appear on the Forecast Input screen (including Forecast ID, Forecast Description, Valid Dates, Status, External Status, and Group).

3. Click **Add**. A new row will appear in the Forecast Item list at the bottom of the screen.
4. Enter or edit the **Read Date**, **Start Time** and **Stop Time** for the forecast item. To change a date, double click the field. A red box will outline the field. Click the arrow to open the calendar control and select the appropriate date or enter the date manually.
5. Enter a **Value** for the forecast item. Double click the Value field. A red box will outline the field and a cursor will appear in the field. Enter the appropriate value.
6. Select the **Determinant** for the forecast item. Double click the Determinant field. A red box will outline the field and a drop-down box will appear in the field, listing all the determinants that have a Type Code of FORECAST in the Bill Determinant table. Select the appropriate determinant from the drop-down list.
7. To add a new forecast item for the same account, click **Add** again.
8. *Optional.* To create a copy of one or more existing forecast items, select the item(s) to copy by checking the checkbox in the far left column, and click **Copy**. Checking the checkbox in the far left column of the headings row selects all existing forecast items.
9. *Optional.* To add forecast values to a different account in the same list, select the account from the **Account List** drop-down box, and repeat steps 2 through 6.
10. *Optional.* To change the forecast's External Status or Group, select the appropriate value from the drop-down lists.
11. To save the forecast, click **Save**.

Note: After you enter new values for a forecast item, the Date and Value fields turns red to indicate that the value has not yet been saved. When you save the forecast, the fields turn blue/white (alternating rows).

How to add usage values to a forecast via file import:

1. From the Forecast Input screen, click **Load from File**.
2. The Upload Files screen opens.
3. Click the **Browse** button. The **Choose file** dialog opens.

Navigate to the file you wish to upload and click **Open**. You can upload *.imp, and *.lse files.

*.imp files are used to load scalar usage to the Meter Value table. See **Creating Forecast Value Import Files** on page 3-9 for more information about creating *.imp files that contain usage records. *.lse files are used to load interval data.

If you select a *.imp file, the **Import Mode** drop-down list appears on the Upload Files screen.

If you select a *.lse file, the **OverCount**, **UnderCount**, and **Validation Status** drop-down lists appear on the Upload Files screen.

4. **For *.imp files only.** Specify how the records in the file are processed by selecting the appropriate **Import Mode**:
 - **Add:** Adds **new** records to the Data Repository. If there are any records in the file that already exist in the database, or if there are duplicate record IDs in the import file, the program considers it an error.
 - **Update:** Replaces **existing** records in the Data Repository with the version in the import file. If there are any records in the file that do not already exist in the database, or if there are duplicate record IDs in the import file, the program considers it an error.
 - **Delete:** Deletes records from the Data Repository. For every parent ID in the import file, the program automatically deletes both the parent and all of its dependents. If there are any records in the file that do not already exist in the database, or if there are duplicate record IDs in the import file, the program considers it an error.
 - **Add/Update:** Both adds **new** records and replaces **existing** records. If a record is not already in the database, it is added. If it does exist, it is updated.

Note: Using the ‘Add/Update’ mode will fail if the Import file contains more columns than the database table you are importing data into. Existing records will **not** be updated, and New records will **not** be created.

5. **For *.lse files only.** Select an **OverCount** option from the drop-down list. This controls the behavior of import functions when an incoming cut has too many recorded intervals for the time span defined by the cut start time and the cut stop time and the DST_Participant flag.
 - **REJECT:** Directs the function to produce an error and disallow the import of any incoming/uploaded cutn when it has too many recorded intervals (Expected < Recorded).
 - **BE:** Behaves exactly like REJECT, except in the case where a cut that crosses the beginning of a DST period has its recorded interval count equal to the expected intervals count without the hour adjusted for DST.
 - **ASIS:** Allow the storage of any incoming cuts with a number of expected intervals less than the number of recorded intervals. The stop times of these cuts will remain unchanged.
6. **For *.lse files only.** Select an **UnderCount** option from the drop-down list. This controls the behavior of import functions when an incoming cut has too few recorded intervals for the time span defined by the cut start time and the cut stop time and the DST Participant flag.
 - **REJECT:** Directs the function to produce an error and disallow the import of any incoming/uploaded cut when it has too few recorded intervals (Expected > Recorded).
 - **BE:** Directs the function to behave similar to the default behavior observed in previous installations and versions of Oracle Utilities products. This setting works exactly like FILL in most cases. When a cut being processed spans the end of the DST period, usually the fall DST hour, if viewed directly from the raw flat file, the cut will appear to be filled using DST calculations, yet if the cut is saved to any binary data source, it will only be filled with missings as if the DST_Participant flag is set to “N”. For example, if a cut is supplied that crosses the Fall DST change and has only 92 intervals (23 hours), the system will fill to only 96 not 100. If 100 intervals are supplied, then 100 will be stored.

Also, if 97 - 99 intervals are supplied and the DST = "Y", then the system will Reject the incoming cut.

- **FILL:** Fills all incoming cuts with missings (value = 0, Status = "9") to the stop time of the cut using DST adjustments if appropriate (DST_Participant = "Y").
 - **ASIS:** Allows the storage of any incoming cuts with a number of expected intervals greater than the number of recorded intervals. The stop times of these cuts will remain unchanged.
7. **For *.lse files only.** Select the **Validation Status** option from the drop-down list. This controls the default behavior of how the system sets the Validate_Record_Flag.
 - **Use Cut's Status:** Sets the incoming cuts as invalid if the Validate_Record_Flag for a cut is set to "Y", or valid if the flag is set to "N". If the incoming Validate_Record_Flag is "Y" then it will act as Force Invalid for that cut. If the incoming Validate_Record_Flag is "N" then it will act as Force Valid for that cut.
 - **Force Valid:** Sets all incoming cuts in the import file as valid (INTERNAL_VALIDATION, EXTERNAL_VALIDATION, MERGE, and DELETE flags all set "Y"), effectively ignoring the Validate_Record_Flags of the imported cuts.
 - **Force Invalid:** Sets all incoming cuts as in the import file invalid (INTERNAL_VALIDATION, EXTERNAL_VALIDATION, MERGE, and DELETE flags all set "N"), effectively ignoring the Validate_Record_Flags of the imported cuts.
 8. Click the **Upload** link to begin the upload. To clear the screen, click the **Reset** link.

The upload will appear as an item on the **View Reports** screen.

To view the upload results, click the **Creation Date** link.
 9. For scalar usage (imported using a *.imp file), the new forecast items will appear on the forecast the next time you view it. For interval data, the data is stored in the Oracle Utilities Data Repository.

How to delete forecast values from a forecast:

1. Select the forecast item(s) to be deleted from the **Forecast Items** list by checking the checkbox (s) in the far left column, and click **Delete**. Checking the checkbox in the far left column of the headings row selects all existing forecast items.

Validating, Finalizing, and Graphing Forecast Data

You can also validate, finalize, and graph forecast data from the Forecast Input screen. Validating data performs customizable validation logic on the data to ensure it meets business-specific criteria, and sets the forecast's status to SUCCESSFUL or FAILED, as appropriate. Finalizing sets the Status of the forecast to FINAL, preventing any modifications to the data. Graphing allows the user to view a graph of the forecast data.

How to validate a forecast:

1. From the Forecast Input screen, click **Validate**.
2. The Process screen opens.
3. When processing is complete, the Forecast Input screen opens.

If the validation was successful, the forecast's Status is set to SUCCESSFUL.

If the validation failed, the forecast's Status is set to FAILED.

How to finalize a forecast:

1. From the Forecast Input screen, click **Finalize**.
2. The Process screen opens.
3. When processing is complete, the Forecast Input screen opens, and the forecast's Status is set to FINAL.

How to view forecast data:

1. From the Forecast Input screen, click **Graph**.

Note: The Graph option is only available if the forecast's Status is SUCCESSFUL or FINAL.

2. The **Interval Data Summary** screen opens, displaying the forecast data.

Creating Forecast Value Import Files

Forecast value import files must follow a number of guidelines in order to work properly.

Importing Scalar Values

Importing scalar values requires creating a *.imp file that contains Forecast Value records. These records contain the following data, separated by commas:

- **FCSTSVAL:** Identifying mnemonic for the record type, in this case Forecast Value records. This must be the first value of the record.
- **Forecast ID:** The forecast id for the forecast item.
- **Bill Determinant:** The bill determinant for the forecast item.
- **Name:** The Name of the forecast item. Names should begin with "RAW_IMPORT-" followed by a combination of other characters. This will help you identify forecast value records created via import vs. those created using the Forecast Input screen.

Note: The combination of Forecast ID, Bill Determinant, and Name must be unique for each record in the Forecast Value table. To ensure you import unique records, use a unique Name for each record (RAW_IMPORT-1000, RAW_IMPORT-1001, RAW_IMPORT-1002, etc.).

- **Value:** The value of the forecast item, as measured in the specified bill determinant.
- **String Value:** A string value for the forecast item.
- **Read Date:** The read date for the forecast item.
- **Start Time:** The start time for the forecast item.

-
- **Stop Time:** The stop time for the forecast item.

Notes:

The following rules provide specific details concerning the input file format:

- Each record must begin on a new line (though text wrapping may occur).
- Comments may be placed on a line by themselves by beginning the line with an asterisk (*) character. Blank lines are also allowed.
- Each value may optionally be enclosed by double-quotation marks. If a value is enclosed in double quotation marks, then all characters between the quotation marks will be considered part of the value, including any leading or trailing blanks.
- If a value contains a comma (,) character, or any leading or trailing blank characters, then it **must** be enclosed in double-quotation marks.
- Null values are represented by no value. Trailing null values must be preceded by commas.

Example:

The following sample could be used to import forecast items for the “BXT01_GS1_FC” forecast for October 2001 through February 2002.

```
FCSTVAL,"BXT01_GS1_FC","1","RAW-1034026752822","120",,"2001-10-31
00:00:00","2001-10-01 00:00:00","2002-10-31 00:00:00"
FCSTVAL,"BXT01_GS1_FC","1","RAW-1034087313350","150",,"2001-11-30
00:00:00","2001-11-01 00:00:00","2002-11-30 00:00:00"
FCSTVAL,"BXT01_GS1_FC","1","RAW-1034087318100","130",,"2001-12-31
00:00:00","2001-12-01 00:00:00","2002-12-31 00:00:00"
FCSTVAL,"BXT01_GS1_FC","1","RAW-1034087318131","140",,"2002-01-31
00:00:00","2002-01-01 00:00:00","2003-01-31 00:00:00"
FCSTVAL,"BXT01_GS1_FC","1","RAW-1034087318146","160",,"2002-02-28
00:00:00","2002-02-01 00:00:00","2003-02-28 00:00:00"
```

See **Appendix A: Oracle Utilities Data Repository Schema Import File Format** in the *Data Manager User's Guide* for more information about creating *.imp files.

Importing Interval Data

When importing interval data, there must be a Channel History record that links the account to the recorder,channel being imported.

Chapter 4

Validating Usage

Usage is actual usage data for accounts and/or lists of accounts used in generating pricing contracts. This chapter describes how to validate usage for use with Oracle Utilities Quotations Management, including:

- **Validating Usage**

Validating Usage


The **Validate Usage** option allows users to validate scalar and interval usage values for accounts, which in turn is used in pricing calculations and generating pricing contracts.

Note: Adding usage is performed using the **Scalar Data->Meter Values** option on the Usage menu. See **Adding Scalar Usage** on page 6-18 in the *Oracle Utilities Energy Information Platform User's Guide* for more information.

How to validate usage:

1. Select **Pricing and Contracts->Validate Usage**.

The Validation window opens.

2. Select an account or list of accounts. To select an account, proceed with steps 3 through 10. To select a list of accounts, skip to steps 11 through 18.
3. To select an account, select ID from the Account drop-down list and click the **Browse** button (). The Accounts window opens.
4. Enter the search criteria in the appropriate field.

You can search based on the Account Name, Customer ID, or an Account ID associated with the account. You can also search based on Account Status, Operating Company, and/or Jurisdiction. To search on one of these, select it from the drop-down lists. In addition, you can search based on contact information such as phone number, address, city/state, etc.


You can use the percent sign (“%”) as a wildcard character when entering values in any of the fields. For instance, if you want to search for all accounts 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 accounts whose names end with the letter t, etc.).

Note that Account Names, Customer IDs, and Account IDs are **case-insensitive**. For example, there is no difference between the “Acct_1” and “acct_1” account IDs.

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 2-6 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 clear all the search fields, click **Reset**.
7. The search results appear on the Accounts screen.

The Accounts window displays the following information for each account:

- Customer Name
 - Account ID
 - Account Name
 - Account Status
 - Start Date/Stop Date
 - Contact Information (includes Contact Type, Name, Address, City, and State).
8. To sort the results by one of the columns, click the appropriate column heading. For example, to sort the results by Customer Name, click the Customer Name column heading. 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.
 9. To perform another search, click **New Search**.

-
10. To select an account, click on the Account ID. The selected account will appear in the Account ID field of the Validation screen.
 11. To select a list, select List from the Account drop-down list and click the **Browse** button (). The Search Lists window opens.
 12. Enter the search criteria in the appropriate field.

You can search based on the Name, Type, Description, Status Code, Public/Private flag, Create Time, Start Time, or Stop Time associated with the 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 lists 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 lists whose names end with the letter t, etc.).

Note that Names are **case-insensitive**. For example, there is no difference between the “List_1” and “list_1” list names.

13. 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 2-6 for more information.
 - Specify how many results should appear on each page in the **Page Length** field.
14. Click **Search** to perform the search. To clear all the search fields, click **Reset**.
15. The search results appear in the Account Lists screen.

The Account Lists window displays the following information for each list:

- List Name
- Description
- Type
- Status
- Public/Private
- User
- Start Time/Stop Time/Create Time

16. To sort the results by one of the columns, click the appropriate column heading. For example, to sort the results by Name, click the Name column heading. 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.
17. To perform another search, click **New Search**.
18. To select a list, click the **Name** link. The selected list will appear in the Account List field of the Validation screen.
19. Enter the **Start Date** and **Stop Date** for the validation.
20. Click **Validate Usage**. The **Process** window appears.
21. When the validation is complete, if the validation failed for the account (or one of the accounts in a list), the Post Validation Failure screen appears.

This screen lists each account and whether it failed the validation or not, including:

- Account ID
- Account Name

-
- Usage Data
 - Validation Status (Passed or Failed)
 - Validation Message (if any)

To run the validation again, click **Run Validation**. To run a loose validation (i.e. a less strict validation), click **Run Loose Validation**.

22. When all the accounts have passed the validation, the Post Validation Success screen appears.

This screen lists each account that passed the validation, including:

- Account ID
- Account Name
- Usage Data (Raw or Edited)
- Validation Status (Passed or Passed (Loose))
- Validation Message (if any)

To estimate and/or weather normalize the usage data, click **Estimate and Normalize**. The Process window appears.

23. When usage for all the accounts have been successfully estimated and/or normalized, the Post Estimation and Normalization Success screen appears.

This screen lists each account that has successfully been estimated and/or normalized, including:

- Account ID
- Account Name
- Usage Data (Raw or Edited)
- Validation Method (Normal or Loose)
- Estimated Values (Yes or No)
- Validation Status (Ready to Quote)

To create a pricing contract based on this usage, click **Add Pricing Contract**. See **Creating Contracts** on page 6-4 for more information about creating pricing contracts.

Chapter 5

Setting Up Contract Terms, Contract Products, and Contract Types

Contract types are contract templates used to create contracts using Oracle Utilities Quotations Management. Setting up contract types allows you to create default settings for different types of contracts, including default contract terms and contract products. This chapter describes how to set up contract terms, contract products, and contract types using Oracle Utilities Quotations Management, including:

- **Contract Terms and Products**
- **Contract Types**
 - **Searching Contract Types**
 - **Creating Contract Types**
 - **Viewing Contract Types**

Contract Terms and Products

Contract terms are specific conditions and/or circumstance required to perform contract calculations. For example, a contract might require a specific margin, a minimum monthly volume of usage, or a date from which prices are in effect. These types of details and conditions are stored as Terms in the Oracle Utilities Data Repository. Contract products are pricing structures and rates used in contract and pricing calculations. Each account included in an offer has an associated product.

Setting up contract terms and products involves creating records in the following tables in the Oracle Utilities Data Repository:

- **Contract Products**
- **Terms**
- **Term Categories**
- **Templates**
- **Term Templates**

Contract Products

Records in the Contract Product table represent individual products used in contract calculations.

Searching Contract Products

You can search for existing contract products in the Oracle Utilities Data Repository.

How to search contract products:

1. Select **Contracts->Contract Setup->Contract Products** (or **Pricing and Contracts->Contract Setup->Contract Products**).

The Contract Product screen opens.

2. Enter the search criteria in the appropriate field.

You can search based on the Product ID, Description, Start Time, Stop Time, or Rate Form associated with the contract product.

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

Note that Product IDs are **case-insensitive**. For example, there is no difference between the “Prod_1” and “prod_1” product IDs.

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 2-7 in the *Oracle Utilities Energy Information Platform User’s Guide* 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**. To add a new record, click **Add**.
5. The search results appear on the Contract Product screen.

The Contract Product screen displays the following information for each product:

- Product ID

-
- Description
 - Start Time
 - Stop Time
 - Rate Form
6. To sort the results by one of the columns, click the appropriate arrow on the column heading. For example, to sort the results in ascending order by Product ID, click the “up” arrow on the Product ID column heading. See **Sorting Search Results** on page 2-7 in the *Oracle Utilities Energy Information Platform User’s Guide* for more information.

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 and press the Enter key.

7. To view a product click on the Product ID. The selected record will appear in the Contract Product screen.
8. To perform another search, click **New Search**. To refresh the contents of the screen, click the refresh icon.

Viewing and Editing Contract Products

Individual contract products are viewed on the Contract Product screen. This screen opens when you select a record from the Contract Product search results screen.

How to view and edit contract products:

1. Click on the Product ID link for the product you wish to view. The selected record opens on the Basics tab of the Contract Product screen.

This screen displays the following information for the selected record:

- **Product ID:** A unique id for the product.
 - **Description:** A description of the product.
 - **Start Time:** The start time of the product. This is the time after which the product is available for use in pricing calculations.
 - **Stop Time:** The stop time of the product. This is the time before which the product is available for use in pricing calculations.
 - **Rate Form:** The rate form that defines the product, from the Rate Form table.
2. Edit data in the fields as appropriate. To restore the record to its original state (before saving), click **Reset**.
 3. To save changes made to the record, click **Save**.
 4. To delete the current record, click **Delete**.

Viewing and Editing Contract Product Terms


You can also view terms associated with the contract product.

How to view and edit contract product terms:

1. Click on the Terms tab of the Contract Product screen. The terms associated with the contract product appear on the Terms tab of the Contract Product screen.

If there is more than one page of terms, 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 and press the Enter key.

The Terms tab displays the following information for each term associated with the Contract Product:

- **Term Type:** The term type for the product term, from the Term Type table.
 - **Start Time:** The start time of the product term. This is the time after which the product term is available for use in pricing calculations.
 - **Standard:** A flag that indicates if the product term is the “standard” product term for the product.
 - **Required:** A flag that indicates if the product term is required for the product.
 - **Calculated:** A flag that indicates if the product term is calculated.
 - **Default Text Value:** *Optional.* The default text value of the product term, if applicable.
 - **Default Numeric Value:** *Optional.* The default numeric value of the product term, if applicable.
 - **UOM:** *Optional.* The unit-of-measure associated with the product term, from the Unit of Measure table.
 - **Default Date Value:** *Optional.* The default date value of the product term, if applicable.
 - **Default Start Time:** *Optional.* The default start time of the product term, if applicable.
 - **Default Stop Time:** *Optional.* The default stop time of the product term, if applicable.
2. To filter the terms displayed by Term Category, select the desired category from the Term Category drop-down list. The default is to display All Terms.
 3. To change the order in which the terms are listed, click on the  area and move the term to the appropriate position in the list. This also determines how the terms are ordered when the contract product is associated with a contract item on a contract.
 4. To add a new product term, select the Term Category for the term you wish to add from the Term Category drop-down list, select the Term Type for the term you wish to add from the Term Type drop-down list, and click **Add Term**.
 5. To delete a product term(s), check the corresponding checkbox(es) and click **Delete Term**.
 6. To save changes, click **Save**.
 7. To edit or view a specific product term, click on the **Term Type** for the term. The selected product term will appear on the Terms tab.

The Terms tab displays the following information for the selected product term:

- **Product:** The contract product, from the Contract Product table.
- **Term:** The term, from the Terms table.
- **Start Time:** The start time of the product term. This is the time after which the product term is available for use in pricing calculations.
- **Stop Time:** The stop time of the product term. This is the time before which the product term is available for use in pricing calculations.

-
- **Standard:** A flag that indicates if the product term is the “standard” product term for the product.
 - **Required:** A flag that indicates if the product term is required for the product.
 - **Default Start Time:** *Optional.* The default start time of the product term, if applicable.
 - **Default Stop Time:** *Optional.* The default stop time of the product term, if applicable.
 - **Default Text Value:** *Optional.* The default text value of the product term, if applicable.
 - **Display Sequence:** A number that indicates the sequence in which the product term is displayed on the Terms tab list, as well as on the terms list for contract items on a contract.
 - **Default Numeric Value:** *Optional.* The default numeric value of the product term, if applicable.
 - **Default Date Value:** *Optional.* The default date value of the product term, if applicable.
 - **Calculated:** A flag that indicates if the product term is calculated.
8. Edit data in the fields as appropriate. To restore the record to its original state (before saving), click **Reset**.
 9. To save changes made to the record, click **Save**.
 10. To delete the current record, click **Delete**.

Adding Contract Products

You can also add new contract products.


How to add contract products:

1. Click **Add** on the Contract Product search screen. The Create Contract Product screen opens.
2. Enter an ID for the product in the **Product ID** field.
3. Enter an optional description of the product in the **Description** field.
4. Enter the start time and stop time of the product in the **Start Time** and **Stop Time** fields.
5. Select an optional rate form for the product in the **Rate Form** field.
6. To clear all the fields (before saving the record), click **Reset**.
7. To return to the search screen without adding a record, click **Cancel**.
8. To save the record, click **Save**. The new contract product appears on the screen.

Adding Contract Product Terms

You can also add terms associated with the contract product.

How to add contract product terms:

1. Click on the Terms tab of the Contract Product screen.
2. Select the Term Category for the term you wish to add from the Term Category drop-down list, select the Term Type for the term you wish to add from the Term Type drop-down list, and click **Add Term**.
3. To delete a product term(s), check the corresponding checkbox(es) and click **Delete Term**.
4. To change the order in which the terms are listed, click on the  area and move the term to the appropriate position in the list. This also determines the order in which the terms are displayed after being added to a contract item on a contract.
5. To save the product terms, click **Save**.

Terms

As described above, terms are specific conditions and/or circumstances required to perform contract calculations.

Searching Terms

You can search for existing terms in the Oracle Utilities Data Repository.

How to search terms:

1. Select **Contracts->Contract Setup->Terms** (or **Pricing and Contracts->Contract Setup->Terms**).

The Term screen opens.

2. Enter the search criteria in the appropriate field.

You can search based on the Start Time, Stop Time, Term Type, Term Category, Term Status, Default Text Value, Default Start Time, Default Stop Time, UOM Code, Default Numeric Value, Default Date Value, or Style.

See **Searching Database Tables** on page 8-7 in the *Oracle Utilities Energy Information Platform User's Guide* for more information about searching records, including the use of operands and wildcards.

3. 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 record, click **Add**.
4. The search results appear on the Term list screen.

The Term list screen displays the following information for each record:

- UID
- Start Time
- Stop Time
- Term Type
- Term Category
- Term Status
- Default Text Value
- Default Start Time
- Default Stop Time
- UOM Code
- Default Numeric Value
- Default Date Value

5. To sort the results by one of the columns, click the appropriate column heading. For example, to sort the results by Start Time, click the Start Time column heading. 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.
6. To view a record, click on the corresponding [...] link. The selected record will appear in the Term screen.
7. To perform another search, click **Search**. To refresh the contents of the list screen, click the refresh icon.
8. *Optional.* To delete one or more records, check the check boxes corresponding to the records to be deleted, and click **Delete**. To clear all the checkboxes, click **Clear**.

Viewing and Editing Terms

Individual Terms are viewed on the Term screen. This screen opens when you select a record from the Term search results screen.

How to view and edit terms:

1. Click on the [...] link for the Term you wish to view. The selected record opens in the Term screen.

The Term screen displays the following information for the selected record:

- **UID:** the unique ID for the record.
 - **Start Time:** The start time of the term. This is the time after which the term is available for use in calculations.
 - **Stop Time:** The stop time of the term. This is the time before which the term is available for use in calculations.
 - **Term Type:** The term type for the term, from the Term Type table.
 - **Standard:** A flag that indicates if the term is the “standard” product term for the product.
 - **Required:** A flag that indicates if the term is required for the product.
 - **Calculated:** A flag that indicates if the term is calculated.
 - **Default Text Value:** *Optional.* The default text value of the term, if applicable.
 - **Default Numeric Value:** *Optional.* The default numeric value of the term, if applicable.
 - **UOM:** The unit-of-measure associated with the term, from the Unit of Measure table.
 - **Default Date Value:** *Optional.* The default date value of the term, if applicable.
 - **Default Start Time:** *Optional.* The default start time of the term.
 - **Default Stop Time:** *Optional.* The default stop time of the term.
2. Edit data in the fields as appropriate. See **Working with Data Types** on page 8-4 in the *Oracle Utilities Energy Information Platform User's Guide* for more information about editing data values.
 3. To save changes made to the record, click **Save**. To save the edited record as a new record, click **Save As New**.
Note: The **Save As New** option only works if the identity of the record has been changed.
 4. To perform a new search, click **Search**.
 5. To open a list of records, click **List**.
 6. To delete the current record, click **Delete**.

Adding Terms

You can also add new Terms.

How to add terms:

1. Click **Add** on either the Term search or list screens. A blank Term screen opens.
2. Enter the start time and stop time for the term in the **Start Time** and **Stop Time** field.
3. Select the term type for the term in the **Term Type** field.
4. Select an optional term category for the term in the **Term Category** field.
5. Select an optional term status for the term in the **Term Status** field.
6. Enter an optional default text value in the **Default Text Value** field.
7. Enter an optional default start time and default stop time for the term in the **Default Start Time** and **Default Stop Time** field.
8. Enter an optional default numeric value in the **Default Numeric Value** field.
9. Enter an optional default date value in the **Default Date Value** field.
10. Enter an optional XSL string to define the user interface when entering values for the term in the **Style** field. **Note:** If using Templates do NOT populate this field.
11. To save the record, click **Save**. The new Term record appears on the screen.

Term Categories

Terms categories are categories of terms (such as product terms, or contract terms).

Searching Term Categories

You can search for existing term categories in the Oracle Utilities Data Repository.

How to search term categories:

1. Select **Contracts->Contract Setup->Term Categories** (or **Pricing and Contracts->Contract Setup->Term Categories**).

The Term Category screen opens.

2. Enter the search criteria in the appropriate field.

You can search based on the Term Category Code or Description.

See **Searching Database Tables** on page 8-7 in the *Oracle Utilities Energy Information Platform User's Guide* for more information about searching records, including the use of operands and wildcards.

3. 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 record, click **Add**.
4. The search results appear on the Term Category list screen.

The Term list screen displays the following information for each record:

- Term Category Code
- Description

5. To sort the results by one of the columns, click the appropriate column heading. For example, to sort the results by Term Category Code click the Term Category Code column heading. 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.

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6. To view a record, click on the corresponding [...] link. The selected record will appear in the Term screen.
 7. To perform another search, click **Search**. To refresh the contents of the list screen, click the refresh icon.
 8. *Optional.* To delete one or more records, check the check boxes corresponding to the records to be deleted, and click **Delete**. To clear all the checkboxes, click **Clear**.

Viewing and Editing Term Categories

Individual Term Categories are viewed on the Term Category screen. This screen opens when you select a record from the Term Category search results screen.

How to view and edit term categories:

1. Click on the [...] link for the Term Category you wish to view. The selected record opens in the Term Category screen.

The Term Category screen displays the following information for the selected record:

- **Term Category Code:** The code for the term category.
 - **Description:** a description of the term category.
2. Edit data in the fields as appropriate. See **Working with Data Types** on page 8-4 in the *Oracle Utilities Energy Information Platform User's Guide* for more information about editing data values.
 3. To save changes made to the record, click **Save**. To save the edited record as a new record, click **Save As New**.

Note: The **Save As New** option only works if the identity of the record has been changed.

4. To perform a new search, click **Search**.
5. To open a list of records, click **List**.
6. To delete the current record, click **Delete**.

Adding Term Categories

You can also add new term categories.

How to add term categories:

1. Click **Add** on either the Term Category search or list screens. A blank Term Category screen opens.
2. Enter a code for the term category in the **Term Category Code** field.
3. Enter an optional description of the term category in the **Description** field.
4. To save the record, click **Save**. The new Term Category record appears on the screen.

Templates

Templates define sets of attributes and properties that define the user interface when entering values for terms used with Oracle Utilities Billing Component - Contract Management and Oracle Utilities Quotations Management. For example, if the terms used in contracts require an effective date value (stored in the Default Date Value field), you could create a template that defines a user interface screen that allows users to specify the effective date using a calendar control.

Searching Templates

You can search for existing templates in the Oracle Utilities Data Repository.

How to search templates:

1. Select **Contracts->Contract Setup->Templates** (or **Pricing and Contracts->Contract Setup->Templates**).

The Template screen opens.

2. Enter the search criteria in the Template Name field.

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

Note that Product IDs are **case-sensitive**. For example, there is a difference between the “Temp_1” and “temp_1” template names.

3. Specify how the search results are displayed.
 - Specify how many results should appear on each page in the **Page Length** field.
4. Click **Search** to perform the search. To add a new record, click **Add**.
5. The search results appear on the Template screen.

The Template screen displays the following information for each product:

- UID
- Template Name

6. 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 and press the Enter key.
7. To view a template click on the Template Name. The selected record will appear in the Template screen.
8. *Optional.* To delete one or more records, check the check boxes corresponding to the records to be deleted, and click **Delete**.
9. To perform another search, click **New Search**. To refresh the contents of the screen, click the refresh icon.

Viewing and Editing Templates

Individual templates are viewed on the Template screen. This screen opens when you select a record from the Template search results screen.

How to view and edit templates:

1. Click on the Template Name link for the template you wish to view. The selected record opens on the Template screen.

This screen displays the following information for the selected record:

- **Template Name:** A unique id for the template.
 - **Rate Code:** The rate form code associated with the template.
 - **Operating Company:** The operating company associated with the template.
 - **Jurisdiction:** The jurisdiction associated with the template.
 - **Attributes Properties:** The attributes and properties that define the user interface when entering values for the term. Each attribute is defined by the following:
 - **Attribute Name:** The name of the column on the Terms table where the values for the term are stored. Can be STARTTIME, STOPTIME, VAL (Default Text Value), VULNUM (Default Numeric Value), or VALDATE (Default Date Value).
 - **Attribute Type:** The type of attribute. Can be string, date, datetime, monthyear, long, double, boolean, lookup, or enumeration.
 - **Caption:** The caption that appears on the user interface when entering values for the term.
 - **Properties:** Click the plus (“+”) in the far left column to display specific properties for the attribute.
 - **Script Document:** A expandable text box that defines Javascript validations and/or business rules related to values entered for the term. Click the **Script Document** plus (“+”) sign to open the text box.
2. Edit data in the fields as appropriate. To restore the record to its original state (before saving), click **Reset**.
 3. To add an attribute, click **Add**. Enter the attribute name in the **Attribute Name** column, select the attribute type from the **Attribute Type** drop-down list, and enter the label for the attribute in the **Caption** column.
 4. To delete an attribute(s), check the corresponding checkbox(es) and click **Delete**.
 5. To edit the **Script Document**, click the Script Document plus (“+”) sign to open the text box and edit the script as appropriate.
 6. To save changes made to the record, click **Save**.

Editing Attribute Properties

The data values defined in a template are called attributes, and each can be one of the following types:

- **String** (xs:string): A string (can contain letters or numbers)
- **Date** (xs:date): A date (e.g. 12/19/2005)
- **DateTime** (xs:dateTime): A date and time (e.g. 12/19/2005 16:03:45)
- **Bill Month** (xs:MonthYear): A bill month (12/2005). Note: when used with a date or date time field, bill months are converted to the first day of the selected month.
- **Long** (xs:long): A long integer
- **Double** (xs:double):

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- **Boolean** (xs:boolean): A boolean value (indicated by a checkbox on the user interface)
 - **Lookup** (ls:lookup): A lookup value from a table in the Oracle Utilities Data Repository
 - **Drop-down list** (ls:enumeration): A drop-down list of possible values

Term attributes correspond to one of the following columns on the Term table:

- **Start Time** (STARTTIME): The start time of the term. This is the time after which the term is available for use in calculations (Date or DateTime attribute types).
- **Stop Time** (STOPTIME): The stop time of the term. This is the time before which the term is available for use in calculations (Date or DateTime attribute types).
- **Default Text Value** (VAL): The default text value of the term (String, Long, or Double attribute types).
- **Default Numeric Value** (VALNUM): The default numeric value of the term (Long or Double attribute types).
- **Default Date Value** (VALDATE): The default date value of the term (Date or DateTime attribute types).

Templates can contain up to five attributes (one for each of the columns in the Terms table described above). Templates can be used with multiple terms. For example, you might create a “Start_Stop” template that defines Start Time and Stop Time attributes that can be used for all terms that use Start Time and Stop Time values. Likewise, a “Start_Stop_Value” template could be used for all terms that use values for Start Time, Stop Time, and Value.

In addition to the Attribute Name, Attribute Type, and Caption, attributes also have other properties that can be defined. These properties help define default values for attributes, the values available with drop-down list attributes, and other parameters.

There are four types of attribute properties:

Common properties define some default behavior for the attribute, including:

- **Default Value:** The default value of the attribute. This default is overridden if a default value is specified for the Term. Note: Default values for Date and DateTime attributes must be in the “YYYY-MM-DD HH:mm:ss” format.
- **Is Required:** A flag that designates (Yes or No) whether or not the attribute is required.
- **Is Visible:** A flag that designates (Yes or No) whether or not the attribute is visible on the user interface.
- **Is Disabled:** A flag that designates (Yes or No) whether or not the attribute is accessible by the user from the user interface.

Event properties allow Javascript or Javascript functions to be called, and include:

- **Event:** The name of the event to trigger the script or call the function.
- **Function Name:** The name of the function called by the event.
- **Script:** The Javascript called by the event.

Entity properties define lookup attributes, including:

- **Table Name:** The name of the table in the Oracle Utilities Data Repository that is used by the lookup
- **IsUID:** A flag that designates (Yes or No) if the lookup field is a UID.
- **Entity Fields:** Filters applied to the lookup. To apply a filter, enter the column name in the left column, select the appropriate operand, and enter the filtering value in the right column.

Enumeration properties define drop-down lists.

To add an entry to the drop-down list, click **Add**, enter the value in the left column, and the label in the right column. For example, to create a drop-down list that displays Yes (value = Y) and No (value = N), you would create the following entries:

Left Column	Right Column
Y	Yes
N	No

To delete an entry (or entries), check the corresponding checkbox(es) and click **Delete**.

Adding Templates

You can also add new templates.

How to add templates:

1. Click **Add** on either the Template search or list screens. A blank Template screen opens.
2. Enter a name for the template in the **Template** field.
3. Enter an optional rate form code for the template in the **Rate Code** field.
4. Enter an optional operating company for the template in the **Operating Company** field.
5. Enter an optional jurisdiction for the template in the **Jursidiction** field.
6. Add attributes for the template in the **Attributes Properties** box. Each attribute is defined by the following:
 - **Attribute Name:** The name of the column on the Terms table where the values for the term are stored. Can be STARTTIME, STOPTIME, VAL (Default Text Value), VULNUM (Default Numeric Value), or VALDATE (Default Date Value).
 - **Attribute Type:** The type of attribute. Can be string, date, datetime, monthyear, long, double, boolean, lookup, or enumeration.
 - **Caption:** The caption that appears on the the user interface when entering values for the term.
 - **Properties:** Click the plus (“+”) in the far left column to enter specific properties for the attribute.
7. Add an optional Javascript document for the template by clicking the **Script Document** plus (“+”) sign and entering the Javascript in the text box.
8. To save the record, click **Save**. The new Template record appears on the screen.

Term Templates

Term templates define relationships between terms and templates. Note that a term can only be associated to a single template. However, templates may be associated to multiple terms.

Searching Term Templates

You can search for existing term templates in the Oracle Utilities Data Repository.

How to search term templates:

1. Select **Contracts->Contract Setup->Term Templates** (or **Pricing and Contracts->Contract Setup->Term Templates**)

The Term GUI XSD screen opens.

2. Enter the search criteria in the appropriate field.

You can search based on the Term or GUI XSD.

See **Searching Database Tables** on page 8-7 in the *Oracle Utilities Energy Information Platform User's Guide* for more information about searching records, including the use of operands and wildcards.

3. 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 record, click **Add**.
4. The search results appear on the Term GUI XSD list screen.

The Term GUI XSD list screen displays the following information for each record:

- Term
- GUI XSD (template)

5. To sort the results by one of the columns, click the appropriate column heading. For example, to sort the results by Term click the Term column heading. 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.
6. To view a record, click on the corresponding [...] link. The selected record will appear in the Term screen.
7. To perform another search, click **Search**. To refresh the contents of the list screen, click the refresh icon.
8. *Optional.* To delete one or more records, check the check boxes corresponding to the records to be deleted, and click **Delete**. To clear all the checkboxes, click **Clear**.

Viewing and Editing Term Templates

Individual term templates are viewed in the Term GUI XSD screen. This screen opens when you select a record from the Term Category search results screen.

How to view and edit term templates:

1. Click on the [...] link for the Term GUI XSD record you wish to view. The selected record opens in the Term GUI XSD screen.

The Term GUI XSD screen displays the following information for the selected record:

- **Term:** The term.
- **GUI XSD:** The template associated with the term..

2. Edit data in the fields as appropriate. See **Working with Data Types** on page 8-4 in the *Oracle Utilities Energy Information Platform User's Guide* for more information about editing data values.

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3. To save changes made to the record, click **Save**. To save the edited record as a new record, click **Save As New**.

Note: The **Save As New** option only works if the identity of the record has been changed.

4. To perform a new search, click **Search**.
5. To open a list of records, click **List**.
6. To delete the current record, click **Delete**.

Adding Term Templates

You can also add new term templates.

How to add term templates:

1. Click **Add** on either the Term GUI XSD search or list screens. A blank Term GUI XSD screen opens.
2. Select the term for the record in the **Term** field.
3. Select the templates for the record in the **GUI XSD** field.
4. To save the record, click **Save**. The new Term GUI XSD record appears on the screen.

Contract Types

Contract types are contract templates used to create contracts using the Oracle Utilities Billing Component - Contract Management application. Setting up contract types allows you create default settings for different types of contracts. This section describes how to work with contract types with Oracle Utilities Billing Component - Contract Management and Oracle Utilities Quotations Management, including:

- **Searching Contract Types**
- **Creating Contract Types**
- **Viewing Contract Types**

Searching Contract Types

The **Contract Types** option allows users to search contract types in the Oracle Utilities Data Repository based on user-specified search criteria.

How to search contract types:

1. Select **Contracts->Contract Setup->Contract Types** (or **Pricing and Contracts->Contract Setup->Contract Types**).

The Contract Type screen opens.

2. Enter the search criteria in the appropriate field.

You can search based on the Contract Type, Contractee ID, Description, Contract Category, Start Time, Stop Time, and Work Queue Type associated with the Contract Type. To enter a date, click the arrow and select the date using the calendar control or enter the data manually.

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 contract types whose contractee ID begins with the letter G, you could enter “G%” in the Contractee ID field. You can use this wildcard before or after specified letters or numbers (i.e. you would use %t to search for all contract types whose contractee ID end with the letter t, etc.).

Note that Contractee IDs are **case-insensitive**. For example, there is no difference between the “Acct_1” and “acct_1” contractee IDs.

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 2-7 in the *Oracle Utilities Energy Information Platform User’s Guide* 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**. To add a new contract type, click **Add**.
5. The search results appear on the Contract Type result screen.

The Contract Type result screen displays the following information for each contract type:

- Contractee ID
- Contract Type
- Description
- Contract Category
- Start Time
- Stop Time

-
- Work Queue Type
6. 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.
 7. To view a contract type, click the **Contract Type** link. The selected contract type appears in the Contract Type screen.
 8. To perform another search, click **New Search**.

Creating Contract Types

How to create a new contract type:

1. Click **Add** on the **Contract Types** screen. The Create Contract Type screen opens.
2. Enter a code for the contract type in the **Contract Type Code** field.
3. Select a **Contractee ID** using the **Browse** button (...). This button opens a dialog window that lists all the available contractees. Click the [...] link for the appropriate contractee. The field is automatically populated.
4. Enter an optional description for the contract type in the **Description** field.
5. Select an optional **Contract Category** using the **Browse** button (...). This button opens a dialog window that lists all the available categories. Click the [...] link for the appropriate category. The field is automatically populated.
6. Enter an optional **Start Time** for the contract type. To enter a date and time, enter the date and time manually or click the arrow and select the date using the calendar control.
7. Enter an optional **Stop Time** for the contract type. To enter a date and time, enter the date and time manually or click the arrow and select the date using the calendar control.
8. For contract types that require an approval process, enter a **Work Queue Type** using the **Browse** button (...). This button opens a dialog window that lists all the available work queue types. Click the [...] link for the appropriate work queue type. The field is automatically populated.
9. Select an optional **Rate Form** using the **Browse** button (...). This button opens a dialog window that lists all the available rate forms. Click the [...] link for the appropriate rate form. The field is automatically populated. This rate form (of type RIDER) should contain Contract Type-specific business logic.
10. Click **Create** to create the Contract Type. To clear all the fields, click **Reset**. To return the previous screen, click **Cancel**.

The contract type appears in the Contract Type screen.

Viewing Contract Types

Contract types are viewed from the Contract Type screen. This screen opens when you select a contract type from the Contract Type Result screen, or when you first create an contract type. The Contract Type screen includes five tabs:

- **Basics Tab**
- **Terms Tab**
- **Documents Tab**
- **Approvals Tab**
- **Reports Tab**

Basics Tab

The Basics tab displays basic information about the contract type, including:

- **Contract Type:** The contract type code.
- **Contractee ID:** The contractee ID for the contract type.
- **Description:** A short description of the contract type.
- **Contract Category:** The contract category for the contract type.
- **Start Time:** The start date for the contract type.
- **Stop Time:** The stop date for the contract type.
- **Rate Form:** An optional rate form (of type RIDER) associated with the contract type that contains contract type-specific business logic.

You can modify any of the fields on this tab.

- To modify the **Contract Type**, edit the field as appropriate.
- To modify the **Contractee ID**, use the **Browse** button (**...**). This button opens a dialog window that lists all the available contractee IDs. Click the **[...]** link for the appropriate record. The field is automatically populated.
- To modify the **Description**, edit the field as appropriate.
- To modify the **Contract Category**, use the **Browse** button (**...**). This button opens a dialog window that lists all the available categories. Click the **[...]** link for the appropriate category. The field is automatically populated.
- To modify the **Start Time**, enter the date and time manually or click the arrow and select the date using the calendar control.
- To modify the **Stop Time**, enter the date and time manually or click the arrow and select the date using the calendar control.
- To modify the optional **Rate Form**, use the **Browse** button (**...**). This button opens a dialog window that lists all the available rate form. Click the **[...]** link for the appropriate record. The field is automatically populated.


Click **Save** to save the changes. To delete the contract type, click **Delete**. To reset the contract type to the previously saved version, click **Reset**.

Terms Tab

The Terms tab displays the following information for each term associated with the contract type:

- **Term Type:** The term type for the term, for this contract type.
- **Start Time:** The start time for the term, for this contract type.
- **Standard:** A flag that indicates if the term should be considered standard for the contract type.
- **Required:** A flag that indicates if the term is required for the contract type.
- **Calculated:** A flag that indicates if the term is calculated for the contract type.
- **Summary:**
- **Default Text Value:** The default text value for the term, for this contract type.
- **Default Numeric Value:** The default numeric value for the term, for this contract type.
- **UOM:** The unit-of-measure associated with the product term, from the Unit of Measure table.
- **Default Date Value:** The default date value for the term, for this contract type.
- **Default Start Time:** The default start time for the term, for this contract type.
- **Default Stop Time:** The default stop time for the term, for this contract type.

How to change the order of terms:

1. Click on the  area of the term you wish to move and move the term to the appropriate position in the list.
2. Click **Save** to save your changes.

How to modify a term:

1. Click the **Term Type** link. The selected term type appears on the Terms tab.
2. To modify the **Start Time**, enter the date and time manually or click the arrow and select the date using the calendar control.
3. To modify the **Stop Time**, enter the date and time manually or click the arrow and select the date using the calendar control.
4. To modify the **Standard**, **Required**, or **Calculated** flags, select the desired value from the drop-down list.
5. To modify the **Default Text Value**, edit the value as appropriate.
6. To modify the **Default Start Time**, enter the date manually or click the arrow and select the date using the calendar control.
7. To modify the **Default Stop Time**, enter the date manually or click the arrow and select the date using the calendar control.
8. To modify the **Display Sequence**, change the number as appropriate.
9. To modify the **Default Numeric Value**, edit the value as appropriate.
10. To modify the **Default Date Value**, enter the date manually or click the arrow and select the date using the calendar control.
11. Click **Save** to save the modified term. To reset the term to the previously saved version, click **Reset**. To return to the list of contract type terms without saving changes, click **Cancel**.

How to add a term to a contract type:

1. Select the Term Category for the term you wish to add from the Term Category drop-down list (from the Term Category table), select the Term Type for the term you wish to add from the Term Type drop-down list (from the Terms table), and click **Add Term Type**. The selected term type appears on the Terms tab.
2. To modify the term type, click the **Term Type** link. The term type appears on the Terms tab.
3. Click **Save** to save your changes.

How to delete a term from a contract type:

1. Check the checkbox in the far left column for the term type you wish to delete and click **Delete Term Type**. The term type will no longer appear on the Terms tab.

Documents Tab

The Documents tab displays the following information for each document type associated with the contract type:

- **Document Type:** The type of the document.
- **Standard:** A flag that indicates if the document type should be considered standard for the contract type.
- **Required:** A flag that indicates if the document type is required for the contract type.

How to modify a document type:

1. Click the **Document Type** link. The selected document type appears on the Documents tab.
2. To select an optional **Document Category**, use the **Browse** button (...). This button opens a dialog window that lists all the available categories. Click the [...] link for the appropriate category. The field is automatically populated.
3. To modify the **Standard** flag, select the desired value from the drop-down list.
4. To modify the **Start Time**, enter the date manually or click the arrow and select the date using the calendar control.
5. To modify the **Stop Time**, enter the date manually or click the arrow and select the date using the calendar control.
6. To modify the **Required** flag, select the desired value from the drop-down list.
7. Click **Save** to save the modified document type. To reset the document type to the previously saved version, click **Reset**. To return to the list of contract type documents without saving changes, click **Cancel**.

How to add a document type to a contract type:

1. Select the document type from the Choose Document Type drop-down list (from the Document Type table), and click **Add Document Type**. The selected document type appear on the Documents tab.
2. To modify the document type, click the **Document Type** link. The document type appears on the Documents tab.
3. Edit the data as appropriate and click **Save**.

How to delete a document from a contract type:

1. Check the checkbox in the far left column for the document type you wish to delete and click **Delete Document Type**. The document type will no longer appear on the Documents tab.

Approvals Tab

The Approvals tab displays the Work Queue Type (and related Approval Procedure) associated to the contract type (if any), including the following information:

- **Work Queue Type:** The work queue type associated to the contract type.
- **Approval Process:** The Approval Procedure associated with the Work Queue Type.
- **Description:** A description of the Approval Procedure associated with the Work Queue Type.
- **Approval Steps:** A table outlining the approval steps that comprise the approval procedure, including:
 - **Step Number:** The step number for the approval step.
 - **Number of Approvals:** The number of approval required for the approval step.
 - **Approval Level Code:** The approval level for the approval step.

How to add a work queue type or change an existing work queue type:

1. Click the **Browse** button (...). This button opens a dialog window that lists all the available work queue types. Click the [...] link for the appropriate record. The screen is automatically populated with the appropriate data.
2. Click **Save** to save the approval.
3. To delete the approval, click **Delete**.

Reports Tab

The Reports tab lists any substitute reports used when viewing calculation and/or contracts for contracts of this contract type, including the following information:

- **Report Name:** The name of the report for which a substitute report template will be used. Can be either ViewCalculations or ViewContract.
- **Start Time:** The start of the relationship between the Report Name and the Substitute Report Name.
- **Stop Time:** The stop of the relationship between the Report Name and the Substitute Report Name.
- **Substitute Report Name:** The name of the report template used as a substitute for the report.

How to modify a substitute report:

1. Click the **Report Name** link. The selected report appears on the Reports tab.
2. To modify the **Report Name**, select the appropriate report (ViewCalculations or ViewContract) from the Report Name drop-down list.
3. To modify the **Start Time**, enter the date manually or click the arrow and select the date using the calendar control.
4. To modify the **Stop Time**, enter the date manually or click the arrow and select the date using the calendar control.
5. To select a different **Substitute Report Name**, use the **Browse** button (...). This button opens a dialog window that lists all the available report templates. Click the [...] link for the appropriate report template. The field is automatically populated.
6. Click **Save** to save the modified report. To reset the report to the previously saved version, click **Reset**. To return to the list of contract type reports without saving changes, click **Cancel**.

How to add a substitute report to a contract type:

1. Click **Add** on the Reports tab. A blank report screen appears on the Reports tab.
2. Select the report (ViewCalculations or ViewContract) for which a substitute report template will be used from the **Report Name** drop-down list.
3. Enter the **Start Time** by either entering date manually or clicking the arrow and selecting the date using the calendar control.
4. Enter the **Stop Time** by either entering date manually or clicking the arrow and selecting the date using the calendar control.
5. Select the **Substitute Report Name** by clicking the **Browse** button (...). This button opens a dialog window that lists all the available report templates. Click the [...] link for the appropriate report template. The field is automatically populated.

How to delete a substitute report from a contract type:

1. Check the checkbox in the far left column for the report you wish to delete and click **Delete**. The report will no longer appear on the Reports tab.

Chapter 6

Working with Contracts

This chapter describes how you work with contracts with Oracle Utilities Quotations Management, including:

- **Searching Contracts**
- **Creating Contracts**
- **Viewing Contracts**
- **Contract Actions**

Searching Contracts

The **Contracts** option allows users to search for contracts in the Oracle Utilities Data Repository based on user-specified search criteria.

How to search contracts:

1. Select **Contracts->Contracts** (or **Pricing and Contracts->Contracts**).

The Contracts screen opens.

2. Enter the search criteria in the appropriate field.

You can search based on the Contract ID, Contains Service Point ID (if Service Points are enabled) Contains Customer ID, Contract Description, Contain Account ID, Start Time, Stop Time, Contractee ID, Date Created, Contract Type, Date Submitted, Contract Status, Date Executed, Contract Category, Date Approved, Parent Contract ID, Date Terminated, External Contract Status, Valid Until, Margin, or Cost of Good Sold. To enter a date, click the arrow and select the date using the calendar control or enter the data manually.

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 pricing contracts whose ID begins with the letter G, you could enter “G%” in the Contract ID field. You can use this wildcard before or after specified letters or numbers (i.e. you would use %t to search for all pricing contracts whose ID end with the letter t, etc.).

Note that Contract IDs, Contractee IDs, and Counter Party IDs are **case-insensitive**. For example, there is no difference between the “Acct_1” and “acct_1” contract IDs.

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 2-7 in the *Oracle Utilities Energy Information Platform User’s Guide* 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 Contract Search Result screen.

The Contract Search Result screen displays the following information for each pricing contract:

- Contract ID
- Contract Description
- Contract Type
- Start Time
- Stop Time
- Contract Category
- Contract Status
- External Status
- Date Created
- Contractee ID
- Counter Party ID
- Parent Contract ID
- Date Submitted

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- Date Approved
 - Date Executed
 - Date Terminated
 - Valid Until
 - Margin
 - Cost of Good Sold
6. 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.
 7. To view a contract, click **Contract ID** link. The selected contract appears in the Contract screen.
 8. To perform another search, click **New Search**.

Creating Contracts

How to create a new contract:

1. Click **Add** on the **Contracts** screen. The Create Contract screen opens.
2. Enter a **Contractee ID** using the **Browse** button (...). This button opens a dialog window that lists all the available contractee IDs. Click the [...] link for the appropriate contractee ID. The field is automatically populated.
3. Select a **Counter Party ID** for the contract. The counter party ID can be either an individual Account, Customer, or Service Point, or a list of Accounts or Customers.

Note: If using Contract Item Groups, the Counter Party ID field may be hidden.

4. Select **Account**, **Customer**, or **Service Point** for the counter party from the drop-down list. To select an account, customer, or service point, proceed with steps 5 through 12. To select a list of accounts or customers, skip to steps 13 through 20.

Note: Selecting a Service Point as the Counter Party is only available if the use of service points with contracts is enabled.

5. To select an account, customer, or service point, select ID from the drop-down list and click the **Browse** button (...). The Accounts (or Customers or Service Points) window opens.

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.

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.

6. To select an account, customer, or service point, click on the [...] link. The selected Account (or Customer or Service Point) ID will appear in the Counter Party field.
7. To select a list of accounts or customers, select List from the drop-down list and click the **Browse** button (...). The Lists window opens.

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.

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.

8. To select a list, click the [...] link. The selected list will appear in the Counter Party field.
9. Enter a **Contract ID**.

Note: If using automatic generation of contract IDs, the Contract ID field is not visible.

10. Enter a **Contract Description**.
11. Enter a **Contract Type** using the **Browse** button (...). This button opens a dialog window that lists all the available types for the selected Contractee ID. Click the [...] link for the appropriate type. The field is automatically populated.
12. Select a **Contract Category** from the drop-down list.

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13. Enter a **Start Time** for the contract. To enter a date, enter the date manually or click the arrow and select the date using the calendar control.
 14. Enter a **Stop Time** for the contract. To enter a date, enter the date manually or click the arrow and select the date using the calendar control.
 15. Click **Create** to create the contract. The **Process** window appears.

When the contract has successfully been created, it appears in the Contract screen.

Viewing Contracts

Contracts are viewed from the Contract screen. This window opens when you select a contract from the Contract Search Results screen, or when you first create a contract.

The Contract window includes seven tabs:

- **Basics Tab**
- **Items Tab**
- **Terms Tab**
- **Documents Tab**
- **Approvals Tab**
- **History Tab**
- **Related Contracts Tab**

The Contract window also contains the following (read-only) information about the contract (above the tabs):

- **Contract ID:** The contract ID.
- **Revision #:** The revision number of the contract.
- **Status:** The current status of the contract.

Basics Tab

The Basics tab displays basic information about the contract, including:

- **Contractee ID:** The contractee ID. Read-only.
- **Description:** Description of the contract.
- **Start Time:** The start time of the contract.
- **Stop Time:** The stop time of the contract.
- **Counter Party ID:** The counter party ID. Read-only. The Counter Party ID is displayed according to the following rules:
 - If the contract is based on a list of accounts/customers, the Counter Party ID is the list name.
 - If the contract is based on a single account, customer, or service point, the Counter Party ID is the ID of the account, customer, or service point.
 - If the contract is based on multiple accounts associated with a single customer, the Counter Party ID is the Customer ID.
- **Date Created:** The date the contract was created. Read-only.
- **Contract Type:** The contract type. Read-only.
- **Date Submitted:** The date the contract was submitted. Read-only.
- **External Contract Status:** The external status of the contract.
- **Date Approved:** The date the contract was approved. Read-only.
- **Contract Category:** The contract's category (contract, subcontract, amendment, offer, etc.). Read-only.
- **Date Executed:** The date the contract was executed. Read-only.
- **Parent Contract ID:** The ID of the contract's parent contract, if applicable.

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- **Date Terminated:** The date the contract was terminated. Read-only.
 - **Margin:** The margin on the contract.
 - **Valid Until:** The date the contract is valid until. This is **required** for calculating an contract.
 - **Cost of Goods Sold:** The Cost of Goods Sold (COGS) for the contract.

How to modify contract basics:

You can modify the **Description**, **External Contract Status**, **Parent Contract ID**, **Margin**, and **Cost of Goods Sold** of a contract.

1. To change the **Description**, edit the text as appropriate.
2. To change the **External Contract Status** select the appropriate value from the drop-down list.
3. To change the **Parent Contract ID**, click the **Browse** button (**...**). This button opens a dialog window that lists all the available contracts that can be parents to the current contract. Click the **[...]** link for the appropriate contract. The field is automatically populated.
4. To change the **Margin** or **Cost of Good Sold**, edit the field as appropriate.
5. To save changes made on this tab, select **Save** from the **Actions** drop-down list.
6. To save the changes and add comments, select **Save w/Comments** from the **Actions** drop-down list.

The **Script Prompt** dialog opens.

7. Enter the comment and click **OK**. To close the window without saving changes, click **Cancel**.

The comment appears on the **History Tab**.

The Basics tab can only be modified when the contract's status is **In Process**.

Items Tab

The Items tab displays information about the individual accounts or service points associated with the contract. There are two versions of the Items tab, one that displays the individual items (Items View), and one that displays groupings of items (Groups View). Contract Item Groups allow users to apply terms common to groups of contract items (accounts or service points) rather than having to apply the same terms to each account or service point individually. This can save considerable time when creating, updating, and altering contracts. The specific version of the Items tab that appears on the Contract screen is based on the security privileges of the user. When Contract Item Groups are disabled, the Items View is displayed. When Contract Item Groups are enabled, the Group View is displayed.

Items View

The Items View of the Items tab displays the following information for each individual account or service point associated with the contract:

- **Service Point ID:** The service point ID.
- **Customer ID:** The customer ID (not displayed for Service Points).
- **Account ID:** The account ID (not displayed for Service Points).
- **Account Name:** The name of the account (not displayed for Service Points).
- **Commodity:** The commodity (Electric, Gas, etc.) the contract is based on.
- **Usage Forecast:** The usage forecast used when calculating the contract (Oracle Utilities Quotations Management only).
- **Usage Status:** The status of usage stored for the contract item (Oracle Utilities Quotations Management only).
- **Terms:** A link that provides access to the terms associated with the contract item for the contract.
- **Product:** The product associated with the contract item for the contract.
- **Product Terms:** A link that provides access to the specific terms for the selected product.

For each contract item, you can change the Usage Forecast, Terms, Product, and Product Terms. You can also add and/or remove accounts or service points.

How to add contract items (accounts or service points) to a contract:

1. Click **Add Account** (or **Add Service Point**).

The Accounts (or Service Points) window opens.

Enter the search criteria and click **Search**. See **Searching and Viewing Data** on page 2-7 for more information about searching records.

The search results appear on the Accounts (or Service Points) window.

2. Select the accounts (or service points) you wish to add to the contract by checking the corresponding checkboxes.
3. Click **Save**.

The selected accounts (or service points) will appear on the Items tab.

How remove contract items from a contract.

1. Select the accounts (or service points) you wish to remove from the contract by checking the corresponding checkboxes.
2. Click **Delete Item**.

How to change the usage forecast for a contract item (Oracle Utilities Quotations Management only):

1. Click the **Usage Forecast** link for the contract item. The **Forecast Options** window opens.
2. Select the appropriate usage forecast from those listed under Forecast ID. The selected forecast will appear in the Usage Forecast column for the contract item. To close the window without making a select, click **Cancel**.

If the contract item has no forecasts associated with it, the only (default) option is Automatic. This means that Oracle Utilities Quotations Management will create a forecast based on the contract item's usage. See **Chapter 3: Working with Forecasts** and **Chapter 4: Validating Usage** in the *Oracle Utilities Quotations Management User's Guide* for more information about forecasts and usage.

Usage forecasts can only be modified when the contract's status is **In Process**.

How to change the terms for a contract item:

1. Click the **Terms** link for the contract item. The **Contract Item Terms** window opens.

This window displays the specific terms for the contract item (if any), including the following for each:

- **Term Type:** The Term Type for the contract item term.
- **Text Value:** The text value (if any) for the contract item term.
- **Numeric Value:** The numeric value (if any) for the contract item term.
- **UOM:** The unit of measure associated with the contract item term (if applicable)
- **Date Value:** The date value (if any) for the contract item term.
- **Status:** The status of the contract item term.

2. To add a term, select the term category from the **All Terms** drop-down list, select the term type of the term to add from the **Choose Term** drop-down list, and click **Add Term**. The selected term appears on the Contract Item Terms window.

3. To edit an individual term, click the **Term Type** link.

The selected term appears in the Contract Item Terms window.

To reset the fields to their default values, click **Set Default**. Edit the values for the term as needed and click **Save**. To reset the fields to their default values, click **Set Default**. To reset the fields to their original values, click **Reset**. To close the window without saving changes, click **Cancel**.

4. To edit all contract item terms, select **Contract** from the **All Terms** drop-down list, and click the **Edit All**.

The Contract Item Terms window displays all the current terms. This window allows users to edit values for multiple terms on a single screen.

To reset the fields for all terms to their default values, click **Set Default**. Edit the values for each term as needed and click **Save**. To reset the fields for all terms to their default values, click **Set Default**. To reset the fields for all terms to their original values, click **Reset**. To close the window without saving changes, click **Cancel**.

5. To delete a contract item term, select the term(s) you wish to delete by checking the corresponding checkboxes and click **Delete Term**. The term will no longer appear on the Contract Item Terms window.
6. To apply the selected contract items terms to this contract item, click **Apply Items Terms**. This option requires customized configuration.
7. To close the Contract Item Terms window and return to the Items tab, click **Close**.

Contract Item Terms can only be modified when the contract's status is **In Process**.

How to change the product for a contract item:

1. Click the **Product** link for the contract item. The **Product Options** window opens.
2. Select the appropriate product from those listed under Product. The selected product will appear in the Product column for the contract item. To close the window without making a select, click **Cancel**.

Products can only be modified when the contract's status is **In Process**.

How to change the product terms for a contract item:

1. Click the **Product Terms** link for the contract item. The **Contract Product Terms** window opens.

This window displays the specific terms for the product (if any), including the following for each:

- **Term Type:** The Term Type for the contract product term.
 - **Text Value:** The text value (if any) for the contract product term.
 - **Numeric Value:** The numeric value (if any) for the contract product term.
 - **UOM:** The unit of measure associated with the contract product term (if applicable)
 - **Date Value:** The date value (if any) for the contract product term.
 - **Status:** The status of the contract product term.
2. To add a term, select the term category from the **All Terms** drop-down list, select the term type of the term to add from the **Choose Term** drop-down list, and click **Add Term**. The selected term appears on the Contract Product Terms window.
 3. To edit an individual term, click the **Term Type** link.

The selected term appears in the Contract Product Terms window.

To reset the fields to their default values, click **Set Default**. Edit the values for the term as needed and click **Save**. To reset the fields to their default values, click **Set Default**. To reset the fields to their original values, click **Reset**. To close the window without saving changes, click **Cancel**.

4. To edit all contract product terms, select **Product** from the **All Terms** drop-down list, and click the **Edit All**.

The Contract Product Terms window displays all the current terms. This window allows users to edit values for multiple terms on a single screen.

To reset the fields for all terms to their default values, click **Set Default**. Edit the values for each term as needed and click **Save**. To reset the fields for all terms to their default values, click **Set Default**. To reset the fields for all terms to their original values, click **Reset**. To close the window without saving changes, click **Cancel**.

5. To delete a contract product term, select the term(s) you wish to delete by checking the corresponding checkboxes and click **Delete Term**. The term will no longer appear on the Contract Product Terms window.
6. To apply the selected product terms to this product for all contract items on the contract that have the product associated to them, click **Apply Product Terms**. This option requires customized configuration.
7. To close the Contract Product Terms window and return to the Items tab, click **Close**.

Contract Product Terms can only be modified when the contract's status is **In Process**.

Note that there are no product terms associated with the default product.

Group View

The Group View of the Items tab can list information about contract items by Service Point or by Group.

Viewing by Service Points

When viewing by service point, this tab displays the following information for each service point associated with the contract:

- **Service Point ID:** The service point ID.
- **Commodity:** The commodity (Electric, Gas, etc.) the contract is based on.
- **Usage Forecast:** The usage forecast used when calculating the contract (Oracle Utilities Quotations Management only).
- **Usage Status:** The status of usage stored for the service point (Oracle Utilities Quotations Management only).
- **Terms:** A link that provides access to the terms associated with the service point for the contract.
- **Product:** The product associated with the service point for the contract.
- **Product Terms:** A link that provides access to the specific terms for the selected product.
- **Group ID:** The ID of the group to which this service point belongs.

For each service point, you can change the Usage Forecast, Terms, Product, and Product Terms. These actions are performed in the same manner as when viewing the Items tab via the Items View.

You can also add and/or remove service points, and move service points between groups, and add/remove groups.

How to add service points to a contract: group

1. Select the active group from the **Active Group** drop-down list.
2. Click **Add to Active Group**.

The Service Points window opens.

Enter the search criteria and click **Search**. See **Searching and Viewing Data** on page 2-7 for more information about searching records.

The search results appear on the Service Points window.

3. Select the service points you wish to add to the contract by checking the corresponding checkboxes.
4. Click **Save**.

The selected service points will appear on the Items tab.

How to move service points between groups:

1. Select the active group from the **Active Group** drop-down list.
2. Select the service points you wish to move by checking the corresponding checkboxes.
3. Click **Move to Active Group**.

How to remove contract items from a contract.

1. Select the service points you wish to remove from the contract by checking the corresponding checkboxes.
2. Click **Delete**.

How to create a new contract group:

1. Click **Add Group**.
The Contract Item Group window opens.
2. Enter the Group ID and select the product from the Product ID drop-down list.
3. Click **Save**. To close the window without adding the new group, click **Close**.

How delete a contract group:

1. Select the active group from the **Active Group** drop-down list.
2. Click **Delete Group**.

Viewing by Groups

When viewing by group, this tab displays the following information for each contract group associated with the contract:

- **Group ID:** The service point ID
- **Members:** The number of service points in the group
- **Product:** The product associated with the group for the contract.
- **Terms:** A link that provides access to the terms associated with the group for the contract.

For each contract group, you can specify or change the terms associated with the group, view the individual service points associated with the group, and add/remove groups.

How to change the terms for a contract group:

1. Click the **Terms** link for the contract group. The **Contract Group Terms** window opens.

This window displays the specific terms for the contract group (if any), including the following for each:

- **Term Type:** The Term Type for the contract group term.
- **Text Value:** The text value (if any) for the contract group term.
- **Numeric Value:** The numeric value (if any) for the contract group term.
- **UOM:** The unit of measure associated with the contract group term (if applicable)
- **Date Value:** The date value (if any) for the contract group term.
- **Status:** The status of the contract group term.

2. To add a term, select the term category from the **All Terms** drop-down list, select the term type of the term to add from the **Choose Term** drop-down list, and click **Add Term**. The selected term appears on the Contract Group Terms window.

3. To edit an individual term, click the **Term Type** link.

The selected term appears in the Contract Group Terms window.

To reset the fields to their default values, click **Set Default**. Edit the values for the term as needed and click **Save**. To reset the fields to their default values, click **Set Default**. To reset the fields to their original values, click **Reset**. To close the window without saving changes, click **Cancel**.

4. To edit all contract group terms, select **Contract** from the **All Terms** drop-down list, and click the **Edit All**.

The Contract Group Terms window displays all the current terms. This window allows users to edit values for multiple terms on a single screen.

To reset the fields for all terms to their default values, click **Set Default**. Edit the values for each term as needed and click **Save**. To reset the fields for all terms to their default values,

click **Set Default**. To reset the fields for all terms to their original values, click **Reset**. To close the window without saving changes, click **Cancel**.

5. To delete a contract group term, select the term(s) you wish to delete by checking the corresponding checkboxes and click **Delete Term**. The term will no longer appear on the Contract Group Terms window.
6. To close the Contract Group Terms window and return to the Items tab, click **Close**.

How to view service points belonging to a contract: group

1. Click the plus sign (+) for the group you wish to view.

A list of service points belonging to the group opens, displaying the following for each service point:

- **Service Point ID:** The service point ID.
- **Commodity:** The commodity (Electric, Gas, etc.) the contract is based on.
- **Usage Forecast:** The usage forecast used when calculating the contract (Oracle Utilities Quotations Management only).
- **Usage Status:** The status of usage stored for the service point (Oracle Utilities Quotations Management only).
- **Terms:** A link that provides access to the terms associated with the service point for the contract.

For each service point, you can change the Usage Forecast and Item Terms. These actions are performed in the same manner as when viewing the Items tab via the Items View.

2. To move a service point to a different group, select the service points you wish to move by checking the corresponding checkboxes, select the group to which you wish to move the service points, and click **Move**.
3. To delete a service point from the group, select the service points you wish to move by checking the corresponding checkboxes, and click **Delete**.
4. To add a service point to the group, click **Add**.

The Service Points window opens.

Enter the search criteria and click **Search**. See **Searching and Viewing Data** on page 2-7 for more information about searching records.

The search results appear on the Service Points window.

Select the service points you wish to add to the contract by checking the corresponding checkboxes.

Click **Save**.

The selected service points will appear on the list of service points for the group.

How to create a new contract group:

1. Click **Add Group**.

The Contract Item Group window opens.

2. Enter the Group ID and select the product from the Product ID drop-down list.
3. Click **Save**. To close the window without adding the new group, click **Close**.

How delete a contract group:

1. Select the groups you wish to delete by checking the corresponding checkboxes.
2. Click **Delete Group**.

Terms Tab

The Terms tab displays specific terms for the contract (if any). This includes the following information for each term:

- **Term Type:** The type of the term.
- **Text Value:** The text value (if any) for the contract term.
- **Numeric Value:** The numeric value (if any) for the contract term.
- **UOM:** The unit of measure associated with the contract term (if applicable)
- **Date Value:** The date value (if any) for the contract term.
- **Details:** Details for the term (minimum values, dates, etc.).
- **Class:** The class of term (Calculated, Optional, Standard, Standard/Required).

How to add a term:

1. Select the term category from the **All Terms** drop-down list, select the term type of the term to add from the **Choose Term** drop-down list, and click **Add Term**. The selected term will appear.
2. To edit the details of the term, click the **Term Type** link.
The **Edit Term** window opens.
3. Edit the term values as needed and click **Save**. To close the window without saving changes, click **Cancel**.
The updated values will appear on the **Terms** tab.
4. To edit all contract terms, select **Contract** from the **All Terms** drop-down list, and click the **Edit All**.

The Edit Term window displays all the current editable terms. This window allows users to edit values for multiple terms on a single screen.

To reset the fields for all terms to their default values, click **Set Default**. Edit the values for each term as needed and click **Save**. To reset the fields for all terms to their default values, click **Set Default**. To reset the fields for all terms to their original values, click **Reset**. To close the window without saving changes, click **Cancel**.

Terms can only be added when the contract's status is **In Process**.

How to delete a term:

1. Select the term(s) you wish to delete by checking the corresponding checkboxes and click **Delete Term**. The term will no longer appear on the Terms tab.

Only terms whose Source is Optional or Standard can be deleted. Calculated and Standard/Required terms cannot be deleted.

Terms can only be deleted when the contract's status is **In Process**.

How to calculate terms:

1. Select **Calculate Terms** from the **Actions** drop-down list.

This calculates (and in some cases, recalculates) and updates the values of the terms (with a Source of Calculated) whose values are defined by records in the Oracle Utilities Data Repository or by the Oracle Utilities Rules Language.

Terms can only be calculated when the contract's status is **In Process**.

Documents Tab

The Documents tab displays documents associated to the contract. This includes the following information for each document:

- **Class:** The class of the document (Optional, Standard, or Standard/Required).
- **Document Type:** The type of the document (from the Document Type table).
- **Image:** A link used to download the document.
- **Document ID:** The document ID.
- **Document Title:** The document's title.
- **Date Entered:** The date the document was added to the contract. This field defaults to the date the contract was created, but is updated when the document is added to the contract.

How to add an Optional or an additional Standard document:

1. Select the type of document from the Choose Document Type drop-down list (from the Document Type table in the Oracle Utilities Data Repository), and click **Add Document**.
The **Upload Document** window opens.
2. Enter a **Document ID** for the document.
3. Enter a **Document Title** for the document.
4. Enter a **Document Type** using the **Browse** button (...). This button opens a dialog window that lists all the available document types. Click the [...] link for the appropriate type. The field is automatically populated.
5. Enter a **Document Category** using the **Browse** button (...). This button opens a dialog window that lists all the available document categories. Click the [...] link for the appropriate category. The field is automatically populated.
6. Enter the **Current Location** of the document. Clicking the **Browse** button opens **Choose File** dialog. Navigate to the document's location, select the document and click **Open**.
The selected path and document appear in the **Current Location** field.
7. Click **Upload** to add the document to the contract.
8. The uploaded document appears on the Documents tab.

Documents can be added to the contract when it is at any Status.

How to add a document image to a Required or Standard document:

1. Click on the **Document Type** link of an existing document.
The **Upload Document** window opens.
2. Enter the **Current Location** of the document. Clicking the **Browse** button opens **Choose File** dialog. Navigate to the document's location, select the document and click **Open**.
The selected path and document appear in the **Current Location** field.
3. Click **Upload** to add the document to the contract.
4. The uploaded document appears on the Documents tab.

Documents can be added to the contract when it is at any Status.

How to edit an existing document:

1. Click the **Document Type** link.
The **Upload Document** window opens.
2. Edit the **Document ID** for the document.

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3. Edit the **Document Title** for the document.
 4. Change the **Document Type** using the **Browse** button (...). This button opens a dialog window that lists all the available document types. Click the [...] link for the appropriate type. The field is automatically populated.
 5. Change the **Document Category** using the **Browse** button (...). This button opens a dialog window that lists all the available document categories. Click the [...] link for the appropriate category. The field is automatically populated.
 6. Change **Current Location** of the document or select a new document. Clicking the **Browse** button opens **Choose File** dialog. Navigate to the document's location, select the document and click **Open**.

The selected path and document appear in the **Current Location** field.
 7. Click **Upload** to add the document to the contract.
 8. The edited document appears on the Documents tab.

Documents can only be edited when the contract's status is **In Process**.

How to delete a document:

1. Check the checkbox in the far left column for the document you wish to delete and click **Delete Document**. The document will no longer appear on the **Documents** tab.

Only documents whose Class is Optional or Standard can be completely deleted. If you delete a Standard/Required document, only the document image is deleted; the document record remains associated with the contract.

Documents can only be deleted when the contract's status is **In Process**.

How to download a document:

1. Click the [...] link in the **Image** column of the document you wish to download.
The **File Download** dialog opens.
2. To open the file, click **Open**. To close the window without opening the file, click **Cancel**.
The file will open using an appropriate application.
3. To save the file, click **Save**. To close the window without saving the file, click **Cancel**.
The **Save As** dialog opens.
4. Select the destination and enter a name for the file and click **Save**. To close the window without saving the file, click **Cancel**.

Documents can be downloaded when the contract is at any Status.

Approvals Tab

The Approvals tab displays approvals associated to the contract. This includes the following information for each approval:

- **Approval Level:** The approval level for the approval.
- **Approval Status:** The current status of the approval. This can be one of Approved, Rejected, or Waiting.
- **Date Approved:** The date the approval was approved/rejected.
- **User:** The user who approved/rejected the approval.
- **Comments:** Additional added by the user concerning the approval.

A contract's approvals are created when the Ready for Approval action on the Actions drop-down list is selected. This also sets the contract's status to In Approval.

At any one time, only one approval will have a status of **Waiting**, indicating that it is the approval to be approved or rejected.

How to approve or reject an approval:

1. To approve the approval, click **Approve**. To reject the approval, click **Reject**.
The Enter Note for Approval (or Reject) dialog opens.
2. Enter an optional note concerning the approval (or rejection) and click **OK**. To close the dialog without approving/rejecting the approval, click **Cancel**.
3. The status of the approval will change to **Approved** or **Rejected**, as appropriate, and the optional note will appear in the Comments column.

Approvals can only be approved or rejected when the contract's status is **In Approval**.

History Tab

The History tab displays actions performed on the contract, such as creating, submitting, revising, and executing the contract. This includes the following information for each action:

- **Creation Date:** The date the action was performed.
- **Type:** The type of action performed.
- **Revised By:** The user who performed the action.
- **Details:** Details about the action.

You can also add notes to the contract on this tab.

How to add an action:

1. Click **Add**.
The **Add Contract History** window opens.
2. Enter an **Action Time** for the action. The Action Time defaults to the current system time. To enter a date, enter the date manually or click the arrow and select the date using the calendar control.
3. Enter an **Action Type**.
4. Edit the **User ID** (optional). This defaults to the current user ID.
5. Enter a description for the action in the **Details** field.
6. Click **Add** to save the action. To close the window without saving changes, click **Cancel**.

The note appears on the **History** tab.

You can add notes to the contract when it is at any Status.

Related Contracts Tab

The Related Contracts tab displays a tree diagram that illustrates the relationship between the contract and any related contracts, such as subcontracts, amendments, or a parent contract. The Contract ID, Revision #, Contract Type, Description, and Start and Stop Dates are displayed for each contract.

Note: The Related Contracts tab is view-only.

How to view a related contract:

1. Click the **ID** link of the related contract you wish to view.
2. The selected contract appears on the **Basics Tab**.

How to add a contract relationship:

1. Click **Add**.

The **Contracts** window opens.

2. To search for an existing contract, enter the search criteria and click **Search**. See **Searching Contracts** for more information.

3. To add a new contract, click **Add**.

The **Create Contract** window opens.

Enter the details for the new contract. See **Creating Contracts** for more information.

Work Queue Detail Tab

The Work Queue Detail tab displays work queue items and approvals related to the contract. The Approvals section displays work queue approvals associated to the contract. The Items section displays work queue items associated to the contract. For each item or approval listed, the Work Queue Detail tab displays the following:

- **UID:** The unique ID of the work queue item
- **Work Queue Type:** The work queue type associated with the item
- **Work Queue:** The work queue associated with the item
- **Priority:** The priority of the work queue item
- **Work By Time:** The date by which the work queue item should be resolved/approved.
- **Hints:** Hints associated with the work queue item. To view a hint, click the hint link.

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

Viewing and Working with Work Queue Items and Approvals

You can view work queue items and approvals for either the current contract, or for the current contract and all related subcontracts. You can also view details for each work queue item.

- To filter the list of items displayed, select **Current Contract** or **All Sub Contracts** from the **Show** drop-down list.

In the Item section, you can also filter by Open or Closed items.

- To view Hint Details and an Item History for an item, click the plus sign (+) next to the item you wish to view.

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- To view and edit an item, click the **UID** for the item. The selected item will display in the Work Queue Item View screen.

You can also perform other actions (such as approve/reject, resolve, close, etc.) on work queue items

How to perform an action on a work queue item:

1. Check the checkbox for the approvals or items you wish to work on, or click the UID link for the item.
2. Click the appropriate action.

Available actions include:

- Assign
- Unassign
- Approve (Approvals only)
- Reject (Approvals only)
- Resolve (Items only)
- Close

See **Chapter 10: Working with Work Queues** in the *Oracle Utilities Energy Information Platform User's Guide* for more information about working with work queue items and approvals.

Contract Actions

The Actions drop-down list on the Contact window lists the available actions that can be performed on contracts, including:

- **Save**
- **Save w/Comments**
- **Calculate Terms**
- **View Calculations**
- **View Contract**
- **Ready for Approval**
- **Submit Contract**
- **Execute Contract**
- **Terminate Contract**
- **Revise Contract**

Note: The descriptions below describe the default behavior for each of the actions. The specific tabs on which each action is available, as well as the Statuses and External Statuses at which each action is permissible can be modified. Refer to the *Oracle Utilities Billing Component Installation and Configuration Guide* or *Oracle Utilities Quotations Management Installation and Configuration Guide* for more information.

Save

The **Save** action saves the contract and any changes made on the **Basics Tab**. This action is only available from the Basics Tab.

Save w/Comments

The **Save w/Comments** action saves the contract and any changes made on the **Basics Tab**, and allows the user to enter comments related to the contract. Comments appear on the **History Tab**. This action is only available from the Basics Tab.

Calculate Terms

The Calculate Terms action calculates (and in some cases, recalculates) and updates the values of the terms (with a Class of Calculated) whose values are defined by records in the Oracle Utilities Data Repository or by the Oracle Utilities Rules Language.

This action can be performed from any tab, and but only when the contract's status is **In Process**.

View Calculations

The View Calculations action performs any calculations associated with the contract and displays the results.

This action can be performed from any tab, and when the contract is at any Status.

When you click the **View Calculation**, the Process window opens. After the calculations are complete, the Report Generate window opens.

Contract calculations are displayed using report templates. Oracle Utilities Quotations Management includes a default contract calculations template that can be customized to suit your specific needs.

When the contract calculations are complete, the contract calculations open.

View Contract

The **View Contract** action generates a contract based on the Items, Terms, and Documents specified on the Contract screen.

This action can be performed from any tab, and when the contract is at any Status.

When you select **View Contract** action on the Actions drop-down list, the Report Generate window opens.

Contracts are created using report templates. Oracle Utilities Quotations Management and Oracle Utilities Billing Component - Contract Management both include a default contract template that can be customized to suit your specific needs.

When the contract generation is complete, the contract window opens.

Ready for Approval

The **Ready for Approval** action sets the contract's Status to **In Approval**, and if applicable, generates work queue items for the contract's approvals.

This action can be performed from any tab, but only when the contract's status is **In Process**.

Submit Contract

The **Submit Contract** action sets the contract's Status to **Submitted**.

This action can be performed from any tab, but only when the contract's status is **In Approval**.

Execute Contract

The **Execute Contract** action sets the contract's Status to **Executed**.

This action can be performed from any tab, but only when the contract's status is **Submitted**.

Terminate Contract

The **Terminate Contract** action sets the contract's Status to **Terminated**.

This action can be performed from any tab, but only when the contract's status is **In Process**, **In Approval**, **Submitted**, or **Executed**.

Revise Contract

The **Revise Contract** action creates a copy of the current contract with an updated Revision number (current revision number plus 1), and sets the original contract's Status to **Revised**, and the revision contract's Status to **In Process**.

This action can be performed from any tab, but only when the contract's status is anything other than **Revised**.

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