

Oracle Utilities Customer Care and Billing Business Intelligence

Metric Reference Guide

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Preface

This guide describes how to perform basic tasks using Oracle Utilities Customer Care and Billing Business Intelligence. It also identifies and describes content components such as dashboards, answers, and subject areas.

Audience

This guide is intended for all users of Oracle Utilities Customer Care and Billing Business Intelligence.

Related Documents

For more information, see the following documents:

- *Oracle Utilities Advanced Spatial and Operational Analytics Installation Guide*
- *Oracle Utilities Advanced Spatial and Operational Analytics Quick Install Guide*
- *Oracle Utilities Advanced Spatial and Operational Administration Guide*
- *Oracle Utilities Advanced Spatial and Operational Analytics Release Notes*
- *Oracle Utilities Advanced Spatial and Operational Analytics User's Guide*

Oracle Utilities Business Intelligence Documentation Library:

- *Oracle Utilities Business Intelligence Quick Install Guide*
- *Oracle Utilities Business Intelligence Installation Guide*
- *Oracle Utilities Business Intelligence DBA Guide*
- *Oracle Utilities Business Intelligence User's Guide*

See Also:

- *Oracle Utilities Business Intelligence V2.4.0 Server Administration Guide*
- *Oracle Utilities Application Framework V4.1 Business Process Guide*
- *Oracle Utilities Application Framework V4.1 Administration Guide*
- Oracle Utilities Customer Care and Billing Documentation Library

Typographical Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Chapter 1

Dashboard Content Reference

This chapter describes Oracle Utilities Customer Care and Billing Business Intelligence dashboard content. The dashboards are grouped by the following analytics:

- **Credit & Collection Analytics**
- **Customer Analytics**
- **Revenue Analytics**

Credit & Collection Analytics

The Credit & Collection Analytics standard set of dashboards provide information on accounts receivables, accounts in arrears, and write offs. Click **Dashboards**, expand **Credit & Collection Analytics**, and then click **Credit & Collection** to access these dashboards.

Dashboards

Credit & Collection Analytics contains four standard dashboard pages:

- **Overview**
- **Arrears**
- **Collectibles**
- **Write Offs**

Overview

The **Overview** dashboard provides a snapshot view of the Arrears, Collectibles, and Write Offs data. Select the fiscal and/or calendar year and period for which you want to view the details.

- **Arrears (31+ Days) Compared to Revenue:** This is an indication of how well payments are made on time. Needle movement toward yellow or red indicates a need to pay more attention toward collecting payments. Click the gauge or the table link to drill down to view respective arrears in detail.
- **Arrears Compared to Revenue by Segment:** Arrears by segment helps target customer segments when running debt collection programs. Click View By to choose to slice the details by customer class, jurisdiction, premise type, or service type. Click a link in the segment to view the respective arrears in detail.
- **Collection Process Effectiveness:** This KPI indicates the level of success with collecting payments in arrears with regards to collection process periods. This is calculated by the difference between arrears amount at the beginning of the collection process period and end

of the collection process period. Click the gauge or the table link to drill down to view respective collectibles in detail.

- **Collection Process Effectiveness by Segment:** Collection process effectiveness broken down by customer segment helps identify whether or not tailored collection processes for different customer segments need to be adopted. Click View By to choose to slice the details by customer class, jurisdiction, or premise type. Click a link in the segment to view the respective collectibles in detail.
- **Current Collectibles by Segment:** A snapshot of current outstanding customer debt. Click View By to choose to slice the pie chart by customer class, jurisdiction, or premise type. Click the pie chart to view the respective collectibles in detail.
- **Write Off Process Effectiveness:** This KPI indicates the level of success with collecting payments in arrears with regards to write offs. This is calculated by the difference between arrears amount at the beginning of the write off process period and end of the write off process period. Click the gauge or the table link to drill down to view respective write offs in detail.
- **Write Off Process Effectiveness by Segment:** This KPI shows the write off process effectiveness broken down by customer segment. This helps facilitate decision making on whether to adopt tailored collection processes for different customer segments. Click View By to choose to slice the details by customer class, jurisdiction, or premise type. Click a value in the segment to view the respective write offs in detail.

Arrears

- **Arrears by Region (Map):** Customer debt broken down by various regions assists in planning effective collection processes. A geographical view is provided for quick analysis of outstanding debt. Click on each color-coded region on the map to view arrears amount by age along with current balance.
- **Arrears by Region:** Customer debt identified by region is further broken down by various customer segments, such as customer class, service type, rate, premise type, jurisdiction, state, city, or postal code. This facilitates quick analysis of outstanding debt. Click View By to choose to slice the details by customer class, service type, rate, premise type, jurisdiction, state, city, postal code. Click a value in the segment to view the respective Bill Cycle.
- **Arrears as a Percentage of Billed Revenue:** This is a snapshot of customer debt as a percentage of revenue. The revenue contains only billed amount. The debt is stored in various buckets based on its age, that is, 31-60 days, 60-90 days and 90+ days. Both the percentage and actual amounts of debt compared to revenue is shown in these graphs to provide an overview of how well the bills are being paid.
- **Arrears by Segment:** Further details about arrears are provided in this KPI; arrears along with the Service Types and Service Agreement Types. Click the table link or on the pie chart to drill down to specific details.

Collectibles

- **Collection Process Effectiveness:** This KPI is the detailed view of the collection process summary that is displayed on the **Overview** dashboard page. The details are displayed for 12 months prior to the month selected.
- **Collection Process Volume:** This graph represents the total number of collection processes run in order to collect all the outstanding customer debt. Higher number of collection processes indicates higher efforts in collecting billed amount.
- **Collectible Amount:** This KPI helps identify any unusual collectible amounts in a particular month.

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- **Collection Duration:** This KPI provides an overview of how long collection processes take at a minimum, maximum and average to close. This helps analyze the lead time in collecting debt.
 - **Collectible Amount by Segment:** This is a detailed view of the summary that is on the Overview dashboard page.

Write Offs

- **Write Off Process Effectiveness:** When a business is not able to collect outstanding customer debt by running collection processes, third-party collection agencies get involved in the process. This KPI shows how effective the third-party programs are in collecting debt.
- **Number of Write Off Processes:** The total number of processes used to collect the debt is displayed in this graph.
- **Write Off Amount:** This graph shows a monthly trend of what amount of debt is being written off after the third-party agencies try to collect the outstanding customer debt.
- **Write Off Duration:** This graph shows how long write off processes took to close before the debt is either written off or collected. Only the closed write off processes are considered in this graph.
- **Write Off by Segment:** This graph shows a monthly trend of amount of debt being written off after third-party collection attempts broken down by customer segment.

Customer Analytics

The Customer Analytics standard set of dashboards provide customer information. Click **Dashboards**, expand **Customer Analytics**, and then click **Customer** to access the customer dashboards.

Dashboards

Customer Analytics contains four standard dashboard pages:

- **Overview**
- **Customers**
- **Cases**
- **Customer Contacts**

Overview

The **Overview** dashboard page provides a high level overview of the latest completed month's customer information, such as customer loss and gain, customer contacts, and customer case information.

- **Customer Gain / Loss:** The Customer Gain / Loss report provides gauges that display the percentage of customers gained or lost during a month. Each provides a table with the average gain or loss over a three month period, as well as the counts for the current and preceding three months.
- **Customer Contact Volume:** Summary of total number of customer contacts. It compares current month's contact volume with average of last three month's volume. Click the gauge to drill down to view detailed information about all customer contacts.
- **Average Case Duration - Comparison:** Summary of the latest completed month's case duration. This KPI shows how quickly cases are being handled compared to the previous three months. Case Type can be used to drill down into detailed information about cases.

Customers

The **Customers** dashboard page provides customer information such as customer gain or loss, latest completed month's customer information, such as customer gain and loss.

- **Customer Map Gain and Loss:** This is a geographical view provided for identifying the areas with highest number of customers gained or lost.
- **Customer Gain / Loss by Region:** This KPI provides an indication of customer churn. Areas with highest numbers of customer gained, lost or net are highlighted. Customer Class, Service Type, CIS Division, and SA Type can be used to drill down to view further information such as Division, Bill Cycle, Account Characteristic Type, and so on.
- **Customer Gain/Loss:** This KPI displays the number of customers gained and lost for the selected year. It provides an indication of the customer churn trend. Hover over the graph bars to view actual number of customer lost or gained.

Cases

The **Cases** dashboard page provides customer case information, such as rate at which cases get opened and closed, case resolution, and case duration statistics.

- **Cases Map:** This is a geographical view provided for identifying the areas with highest number of open and closed cases. Click on the map for details about the number of cases closed/open and the duration.
- **Cases Opened/Closed By Region:** This KPI shows the rate at which customer cases are getting opened and closed in any given region. Click on customer class to drill down to view Bill Cycle.
- **Average Case Duration by Case Status:** This KPI shows the average duration for the given case type.
- **Case Duration Statistics:** This graph shows the maximum, minimum, and average case duration for the selected case type for each month of the selected year. This shows any trends in the time it takes to close a case for the given type.
- **Case Duration:** This KPI lists the top closed cases by duration for the given case type that was closed during the selected month. Hover over the graph bars to view the average case duration.

Customer Contacts

- **Customer Contact Map:** This is a geographical view provided for identifying the number of contacts in a region. Click on the map for details about the number of contacts in that area.
- **Customer Contact Volume by Region:** This KPI helps monitor contact volumes which can be used for resources allocation in order to handle these contacts.
- **Contacts by Day of Week:** This KPI shows the number of customer contacts made on each day of the week for the calendar month and year selected. For each day, the number is broken down into time periods that helps users to see if the time of day is adequately staffed. Hover over the graph bars to view the contact details.
- **Contacts by Day of Week Hourly Summary:** This KPI further breaks down the day of week contact volume into hourly summary.
- **Contact Class and Type Distribution:** Contact volume by class and type helps in resource planning. Click Customer Contact Class either on the table link or on the pie chart to drill down to customer contact type.

Revenue Analytics

The Revenue Analytics standard set of dashboards provide information on revenue and billing. Click **Dashboards**, expand **Revenue Analytics**, and then click **Revenue** to access these dashboards.

Dashboards

Revenue Analytics contains four standard dashboard pages:

- **Overview**
- **Revenues**
- **Billed Usage**
- **Bills & Payments**

Overview

The **Overview** dashboard provides a high level overview of revenue viewed period and customer segmentation.

- **Revenue:** This revenue gauge shows how revenues for the selected period compare with the same period last year. This is a key indicator of business growth. Click the gauge to drill down to view revenue details.
- **Revenue by Segment:** Revenue is broken down by customer class to provide detailed insight into revenue contribution by each segment. Click the individual customer class to drill down to view further information.

Revenues

- **Revenue by Region (Map):** This geographical view shows how much each region/city is contributing to total revenue. Click on the color-coded region on the map for more revenue details about that region.
- **Revenue by Region:** This KPI provides a tabular view of how different cities contribute to total revenue. Click the customer class to drill down to view Bill Cycle.
- **Revenue by Segment:** A detailed view of revenue broken down into segments. Click View By options to select various segments. Hover over the graph bars to view specific revenue details.
- **Year to Date Revenue:** A monthly break down of revenue shows the seasonality (if any) in revenues.

Billed Usage

- **Billed Usage by Region (Map):** This geographical view shows the actual usage per area/region. Click on the map for details about the calculated amount and billed quantity in a region.
- **Billed Usage by Region:** This KPI provides a trend of actual usage over calendar months. This helps observe any unusual consumptions. It can also be used to run programs aiming individual customer segment in particular geographical areas based on consumption patterns. Click View By to choose to slice the details by customer class, service type, rate, jurisdiction, premise type, state, city, or postal code. Click a value in the segment to view the respective Bill Cycle.

Bills & Payments

- **Payments /Bills & Adjustments:** This KPI shows how well payments are done; 100% payments being the target. Hover over the graph bars to view specific details about payments, bills, and adjustments.

Additional Information

The Licensing and Packaging Guide contains valuable information on the features and data structures available in Oracle Utilities Customer Care and Billing Business Intelligence. The guide is provided as an Excel spreadsheet, Oracle Utilities Advanced Spatial and Operational Analytics V2.4.0 Licensing and Packaging Guide.xls. Content includes:

- A list of all of the available Oracle Utilities Business Intelligence products.
- Installer Options - the required extractors and schemas for each product.
- Subject Areas, Facts, and Dimensions.
- Dashboards and Answers - the standard dashboards available and the associated Answers along with the Answer path.