

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

Utility Reference Model

5.1.5.2 Manage Un-Metered Site

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Oracle Utilities Customer Care and Billing Utility Resource Model 5.1.5.2, Release 2.3.1

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Chapter 1

Overview

This chapter provides a brief description of the Manage Un-Metered Site business process and associated process diagrams. This includes:

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

Brief Description

Business Process: 5.1.5.2 Manage Un-Metered Site

Process Type: Sub Process

Parent Process: 5.1.5 Manage Site Infrastructure

Sibling Processes: 5.1.5.1 Manage Metered Site

This process describes the creation and maintenance of Premise and Service Point in CC&B for un-metered service. The Premise record is considered the service address, and typically contains associated geographic and jurisdiction information. The Service Point is a specific geographic location that delivers service to a Premise. It is considered to be the exact location for a meter, device or other equipment. The Service Point contains information about the type of service, reading cycle, responsible field office, Distribution Company and other pertinent information. The Premise and the Service Point have a direct relationship although the Premise may have more than one associated Service Point. This typically occurs when the organization supplies more than one type of service to a given Premise.

There are three major categories of Service Points:

- Metered - for measuring consumption.
- Badged Item - for devices such as a specific fire hydrant or specific street light that are uniquely identified.
- Unbadged - for devices not uniquely identified that may be grouped together such as a group of street lights.

A single Premise and associated Service Point may be added online. Quantities of multiple like Premises and Service Points may be added online through replication functionality.

Over time many items may be installed and removed at a Service Point. CC&B maintains a historical record of installations and removals for Billing and audit purposes.

Actors/Roles

The Manage Un-Metered Site business process involves the following actors and roles:

- **CSR:** CSR or Authorized User of the Customer Care and Billing application.
- **CC&B:** The Customer Care and Billing application. Steps performed by this actor/role are performed automatically by the application, without the need for user initiation or intervention.
- **Field Operations:** Company or department that provides operational support, coordinates and performs field work (installation, repair, maintenance, investigations etc. that allows Utilities to provide services to customers).

Chapter 2

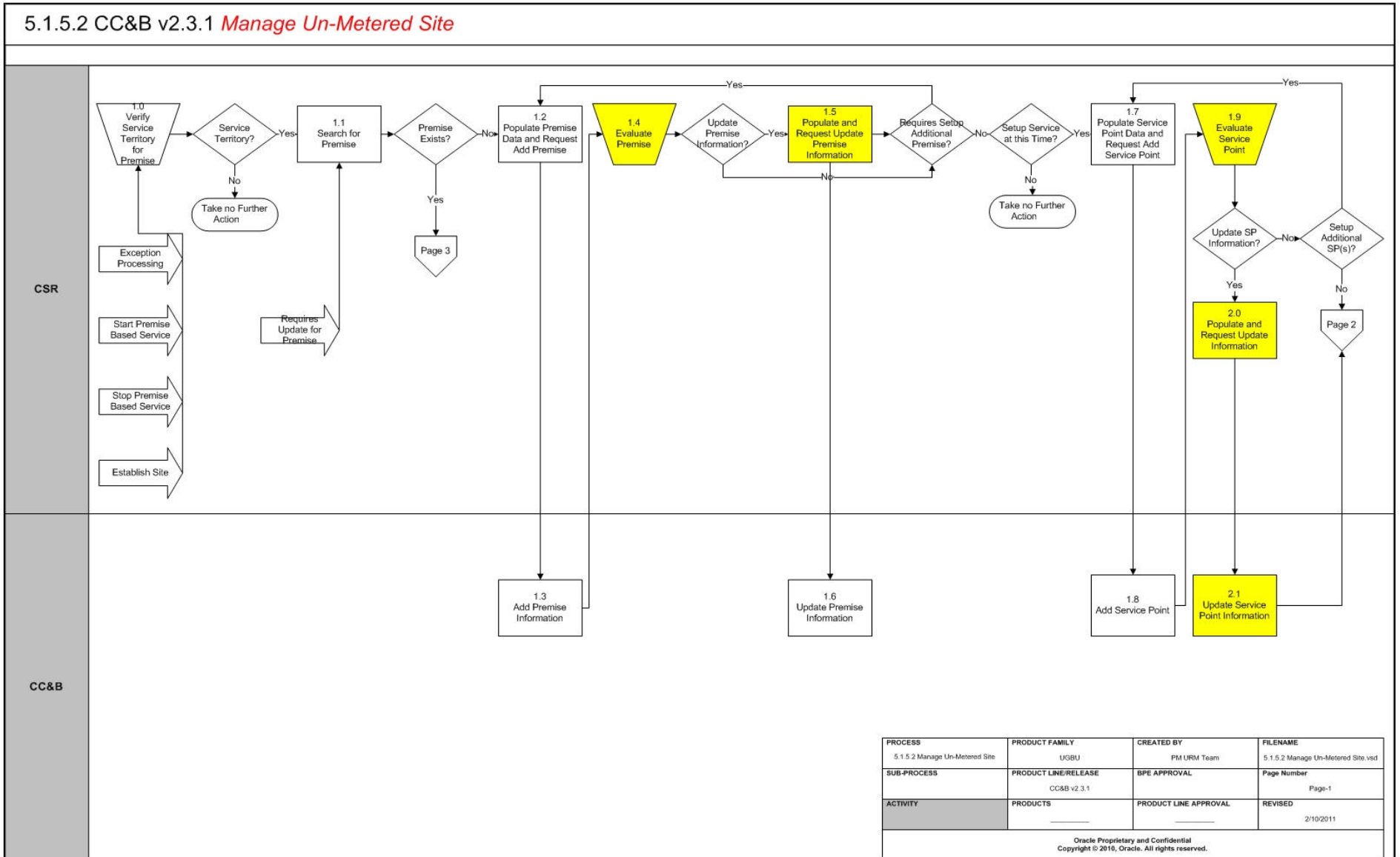
Detailed Business Process Model Description

This chapter provides a detailed description of the Manage Un-Metered Site business process.
This includes:

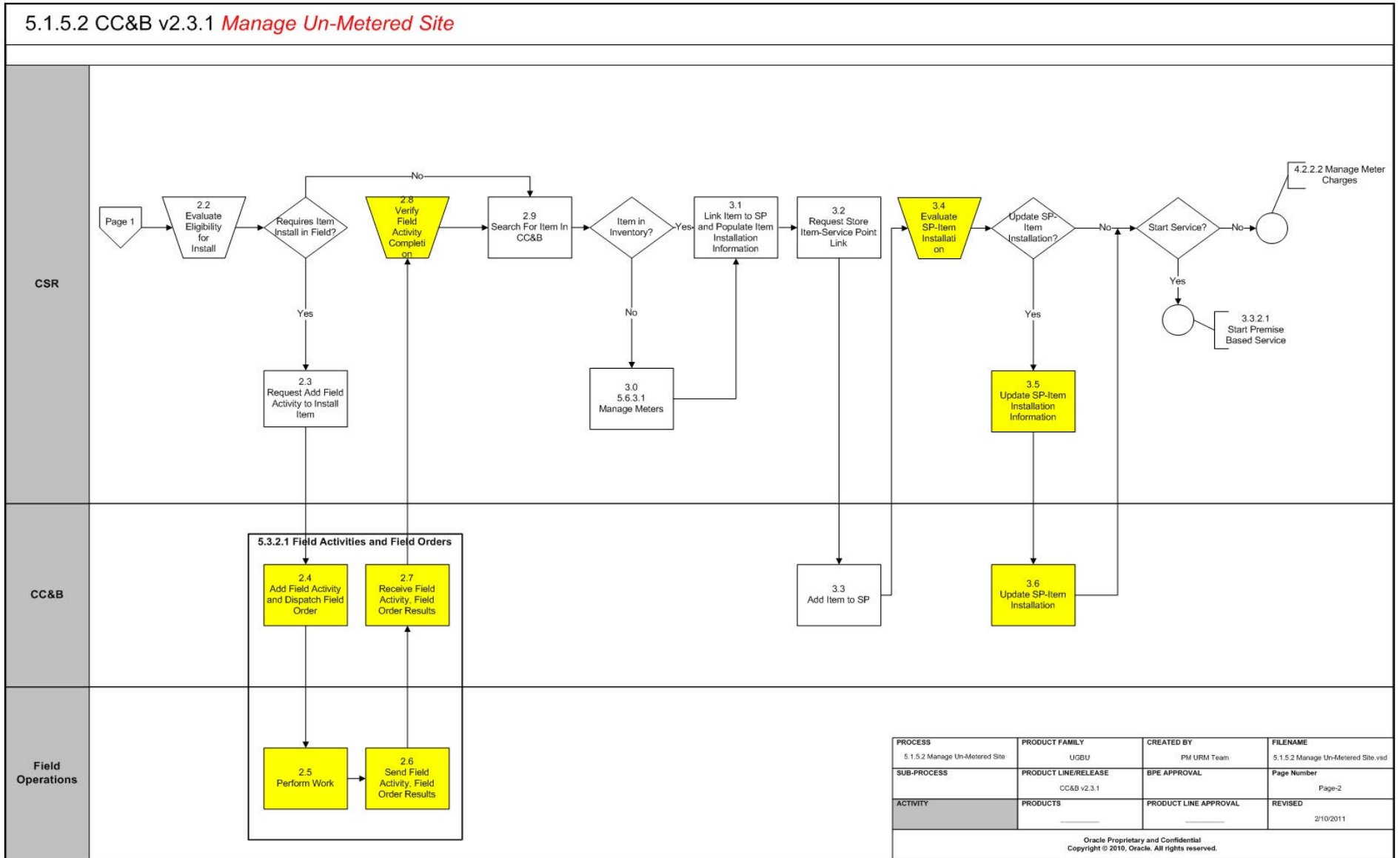
- **Business Process Diagrams**
 - **Manage Un-Metered Site (Page1)**
 - **Manage Un-Metered Site (Page2)**
 - **Manage Un-Metered Site (Page3)**
 - **Manage Un-Metered Site (Page4)**
- **Manage Un-Metered Site Description**
- **Related Training**

Business Process Diagrams

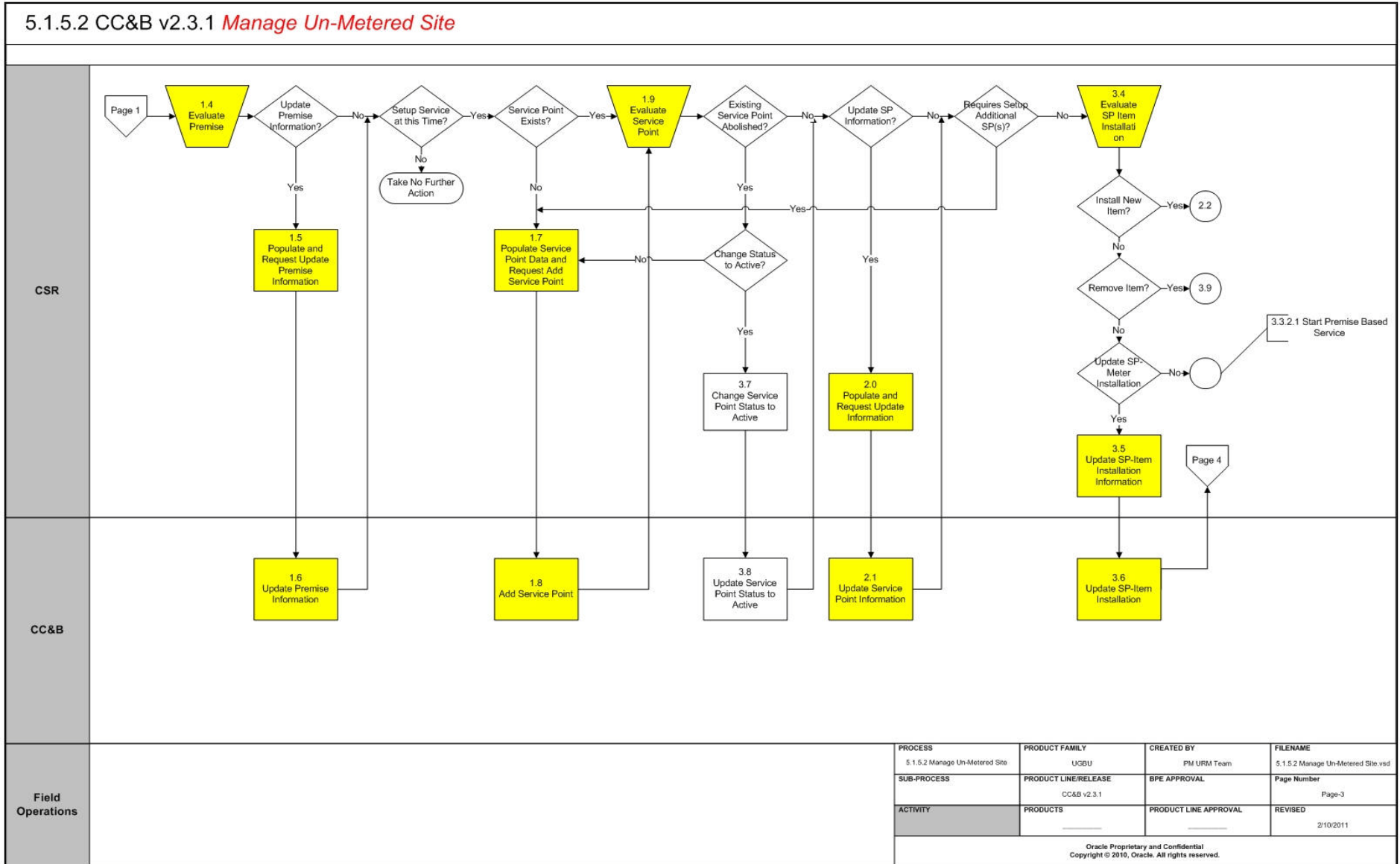
Manage Un-Metered Site (Page1)



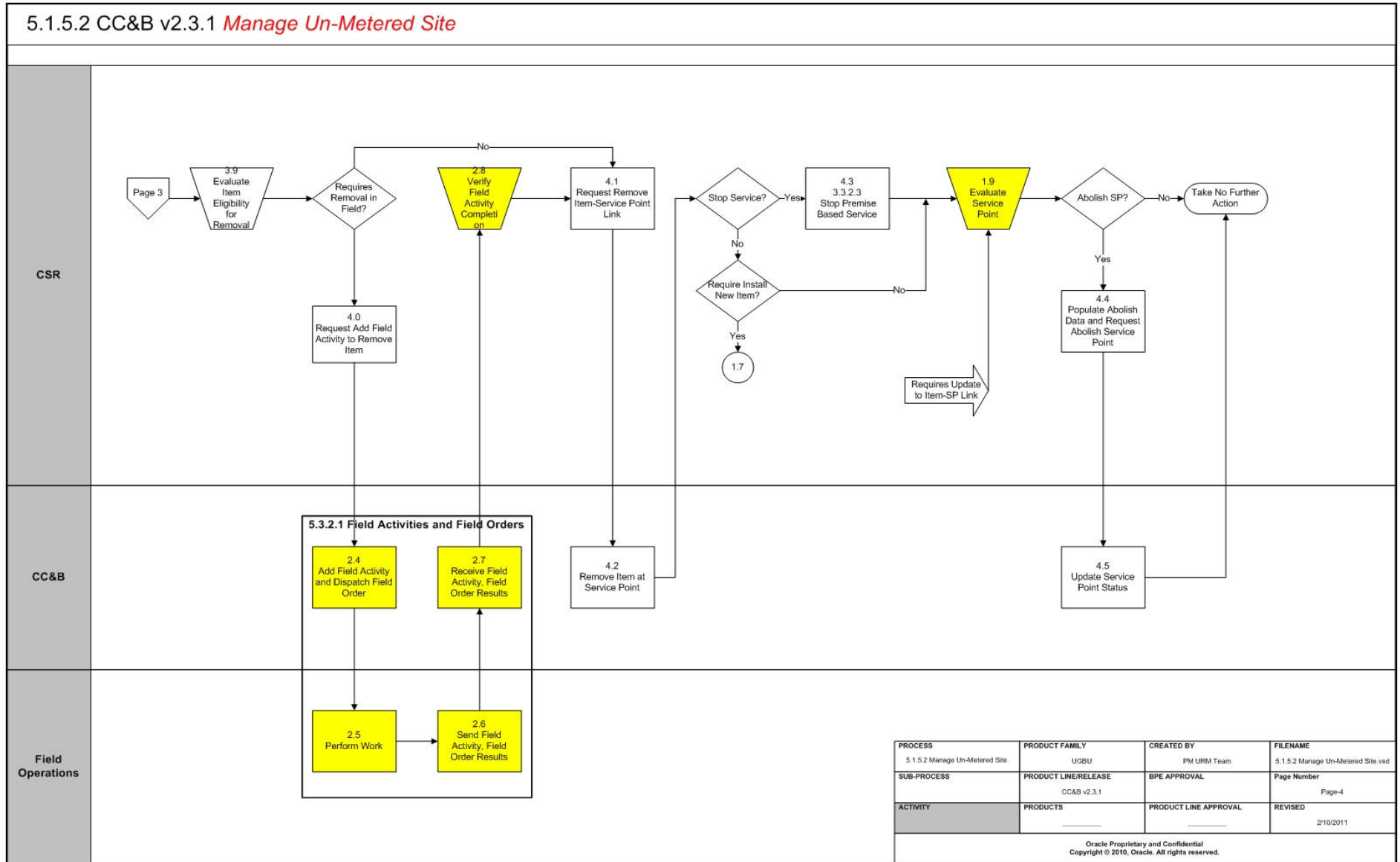
Manage Un-Metered Site (Page2)



Manage Un-Metered Site (Page3)



Manage Un-Metered Site (Page4)



Manage Un-Metered Site Description

This section includes detailed descriptions of the steps involved in the Manage Un-Metered Site business process, including:

- 1.0 Verify Service Territory for Premise
- 1.1 Search for Premise
- 1.2 Populate Premise Data and Request Add Premise
- 1.3 Add Premise
- 1.4 Evaluate Premise
- 1.5 Populate and Request Update Premise Information
- 1.6 Update Premise Information
- 1.7 Populate Service Point Data and Request Add Service Point
- 1.8 Add Service Point
- 1.9 Evaluate Service Point
- 2.0 Populate and Request Update SP Information
- 2.1 Update Service Point Information
- 2.2 Evaluate Eligibility for Install
- 2.3 Request Add Field Activity to Install Item
- 2.4 Add Field Activity and Dispatch Field Order
- 2.5 Perform Work
- 2.6 Send Field Activity, Field Order Results
- 2.7 Receive Field Activity, Field Order Results
- 2.8 Verify Field Activity Completion
- 2.9 Search for Item in CC&B
- 3.0 5.6.3.1 Manage Meters in CC&B
- 3.1 Link Item to SP and Populate Item Installation Information
- 3.2 Request Store Item-Service Point Link
- 3.3 Add Item to Service Point
- 3.4 Evaluate SP-Item Installation
- 3.5 Update SP-Item Installation Information
- 3.6 Update SP-Item Installation
- 3.7 Change Service Point Status to Active
- 3.8 Update SP Status to Active
- 3.9 Evaluate Item Eligibility for Removal
- 4.0 Request Add Field Activity to Remove Item
- 4.1 Request Remove Item-Service Point Link
- 4.2 Remove Item at Service Point
- 4.3 3.3.2.3 Stop Premise Based Service
- 4.4 Populate Abolish Data and Request Abolish Service Point

- 4.5 Update Service Point Status

1.0 Verify Service Territory for Premise

See **Manage Un-Metered Site (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User first determines the address is in the service territory. If not, the CSR or Authorized User refers the caller to appropriate agency and the process stops with no further action.

1.1 Search for Premise

See **Manage Un-Metered Site (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Upon receipt of request for service or new service requirements are made available, the CSR uses Control Central Search to locate the Premise address to Start Service in CC&B. Control Central and Dashboard Alerts provide the CSR or Authorized User with valuable insight for overall analysis of any existing Premise. It is possible the site needs to be established in CC&B now and service will start at a later date.

Entities to Configure

Installation Options
 Installation Options - Framework
 Zones

Business Object	Available Algorithms
C1-UserDisplayAllPremises - User - Display All Premises	ADCTSTPO- Address 1, City, State, Postal. This algorithm formats the "Premise Info" that appears throughout the system. Use the algorithm's parameters to define which fields should appear in the address string and their relative position. CCAL WFPREMR- Display active WF for premise based on char CCAL WFPREMX- Display active WF for premise based on context C1_LSSLPR-DF - Highlight Life Support/Sensitive Load on Premise CCAL-DECL - Highlight effective declarations for acct and prem F1-SYNRQALRT -Retrieve Outstanding Sync Request

1.2 Populate Premise Data and Request Add Premise

See **Manage Un-Metered Site (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Requests for new Premises are initiated with new construction single family, commercial, or large industrial, commercial or residential developments. New Premises may be added when new service territory is acquired by an organization. The CSR or Authorized User enters the necessary information to establish the Premise. Landlord and Parent Premise Information may be required to link a single Premise with a Landlord, Property Management Company or associated Parent Premise. A configured premise type is assigned to briefly describe the Premise. A premise's state, city, county, division, characteristics, trend area and geographic data default from configured postal default information. The address defined has an indicator to note whether or not it is a valid mailing address.

1.3 Add Premise

See **Manage Un-Metered Site (Page1)** for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Premise is added in CC&B.

Entities to Configure

Installation Options
 Installation Options - Framework
 Premise Type
 Characteristic Type and Values
 Postal Code Defaults
 Trend
 Geographic Type
 CIS Division
 Country
 Time Zone

Business Object	Available Algorithms
Address - Premise business object for address	ADCTSTPO- Address 1, City, State, Postal. This algorithm formats the "Premise Info" that appears throughout the system. Use the algorithm's parameters to define which fields should appear in the address string and their relative position.
CI_UploadPremiseCSVNonRes - Upload Premise from CSV file for Non-Residential Customers	
CI_UploadPremiseCSVRes - Upload Premise from CSV file for Residential Customers	
DR_Premise - Data Replicator - Premise	
Premise - Premise fields common to all premise BOs	

1.4 Evaluate Premise

See **Manage Un-Metered Site (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User reviews the entered Premise information and verifies its accuracy. The CSR or Authorized User determines if additional premises are required or if updates are needed for the newly entered Premise.

1.5 Populate and Request Update Premise Information

See **Manage Un-Metered Site (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User enters any required changes for the Premise.

1.6 Update Premise Information

See **Manage Un-Metered Site (Page1)** for the business process diagram associated with this activity.

Actor/Role: CC&B

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

1.7 Populate Service Point Data and Request Add Service Point

See **Manage Un-Metered Site (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User enters required Service Point Information for a new Service Point. The Service Point has an effective date to indicate when it was installed in CC&B. An item cannot be placed at the Service Point before the Service Point install date. Business rules are configured for each Service Point Type and impact the following:

- Defines the type of service delivered at the SP.
- Defines Service Point as Metered or Item based.
- Defines Characteristics that are the same for all service points of a given type.
- Defines Field Activities that may be performed at its Service Points.
- Defines Items that may be installed at its Service Points.
- Defines Service Agreements that may pay for service at its Service Points.
- Defines Equipment that may be linked to its Service Points.

1.8 Add Service Point

See **Manage Un-Metered Site (Page1)** for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Service Point information is added in CC&B.

Entities to Configure

Installation Options
 Installation Options - Framework
 Characteristic Type and Values
 Geographic Type
 SP Type
 Service Cycle
 Service Route Type
 Meter Location
 Operations Area

Business Object	Available Algorithms
C1-SPBasic - Service Point Basic	CL_SPIN-DF - SP information - SP
CL_SPInfo - SP Information	Type, Read Cycle, Premise Info -
CL_ServicePointAudit - Service	This algorithm formats the "Service
Point Audit	Point Info" that appears
CL_UploadSPCSVNonRes -	throughout the system. It also calls
Upload SP from CSV file for Non-	the Premise Information algorithm.
Residential Customers	CL_SP_BO - Determine Business
CL_UploadSPCSVRes - Upload SP	Object of Service Point
from CSV file for Residential	F1-GCHG-CDCP - Generic
Customers	Change Data Capture
DR_ServicePoint - Data Replicator	CL_VAL-SP - Create Validate
- SP	service point Job
	CL_GENAUDIT - Generic Audit

1.9 Evaluate Service Point

See **Manage Un-Metered Site (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User reviews and verifies the newly entered Service Point information. The existing Service Point may be in an Abolished status. Additional Service Points or updates for the newly entered Service Point may be required. At times it may be required to abolish an existing Service Point. This type of service may no longer be required or may be moved to another location for the Premise.

2.0 Populate and Request Update SP Information

See **Manage Un-Metered Site (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User determines information for the Service Point requires changing or updating.

2.1 Update Service Point Information

See **Manage Un-Metered Site (Page1)** for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Service Point information is updated in CC&B.

2.2 Evaluate Eligibility for Install

See **Manage Un-Metered Site (Page2)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized reviews the Premise and Service Point to determine if fieldwork is required at this time. The Item may already be installed and only needs to establish the record in CC&B.

2.3 Request Add Field Activity to Install Item

See **Manage Un-Metered Site (Page2)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: If the Service Point does not have an existing Item, a fieldwork request is made to install an Item.

Entities to Configure

Installation Options - Framework

Available Algorithm

CI_FAIN-DFLT- Default algorithm for field activity information. This algorithm formats the field activity information that appears throughout the system. The algorithm formats the information as follows: SP Type description, 'Created By' description, FA Type description, FA Status description, "Scheduled" <scheduled date/time>, Intermediate Status description.
FAAD-PHONE - Display phone number information from field order

2.4 Add Field Activity and Dispatch Field Order

See **Manage Un-Metered Site (Page2)** for the business process diagram associated with this activity.

Group: 5.3.2.1 Manage Field Activities and Field Orders Process

Actor/Role: CC&B

Description: The Field Activity for the Service Point and corresponding Field Order for the Premise address are added and dispatched in CC&B. Please refer to process 5.3.2.1 Manage Field Activities and Field Orders for further details.

2.5 Perform Work

See **Manage Un-Metered Site (Page2)** for the business process diagram associated with this activity.

Group: 5.3.2.1 Manage Field Activities and Field Orders Process

Actor/Role: Field Operations

Description: The Field Operations office receives the Dispatched Field Activity and a technician is routed to the field to install an Item.

2.6 Send Field Activity, Field Order Results

See **Manage Un-Metered Site (Page2)** for the business process diagram associated with this activity.

Group: 5.3.2.1 Manage Field Activities and Field Orders Process

Actor/Role: Field Operations

Description: The completed Item installation information is returned to CC&B.

2.7 Receive Field Activity, Field Order Results

See **Manage Un-Metered Site (Page2)** for the business process diagram associated with this activity.

Group: 5.3.2.1 Manage Field Activities and Field Orders Process

Actor/Role: CC&B

Description: The Service Point Field Activity information for the installed Item is received in CC&B. Please refer to process 5.3.2.1 Manage Field Activities and Field Orders for further details.

2.8 Verify Field Activity Completion

See **Manage Un-Metered Site (Page2)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User reviews the returned Field Activity Information to obtain the required Item installation information. Please refer to process 5.3.2.1 Manage Field Activities and Field Orders for further details.

2.9 Search for Item in CC&B

See **Manage Un-Metered Site (Page2)** for the business process diagram associated with this activity.

Actor/Role: CSR

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

Entities to Configure

Installation Options - Framework

Available Algorithm

CI_ITMI-DFLT - Default algorithm for item information. This algorithm formats the "Item Info" that appears throughout the system. This routine concatenates the following information: Item Type (description), Badge Number, Serial Number, Item Status (description), and Location Information.

3.0 5.6.3.1 Manage Meters in CC&B

See **Manage Un-Metered Site (Page2)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The Item information needs to be recorded in inventory prior to installation in CC&B. Refer to 5.6.3.1 Manage Meters in CC&B.

3.1 Link Item to SP and Populate Item Installation Information

See **Manage Un-Metered Site (Page2)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User links the Item information to the associated Service Point.

3.2 Request Store Item-Service Point Link

See **Manage Un-Metered Site (Page2)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User saves the entered Item-Service Point information.

3.3 Add Item to Service Point

See **Manage Un-Metered Site (Page2)** for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Item and associated Service Point are linked in CC&B.

3.4 Evaluate SP-Item Installation

See **Manage Un-Metered Site (Page2)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User evaluates the existing Service Point-Item Link and verifies information to ensure accuracy. Updates to the on/off history may be required. It is possible the existing Item may need to be removed.

3.5 Update SP-Item Installation Information

See **Manage Un-Metered Site (Page2)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User determines updates to the Service Point-Item Installation record are required.

3.6 Update SP-Item Installation

See **Manage Un-Metered Site (Page2)** for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Service Point-Item Installation record is updated in CC&B.

3.7 Change Service Point Status to Active

See **Manage Un-Metered Site (Page3)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User determines the existing Service Point status can be reinstated from Abolished to Active. Service Point status impacts whether or not it can be linked to Service Agreements.

3.8 Update SP Status to Active

See **Manage Un-Metered Site (Page3)** for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Service Point status is changed to Active in CC&B.

3.9 Evaluate Item Eligibility for Removal

See **Manage Un-Metered Site (Page4)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized reviews the Premise and Service Point to determine if fieldwork is required at this time. The Item may already be removed due to other maintenance, and only needs recording in CC&B.

4.0 Request Add Field Activity to Remove Item

See **Manage Un-Metered Site (Page4)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: At times it is necessary to remove the Item to better meet the Installation requirements or perhaps an Item is no longer required for the Service Point. The CSR or Authorized User creates a Field Activity to remove the Item.

Entities to Configure

FA Type

FA Type Profile

4.1 Request Remove Item-Service Point Link

See **Manage Un-Metered Site (Page4)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User saves the Service Point-Item History record with the associated removal reading, date and time. Another Item may be installed or service may be stopped.

4.2 Remove Item at Service Point

See **Manage Un-Metered Site (Page4)** for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: CC&B is updated and the Service Point-Item History record reflects the removal.

4.3 3.3.2.3 Stop Premise Based Service

See **Manage Un-Metered Site (Page4)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: It is determined the service is no longer required for this customer. Refer to 3.3.2.3 Stop Premise Based Service.

4.4 Populate Abolish Data and Request Abolish Service Point

See **Manage Un-Metered Site (Page4)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User determines this Service Point will no longer be used. The Service Point Status is changed to abolished, with an effective date entered. The Service Point status impacts whether or not it can be linked to Service Agreements.

4.5 Update Service Point Status

See **Manage Un-Metered Site (Page4)** for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Service Point status is updated in CC&B.

Installation Options Control Central Alert Algorithms

The following installation options are available:

Value	Description
PP-Active	Show Count of Active Pay Plans
PP-Broken	Show Count of Broken Pay Plans
PP-Kept	Show Count of Kept Pay Plans
CC-PPDENIAL	Count Pay Plan Denial Customer Contacts
CCAL WFACCTX	Display Active WF for Account Based on Context
CCAL WFPREMX	Display Active WF for Premise Based on Context
CCAL-TD	Highlight Outstanding To Do Entries
CCAL-DECL	Highlight Effective Declarations for Account and Premise
CCAL-CASE	Highlight Open Cases
CCAL-FAERMSG	Highlight FA's with outstanding outgoing messages
CI_WO_BILL	Highlight Written off Bills
CI_OD-PROC	Highlight Active Overdue Processes
CI_OMF_DF	Highlight Open and Disputed Match Even
CI_STOPSA-DF	Highlight Stopped SA's
C1-CCAL-CLM	Highlight Open Rebate Claims
C1-COLL-DF	Highlight Active Collection Processes
C1_COLLRF-DF	Highlight Active Collection Agency Referral
C1_PENDST-DF	Highlight Pending Start Service Agreements
C1_CASH-DF	Cash Only Account
C1_CRRT-DF	Credit Rating Alert
C1_LSSL-DF	Highlight Life Support/Sensitive Load on Person
C1_LSSLPR-DF	Highlight Life Support/Sensitive Load on Premise
C1_SEVPR-DF	Highlight Active Severance Processes
C1-CCAL-OCBG	Highlight Open Off Cycle Bill Generators
F1-SYNRQALRT	Retrieve Outstanding Sync Request

Related Training

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

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