Oracle Utilities Customer Care and Billing Release 2.3.1

Utility Reference Model

5.3.2.1 Manage Field Activities and Field Orders

July 2012

ORACLE

Oracle Utilities Customer Care and Billing Utility Resource Model 5.3.2.1, Release 2.3.1

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Chapter 1

Overview

This chapter provides a brief description of the Manage Field Activities and Field Orders business process and associated process diagrams. This includes:

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

Brief Description

Business Process: 5.3.2.1 Manage Field Activities and Field Orders

Process Type: Sub Process

Parent Process: 5.3.2 Manage Fieldworks (CCB)

Sibling Processes: 3.3.2.1 Start Premise Based Service, 3.3.2.3 Stop Premise Based Service, 4.2.1.1a Read Meter, 4.2.1.3a Validate Meter Reads, 4.3.2.2 Manage Severance Process, 5.1.5.1 Manage Metered Site, 5.1.5.2 Manage Un-Metered Site, 5.6.3.1 Manage Meters, 5.6.3.2 Manage Items.

This process describes how work in the field is managed and tracked for an organization. Typically utilities require field visits when:

- Customer starts or stops service.
- Customer requests check meter or premise
- Maintenance of meters and/or premise, or the organization's other property or equipment
- Disconnection due to non-payment of bill
- Customer requests restore service due to power outage, or reconnect from disconnection due to non-payment of bill

Actors/Roles

The Field Activities and Field Orders 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).
- **Document Management Software**: Document Management Software that allows create and maintain paper or paperless documents and manage document workflow
- **Customer**: Utility Company's Customer.

Chapter 2

Detailed Business Process Model Description

This chapter provides a detailed description of the Manage Field Activities and Field Orders business process. This includes:

- **Business Process Diagrams**
  - **Manage Field Activities and Field Orders (Page1)**
  - **Manage Field Activities and Field Orders (Page2)**
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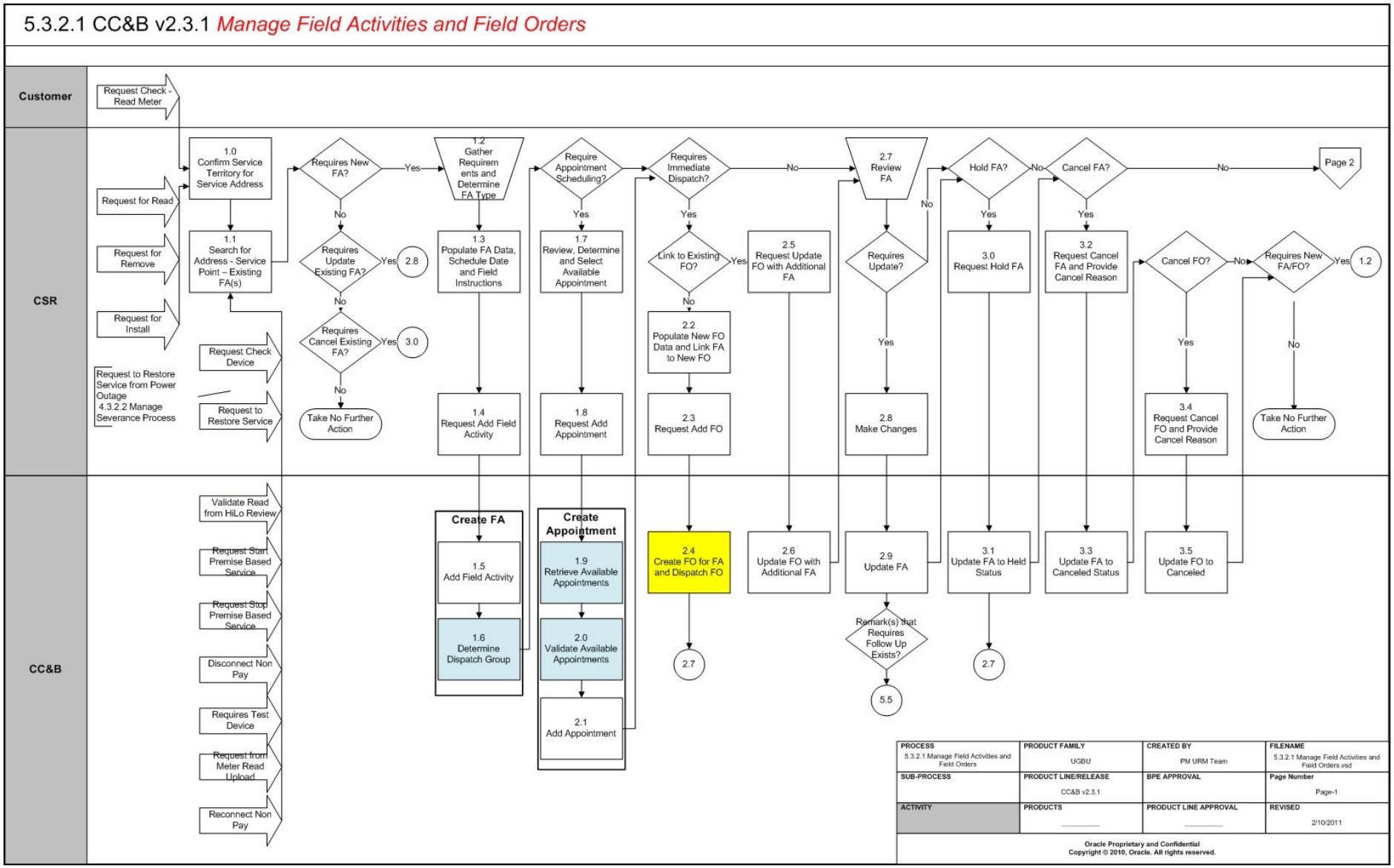
  - **Manage Field Activities and Field Orders (Page6)**
- **Field Activities and Field Orders Description**
- **Installation Options Control Central Alert Algorithms**
- **Related Training**

Business Process Diagrams

Manage Field Activities and Field Orders (Page1)



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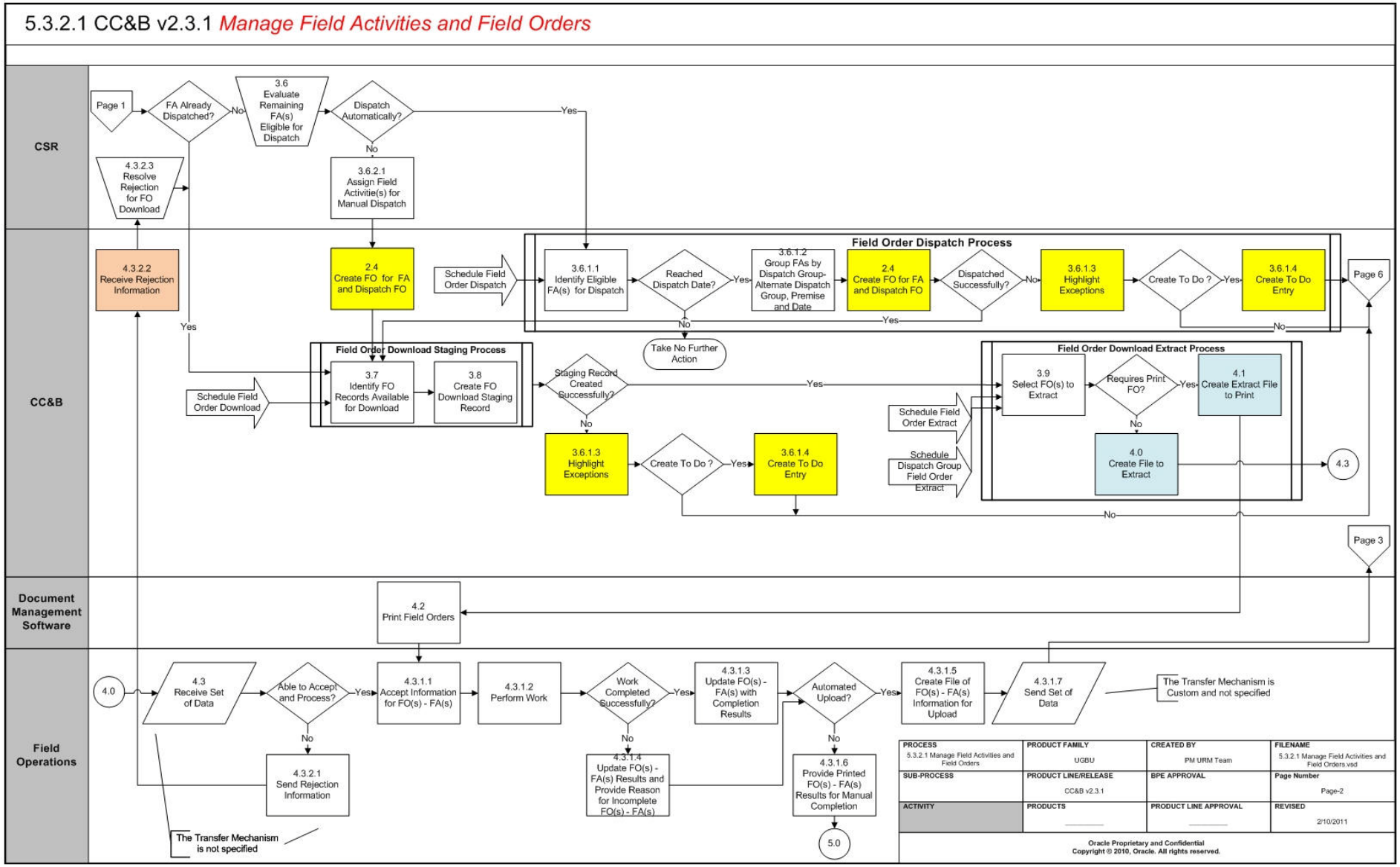
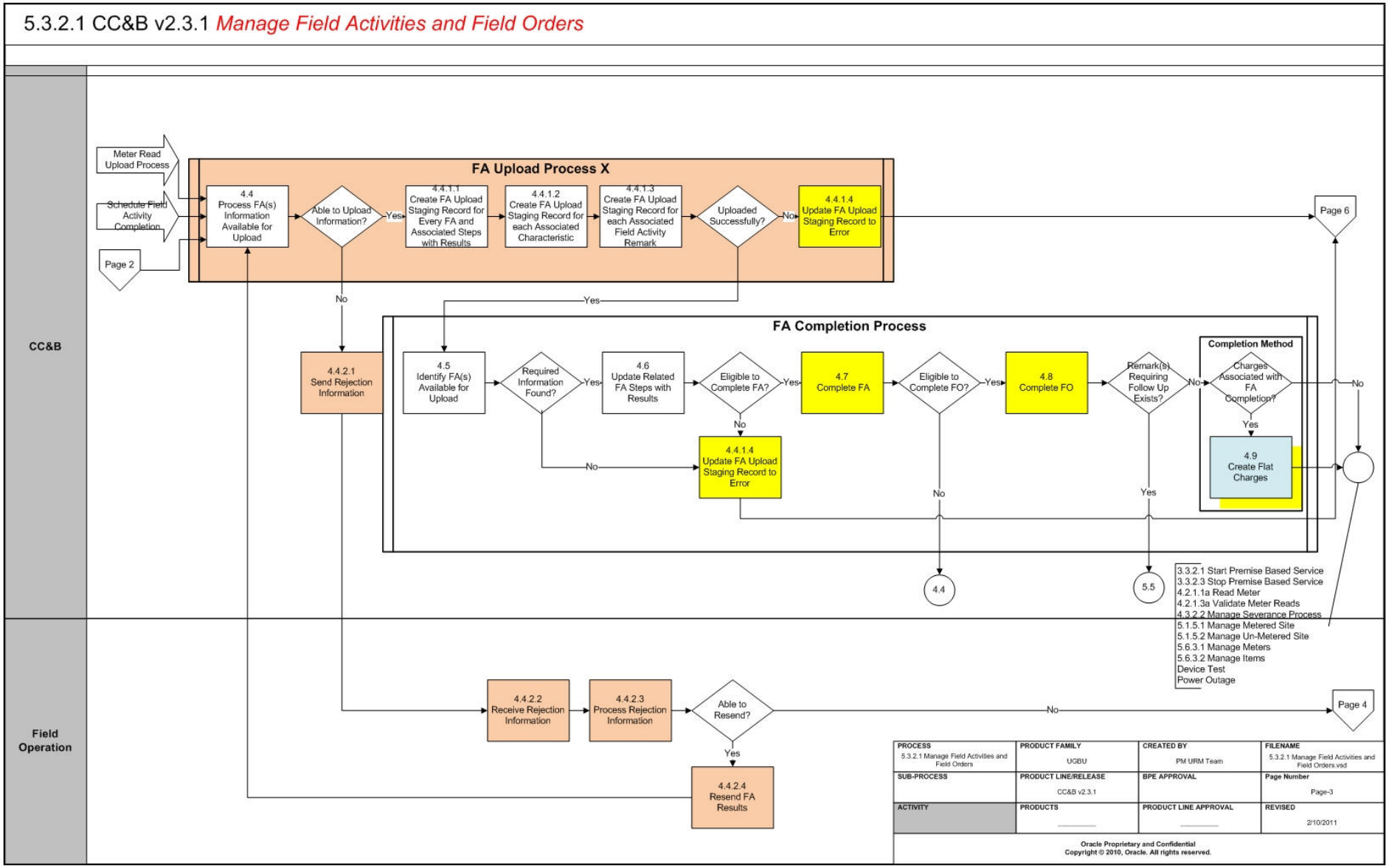
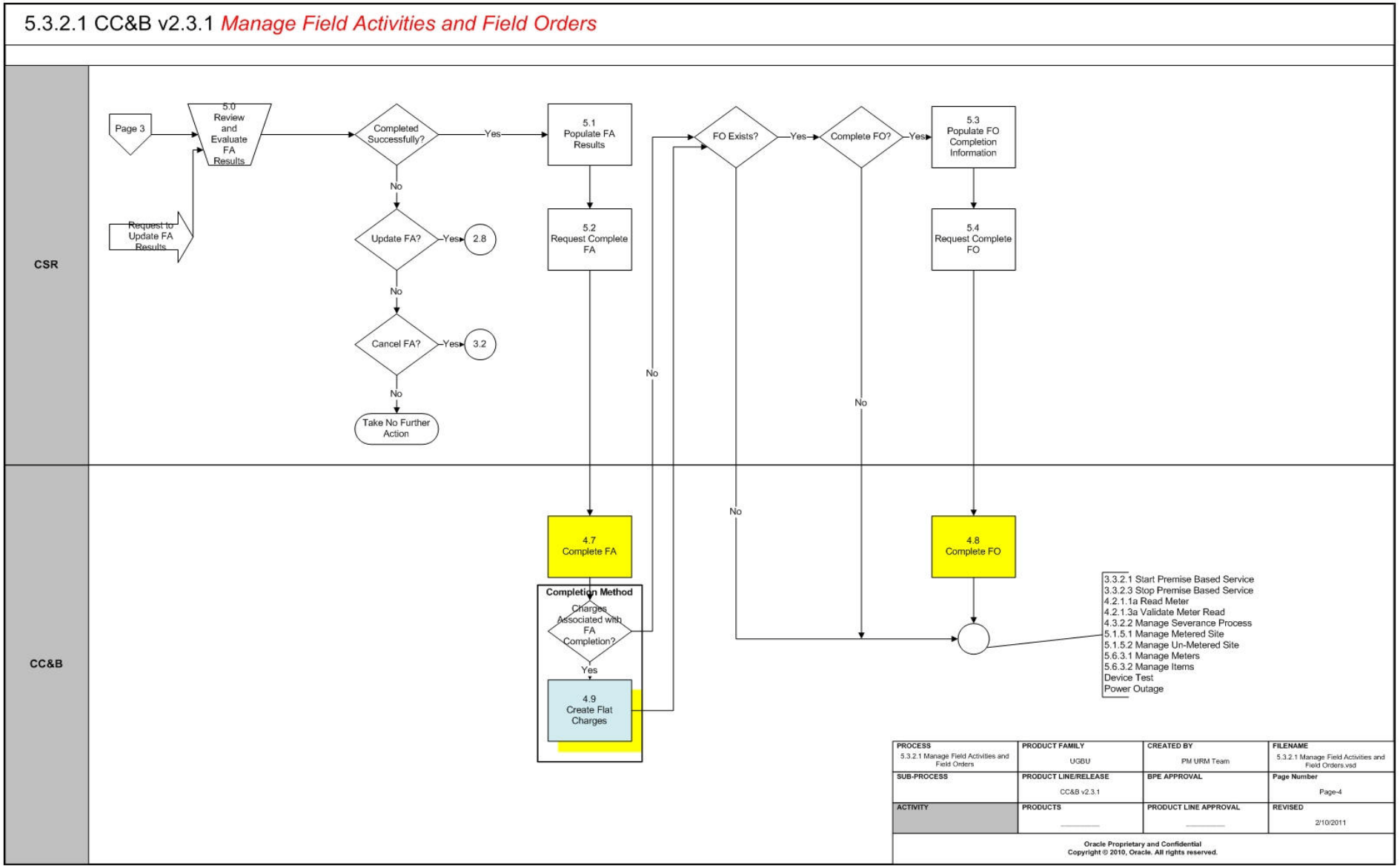


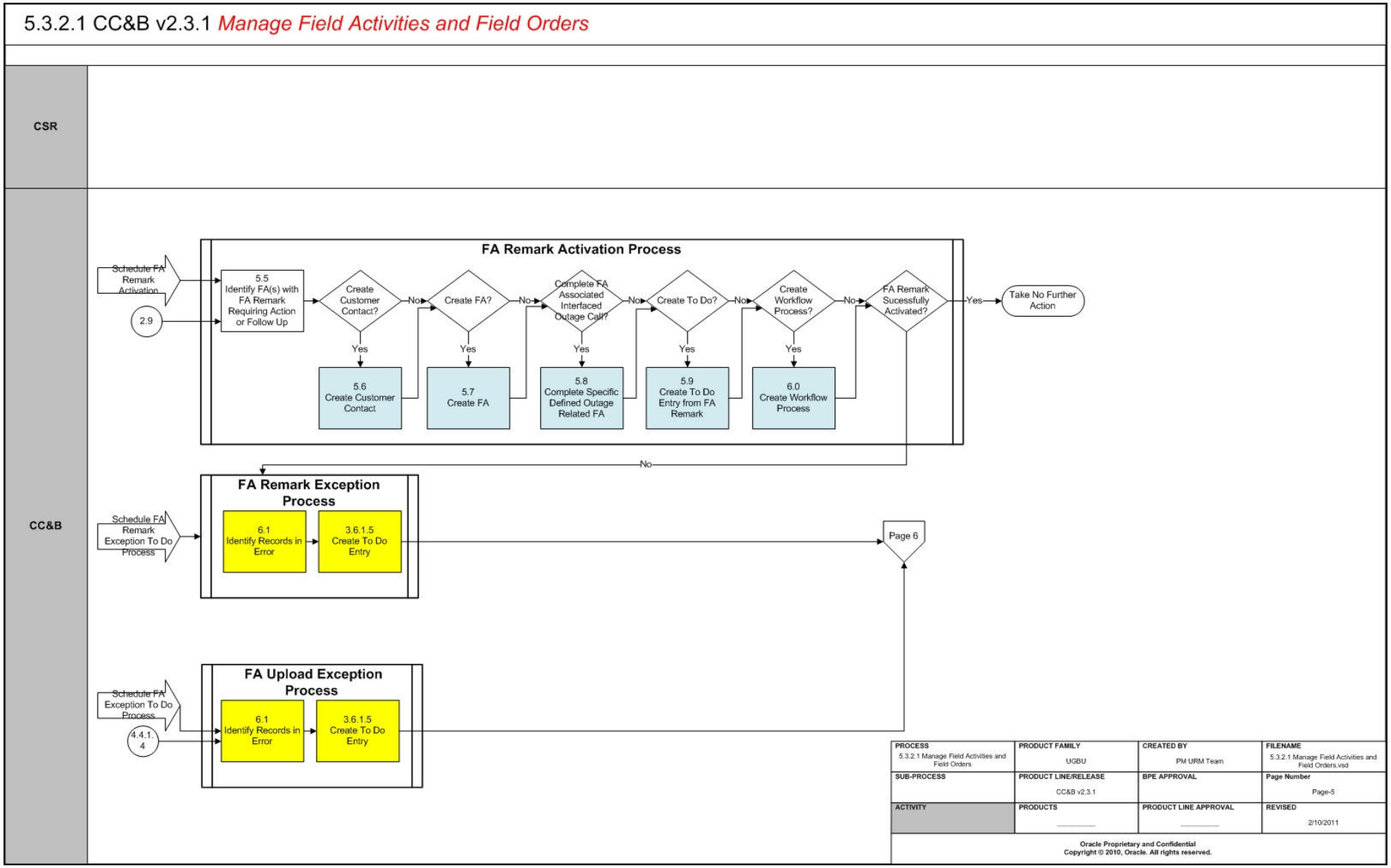
Manage Field Activities and Field Orders (Page3)



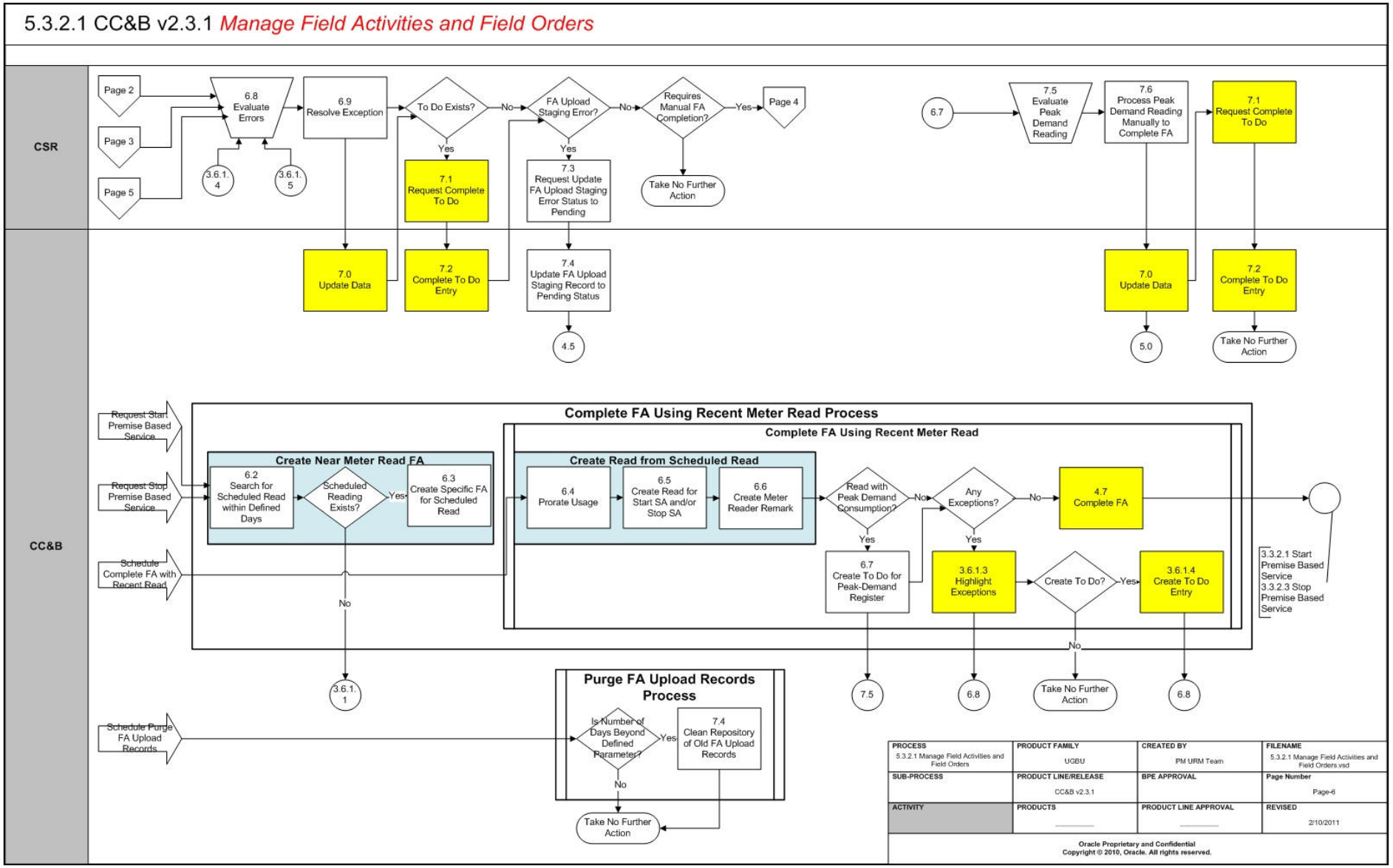
Manage Field Activities and Field Orders (Page4)



Manage Field Activities and Field Orders (Page5)



Manage Field Activities and Field Orders (Page6)



Field Activities and Field Orders Description

This section includes detailed descriptions of the steps involved in the Field Activities and Field Orders business process, including:

- **1.0 Confirm Service Territory for Service Address**
- **1.1 Search for Address - Service Point - Existing FA(s)**
- **1.2 Gather Requirements and Determine FA Type**
- **1.3 Populate FA Data, Schedule Date and Field Instructions**
- **1.4 Request Add Field Activity**
- **1.5 Add Field Activity**
- **1.6 Determine Dispatch Group: Create FA**
- **1.7 Review, Determine and Select Available Appointment**
- **1.8 Request Add Appointment**
- **1.9 Retrieve Available Appointments**
- **2.0 Validate Available Appointments**
- **2.1 Add Appointment**
- **2.2 Populate New FO Data and Link FA to FO**
- **2.3 Request Add FO**
- **2.4 Create FO for FA and Dispatch FO**
- **2.5 Request Update FO with Additional FA**
- **2.6 Update FO with Additional FA**
- **2.7 Review FA**
- **2.8 Make Changes**
- **2.9 Update FA**
- **3.0 Request Hold FA**
- **3.1 Update FA to Held Status**
- **3.2 Request Cancel FA and Provide Cancel Reason**
- **3.3 Update FA to Canceled Status**
- **3.4 Request Cancel FO and Provide Cancel Reason**
- **3.5 Update FO to Canceled**
- **3.6 Evaluate Remaining FA(s) Eligible for Dispatch**
- **3.6.1.1 Identify Eligible FA(s) for Dispatch**
- **3.6.1.2 Group FAs by Dispatch Group, Alternate Dispatch Group, Premise and Date**
- **3.6.1.3 Highlight Exceptions**
- **3.6.1.4 Create To Do Entry**
- **3.6.2.1 Assign Field Activities for Manual Dispatch**
- **3.6.1.3 Highlight Exceptions**
- **3.6.1.4 Create To Do Entry**
- **3.6.2.1 Assign Field Activities for Manual Dispatch**

- **3.6.2.2 Create FO for Associated FA and Assign FO Dispatch Status**
- **3.7 Identify FO Records Available for Download**
- **3.8 Create FO Download Staging Record**
- **3.9 Select FO(s) to Extract**
- **4.0 Create File for Extract**
- **4.1 Create Extract File to Print**
- **4.2 Print Field Orders**
- **4.3 Receive Set of Data**
- **4.3.1.1 Accept Information For FA(s) -FO(s)**
- **4.3.1.2 Perform Work**
- **4.3.1.3 Update FO(s) - FA(s) Status with Completion Results**
- **4.3.1.4 Update FO(s) -FA(s) Status and provide Reason for Incomplete FO(s) - FA(s)**
- **4.3.1.5 Create File of FO(s) - FA(s) Information for Upload**
- **4.3.1.6 Provide Printed FO(s) - FA(s) with Results**
- **4.3.1.7 Send Set of Data**
- **4.3.2.1 Send Rejection Information**
- **4.3.2.2 Receive Rejection Information**
- **4.3.2.3 Resolve Rejection for FO Download**
- **4.4 Process FA(s) Information Available for Upload**
- **4.4.1.1 Create FA Upload Staging Record for Every FA and Associated Steps with Results**
- **4.4.1.2 Create FA Upload Staging Record for each Associated Characteristic**
- **4.4.1.3 Create FA Upload Staging Record for each Associated Field Activity Remark**
- **4.4.1.4 Update FA Upload Staging Record to Error**
- **4.4.2.1 Send Rejection Information**
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- **4.4.2.3 Process Rejection Information**
- **4.4.2.4 Resend FA Results**
- **4.5 Identify FA(s) Available for Upload**
- **4.6 Update Related FA Steps with Results**
- **4.7 Complete FA**
- **4.8 Complete FO**
- **4.9 Create Flat Charges**
- **5.0 Review and Evaluate FA Results**
- **5.1 Populate FA Results**
- **5.2 Request Complete FA**
- **5.3 Populate FO Completion Information**
- **5.4 Request Complete FO**

- **5.5 Identify FA(s) with FA Remark Requiring Action or Follow Up**
- **5.6 Create Customer Contact**
- **5.7 Create FA**
- **5.8 Complete Specific Defined Outage Related FA**
- **5.9 Create To Do Entry from FA Remark**
- **6.0 Create Workflow Process**
- **6.1 Identify Records in Error**
- **6.2 Search for Scheduled Read with Defined Days**
- **6.3 Create Specific FA for Scheduled Read**
- **6.4 Prorate Usage**
- **6.5 Create Read for Start SA and/or Stop SA**
- **6.6 Create Meter Reader Remark**
- **6.7 Create To Do for Peak-Demand Register**
- **6.8 Evaluate Errors**
- **6.9 Resolve Exception**
- **7.0 Update Data**
- **7.1 Request Complete To Do**
- **7.2 Complete To Do Entry**
- **7.3 Request Update FA Upload Staging Error Status to Pending**
- **7.4 Update FA Upload Staging Record to Pending Status**
- **7.5 Evaluate Peak Demand Reading**
- **7.6 Process Peak Demand Reading Manually to Complete FA**
- **7.7 Clean Repository of Old FA Upload Records**

1.0 Confirm Service Territory for Service Address

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Upon receipt of request, 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 process stops with no further action.

1.1 Search for Address - Service Point - Existing FA(s)

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Upon receipt of request for Start Service, the CSR or Authorized User locates the address and specific Service Point in CC&B using Control Central Search. When an address is selected, the CSR or Authorized User is automatically transferred to Control Central - Account Information refreshed with the selected customer's data. Dashboard Alerts provide the CSR or Authorized User with pertinent information for the customer and address such as existing Field Activities. All Service Points for the address will be displayed at Control Central - Premise Tree.

Entities to Configure
Installation Options

Business Object	Available Algorithms
Premise - This business object is designed to be included into all premise BOs. It contains common elements that all BOs for the premise MO will have in common. C1-UserDisplayAllPremises - This business object is used to retrieve the display all premises switch for a given user.	Installation Options - Control Central Alerts Installation Options - ADCTSTPO This algorithm formats the "Premise Info" that appears throughout the system Installation Options - CI_SPIN_DF - This algorithm formats the "Service Point Info" that appears throughout the system FAAD-INFO - This algorithm formats the field activity additional information that appears on the field activity page. If a field order is linked to the field activity, the algorithm formats the information as follows: Phone Type description, Phone number. In addition, if the Extension is available, Extension description and number are appended to the message. FAIN-INFO - 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", Intermediate Status description. In addition, if the FA is linked to an appointment, the text "Appointment Scheduled" is appended to the message.

1.2 Gather Requirements and Determine FA Type

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description:

After discussion with the customer or evaluation of the request, the CSR or Authorized User determines the work to be accomplished in the field.

1.3 Populate FA Data, Schedule Date and Field Instructions

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Based on established business rules, the CSR or Authorized User enters the specific type of Field Activity, schedule date and any instructions for the field technician. The default Dispatch Group is populated based on the type of Field Activity selected.

Entities to Configure
FA Type
FA Type Profile
Field Service Class
Field Service Control
Operations Area
Dispatch Group
Service Type

1.4 Request Add Field Activity

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User adds the Field Activity in CC&B.

1.5 Add Field Activity

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Group: Create FA

Actor/Role: CC&B

Description: The Field Activity is added in CC&B and available for Dispatching.

Business Object	Available Algorithms
C1-AddFieldActivityLog - This business object is used to add a field activity log entry.	FAIN-INFO - This algorithm formats the "Field Activity Info" that appears throughout the system FAAD-INFO - This algorithm formats the field activity additional information that appears on the field activity page. If a field order is linked to the field activity, the algorithm formats the information as follows: Phone Type description, Phone number. In addition, if the Extension is available, Extension description and number are appended to the message.

Note: Customers who require Workflow and Notifications may use the following Workflow Event algorithms to create a field activity:

- WFA-FA – Workflow activation, create field activity. This algorithm type creates a field activity (marked with the designated Field Activity Type) for the service point(s) associated with the workflow process. It also sets the status of the associated workflow event to either Wait or Complete as per the value of Event Status (a value of 20 means that the status is Wait, a value of 30 means that the status is Complete).
- WFF-FA – Workflow failure, create field activity. This workflow event failure algorithm type creates a field activity (marked with the designated Field Activity Type) for the service points associated with the workflow process.

1.6 Determine Dispatch Group: Create FA

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Dispatch Group is defaulted for the Field Activity based on configurable business rules

Entities to Configure
FA Type
FA Type Profile
Field Service Class
Field Service Control
Operations Area
Dispatch Group
Service Type

Available Algorithm
OFSDGRP_DFLT - FA Type Dispatch Group Criteria Algorithm - This field activity dispatch group derivation algorithm returns a dispatch group to be used on a field activity. It does this by extracting the dispatch group defined on the Field Service Control associated with a field activity's Service Type, Field Activity and Operation Area.

1.7 Review, Determine and Select Available Appointment

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Based on customer request and established business rules the CSR or Authorized User selects an available appointment for the Field Activity.

Entities to Configure
Dispatch Group Appointment Appointment Period

1.8 Request Add Appointment

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR saves the Appointment Information.

1.9 Retrieve Available Appointments

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Group: Create Appointment

Actor/Role: CC&B

Description: CC&B looks for the available appointments and displays this information for the CSR or Authorized User.

Entities to Configure
Dispatch Group Appointment Appointment Period

Available Algorithm
AAVL-AVLAPPT - This dispatch group available appointments algorithm returns appointment periods for a given dispatch group and a calculated date range.

2.0 Validate Available Appointments

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Group: Create Appointment

Actor/Role: CC&B

Description: CC&B looks for and displays appointments already scheduled. If all appointments are already taken, no information is displayed.

Entities to Configure
Dispatch Group Appointment Appointment Period

Available Algorithm
AVAL-VALAPPT - This dispatch group appointment validation algorithm validates if a selected appointment period is still available for scheduling.

2.1 Add Appointment

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Group: Create Appointment

Actor/Role: CC&B

Description: The appointment information is updated in CC&B and linked to the Field Activity.

Entities to Configure
Dispatch Group Appointment Appointment Period

Business Object
C1-FieldOrderAuditLog - This business object maintains business event log records for field order auditing. The following is audited: - Changes to the schedule date/time - The reschedule reason The audit logs are displayed on the field order audit portal which can be accessed from the field order context menu.

2.2 Populate New FO Data and Link FA to FO

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: At times it is necessary to create the Field Order manually online for immediate dispatch. The CSR enters required information and links the existing Field Activity(s) to the Field Order.

2.3 Request Add FO

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR then saves the linked Field Activity - Field Order information in CC&B.

2.4 Create FO for FA and Dispatch FO

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR - CC&B

Description: When the CSR or Authorized User creates the Field Order online and links the Field Activity, the Field Order is Dispatched. Executing the background process, Field Order Dispatch, Field Orders are created and Field Activities are linked to the Field Orders in CC&B.

- Manual Process: The CSR or Authorized User manually creates the Field Order and links the Field Activity or uses the Dispatch Field Activities Notebook in CC&B to create the Field Order
- Automated Process: The batch process, Field Order Dispatch creates the Field Order and links the appropriate Field Activities.

Entities to Configure
Dispatch Group FA Type

Customizable Process
Field Order Dispatch - FOD - This batch process automatically dispatches eligible field activities a given number of days in advance of the scheduled date.

2.5 Request Update FO with Additional FA

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: At times the CSR or Authorized User is able to link a Field Activity to an existing Field Order. It is possible the same crew can perform the additional work on the same field visit.

2.6 Update FO with Additional FA

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The additional Field Activity is linked to the existing Field Order in CC&B.

2.7 Review FA

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User reviews the newly created Field Activity for accuracy and determines if updates are required. Based on establish business rules, the CSR or Authorized User can make changes including the date, FA Type, or Dispatch Group. Additional instructions may be required and also updated. At times an existing Field Activity may require similar updates.

2.8 Make Changes

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User enters necessary changes.

Entities to Configure
Fieldwork Reschedule Reason
FA Remark

2.9 Update FA

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Field Activity is updated in CC&B.

Business Object	Available Algorithms
C1-AddFieldActivityLog - This business object is used to add a field activity log entry.	FAIN-INFO - This algorithm formats the "Field Activity Info" that appears throughout the system FAAD-INFO - This algorithm formats the field activity additional information that appears on the field activity page. If a field order is linked to the field activity, the algorithm formats the information as follows: Phone Type description, Phone number. In addition, if the Extension is available, Extension description and number are appended to the message.

3.0 Request Hold FA

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: At times it may be necessary to hold a Field Activity based on customer's request, or due to current accessibility.

3.1 Update FA to Held Status

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Actor/Role: CC&B

Description:The Field Activity status is updated to Held.

3.2 Request Cancel FA and Provide Cancel Reason

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The Fieldwork may no longer be required, is the wrong FA Type, or cannot be completed at this time. The CSR or Authorized User cancels the Field Activity and provides a Cancel Reason.

Entities to Configure
Fieldwork Cancel Reason

3.3 Update FA to Canceled Status

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Field Activity is updated to a Canceled status in CC&B.

Entities to Configure
Fieldwork Cancel Reason

3.4 Request Cancel FO and Provide Cancel Reason

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: There may be only one Field Activity associated with the Field Order. In this case, the CSR or Authorized User may also cancel the Field Order.

Entities to Configure
Fieldwork Cancel Reason

3.5 Update FO to Canceled

See **Manage Field Activities and Field Orders (Page1)** for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Field Order is updated to a Canceled status in CC&B.

Entities to Configure
Fieldwork Cancel Reason

3.6 Evaluate Remaining FA(s) Eligible for Dispatch

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User can manually Dispatch a Field Activity by creating the Field Order and linking the Field Activity to the Field Order as described in earlier steps. There are also two separate notebooks available online for dispatching of Field Activities. The CSR or Authorized User selects the appropriate method based on established business rules and procedures.

Automated Process is accomplished through the Field Order Dispatch background process.

3.6.1.1 Identify Eligible FA(s) for Dispatch

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Group: Field Order Dispatch Process

Actor/Role: CC&B

Description: This batch process automatically dispatches eligible field activities a given number of days in advance of the scheduled date. The number of days is configurable. This process creates the Field Orders and links the Field Activities to the Field Order. Field activities must be in Pending Status, a dispatch able Field Activity Type, within the specified Dispatch Days, and of a certain priority if defined as criteria for Dispatch. This background process selects the Field Activities for Dispatch based on configurable criteria.

Entities to Configure
Dispatch Group FA Type

Customizable Process
Field Order Dispatch - FOD - This batch process automatically dispatches eligible field activities a given number of days in advance of the scheduled date.

3.6.1.2 Group FAs by Dispatch Group, Alternate Dispatch Group, Premise and Date

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Group: Field Order Dispatch Process

Actor/Role: CC&B

Description: The Dispatched Field Activities are grouped by premise, Dispatch group, (or alternate Dispatch Group) and date.

Entities to Configure
Dispatch Group FA Type

Customizable Process
Field Order Dispatch - FOD - This batch process automatically dispatches eligible field activities a given number of days in advance of the scheduled date.

3.6.1.3 Highlight Exceptions

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Group: Field Order Dispatch Process

Group: Field Order Download Staging Process

Group: FA Remark Activation Process

Group: Complete FA with Recent Read Process

Actor/Role: CC&B

Description: Exceptions, anomalies or errors are detected and are made available for review. Dependent on the specific process, these exceptions can be reviewed as output from the Batch process, through staging tables, or through To Do Entries.

Entities to Configure
To Do Role To Do Type

Customizable Process
TD-FACT - This background process creates a To Do entry for every field activity remark record that's in error. FDS - Field Order Download Staging - The create field order download staging process creates a download staging record for every field order that is ready for download. FOD - Field Order Dispatch - This batch process automatically dispatches eligible field activities a given number of days in advance of the scheduled date. FANRMRCO - The complete field activity using a recent read process looks for pending start / stop field activities

3.6.1.4 Create To Do Entry

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Group: Field Order Dispatch Process

Group: Field Order Download Staging Process

Group: FA Remark Activation Process

Group: FA Upload Exception Process

Group: Complete FA with Recent Read Process

Actor/Role: CC&B

Description: If configured, CC&B creates a To Do Entry for each identified exception.

Entities to Configure
To Do Role To Do Type

Customizable Process
TD-FACT - This background process creates a To Do entry for every field activity remark record that's in error. FDS - Field Order Download Staging - The create field order download staging process creates a download staging record for every field order that is ready for download. FOD - Field Order Dispatch - This batch process automatically dispatches eligible field activities a given number of days in advance of the scheduled date. FANRMRCO - The complete field activity using a recent read process looks for pending start / stop field activities. This background process creates object specific errors as a To Do Entry, if configured. TD-FAUPL - This background process creates a To Do entry for every field activity upload staging record that's in error.

3.6.2.1 Assign Field Activities for Manual Dispatch

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User assigns selected representative and scheduling based on selected date and time

Entities to Configure
Dispatch Groups Field Service Class Field Service Control Representative

3.6.2.2 Create FO for Associated FA and Assign FO Dispatch Status

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The new field order(s) are assigned to the selected representative and scheduled on the selected date and time. The appropriate Field Activities are linked to each Field Order.

Entities to Configure
Dispatch Groups Field Service Class Field Service Control Representative

3.7 Identify FO Records Available for Download

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Group: Field Order Download Staging Process

Actor/Role: CC&B

Description: This background process looks for all Field Orders marked for extraction. A Field Order gets marked for extraction when first created if its Dispatch Group is dispatch able.

Customizable Process
FDS - Field Order Download Staging - The create field order download staging process creates a download staging record for every field order that is ready for download.

3.8 Create FO Download Staging Record

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Group: Field Order Download Staging Process

Actor/Role: CC&B

Description: For each record found, CC&B creates a Field Order download staging record.

Customizable Process
FDS - Field Order Download Staging - The create field order download staging process creates a download staging record for every field order that is ready for download.

3.9 Select FO(s) to Extract

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Group: Field Order Download Extract Process

Actor/Role: CC&B

Description: This process reads all download staging records marked with a given batch control ID & run number and selects the Field Orders to pass to the dispatching software.

Entities to Configure
Dispatch Group

Available Algorithm
FOEX-OX - This algorithm constructs the records that contain the information that appears on a printed field order. FOEX-CR - This algorithm constructs the records that contain the information for printing field orders using a reporting engine.

Customizable Process
FODL - The field order download process creates the flat file that is interfaced to field order print / dispatching software.

4.0 Create File for Extract

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Group: Field Order Download Extract Process

Actor/Role: CC&B

Description: This process creates the file passed to the field order dispatch software. There are two separate batch processes as options depending on the printing requirements for the organization. The format of the file is determined based on an extract program linked to the Field Order's Dispatch Group.

Entities to Configure
Dispatch Group

Available Algorithm
FOEX-OX - This algorithm constructs the records that contain the information that appears on a printed field order. FOEX-CR - This algorithm constructs the records that contain the information for printing field orders using a reporting engine.

Customizable Process
FODL - The field order download process creates the flat file that is interfaced to field order print / dispatching software.

4.1 Create Extract File to Print

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Group: Field Order Download Extract Process

Actor/Role: CC&B

Description: This process creates the file passed to the field order print / dispatch software. There are two separate batch processes as options depending on the printing requirements for the organization. The format of the file is determined based on an extract program linked to the Field Order's Dispatch Group.

Entities to Configure
Dispatch Group

Available Algorithm
FOEX-OX - This algorithm constructs the records that contain the information that appears on a printed field order. FOEX-CR - This algorithm constructs the records that contain the information for printing field orders using a reporting engine.

Customizable Process
FODL - The field order download process creates the flat file that is interfaced to field order print / dispatching software. DSGFODL - The dispatch group FO print production process invokes the field order extract algorithm defined on the dispatch group associate to the batch control.

4.2 Print Field Orders

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Actor/Role: Document Management Software

Description: Field Orders are printed as required by the organization's assigned Document Management software.

4.3 Receive Set of Data

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Actor/Role: Field Operations

Description: The responsible group or software receives the Field Order extract file information. The transfer mechanism is not specified, as it is a custom process.

4.3.1.1 Accept Information For FA(s) -FO(s)

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Actor/Role: Field Operations

Description: The responsible group or software accepts the Field Order information.

4.3.1.2 Perform Work

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Actor/Role: Field Operations

Description: A technician is dispatched to the field to obtain read, and/or connect, or perform other tasks. This represents a combined set of processes that includes dispatching, performing the work, recording of a read or other activity at the site, and uploading results.

4.3.1.3 Update FO(s) - FA(s) Status with Completion Results

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Actor/Role: Field Operations

Description: If the work is completed successfully, completion results will be recorded for transfer back to CC&B.

4.3.1.4 Update FO(s) -FA(s) Status and provide Reason for Incomplete FO(s) - FA(s)

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Actor/Role: Field Operations

Description: If the field technician cannot complete some or all of the work, an explanation or some type of completion codes will be recorded for transfer back to CC&B.

4.3.1.5 Create File of FO(s) - FA(s) Information for Upload

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Actor/Role: Field Operations

Description: A file of Field Order results and completion information is created for Upload and transfer back to CC&B.

4.3.1.6 Provide Printed FO(s) - FA(s) with Results

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Actor/Role: Field Operations

Description: If the Field Order and Field Activity information is printed and results communicated on the printed form, the Field Activity and Field Order will be completely manually.

4.3.1.7 Send Set of Data

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Actor/Role: Field Operations

Description: It is possible to return the Field Activity Results through various methods. CC&B accepts this information through custom processing and the transfer mechanism is not specified.

4.3.2.1 Send Rejection Information

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Actor/Role: Field Operations

Description: The responsible group or software is not able to accept the information and returns rejection information.

4.3.2.2 Receive Rejection Information

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: Any rejection information is returned to CC&B for evaluation.

4.3.2.3 Resolve Rejection for FO Download

See **Manage Field Activities and Field Orders (Page2)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Any rejection information is reviewed by a CSR or Authorized User and made available for Download again as applicable.

4.4 Process FA(s) Information Available for Upload

See **Manage Field Activities and Field Orders (Page3)** for the business process diagram associated with this activity.

Group: FA Upload Process X

Actor/Role: CC&B

Description: CC&B processes the available Field information to determine if staging tables can be created. These steps walk through the required information needed to populate various staging tables in CC&B.

Customizable Process
This is a completely custom process designed to add the required staging tables in CC&B.

4.4.1.1 Create FA Upload Staging Record for Every FA and Associated Steps with Results

See **Manage Field Activities and Field Orders (Page3)** for the business process diagram associated with this activity.

Group: FA Upload Process X

Actor/Role: CC&B

Description: A staging record for each Field Activity and FA steps with results is created in CC&B.

Customizable Process
This is a completely custom process designed to add the required staging tables in CC&B.

4.4.1.2 Create FA Upload Staging Record for each Associated Characteristic

See **Manage Field Activities and Field Orders (Page3)** for the business process diagram associated with this activity.

Group: FA Upload Process X

Actor/Role: CC&B

Description: A staging record for each associated FA Characteristic is created in CC&B.

Customizable Process
This is a completely custom process designed to add the required staging tables in CC&B.

4.4.1.3 Create FA Upload Staging Record for each Associated Field Activity Remark

See **Manage Field Activities and Field Orders (Page3)** for the business process diagram associated with this activity.

Group: FA Upload Process X

Actor/Role: CC&B

Description: A staging record is created for each associated Field Activity Remark.

Customizable Process
This is a completely custom process designed to add the required staging tables in CC&B.

4.4.1.4 Update FA Upload Staging Record to Error

See **Manage Field Activities and Field Orders (Page3)** for the business process diagram associated with this activity.

Group: FA Upload Process X

Group: FA Completion Process

Actor/Role: CC&B

Description: The Upload information is incomplete or inaccurate. The FA Upload record is transitioned to an Error status. The CSR or Authorized User can review, make necessary and return status to Pending. If configured, a separate To Do Entry is created.

Customizable Process
FACOMPL - Field Activity Completion - The field activity completion process completes field activities and field orders using the records in the various field activity staging tables. Process X - This is a completely custom process designed to add the required staging tables in CC&B.

4.4.2.1 Send Rejection Information

See **Manage Field Activities and Field Orders (Page3)** for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: At times this information cannot be uploaded. An organization may require notification sent back when FA information is rejected. This requires customization.

4.4.2.2 Receive Rejection Information

See **Manage Field Activities and Field Orders (Page3)** for the business process diagram associated with this activity.

Actor/Role: Field Operations

Description: The responsible group or software receives notification of rejected Field Activity information.

4.4.2.3 Process Rejection Information

See **Manage Field Activities and Field Orders (Page3)** for the business process diagram associated with this activity.

Actor/Role: Field Operations

Description: The responsible group or software processes the rejection information to determine what needs to be changed.

4.4.2.4 Resend FA Results

See **Manage Field Activities and Field Orders (Page3)** for the business process diagram associated with this activity.

Actor/Role: Field Operations

Description: The responsible group or software resends the FA information after changes are made.

4.5 Identify FA(s) Available for Upload

See **Manage Field Activities and Field Orders (Page3)** for the business process diagram associated with this activity.

Group: FA Completion Process

Actor/Role: CC&B

Description: CC&B identifies the Field Activities ready for completion.

Customizable Process
FACOMPL - Field Activity Completion - The field activity completion process completes field activities and field orders using the records in the various field activity staging tables.

4.6 Update Related FA Steps with Results

See **Manage Field Activities and Field Orders (Page3)** for the business process diagram associated with this activity.

Group: FA Completion Process

Actor/Role: CC&B

Description: Field Activity Steps are populated with information about the work that was done in the field. These steps may include a meter read, installation or removal of a meter or item, and/or other tasks. CC&B updates Service Point information, SP Meter/Item History records; meter read records and other information included in the specific FA Step. At times not all Steps can be completed.

Customizable Process
FACOMPL - Field Activity Completion - The field activity completion process completes field activities and field orders using the records in the various field activity staging tables.

4.7 Complete FA

See **Manage Field Activities and Field Orders (Page3)** for the business process diagram associated with this activity.

Group: FA Completion Process

Group: Complete FA using Recent Read Process

Actor/Role: CC&B

Description: The Field Activity Step information is appropriately linked to the various records in CC&B. This can include Service Point, Service Point Meter/Item History, or Meter Read records. The Field Activity is transitioned to a Complete status.

- Automated - The Field Order is automatically transitioned to Complete.
- Manual - The CSR or Authorized User transitions the Field Order to Complete.

Business Object	Available Algorithms
CI_AccountBillMessageFARemark - This business object is used to add an account bill message from FA Remarks. CI_CustomerInfo_Inquiry - This business object is used by the create object plug-ins to create a Case form FA completion.	C1-CREOBJFAC - This algorithm creates a new object when a field activity is completed. For example, it may be used to create a case when a field activity is completed. It does the following: • The field activity is read using the Source Business Object. • Elements in the Source Business Object schema are moved to the Target Business Object schema. • A new object is added using the Target Business Object

Customizable Process
FACOMPL - Field Activity Completion - The field activity completion process completes field activities and field orders using the records in the various field activity staging tables.

4.8 Complete FO

See **Manage Field Activities and Field Orders (Page3)** for the business process diagram associated with this activity.

Group: FA Completion Process

Actor/Role: CC&B

Description: If all Field Activities associated with a given Field Order are completed or canceled, the Field Order is transitioned to a Complete status.

- Automated - The Field Order is automatically transitioned to Complete.
- Manual - The CSR or Authorized User transitions the Field Order to Complete.

Customizable Process
FACOMPL - Field Activity Completion - The field activity completion process completes field activities and field orders using the records in the various field activity staging tables.

4.9 Create Flat Charges

See **Manage Field Activities and Field Orders (Page4)** for the business process diagram associated with this activity.

Group: Completion Method

Group: FA Completion Process

Actor/Role: CC&B

Description: Based on the specific work done and the organization's business rules, a charge may be levied upon completion of the work.

The step is similar whether automated or manual.

Entities to Configure
Adjustment Type Adjustment Type Profile SA Type To Do Role To Do Type

Available Algorithm
FACMPL-FLATC - This algorithm levies a flat charge when a field activity is completed. It levies a flat charge against a service agreement for the field activity's service point. C1-FACCHARGE - This algorithm creates up to five separate flat charges against a service agreement for the field activity's service point. If no service agreement is found: • If a To Do Type is provided as an input parameter, a To Do entry is created. • If no To Do Type is provided, no further processing is performed.

Customizable Process
FACOMPL - Field Activity Completion - The field activity completion process completes field activities and field orders using the records in the various field activity staging tables.

5.0 Review and Evaluate FA Results

See **Manage Field Activities and Field Orders (Page4)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User will review the uploaded information for accuracy and may determine to complete the Field Activity manually. It is possible to cancel the existing Field Activity and create a new Field Activity.

5.1 Populate FA Results

See **Manage Field Activities and Field Orders (Page4)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User has the necessary information and is able to complete the Field Activity manually. The CSR or Authorized User enters the Field Activity results.

5.2 Request Complete FA

See **Manage Field Activities and Field Orders (Page4)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User saves the Field Activity Results.

5.3 Populate FO Completion Information

See **Manage Field Activities and Field Orders (Page4)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: If all associated Field Activities are Complete the Field Order can also be completed. The CSR or Authorized User enters the Field Order Completion information including work date and time and any comments.

5.4 Request Complete FO

See **Manage Field Activities and Field Orders (Page4)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User saves the Field Order completion information.

5.5 Identify FA(s) with FA Remark Requiring Action or Follow Up

See **Manage Field Activities and Field Orders (Page5)** for the business process diagram associated with this activity.

Group: FA Remark Activation Process

Actor/Role: CC&B

If a field activity has a remark code algorithms for further action or follow up associated with it, CC&B activates the algorithms each time the Field Activity Remark Activation background process is executed. If errors occur during the activation of the algorithms, a field activity remark exception is created.

Entities to Configure
FA Type
FA Characteristic Type
FA Remark Characteristic Type
To Do Role
To Do Type
Customer Contact Class
Customer Contact Type
Workflow Process Template

Business Object	Available Algorithms
CI_AccountBillMessageFARemark - This business object is used to add an account bill message from FA Remarks. CI_CustomerInfo_Inquiry - This business object is used by the create object plug-ins to create a Case form FA completion.	FACT-CCC - This algorithm creates customer contacts linked to each main customer associated with the field activity using the Customer Contact Class and Customer Contact Type parameters. FACT-CFA - This algorithm creates a new field activity using the Field Activity Type parameter. FACT-CMPOTG - This FA Remark activation algorithm completes the related field activity if it was interfaced to an OMS System. FACT-CTD - This algorithm creates a To Do entry using the To Do Type and To Do Role parameters. FACT-CWF - This algorithm creates a workflow process using the Workflow Process Template parameter. C1-CREABMFA - This algorithm type adds a bill message to an account from a field activity remark. C1-CREOBJFA - This algorithm type creates a new object from a field activity remark. For example, it may be used to create a case from a field activity remark.

Customizable Process
FACT - The field activity remark activation process executes the algorithm associated with field activities that have pending field activity remarks that reference an activation algorithm.

5.6 Create Customer Contact

See **Manage Field Activities and Field Orders (Page5)** for the business process diagram associated with this activity.

Group: FA Remark Activation Process

Actor/Role: CC&B

Description: If configured, CC&B creates a Customer Contact based on a Field Activity Remark.

Entities to Configure
FA Type FA Characteristic Type FA Remark Characteristic Type To Do Role To Do Type Customer Contact Class Customer Contact Type

Available Algorithm
FACT-CCC - This algorithm creates customer contacts linked to each main customer associated with the field activity using the Customer Contact Class and Customer Contact Type parameters.

Customizable Process
FACT - The field activity remark activation process executes the algorithm associated with field activities that have pending field activity remarks that reference an activation algorithm.

5.7 Create FA

See **Manage Field Activities and Field Orders (Page5)** for the business process diagram associated with this activity.

Group: FA Remark Activation Process

Actor/Role: CC&B

Description: If configured, CC&B creates a new Field Activity based on a Field Activity Remark.

Entities to Configure
FA Type FA Characteristic Type FA Remark Characteristic Type To Do Role To Do Type

Available Algorithm
FACT-CFA - This algorithm creates a new field activity using the Field Activity Type parameter.

Customizable Process
FACT - The field activity remark activation process executes the algorithm associated with field activities that have pending field activity remarks that reference an activation algorithm.

5.8 Complete Specific Defined Outage Related FA

See **Manage Field Activities and Field Orders (Page5)** for the business process diagram associated with this activity.

Group: FA Remark Activation Process

Actor/Role: CC&B

Description: If configured, CC&B completes a specifically defined FA that communicates with an Outage Management System based on the Field Activity Remark. There is a parameter for number of days to elapse before completing the Field Activity. The Field Activity Remark remains open during this time.

Entities to Configure
FA Type FA Characteristic Type FA Remark Characteristic Type To Do Role To Do Type

Available Algorithm
FACT-CMPOTG - This FA Remark activation algorithm completes the related field activity if it was interfaced to an OMS System.

Customizable Process
FACT - The field activity remark activation process executes the algorithm associated with field activities that have pending field activity remarks that reference an activation algorithm.

5.9 Create To Do Entry from FA Remark

See **Manage Field Activities and Field Orders (Page5)** for the business process diagram associated with this activity.

Group: FA Remark Activation Process

Actor/Role: CC&B

Description: If configured, CC&B creates a To Do Entry for follow up based on the Field Activity Remark.

Entities to Configure
FA Type FA Characteristic Type FA Remark Characteristic Type To Do Role To Do Type

Available Algorithm
FACT-CTD - This algorithm creates a To Do entry using the To Do Type and To Do Role parameters.

Customizable Process
FACT - The field activity remark activation process executes the algorithm associated with field activities that have pending field activity remarks that reference an activation algorithm.

6.0 Create Workflow Process

See **Manage Field Activities and Field Orders (Page5)** for the business process diagram associated with this activity.

Group: FA Remark Activation Process

Actor/Role: CC&B

Description: If configured, CC&B creates a Workflow Process based on the Field Activity Remark. A Workflow Process is any series of events that play a part in a business process and may have events that require separate follow up.

Entities to Configure
FA Type FA Characteristic Type FA Remark Characteristic Type To Do Role To Do Type Workflow Process Template

Available Algorithm
FACT-CWF - This algorithm creates a workflow process using the Workflow Process Template parameter.

Customizable Process
FACT - The field activity remark activation process executes the algorithm associated with field activities that have pending field activity remarks that reference an activation algorithm.

6.1 Identify Records in Error

See **Manage Field Activities and Field Orders (Page5)** for the business process diagram associated with this activity.

Group: FA Upload Exception Process

Group: FA Remark Exception Process

Actor/Role: CC&B

Description: These various exception processes generate To Do Entries for review and resolution by a CSR or Authorized User. The first step for each background process is to identify the exception. Some background processes automatically create To Do Entries and others require a separate background process to create the To Do Entry.

Entities to Configure
To Do Role To Do Type

Customizable Process
TD-FACT - This background process creates a To Do entry for every field activity remark record that's in error. TD-FAUPL - This background process creates a To Do entry for every field activity upload staging record that's in error. FDS - Field Order Download Staging - The create field order download staging process creates a download staging record for every field order that is ready for download. FOD - Field Order Dispatch - This batch process automatically dispatches eligible field activities a given number of days in advance of the scheduled date. FANRMRCO -This background process creates object specific errors as a To Do Entry, if configured.

6.2 Search for Scheduled Read with Defined Days

See **Manage Field Activities and Field Orders (Page6)** for the business process diagram associated with this activity.

Group: Create Near Meter Read FA

Group: Complete FA Using Recent Meter Read Process

Actor/Role: CC&B

Description: CC&B looks for a recent scheduled read based on a configurable number of days.

Entities to Configure
FA Type SA Type Field Activity Type Profile

Available Algorithm
SASP_FW_CRE - This algorithm type causes field activities to be created for pending start and pending stop service agreements shortly before the pending start / stop date if field activities do not already exist. If a scheduled MR exists in the future of the start / stop date and the number of days is less than or equal to Wait Time for MR Schedule, the FA type of the FA will be set to the value of FA Type for Near MR Schedule if the state of the SP and meter is consistent with the value of SP's desired state.

6.3 Create Specific FA for Scheduled Read

See **Manage Field Activities and Field Orders (Page6)** for the business process diagram associated with this activity.

Group: Create Near Meter Read FA

Group: Complete FA Using Recent Meter Read Process

Actor/Role: CC&B

Description: CC&B creates a specific Field Activity to use the scheduled read. This process is used in conjunction with the Start and Stop process.

Entities to Configure
FA Type SA Type Field Activity Type Profile

Available Algorithm
SASP_FW_CRE - This algorithm type causes field activities to be created for pending start and pending stop service agreements shortly before the pending start / stop date if field activities do not already exist. If a scheduled MR exists in the future of the start / stop date and the number of days is less than or equal to Wait Time for MR Schedule, the FA type of the FA will be set to the value of FA Type for Near MR Schedule if the state of the SP and meter is consistent with the value of SP's desired state.

6.4 Prorate Usage

See **Manage Field Activities and Field Orders (Page6)** for the business process diagram associated with this activity.

Group: Create Read from Scheduled Read

Group: Complete FA Using Recent Meter Read

Group: Complete FA using Recent Meter Read Process

Actor/Role: CC&B

Description: CC&B prorates the read (Usage only) into an end read and a start read for the start and stops SAs. The new reads are created with meter read type system prorated, and are linked to the SA/SP. The Service Agreement Type must be configured with the fieldwork algorithm

Entities to Configure
FA Type SA Type Field Activity Type Profile

Available Algorithm
SASP_FW_CRE - This algorithm type causes field activities to be created for pending start and pending stop service agreements shortly before the pending start / stop date if field activities do not already exist. If a scheduled MR exists in the future of the start / stop date and the number of days is less than or equal to Wait Time for MR Schedule, the FA type of the FA will be set to the value of FA Type for Near MR Schedule if the state of the SP and meter is consistent with the value of SP's desired state.

Customizable Process
FANRMRCO - The complete field activity using a recent read process looks for pending start / stop field activities for which a meter read was recently taken. It prorates the read (Usage only) into a start read and an end read for the start and stop SAs. The new reads are created with meter read type system prorated, and are linked to the SA/SP. A meter read remark is also created for the reading. If this process finds a peak demand type reading or a consumption type reading, it posts a To Do entry.

6.5 Create Read for Start SA and/or Stop SA

See **Manage Field Activities and Field Orders (Page6)** for the business process diagram associated with this activity.

Group: Create Read from Scheduled Read

Group: Complete FA Using Recent Meter Read

Group: Complete FA using Recent Meter Read Process

Actor/Role: CC&B

Description: From the usage calculation, CC&B creates an end read and a start read for the start and stops SAs. The new reads are created with meter read type system prorated, and are linked to the SA/SP.

Entities to Configure

FA Type
SA Type
FA Type Profile

Available Algorithm

SASP_FW_CRE - This algorithm type causes field activities to be created for pending start and pending stop service agreements shortly before the pending start / stop date if field activities do not already exist. If a scheduled MR exists in the future of the start / stop date and the number of days is less than or equal to Wait Time for MR Schedule, the FA type of the FA will be set to the value of FA Type for Near MR Schedule if the state of the SP and meter is consistent with the value of SP's desired state.

SSFW-INTV MR - This algorithm creates a start or stop meter read and updates the SA/SP with the meter read if the SA/SP is associated with an interval meter.

Customizable Process

FANRMRCO - The complete field activity using a recent read process looks for pending start / stop field activities for which a meter read was recently taken. It prorates the read (Usage only) into a start read and an end read for the start and stop SAs. The new reads are created with meter read type system prorated, and are linked to the SA/SP. A meter read remark is also created for the reading. If this process finds a peak demand type reading or a consumption type reading, it posts a To Do entry.

6.6 Create Meter Reader Remark

See **Manage Field Activities and Field Orders (Page6)** for the business process diagram associated with this activity.

Group: Create Read from Scheduled Read

Group: Complete FA Using Recent Meter Read

Group: Complete FA using Recent Meter Read Process

Actor/Role: CC&B

Description: CC&B also creates a Meter Read remark associated with this special system prorated reading.

Entities to Configure
FA Type SA Type FA Type Profile

Available Algorithm
SASP_FW_CRE - This algorithm type causes field activities to be created for pending start and pending stop service agreements shortly before the pending start / stop date if field activities do not already exist. If a scheduled MR exists in the future of the start / stop date and the number of days is less than or equal to Wait Time for MR Schedule, the FA type of the FA will be set to the value of FA Type for Near MR Schedule if the state of the SP and meter is consistent with the value of SP's desired state.

Customizable Process
FANRMRCO - The complete field activity using a recent read process looks for pending start / stop field activities for which a meter read was recently taken. It prorates the read (Usage only) into a start read and an end read for the start and stop SAs. The new reads are created with meter read type system prorated, and are linked to the SA/SP. A meter read remark is also created for the reading. If this process finds a peak demand type reading or a consumption type reading, it posts a To Do entry.

6.7 Create To Do for Peak-Demand Register

See **Manage Field Activities and Field Orders (Page6)** for the business process diagram associated with this activity.

Group: Complete FA Using Recent Meter Read

Group: Complete FA Using Recent Meter Read Process

Actor/Role: CC&B

Description: If this background process finds a peak demand type reading or a consumption type read it does not prorate a reading. Instead, the background process creates a To Do entry for review by the CSR or Authorized User.

Entities to Configure
FA Type SA Type FA Type Profile

Available Algorithm
SASP_FW_CRE - This algorithm type causes field activities to be created for pending start and pending stop service agreements shortly before the pending start / stop date if field activities do not already exist. If a scheduled MR exists in the future of the start / stop date and the number of days is less than or equal to Wait Time for MR Schedule, the FA type of the FA will be set to the value of FA Type for Near MR Schedule if the state of the SP and meter is consistent with the value of SP's desired state.

Customizable Process
FANRMRCO - The complete field activity using a recent read process looks for pending start / stop field activities for which a meter read was recently taken. It prorates the read (Usage only) into a start read and an end read for the start and stop SAs. The new reads are created with meter read type system prorated, and are linked to the SA/SP. A meter read remark is also created for the reading. If this process finds a peak demand type reading or a consumption type reading, it posts a To Do entry.

6.8 Evaluate Errors

See **Manage Field Activities and Field Orders (Page6)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Based on established business rules, the CSR or Authorized User investigates possible solutions or workarounds for missing or incomplete information.

6.9 Resolve Exception

See **Manage Field Activities and Field Orders (Page6)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User enters required information in CC&B to resolve the exception. This may include manual entry of information in the Field Activity record, Meter record, Service Point record, or SP Meter/Item History records. Field activities may be canceled and new Field Activities created.

7.0 Update Data

See **Manage Field Activities and Field Orders (Page6)** for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: Any resolution or change information is updated in CC&B.

7.1 Request Complete To Do

See **Manage Field Activities and Field Orders (Page6)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: If the background process creates a To Do Entry, the CSR or Authorized User marks the To Do Entry as complete and requests completion of the To Do Entry once the error is resolved. The CSR or Authorized User may add comments or a log entry for future reference.

Entities to Configure
To Do Role
To Do Type

7.2 Complete To Do Entry

See **Manage Field Activities and Field Orders (Page6)** for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The To Do Entry is updated to Complete status in CC&B.

Entities to Configure
To Do Role
To Do Type

7.3 Request Update FA Upload Staging Error Status to Pending

See **Manage Field Activities and Field Orders (Page6)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: After evaluating an exception, the CSR or Authorized User may change the FA Upload record from Error to Pending to allow for the Field Activity information to be available for upload in CC&B.

7.4 Update FA Upload Staging Record to Pending Status

See **Manage Field Activities and Field Orders (Page6)** for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The FA Upload record is again updated to Pending status in CC&B.

7.5 Evaluate Peak Demand Reading

See **Manage Field Activities and Field Orders (Page6)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Based on established business rules, the CSR or Authorized User evaluates the peak demand reading to determine this read for the pending start or pending stop.

7.6 Process Peak Demand Reading Manually to Complete FA

See **Manage Field Activities and Field Orders (Page6)** for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User will enter Meter Reads manually as needed for a demand register related to a pending start or pending stop. It is always possible a new Field Activity may be required.

7.7 Clean Repository of Old FA Upload Records

See **Manage Field Activities and Field Orders (Page6)** for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: Executing this background process periodically purges completed Field Activity Upload records older than a defined number of days.

Customizable Process
FAUP-PRG - This background process purges completed field activity upload objects given a certain number of days parameter

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 Task