Oracle Utilities Customer Care and Billing Release 2.4.0

Utility Reference Model

5.3.2.1 Manage Field Activities and Field Orders

December 2015

ORACLE

Oracle Utilities Customer Care and Billing Utility Reference Model 5.3.2.1, Release 2.4.0

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5.3.2.1 Manage Field Activities and Field Orders

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- Installation Options - Control Central Alert Algorithms
- Related Training

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

A Field Activity is created in CC&B to perform this work at the Service Point. Different Field activities may be created based on the task to be accomplished, various work crew skills, service types, or other requirements specific for the organization. If there are multiple tasks for the time period, several Field Activities may be grouped together. When the Field Activitys is sent to Field Operations to perform the work it is sent as a Dispatched Field Order for the specified Premise.

Field Activities may be created online by the CSR or Authorized User or created automatically as a result of notification from a field technician.

Some Field Activities are not dispatched. The Field Activity may be created to document work already done. If a read is scheduled in the near future, CC&B may be able to use this read for starting or stopping service eliminating a separate field visit.

Fieldwork results are returned to record and update information in CC&B. Typically the results are uploaded automatically however a CSR or Authorized User may complete a Field Activity and Field Order online.

Actors/Roles

The Manage Field Activities and Field Orders business process involves the following actors and roles.

- **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.
- **CSR:** CSR or Authorized User of the Customer Care and Billing application.
- **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).

Business Process Diagrams

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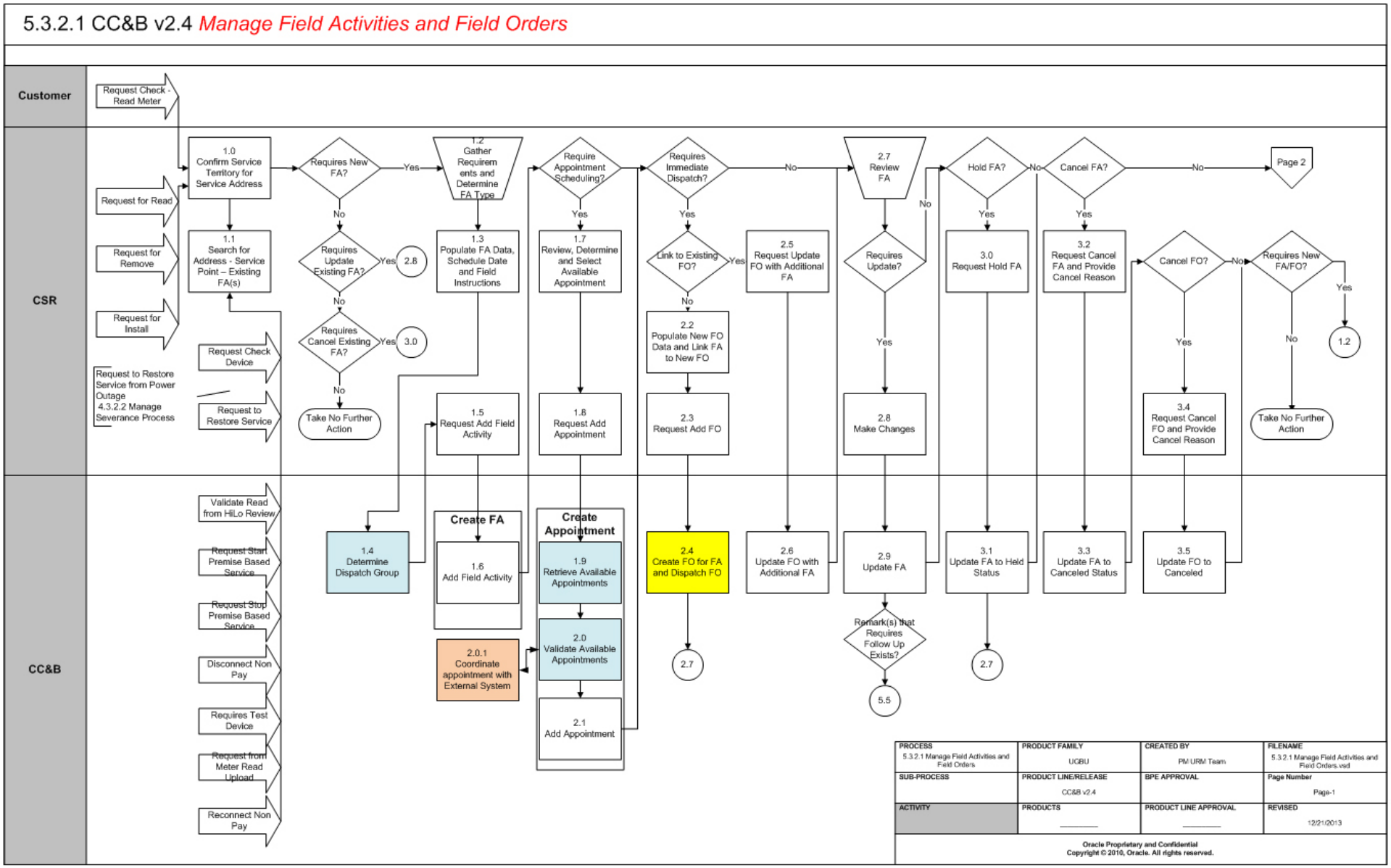

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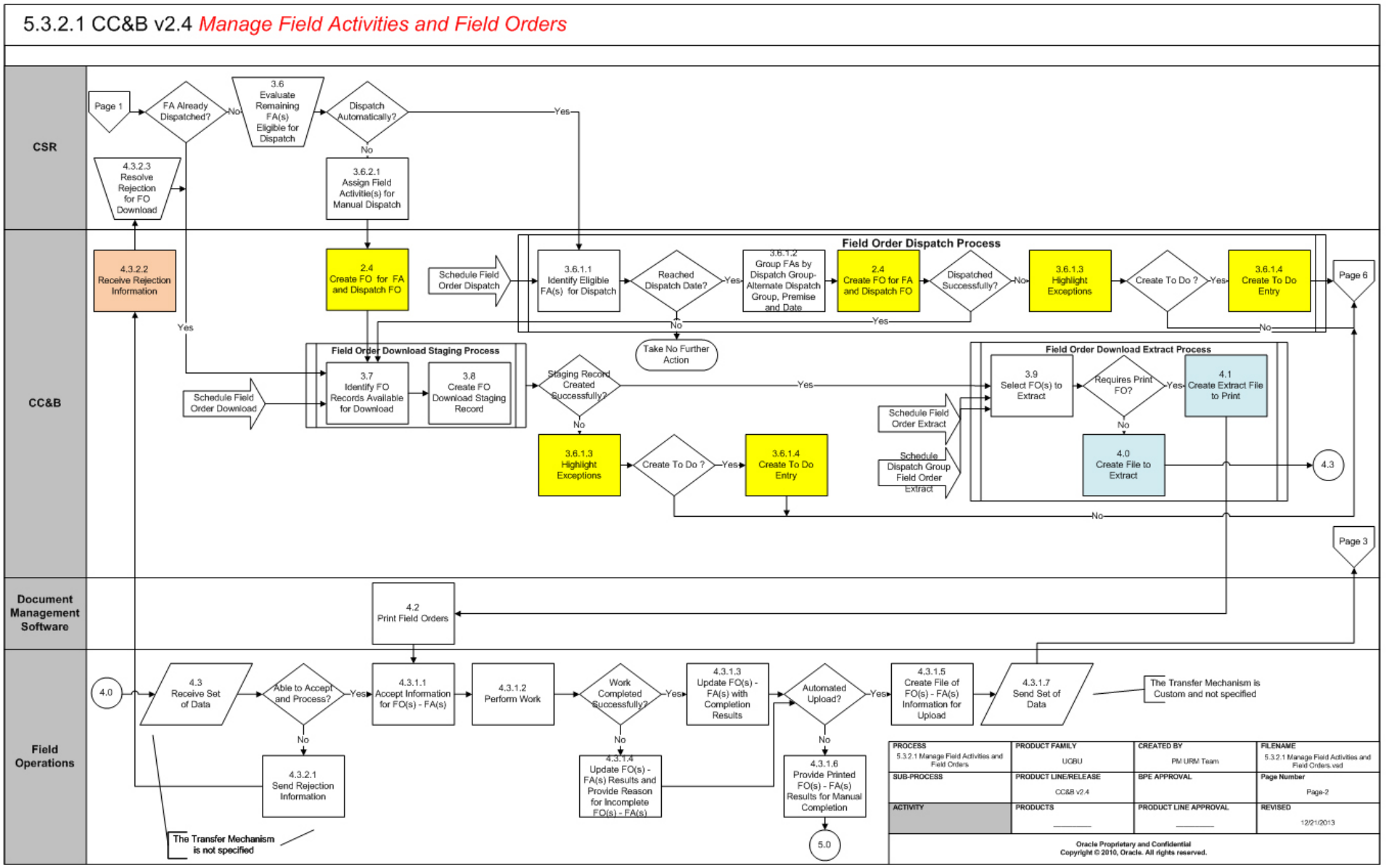

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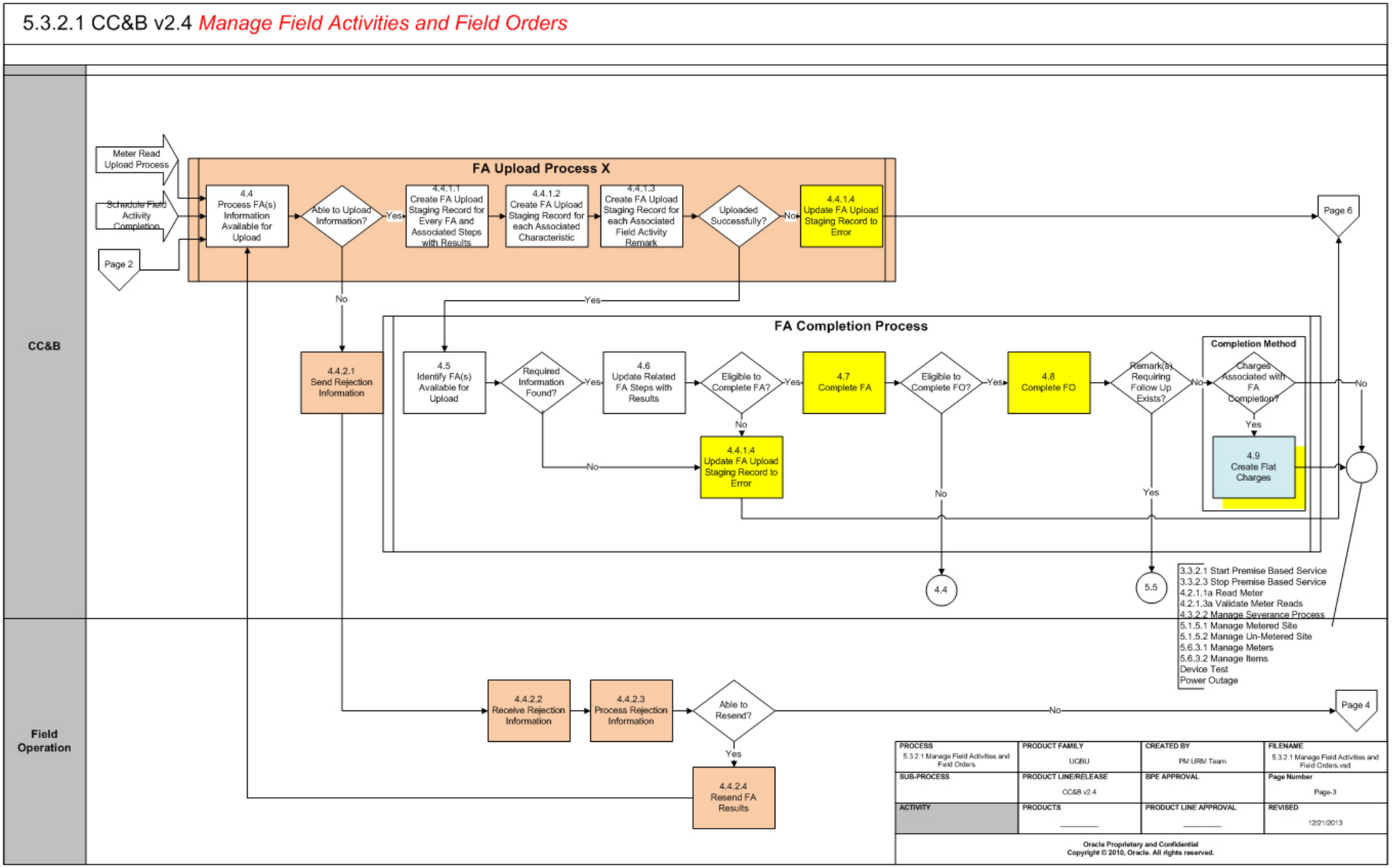

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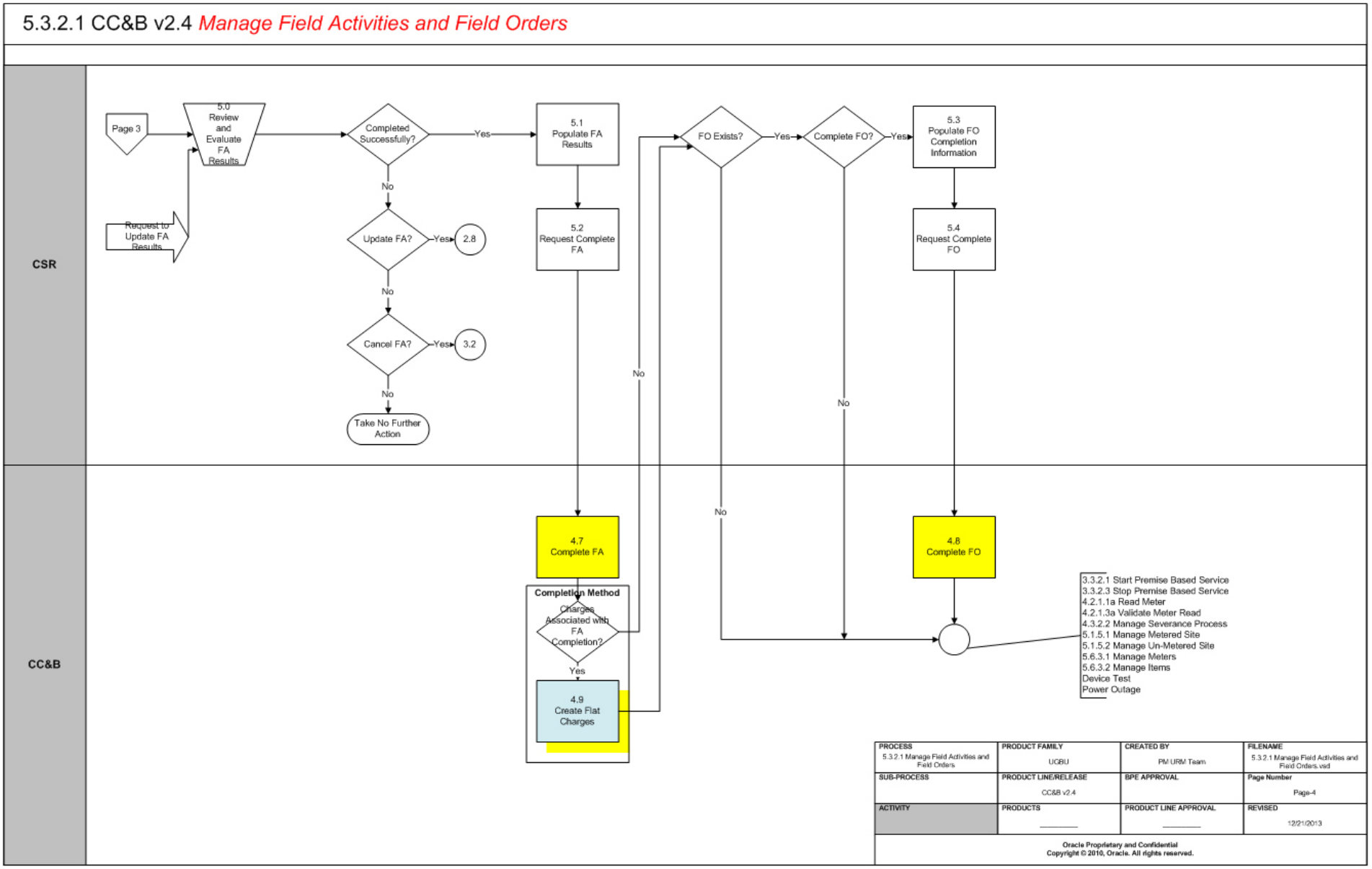

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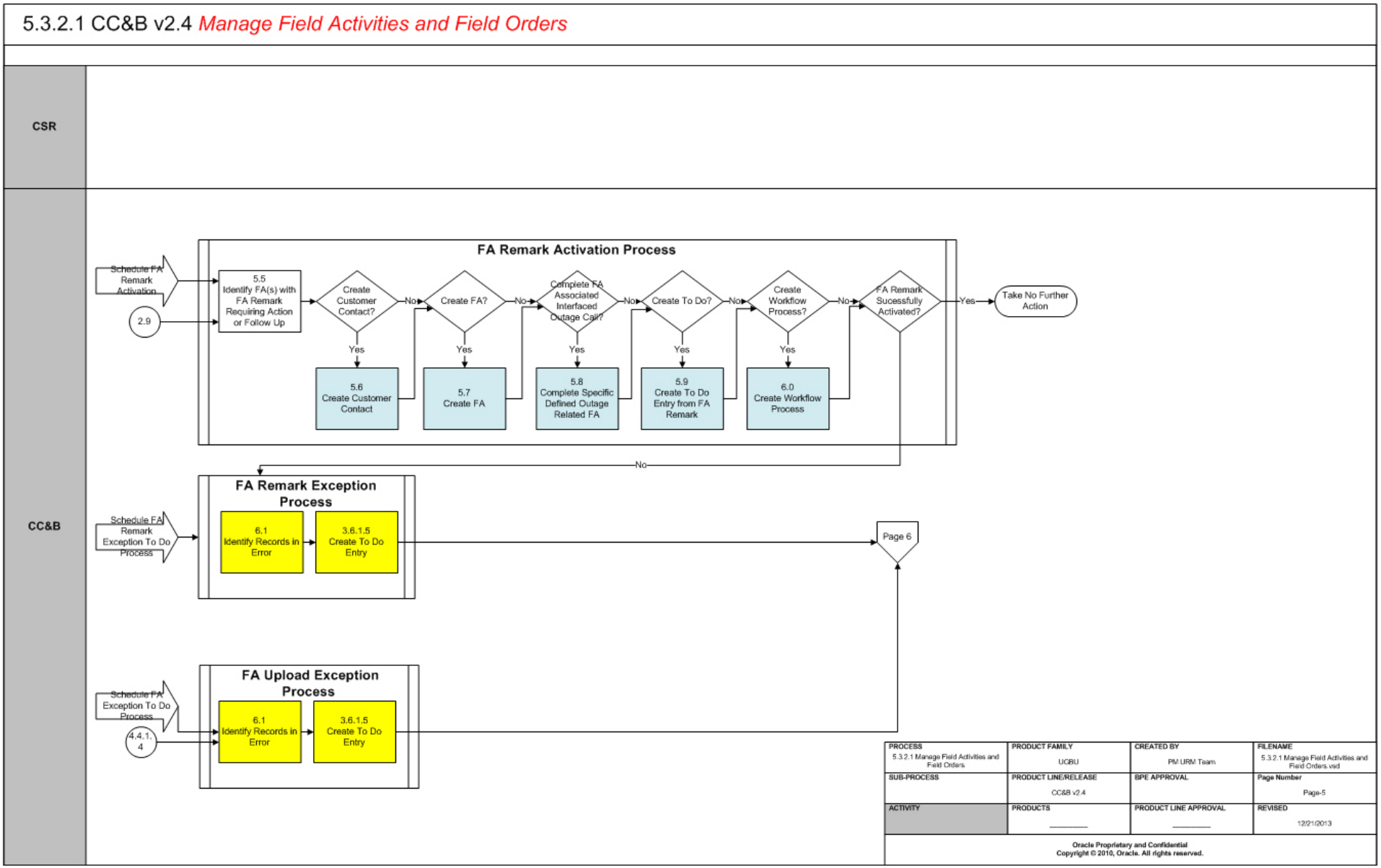

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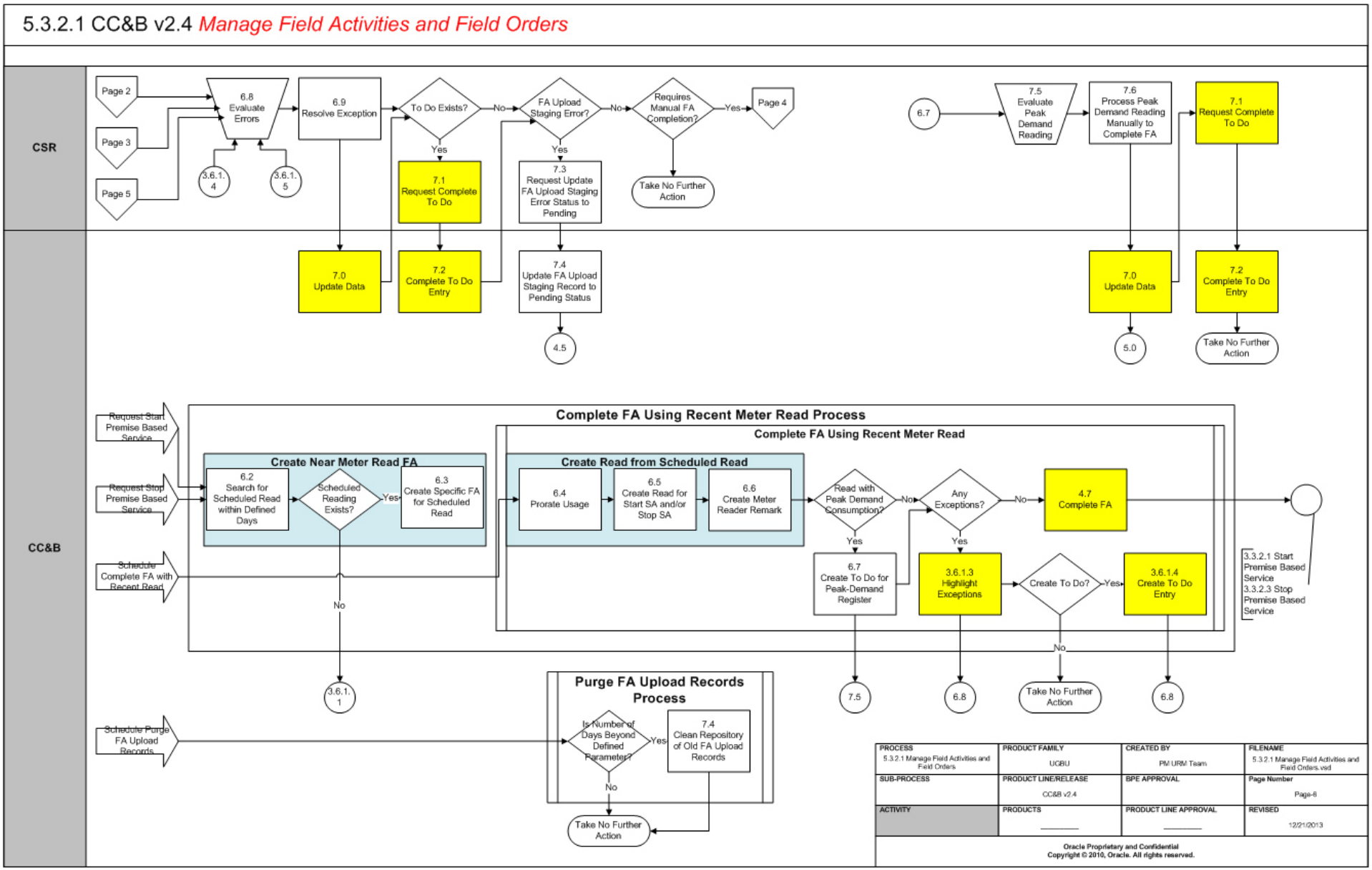

Manage Field Activities and Field Orders Detailed Process Model Description

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

- 1.0 Confirm Service Territory for Service Address
- 1.1 Search for Address – Service Point – Existing FAs
- 1.2 Gather Requirements and Determine FA Type
- 1.3 Populate FA Data, Schedule Date and Field Instructions
- 1.4 Determine Dispatch Group
- 1.45 Request Add Field Activity
- 1.56 Add Field Activity
- 1.7 Review, Determine and Select Available Appointment
- 1.8 Request Add Appointment
- 1.9 Retrieve Available Appointments
- 2.0 Validate Available Appointments
- 2.0.1 Coordinate Appointment With External System (Integration Optional)
- 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 FAs Eligible for Dispatch
- 3.6.1.1 Identify Eligible FAs 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
- 3.6.2.2 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 FOs 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 FAs –FOs
- 4.3.1.2 Perform Work
- 4.3.1.3 Update FOs – FAs Status with Completion Results
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- 4.3.1.5 Create File of FOs – FAs Information for Upload
- 4.3.1.6 Provide Printed FOs – FAs 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 FAs 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
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- 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 FAs 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

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

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 FAs

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: **CSR**

Description: Upon receipt of request for Start Service, the CSR or Authorized User locates the address and the 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.

Available Algorithms

- 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.

Business Objects

- 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.

Entities to Configure

- Installation Options

1.2 Gather Requirements and Determine FA Type

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

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.

Entities to Configure

- FA Type
- FA Type Profile
- Field Service Class
- Field Service Control
- Operations Area
- Dispatch Group
- Service Type

1.4 Determine Dispatch Group

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CC&B

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

Available Algorithms

- OFSDGRP_DFLT – Algorithm Type
- C1-DGRP-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.
- DFLT DGRP - FA Type Dispatch Group Criteria Algorithm - This field activity dispatch group derivation algorithm returns a dispatch group to be used on a field activity.

Entities to Configure

- FA Type
- FA Type Profile
- Field Service Class
- Field Service Control
- Operations Area
- Dispatch Group
- Service Type

1.45 Request Add Field Activity

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CSR

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

1.56 Add Field Activity

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

Group: Create FA

Actor/Role: CC&B

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

Available Algorithms

- FAIN-INFO - (Algorithm Type)
- C1-FAIN-INFO - Formats the field activity information that appears throughout the system.
- CI_FAIN-DFLT - Formats the field activity information that appears throughout the system.
- FAAD-INFO - (Algorithm Type)
- FAAD-PHONE - Formats the field activity additional information that appears on the field activity Page .
- C1-FAAD-INFO - Formats the field activity additional information that appears on the field activity Page .

Business Objects

- C1-AddFieldActivityLog – This business object is used to add a field activity log entry.
- C1-FieldActivityAudit - This business object is used to audit changes to a field activity's schedule date/time.
- C1-FABasic - This business object is used to retrieve the FA Type and FA Status of a field activity.
- C1-FieldActivityAudit - This business object is used to audit changes to a field activity's schedule date/time.
- C1-FASteps - This business object contains FA Step elements relevant to FA Completion.
- C1-FARemarkPhysicalBO - Physical BO for Field Activity Remark.
- C1-FATypePhysicalBO - Physical BO for Field Activity Type.
- C1-ServiceRequestFieldActivity - Service Request Field Activity.

1.7 Review, Determine and Select Available Appointment

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CSR

Description: The CSR saves the Appointment Information.

1.9 Retrieve Available Appointments

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

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.

Available Algorithms

- AAVL-3/3 - This dispatch group available appointments algorithm returns appointment periods for a given dispatch group and a calculated date range. In this Algorithm it look for avail appts 3 days before and after.

Entities to Configure

- Dispatch Group
- Appointment
- Appointment Period

Business Objects

- CC&B – MWM Inegartion:
- C1-ServiceRequestFieldActivity - This business object is used to capture the initial and final FA snapshot to be synced to the field work system.
- C1-AppointmentSchedPhysicalBO - Physical BO for Dispatch Group Appointment Schedule

2.0 Validate Available Appointments

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

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.

Available Algorithms

- C1-AVAL-NOEX - This dispatch group appointment validation algorithm validates if a selected appointment period is still available for scheduling.
- AVAL-NOEX - This dispatch group appointment validation algorithm validates if a selected appointment period is still available for scheduling

Entities to Configure

- Dispatch Group
- Appointment

- Appointment Period

2.0.1 Coordinate Appointment With External System (Integration Optional)

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CC&B

Description: If the dispatch group for your FA integrates with an external system for appointments, users navigate to the appointment Page to book the appointment. The system communicates with the external system for the following actions:

- Display available appointments
- Book an appointment
- Cancel an appointment

2.1 Add Appointment

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

Group: Create Appointment

Actor/Role: CC&B

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

Business Objects

- C1-ServiceRequestFieldActivity – This business object is basic service for updating FA.
- C1-FieldActivityAudit - This business object is used to audit changes to a field activity's schedule date/time.
- C1-FieldOrderAuditLog – This business object maintains business event log records for field order auditing.

Entities to Configure

- Dispatch Group
- Appointment
- Appointment Period

2.2 Populate New FO Data and Link FA to FO

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

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 Activitys to the Field Order.

2.3 Request Add FO

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B CC&B Creates the Field Order, links the Field Activity,and dispatched Field Order.

- **Manual Process**: This step is executed, when 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.

Process

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

Entities to Configure

- Dispatch Group
- FA Type

Business Objects

- C1-FieldOrderAudit - This business object is used to audit changes to a field order's schedule date/time. If your organization requires a reschedule reason when a field order's schedule date/time is changed, you must set up a Fieldwork Options feature configuration.
- C1-FieldOrderAuditLog - This business object maintains business event log records for field order auditing.

2.5 Request Update FO with Additional FA

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CC&B

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

Business Objects

- C1-FieldOrderAudit - This business object is used to audit changes to a field order's schedule date/time. If your organization reqeldwork Options feature configuration.
- C1-FieldOrderAuditLog - This businuires a reschedule reason when a field order's schedule date/time is changed, you must set up a Fiess object maintains business event log records for field order auditing.

2.7 Review FA

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User enters necessary changes.

Entities to Configure

- Fieldwork Reschedule Reason
- FA Remark

Business Objects

- C1-FieldOrderAudit - This business object is used to audit changes to a field order's schedule date/time. If your organization requires a reschedule reason when a field order's schedule date/time is changed, you must set up a Fieldwork Options feature configuration.
- C1-FieldOrderAuditLog - This business object maintains business event log records for field order auditing.

2.9 Update FA

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CC&B

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

Available Algorithms

- FAIN-INFO - (Algorithm Type)
- C1-FAIN-INFO - This algorithm formats the "Field Activity Info" that appears throughout the system
- CI_FAIN-DFLT - This algorithm formats the "Field Activity Info" that appears throughout the system
- FAAD-INFO (Algorithm Type)
- C1-FAAD-INFO - This algorithm formats the field activity additional information that appears on the field activity Page .
- FAAD-PHONE - This algorithm formats the field activity additional information that appears on the field activity Page .

Business Objects

- C1-AddFieldActivityLog – This business object is used to add a field activity log entry.
- C1-FieldActivityAudit - This business object is used to audit changes to a field activity's schedule date/time.
- C1-FABasic - This business object is used to retrieve the FA Type and FA Status of a field activity.

- C1-FieldActivityAudit - This business object is used to audit changes to a field activity's schedule date/time.
- C1-FASteps - This business object contains FA Step elements relevant to FA Completion.
- C1-FARemarkPhysicalBO - Physical BO for Field Activity Remark.
- C1-FATypePhysicalBO - Physical BO for Field Activity Type.
- C1-ServiceRequestFieldActivity - Service Request Field Activity.

3.0 Request Hold FA

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CC&B

Description: The Field Activity status is updated to Held.

Available Algorithms

- FAIN-INFO - (Algorithm Type)
- C1-FAIN-INFO - This algorithm formats the "Field Activity Info" that appears throughout the system
- CI_FAIN-DFLT - This algorithm formats the "Field Activity Info" that appears throughout the system
- FAAD-INFO (Algorithm Type)
- C1-FAAD-INFO - This algorithm formats the field activity additional information that appears on the field activity Page .
- FAAD-PHONE - This algorithm formats the field activity additional information that appears on the field activity Page .

Business Objects

- C1-AddFieldActivityLog – This business object is used to add a field activity log entry.
- C1-FieldActivityAudit - This business object is used to audit changes to a field activity's schedule date/time.
- C1-FABasic - This business object is used to retrieve the FA Type and FA Status of a field activity.
- C1-FieldActivityAudit - This business object is used to audit changes to a field activity's schedule date/time.
- C1-FASteps - This business object contains FA Step elements relevant to FA Completion.
- C1-FARemarkPhysicalBO - Physical BO for Field Activity Remark.
- C1-FATypePhysicalBO - Physical BO for Field Activity Type.
- C1-ServiceRequestFieldActivity - Service Request Field Activity.

3.2 Request Cancel FA and Provide Cancel Reason

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CC&B

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

Entities to Configure

- Fieldwork Cancel Reason

Available Algorithms

- FAIN-INFO - (Algorithm Type)
- C1-FAIN-INFO - This algorithm formats the "Field Activity Info" that appears throughout the system
- CI_FAIN-DFLT - This algorithm formats the "Field Activity Info" that appears throughout the system
- FAAD-INFO (Algorithm Type)
- C1-FAAD-INFO - This algorithm formats the field activity additional information that appears on the field activity Page .
- FAAD-PHONE - This algorithm formats the field activity additional information that appears on the field activity Page .

Business Objects

- C1-AddFieldActivityLog – This business object is used to add a field activity log entry.
- C1-FieldActivityAudit - This business object is used to audit changes to a field activity's schedule date/time.
- C1-FABasic - This business object is used to retrieve the FA Type and FA Status of a field activity.
- C1-FieldActivityAudit - This business object is used to audit changes to a field activity's schedule date/time.
- C1-FASteps - This business object contains FA Step elements relevant to FA Completion.
- C1-FARemarkPhysicalBO - Physical BO for Field Activity Remark.
- C1-FATypePhysicalBO - Physical BO for Field Activity Type.
- C1-ServiceRequestFieldActivity - Service Request Field Activity.

3.4 Request Cancel FO and Provide Cancel Reason

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CC&B

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

Entities to Configure

- Fieldwork Cancel Reason

Available Algorithms

- FAIN-INFO - (Algorithm Type)
- C1-FAIN-INFO - This algorithm formats the "Field Activity Info" that appears throughout the system
- CI_FAIN-DFLT - This algorithm formats the "Field Activity Info" that appears throughout the system
- FAAD-INFO (Algorithm Type)
- C1-FAAD-INFO - This algorithm formats the field activity additional information that appears on the field activity Page .
- FAAD-PHONE - This algorithm formats the field activity additional information that appears on the field activity Page .

Business Objects

- C1-AddFieldActivityLog – This business object is used to add a field activity log entry.
- C1-FieldActivityAudit - This business object is used to audit changes to a field activity's schedule date/time.
- C1-FABasic - This business object is used to retrieve the FA Type and FA Status of a field activity.
- C1-FieldActivityAudit - This business object is used to audit changes to a field activity's schedule date/time.
- C1-FASteps - This business object contains FA Step elements relevant to FA Completion.
- C1-FARemarkPhysicalBO - Physical BO for Field Activity Remark.
- C1-FATypePhysicalBO - Physical BO for Field Activity Type.
- C1-ServiceRequestFieldActivity - Service Request Field Activity.

3.6 Evaluate Remaining FAs Eligible for Dispatch

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

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.

The following points describe every possible way in which a field order can be created:

- The Dispatch Field Activities Page allows a user to create (and dispatch) field orders for pending field activities.
- The Group Premise Field Activities Page allows a user to create (and dispatch) field orders for field activities at a premise.
- The Automatic Dispatch background process automatically creates field orders for field activities.
- A user may create a field order and link field activities to it using the Field Order Page .

3.6.1.1 Identify Eligible FAs for Dispatch

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

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.

Process

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

Entities to Configure

- Dispatch Group
- FA Type

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

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

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.

Process

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

Entities to Configure

- Dispatch Group
- FA Type

3.6.1.3 Highlight Exceptions

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

Groups:

- Field Order Dispatch Process
- Field Order Download Staging Process
- FA Remark Activation Process
- 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.

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

Entities to Configure

- To Do Role
- To Do Type

3.6.1.4 Create To Do Entry

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

Groups:

- Field Order Dispatch Process
- Field Order Download Staging Process
- FA Remark Activation Process
- FA Upload Exception Process
- Complete FA with Recent Read Process

Actor/Role: CC&B

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

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.

Entities to Configure

- To Do Role
- To Do Type

3.6.2.1 Assign Field Activities for Manual Dispatch

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: The new field orders 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

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

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.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

Group: Field Order Download Staging Process

Actor/Role: CC&B

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

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 FOs to Extract

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

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.

Available Algorithms

- FO FOR DOC1 - Create FO extract records for Doc 1.
- C1-FOEX-OX - Create FO extract records for Documaker.

(Does Not Exist)

Process

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

Entities to Configure

- Dispatch Group

4.0 Create File for Extract

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

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.

Available Algorithms

- FO FOR DOC1 - Create FO extract records for Doc 1.
- C1-FOEX-OX - Create FO extract records for Documaker.

Process

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

Entities to Configure

- Dispatch Group

4.1 Create Extract File to Print

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

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.

Available Algorithms

- FO FOR DOC1 - Create FO extract records for Doc 1.
- C1-FOEX-OX - Create FO extract records for Documaker.

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.

Entities to Configure

- Dispatch Group

4.2 Print Field Orders

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

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 FAs –FOs

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: Field Operations

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

4.3.1.2 Perform Work

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

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 FOs – FAs Status with Completion Results

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

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 FOs –FAs Status and Provide Reason for Incomplete FOs – FAs

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

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 FOs – FAs Information for Upload

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

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 FOs – FAs with Results

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

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

4.3.2.3 Resolve Rejection for FO Download

Reference: Manage Field Activities and Field Orders Process Model - Page 2 on page 4 for the associated business process diagram.

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 FAs Information Available for Upload

Reference: Manage Field Activities and Field Orders Process Model - Page 3 on page 5 for the associated business process diagram.

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.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 3 on page 5 for the associated business process diagram.

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.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 3 on page 5 for the associated business process diagram.

Group: FA Upload Process X

Actor/Role: CC&B

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

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

Reference: Manage Field Activities and Field Orders Process Model - Page 3 on page 5 for the associated business process diagram.

Group: FA Upload Process X

Actor/Role: CC&B

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

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

Reference: Manage Field Activities and Field Orders Process Model - Page 3 on page 5 for the associated business process diagram.

Groups:

- FA Completion Process
- FA Upload Process X

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.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 3 on page 5 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: Field Operations

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

4.4.2.3 Process Rejection Information

Reference: Manage Field Activities and Field Orders Process Model - Page 3 on page 5 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: Field Operations

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

4.5 Identify FAs Available for Upload

Reference: Manage Field Activities and Field Orders Process Model - Page 3 on page 5 for the associated business process diagram.

Group: FA Completion Process

Actor/Role: CC&B

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

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

Reference: Manage Field Activities and Field Orders Process Model - Page 3 on page 5 for the associated business process diagram.

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

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

Reference: Manage Field Activities and Field Orders Process Model - Page 3 on page 5 for the associated business process diagram.

Groups:

- FA Completion Process
- 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.

Available Algorithms

- CI_CREFACSE – 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

Business Objects

- CI_AccountBillMessageFARemark – This business object is used to add an account bill message from FA Remarks.
- C1-FASteps - This business object contains FA Step elements relevant to FA Completion.
- C1-AddFieldActivityLog - This business object is used to add a field activity log entry.
- C1-FABasic - This business object is used to retrieve the FA Type and FA Status of a field activity.
- CI_CustomerInfo_Inquiry - This business object is used by the create object plug-ins to create a Case form FA completion.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 3 on page 5 for the associated business process diagram.

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.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 3 on page 5 for the associated business process diagram.

Groups:

- Completion Method
- 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.

Available Algorithms

- FACMP-SVCCHG(FACMP-DFLT) – 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. If more than one service agreement is linked to the service point, the status is used to pick an appropriate SA. The status priority is Active, Pending Stop, Reactivated, Pending Start, Stopped and Closed. Canceled SAs are ignored. The type of adjustment and the amount are defined using the input parameters.
- CI_FACCHARGE – This algorithm creates up to five separate flat charges against a service agreement for the field activity's service point.
  - If more than one service agreement is linked to the service point, the status is used to pick an appropriate SA. The status priority is Active, Pending Stop, Reactivated, Pending Start, Stopped and Closed. Canceled SAs are ignored.
  - If no service agreement is found and 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.

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

Entities to Configure

- Adjustment Type
- Adjustment Type Profile
- SA Type
- To Do Role
- To Do Type

5.0 Review and Evaluate FA Results

Reference: Manage Field Activities and Field Orders Process Model - Page 4 on page 6 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 4 on page 6 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 4 on page 6 for the associated business process diagram.

Actor/Role: CSR

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

5.3 Populate FO Completion Information

Reference: Manage Field Activities and Field Orders Process Model - Page 4 on page 6 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 4 on page 6 for the associated business process diagram.

Actor/Role: CSR

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

5.5 Identify FAs with FA Remark Requiring Action or Follow Up

Reference: Manage Field Activities and Field Orders Process Model - Page 5 on page 7 for the associated business process diagram.

Group: FA Remark Activation Process

Actor/Role: CC&B

Description: 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.

Available Algorithms

- FARSPTOCUS – 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.
- FAR-SIO – This algorithm creates a new field activity using the Field Activity Type parameter.
- CI_FARCMPL (FAR-CMPLNOW)– This FA Remark activation algorithm completes the related field activity if it was interfaced to an OMS System.
- FARREVTODO – This algorithm creates a To Do entry using the To Do Type and To Do Role parameters.

- FACT-CWF (No base Algorithm) – This algorithm creates a workflow process using the Workflow Process Template parameter.
- CI_CREABMFA – This algorithm type adds a bill message to an account from a field activity remark.
- CI_CREFARCSE – 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.
- CI_FARCMPL (FAR-CMPLNOW)- This FA Remark activation algorithm completes the related field activity if it was interfaced to an OMS System.
- CI_CREABMFA - This algorithm type adds a bill message to an account from a field activity remark as follows:
  - The field activity is read using the Source Business Object
  - Using the Account ID xpath element and the Bill Message, a temporary bill message is created for the account
  - A field activity log entry is created

Business Objects

- CI_AccountBillMessageFARemark – This business object is used to add an account bill message from FA Remarks.
- C1-FASteps - This business object contains FA Step elements relevant to FA Completion.
- C1-AddFieldActivityLog - This business object is used to add a field activity log entry.
- C1-FABasic - This business object is used to retrieve the FA Type and FA Status of a field activity.
- CI_CustomerInfo_Inquiry - This business object is used by the create object plug-ins to create a Case form FA completion.

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.

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

5.6 Create Customer Contact

Reference: Manage Field Activities and Field Orders Process Model - Page 5 on page 7 for the associated business process diagram.

Actor/Role: CC&B

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

Available Algorithms

- 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.

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.

Entities to Configure

- FA Type
- FA Characteristic Type
- FA Remark Characteristic Type
- To Do Role
- To Do Type
- Customer Contact Class
- Customer Contact Type

5.7 Create FA

Reference: Manage Field Activities and Field Orders Process Model - Page 5 on page 7 for the associated business process diagram.

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.

Available Algorithms

- FAR-SIO – This algorithm creates a new field activity using the Field Activity Type parameter.

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.

Entities to Configure

- FA Type
- FA Characteristic Type
- FA Remark Characteristic Type
- To Do Role
- To Do Type

5.8 Complete Specific Defined Outage Related FA

Reference: Manage Field Activities and Field Orders Process Model - Page 5 on page 7 for the associated business process diagram.

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.

Available Algorithms

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

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.

Entities to Configure

- FA Type
- FA Characteristic Type
- FA Remark Characteristic Type
- To Do Role
- To Do Type

5.9 Create To Do Entry from FA Remark

Reference: Manage Field Activities and Field Orders Process Model - Page 5 on page 7 for the associated business process diagram.

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.

Available Algorithms

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

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.

Entities to Configure

- FA Type
- FA Characteristic Type
- FA Remark Characteristic Type
- To Do Role
- To Do Type

6.0 Create Workflow Process

Reference: Manage Field Activities and Field Orders Process Model - Page 5 on page 7 for the associated business process diagram.

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.

Available Algorithms

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

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.

Entities to Configure

- FA Type
- FA Characteristic Type
- FA Remark Characteristic Type
- To Do Role
- To Do Type
- Workflow Process Template

6.1 Identify Records in Error

Reference: Manage Field Activities and Field Orders Process Model - Page 5 on page 7 for the associated business process diagram.

Groups:

- FA Remark Exception Process
- FA Upload 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.

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.

Entities to Configure

- To Do Role
- To Do Type

6.2 Search for Scheduled Read with Defined Days

Reference: Manage Field Activities and Field Orders Process Model - Page 6 on page 8 for the associated business process diagram.

Groups:

- Create Near Meter Read FA
- 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.

Available Algorithms

- 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

Entities to Configure

- FA Type
- SA Type
- Field Activity Type Profile

6.3 Create Specific FA for Scheduled Read

Reference: Manage Field Activities and Field Orders Process Model - Page 6 on page 8 for the associated business process diagram.

Groups:

- Create Near Meter Read FA
- 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.

Available Algorithms

- 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.

Entities to Configure

- FA Type
- SA Type
- Field Activity Type Profile

6.4 Prorate Usage

Reference: Manage Field Activities and Field Orders Process Model - Page 6 on page 8 for the associated business process diagram.

Groups:

- Create Read from Scheduled Read
- Complete FA Using Recent Meter Read
- Complete FA using Recent Meter Read Process (new)

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.

Available Algorithms

- 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.

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.

Entities to Configure

- FA Type
- SA Type
- FA Type Profile

6.5 Create Read for Start SA and/or Stop SA

Reference: Manage Field Activities and Field Orders Process Model - Page 6 on page 8 for the associated business process diagram.

Groups:

- Create Read from Scheduled Read
- Complete FA Using Recent Meter Read
- 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.

Available Algorithms

- 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
- CI_SASP-INMR – 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.

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.

Entities to Configure

- FA Type
- SA Type
- FA Type Profile

6.6 Create Meter Reader Remark

Reference: Manage Field Activities and Field Orders Process Model - Page 6 on page 8 for the associated business process diagram.

Groups:

- Create Read from Scheduled Read
- Complete FA Using Recent Meter Read
- 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.

Available Algorithms

- 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.

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.

Entities to Configure

- FA Type
- SA Type
- FA Type Profile

6.7 Create To Do for Peak-Demand Register

Reference: Manage Field Activities and Field Orders Process Model - Page 6 on page 8 for the associated business process diagram.

Groups:

- Complete FA Using Recent Meter Read
- 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.

Available Algorithms

- 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

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.

Entities to Configure

- FA Type
- SA Type
- FA Type Profile

6.8 Evaluate Errors

Reference: Manage Field Activities and Field Orders Process Model - Page 6 on page 8 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 6 on page 8 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 6 on page 8 for the associated business process diagram.

Actor/Role: CC&B

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

7.1 Request Complete To Do

Reference: Manage Field Activities and Field Orders Process Model - Page 6 on page 8 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 6 on page 8 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 6 on page 8 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 6 on page 8 for the associated business process diagram.

Actor/Role: CC&B

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

7.5 Evaluate Peak Demand Reading

Reference: Manage Field Activities and Field Orders Process Model - Page 6 on page 8 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 6 on page 8 for the associated business process diagram.

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

Reference: Manage Field Activities and Field Orders Process Model - Page 6 on page 8 for the associated business process diagram.

Actor/Role: CC&B

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

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:

CCAL-WF	Account or Premise linked to Active Workflow Process
CCAL-TD	Highlight outstanding To Do entries
CCAL-DECL	Highlight Effective Declarations for Acct and Prem
CCAL-CASE	Highlight cases
PP BY STATUS	Count pay plans
C1-CASH-ACCT	Highlight Cash Only Account
C1-CCAL-CLM	Highlight Open Rebate Claims
C1-COLL-REF	Highlight Active Collection Referral
C1-COLLPR-AC	Highlight Active Collection Process
C1-CRRT-ACCT	Highlight Credit Rating
C1-LSSL-PER	Highlight Person Life Support/Sensitive Load
C1-LSSL-PRM	Highlight Premise Life Support/Sensitive Load
C1-PEND-STRT	Highlight Pending Start
C1-SEVPR-ACT	Highlight Active Severance Processes
CCAL-FAERMSG	Highlight FAs with outstanding outgoing messages
C1-OD-PROC	Highlight Active Overdue Processes
C1-OPN-MEVT	Highlight Open and Disputed Match Events
C1-STOP-SA	Highlight Stopped SAs
C1-WO-BILL	Highlight Written Off Bills
C1-CCAL-OCBG	Highlight Open Off Cycle Bill Generators
CC BY TYPCL	Count number of customer contacts
C1-STASKALRT	Retrieve Open Service Tasks
C1-STSKALSAC	Service Task Alert By SA Characteristic
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, Administrative Setup
- Oracle Utilities UPK for Customer Care and Billing, User Tasks
- Oracle Utilities UPK for Customer Care and Billing, Credit and Collections
- Oracle Utilities UPK for Customer Care and Billing, Rating and Billing
- Oracle Utilities UPK for Customer Care and Billing, Rating and Billing for Interval Data