Oracle Utilities Customer Self Service Release 2.1.0

Utility Reference Model

3.3.2.1 OUCSS-CCB Start a Premise-Based Service

May 2016

ORACLE

Oracle Utilities Customer Self Service Release 2.1.0 Utility Reference Model 3.3.2.1 OUCSS-CCB Start a Premise-Based Service

Copyright © 2016, Oracle and/or its affiliates. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Contents

3.3.2.1 OUCSS-CCB Start a Premise-Based Service

3.3.2.1 OUCSS-CCB Start a Premise-Based Service 1

Brief Description 2

Actors/Roles 2

Business Process Diagrams 3

OUCSS-CCB Start a Premise-Based Service Process Model - Page 1 3

OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 4

OUCSS-CCB Start a Premise-Based Service Process Model - Page 3 5

OUCSS-CCB Start a Premise-Based Service Process Model - Page 4 6

OUCSS-CCB Start a Premise-Based Service Process Model - Page 5 7

OUCSS-CCB Start a Premise-Based Service Process Model - Page 6 8

OUCSS-CCB Start a Premise-Based Service Detailed Process Model Description 9

1.0 Log Into Utility Portal 11

1.1 Establish and Maintain Self Service User 11

1.2 Retrieve Enrolled Account(s) and Send Request 11

1.3 Send Account(s) Information 11

1.4 Process Response 11

1.5 Review Results 12

1.6 Select Account 12

1.7 Populate Person Details for New Account 12

1.8 Populate Premise Details 12

1.9 Request List of Acceptable Premise Locations 12

2.0 Send List of Acceptable Premise Locations 12

2.1 Receive Results 13

2.2 View Results 13

2.3 Contact Utility for New Service Request 13

2.4 Select Premise 13

2.5 Populate Service Request Start Date 13

2.6 Request List of Required Questions to Process Service Request 13

2.7 Send List of Required Questions to Process Service Request 13

2.8 Populate Service Start Details and Submit Request 14

2.9 Populate Contact and Additional Details 14

3.0 Confirm New Service Request Details 14

3.1 Send Start New Service Request 14

3.2 Create Start Request Service Task in Pending Status 14

3.2.1 Send Confirmation ID 15

3.2.2 Receive Confirmation and Generate Message 15

3.2.3 Receive Confirmation 15

3.3 Initiate Service Task Monitor 15

3.4 Validate Request Details 16

3.5 Transition Request to Validation Error Status 16

3.6 Create To Do 16

3.7 Monitor Process and Transition to Awaiting Process Status 17

3.8 Initiate and Transition to Process Request Status 17

3.9 Populate Data and Create Person 17
4.0 Populate Account Data, Bill Route, and Create Account 17
4.1 Validate Eligibility 17
4.2 Create SP and Link to Premise 18
4.3 Add Pending Start SA and Link SA/SP 18
4.4 Add Pending Start Alert 18
4.5 Transition to Processing Error Status 18
4.6 Transition Request Task to Complete Status 19
4.7 Send Confirmation Email 19
4.8 Receive Email 19
4.9 Create Field Activity 19
5.0 Start Non Premise Based Service 19
5.1 Manage Field Activities-Field Orders 19
5.2 Highlight Exceptions 20
5.3 Update SA and Change Status to Active 20
5.4 Add Customer Contact 20
5.5 Evaluate Pending Service Start Agreement 21
5.6 Update SA/SP with Read 21
5.7 Request Activate SA 21
5.8 Initiate Cancel for Pending Start 21
5.9 Cancel Pending Start 21
6.0 Investigate and Resolve Error 22
6.1 Request Complete To Do 22
6.2 Complete To Do Entry 22
6.3 Obtain Meter Read Information 22
6.4 Analyze Active SA 23
6.5 Evaluate Cancellation 23
6.6 Manage Meter Charges and Manage Payments 23
6.7 Initiate Cancel SA 23
6.8 Cancel SA 23
6.9 CCB.3.3.2.3 Stop Premise Based Service 24
7.0 Perform Work 24
7.1 Send Field Activity/Field Order/ Results 24
7.2 Complete FA 24
7.3 Store Meter Read on SA/SP 25
7.4 Investigate and Resolve Error 25
7.5 Obtain Meter Read Information 26
7.6 Request Complete FA 26
7.7 Evaluate Errors 26
7.8 Resolve Exception 26
7.9 Update Data 26
8.0 Request Latest Alerts 26
8.1 Process Request 27
8.2 Check Alerts for Account 27
8.3 Send Response 27
8.4 Review Alerts 27
8.5 Work To Do 27
8.6 Request Discard Task to Start Service 27
8.7 Transition Service Task to Discard Status 28
8.8 Contact Customer 28
8.9 Provide Additional Details 28

3.3.2.1 OUCSS-CCB Start a Premise-Based Service

This section provides a brief description of the "OUCSS-CCB Start a Premise-Based Service" business process. This includes:

- Brief Description
  - Actors/Roles
- Business Process Diagrams
  - OUCSS-CCB Start a Premise-Based Service Process Model - Page 1
  - OUCSS-CCB Start a Premise-Based Service Process Model - Page 2
  - OUCSS-CCB Start a Premise-Based Service Process Model - Page 3
  - OUCSS-CCB Start a Premise-Based Service Process Model - Page 4
  - OUCSS-CCB Start a Premise-Based Service Process Model - Page 5
  - OUCSS-CCB Start a Premise-Based Service Process Model - Page 6
- OUCSS-CCB Start a Premise-Based Service Detailed Process Model Description

Brief Description

Business Process: 3.3.2.1 OUCSS-CCB Start a Premise-Based Service

Process Type: Sub-Process

Parent Process: 3.3.2 OUCSS-CC&B.Manage Service Agreement

Sibling Processes: n/a

This process takes place when Service (premise-based) has to be established for the Customer based on Customer request via self-service. The process allows understanding of relationships between Customer and the Organization who provides the Services that can be added.

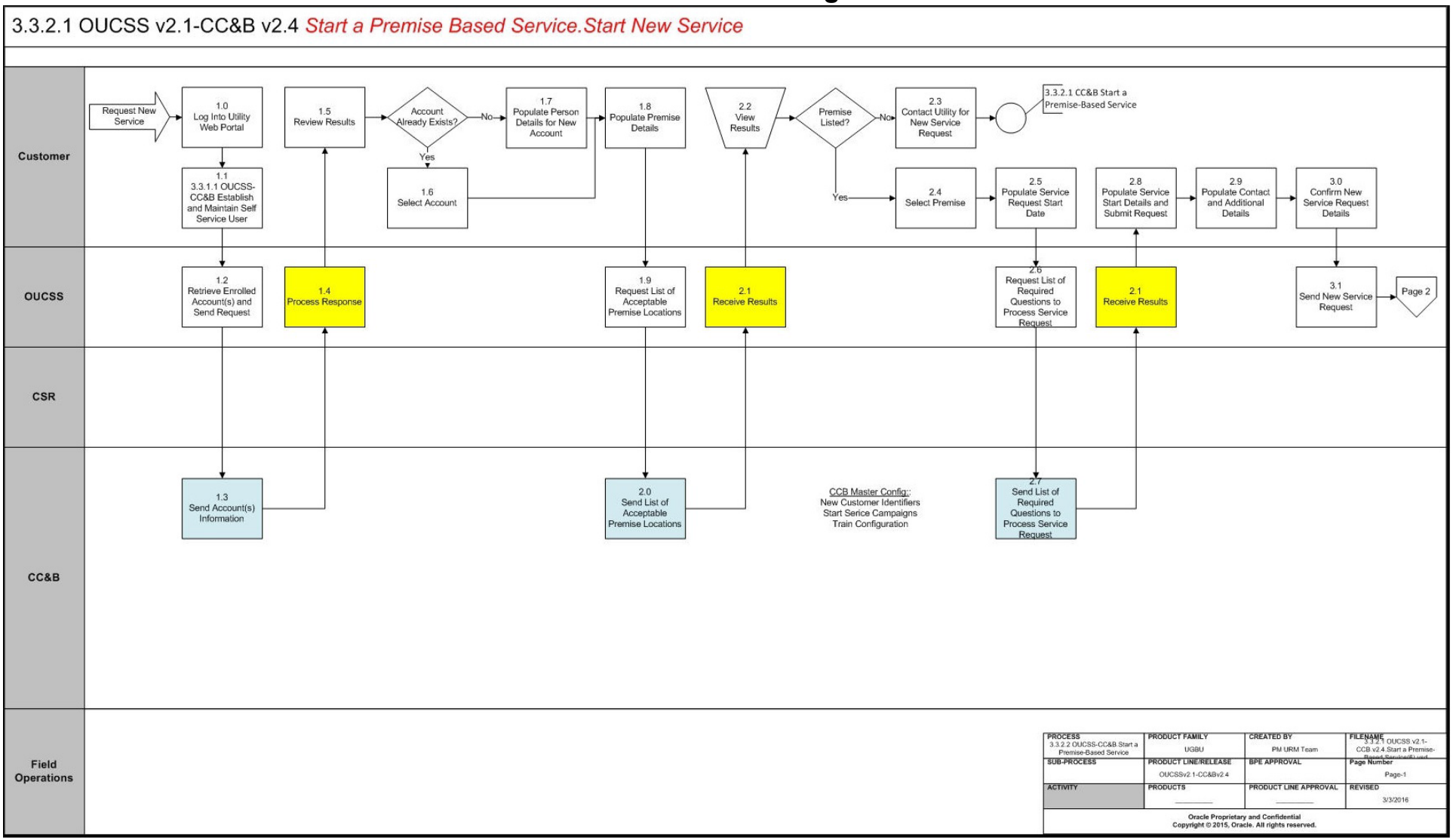
Actors/Roles

The OUCSS-CCB Start a Premise-Based Service 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.
- **Customer**: The service customer.
- **OUCSS:** The Oracle Utilities Customer Self Service application.

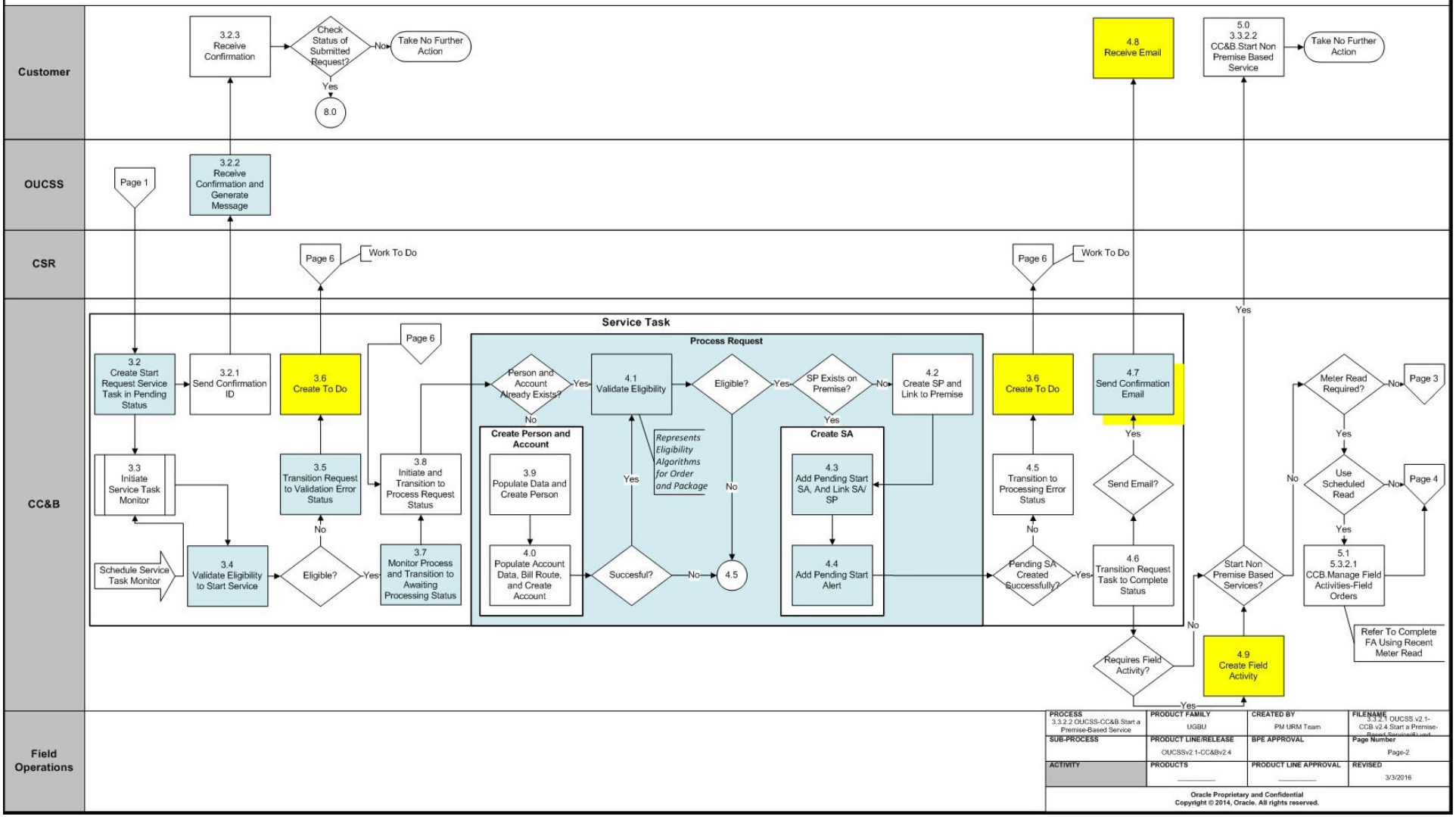
Business Process Diagrams

OUCSS-CCB Start a Premise-Based Service Process Model - Page 1



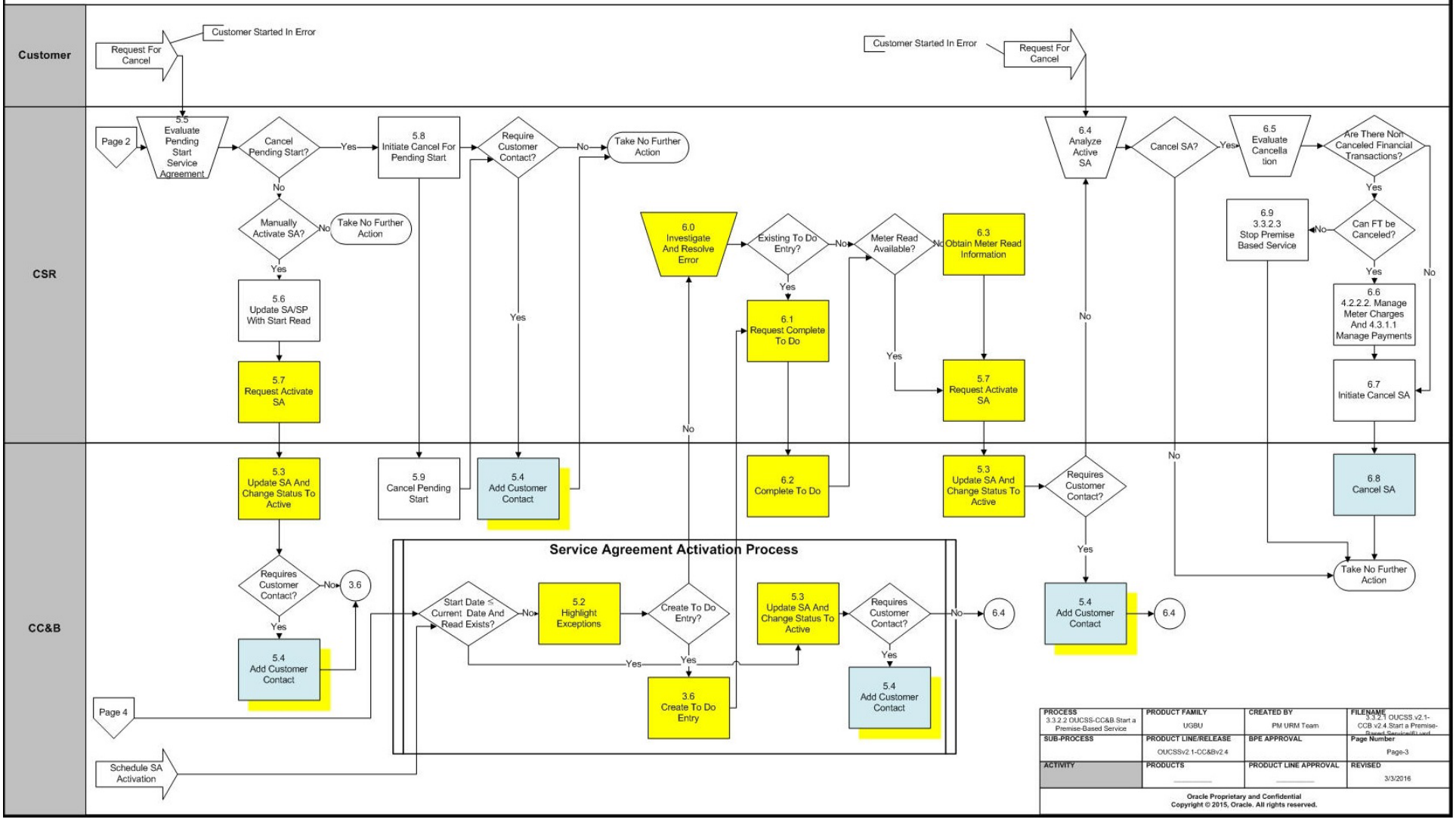
OUCSS-CCB Start a Premise-Based Service Process Model - Page 2

3.3.2.1 OUCSS v2.1-CC&B v2.4 *Start a Premise Based Service.Start New Service*



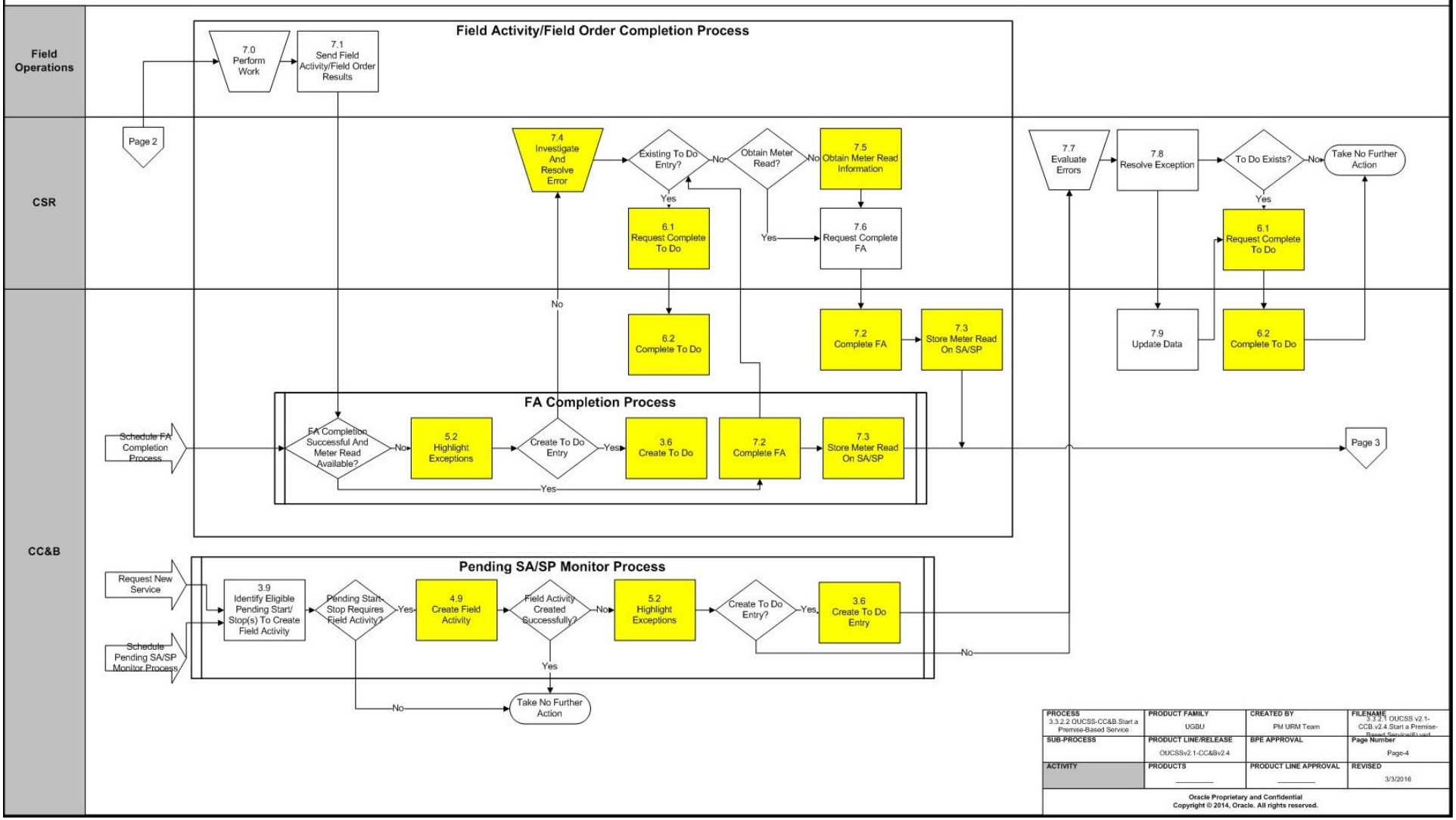
OUCSS-CCB Start a Premise-Based Service Process Model - Page 3

3.3.2.1 OUCSS v2.1-CC&B v2.4 *Start a Premise Based Service.Start New Service*



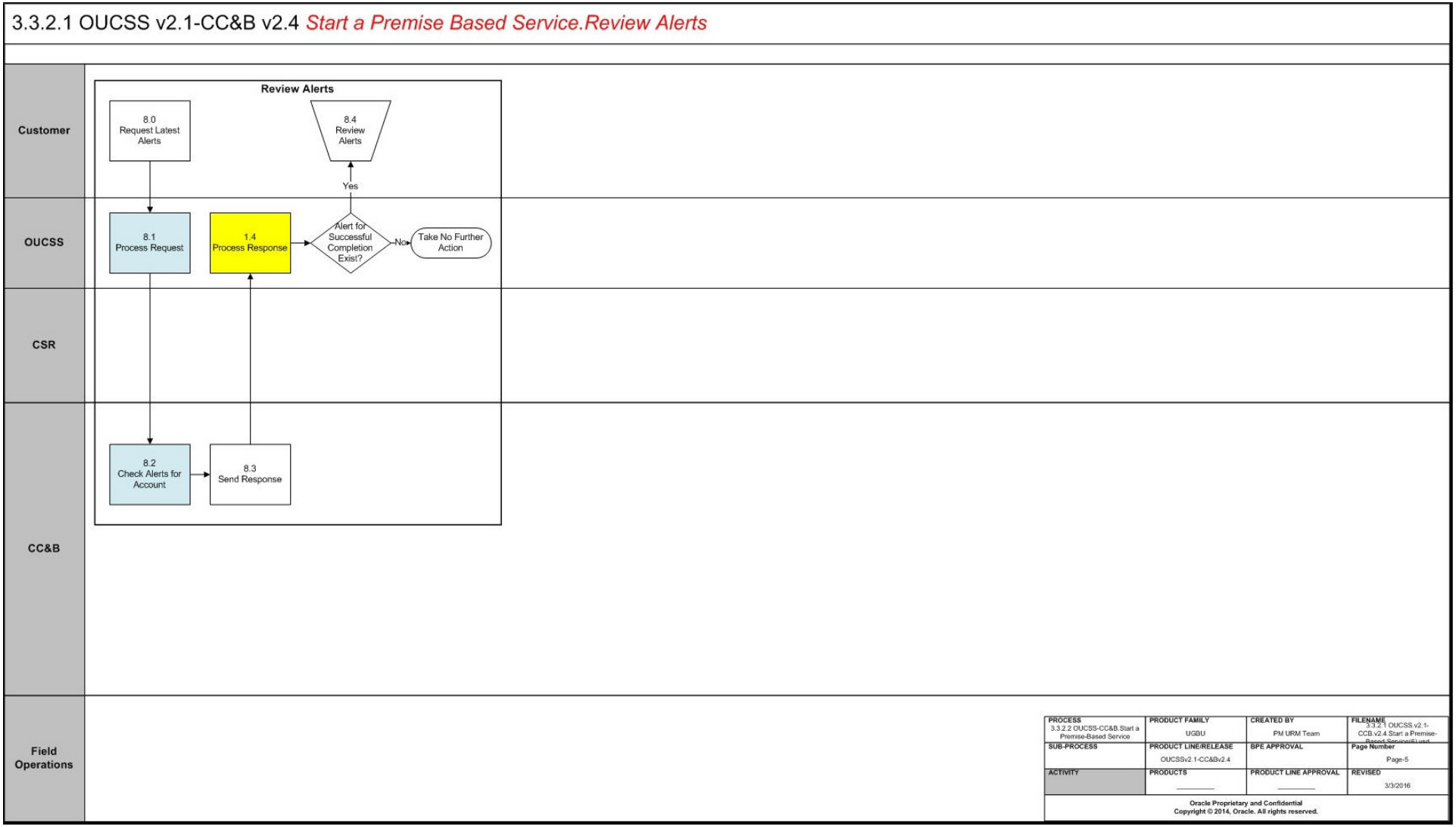
OUCSS-CCB Start a Premise-Based Service Process Model - Page 4

3.3.2.1 CC&B v2.3.1 *Start Premise Based Service.Start New Service*



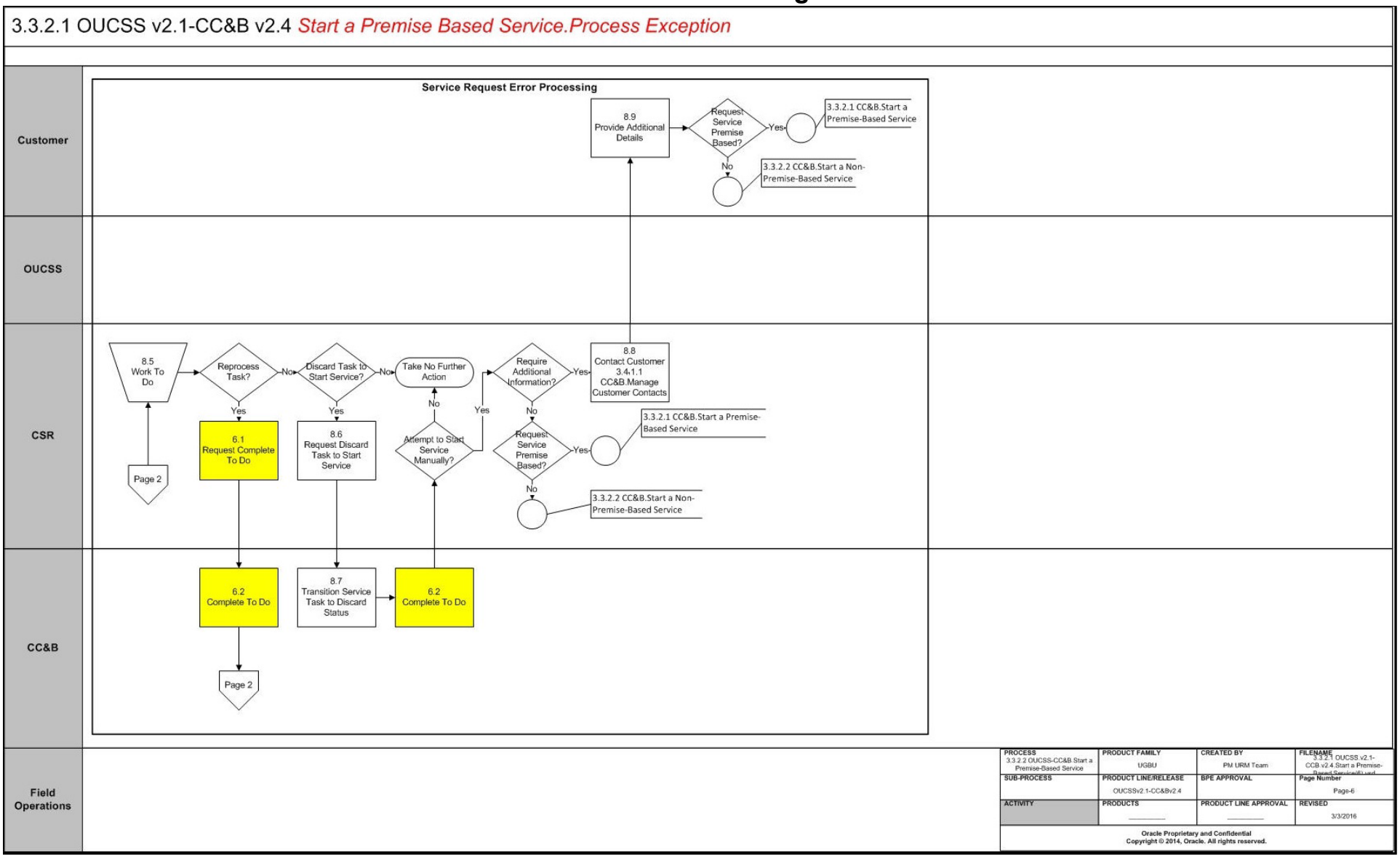
OUCSS-CCB Start a Premise-Based Service Process Model - Page 5

3.3.2.1 OUCSS v2.1-CC&B v2.4 *Start a Premise Based Service.Review Alerts*



OUCSS-CCB Start a Premise-Based Service Process Model - Page 6

3.3.2.1 OUCSS v2.1-CC&B v2.4 *Start a Premise Based Service.Process Exception*



OUCSS-CCB Start a Premise-Based Service Detailed Process Model Description

This section provides a detailed description of the "OUCSS-CCB Start a Premise-Based Service" business process, including:

- 1.0 Log Into Utility Portal
- 1.1 Establish and Maintain Self Service User
- 1.2 Retrieve Enrolled Account(s) and Send Request
- 1.3 Send Account(s) Information
- 1.4 Process Response
- 1.5 Review Results
- 1.6 Select Account
- 1.7 Populate Person Details for New Account
- 1.8 Populate Premise Details
- 1.9 Request List of Acceptable Premise Locations
- 2.0 Send List of Acceptable Premise Locations
- 2.1 Receive Results
- 2.2 View Results
- 2.3 Contact Utility for New Service Request
- 2.4 Select Premise
- 2.5 Populate Service Request Start Date
- 2.6 Request List of Required Questions to Process Service Request
- 2.7 Send List of Required Questions to Process Service Request
- 2.8 Populate Service Start Details and Submit Request
- 2.9 Populate Contact and Additional Details
- 3.0 Confirm New Service Request Details
- 3.1 Send Start New Service Request
- 3.2 Create Start Request Service Task in Pending Status
- 3.2.1 Send Confirmation ID
- 3.2.2 Receive Confirmation and Generate Message
- 3.2.3 Receive Confirmation
- 3.3 Initiate Service Task Monitor
- 3.4 Validate Request Details
- 3.5 Transition Request to Validation Error Status
- 3.6 Create To Do
- 3.7 Monitor Process and Transition to Awaiting Process Status
- 3.8 Initiate and Transition to Process Request Status
- 3.9 Populate Data and Create Person
- 4.0 Populate Account Data, Bill Route, and Create Account
- 4.1 Validate Eligibility
- 4.2 Create SP and Link to Premise
- 4.3 Add Pending Start SA and Link SA/SP
- 4.4 Add Pending Start Alert
- 4.5 Transition to Processing Error Status
- 4.6 Transition Request Task to Complete Status
- 4.7 Send Confirmation Email
- 4.8 Receive Email
- 4.9 Create Field Activity
- 5.0 Start Non Premise Based Service
- 5.1 Manage Field Activities-Field Orders

- 5.2 Highlight Exceptions
- 5.3 Update SA and Change Status to Active
- 5.4 Add Customer Contact
- 5.5 Evaluate Pending Service Start Agreement
- 5.6 Update SA/SP with Read
- 5.7 Request Activate SA
- 5.8 Initiate Cancel for Pending Start
- 5.9 Cancel Pending Start
- 6.0 Investigate and Resolve Error
- 6.1 Request Complete To Do
- 6.2 Complete To Do Entry
- 6.3 Obtain Meter Read Information
- 6.4 Analyze Active SA
- 6.5 Evaluate Cancellation
- 6.6 Manage Meter Charges and Manage Payments
- 6.7 Initiate Cancel SA
- 6.8 Cancel SA
- 6.9 CCB.3.3.2.3 Stop Premise Based Service
- 7.0 Perform Work
- 7.1 Send Field Activity/Field Order/ Results
- 7.2 Complete FA
- 7.3 Store Meter Read on SA/SP
- 7.4 Investigate and Resolve Error
- 7.5 Obtain Meter Read Information
- 7.6 Request Complete FA
- 7.7 Evaluate Errors
- 7.8 Resolve Exception
- 7.9 Update Data
- 8.0 Request Latest Alerts
- 8.1 Process Request
- 8.2 Check Alerts for Account
- 8.3 Send Response
- 8.4 Review Alerts
- 8.5 Work To Do
- 8.6 Request Discard Task to Start Service
- 8.7 Transition Service Task to Discard Status
- 8.8 Contact Customer
- 8.9 Provide Additional Details

1.0 Log Into Utility Portal

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: Customer

Description: User logs into self-service account to access Utility Web Portal.

1.1 Establish and Maintain Self Service User

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: Customer

Description: See process 3.3.1.1 OUCSS-CC&B.Establish and Maintain Self Service User

1.2 Retrieve Enrolled Account(s) and Send Request

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: OUCSS

Description: Application retrieves list of enrolled account for self-service user and requests details from CC&B for the Line of Business context.

Entities to Configure

- OUCSS Lines of Business

1.3 Send Account(s) Information

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B provides account information to OUCSS to render and display to the user.

Available Algorithm

- Script: WX-AcctList

Entities to Configure

- XAI Service: WXViewAccountList

1.4 Process Response

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: OUCSS

Description: Application processes information and displays account list to customer.

Note that Menu/Navigation configuration allows user to select “new account flow” vs. “existing account flow.”

Entities to Configure

- OUCSS Navigation Model

1.5 Review Results

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: Customer

Description: Customer reviews list of account enrolled for self-service access and decides to start service for existing account or new account. Selection is made via the navigation menu.

1.6 Select Account

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: Customer

Description: Customer selects the account for which they want to start service.

1.7 Populate Person Details for New Account

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: OUCSS

Description: Customer selects to start service on a new account, enters in person details.

1.8 Populate Premise Details

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: Customer

Description: Customer enters premise location details to search in CC&B.

1.9 Request List of Acceptable Premise Locations

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: OUCSS

Description: Application requests list of valid premises from CC&B based on the details provided by the customer.

2.0 Send List of Acceptable Premise Locations

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B provides premise information to OUCSS to render and display to the user.

Available Algorithm

- Script: WX-PremSrch

Entities to Configure

- XAI Service: WXPremiseSearch

2.1 Receive Results

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: OUCSS

Description: Application processes information and displays results to customer.

2.2 View Results

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: Customer

Description: Customer views and evaluates the results from the premise search.

2.3 Contact Utility for New Service Request

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: Customer

Description: Customer does not see the premise they desired listed and contacts the utility directly. Proceed to 3.3.2.1 CC&B.Start a Premise-Based Service.

2.4 Select Premise

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: OUCSS

Description: Customer selects the premise and continues to the next step.

2.5 Populate Service Request Start Date

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: Customer

Description: Customer enters in date for when they want to start service.

2.6 Request List of Required Questions to Process Service Request

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: OUCSS

Description: Application requests list of questions from CC&B necessary for processing the start service flow.

2.7 Send List of Required Questions to Process Service Request

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B provides questions necessary for processing the start service flow.

Business Objects

- Master Configuration (Self-Service Integration)

Entities to Configure

- XAI Service: WXProcessStartStopRequest
- Campaigns: Start Service (for each LOB)

2.8 Populate Service Start Details and Submit Request

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: Customer

Description: Customer answers questions necessary to process start service request. Proceed to Next Step.

2.9 Populate Contact and Additional Details

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: Customer

Description: Customer provides contact and addition details necessary to process start service request.

3.0 Confirm New Service Request Details

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: Customer

Description: Customer reviews and confirms all details provided for start service request.

3.1 Send Start New Service Request

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 1 on page 3 for the associated business process diagram.

Actor/Role: OUCSS

Description: Send all details provided for start service request to CC&B for processing.

3.2 Create Start Request Service Task in Pending Status

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: Create service task for processing Start Service Request.

Business Objects

- C1-SelfServiceCustomerReqTask
- C1-StartStopTaskType

Entities to Configure

- XAI Service: WXProcessStartStopRequest

3.2.1 Send Confirmation ID

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: Send email to confirming the Start Service Request was received by the system.

Business Objects

- C1-SelfServiceCustomerReqTask
- C1-StartStopTaskType

Entities to Configure

- XAI Service: WXProcessStartStopRequest

Process

- CI_CONFRMEML

3.2.2 Receive Confirmation and Generate Message

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: OUCSS

Description: Application receives service task ID from CC&B and generates message to display to the customer.

3.2.3 Receive Confirmation

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: Customer

Description: Customer receives confirmation message in portal.

3.3 Initiate Service Task Monitor

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: Service Task monitor batch process executes and transitions the service task to the next state.

Business Objects

- C1-SelfServiceCustomerReqTask
- C1-StartStopTaskType

Process

- F1-STKDF (Process Name: F1-TRN-DF-NS)
- F1-STKTR (Process Name: F1-TRN-DF-NS)

3.4 Validate Request Details

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: Validate Start Service Request details for automated processing. Base validation is that no active SAs must exist for the premise.

Available Algorithms

- C1-VASTSTPRQ

Business Objects

- C1-SelfServiceCustomerReqTask
- C1-StartStopTaskType

Entities to Configure

- XAI Service: WXProcessStartStopRequest

3.5 Transition Request to Validation Error Status

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: Transition Service Task to Validation Error status.

Business Objects

- C1-SelfServiceCustomerReqTask
- C1-StartStopTaskType

Entities to Configure

- XAI Service: WXProcessStartStopRequest

3.6 Create To Do

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: Create a To Do for customer service representative to process exception.

Business Objects

- C1-SelfServiceCustomerReqTask
- C1-StartStopTaskType

Entities to Configure

- XAI Service: WXProcessStartStopRequest
- To Do Types
- To Do Roles

3.7 Monitor Process and Transition to Awaiting Process Status

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: Continue processing Start Service Request and transition to Awaiting Processing status.

Business Objects

- C1-SelfServiceCustomerReqTask
- C1-StartStopTaskType

Entities to Configure

- XAI Service: WXProcessStartStopRequest

3.8 Initiate and Transition to Process Request Status

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: Initiate processing of Start Service Request process and transition to Process Request Status.

3.9 Populate Data and Create Person

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: Create Person entity in CC&B based on details in Start Service Request.

4.0 Populate Account Data, Bill Route, and Create Account

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: Create Account in CC&B based on details in Start Service Request

4.1 Validate Eligibility

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: Process Start Service Request based on eligibility algorithms for order and package.

Available Algorithms

- C1-PRSTSTPRQ

Business Objects

- C1-SelfServiceCustomerReqTask
- C1-StartStopTaskType
- Master Configuration

Entities to Configure

- XAI Service: WXProcessStartStopRequest
- Campaigns for each LOB: OUCSS-RESSVC

4.2 Create SP and Link to Premise

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: Create Service Point and Link to premise as detailed in Start Request.

4.3 Add Pending Start SA and Link SA/SP

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: Create Service Agreement based on details in the Start Request.

Available Algorithms

- C1-PRSTSTPRQ

Business Objects

- C1-SelfServiceCustomerReqTask
- C1-StartStopTaskType

Entities to Configure

- XAI Service: WXProcessStartStopRequest

4.4 Add Pending Start Alert

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: Add self-service Alert for account indicating that Start Service is Pending

Available Algorithms

- C1-PRSTSTPRQ

Business Objects

- C1-SelfServiceCustomerReqTask
- C1-StartStopTaskType

Entities to Configure

- XAI Service: WXProcessStartStopRequest

4.5 Transition to Processing Error Status

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: Transition service task to Processing Error status.

4.6 Transition Request Task to Complete Status

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: Transition service task to Complete status.

4.7 Send Confirmation Email

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: Send customer email to confirm that start service is completed.

Business Objects

- C1-SelfServiceCustomerReqTask
- C1-StartStopTaskType

Entities to Configure

- XAI Service: WXProcessStartStopRequest

Process

- CI_CONFRMEML

4.8 Receive Email

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: Customer

Description: Customer receives email with confirmation.

4.9 Create Field Activity

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: Create field activity to complete Start Service process.

5.0 Start Non Premise Based Service

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: Customer

Description: See process 3.3.2.2 CC&B.Start Non Premise Based Service

5.1 Manage Field Activities-Field Orders

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 2 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: See process 5.3.2.1 CCB.Manage Field Activities – Field Orders

5.2 Highlight Exceptions

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: The background process, **SAACT**, Service Agreement Activation, periodically checks to see if Service Agreements can be activated. CC&B creates an exception processing record for each Service Agreement with the Service Agreement's effective start date less than the current business date and with missing or incomplete information. The Service Agreement may also be manually activated. A separate background process creates To Do Entries for Pending Start/Stops that are older than a configured date. To Do Type and To Do Roles must also be configured.

Process

- SAACT - SA Activation – activates and stops Service Agreements when all required information is available.
- TD-SSFTL To Do for Old Pending Start/Stops-catches start/stop requests that have gone unfulfilled.

Entities to Configure

- To Do Role
- To Do Type

5.3 Update SA and Change Status to Active

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: The Service Agreement status is transitioned to active in CC&B.

Manual Process: The CSR or Authorized User may transition the Service Agreement to Active as a result of exception processing.

Automated Process: CC&B will automatically transition the Service Agreement to Active status when all required information is made available.

Process

- SAACT - SA Activation – activates and stops Service Agreements when all required information is available.

5.4 Add Customer Contact

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: The Customer Contact is added in CC&B. If configured, CC&B can automatically create a Customer Contact when Service Agreements are activated. CC&B creates a Dashboard Alert for the Customer Contact information and displays the last contact in the Dashboard Alert.

Manual Process: – The CSR or Authorized User can create a Customer Contact online based on established business rules.

Automated Process: – Based on configuration a Customer Contact can be created automatically.

Available Algorithms

- SAAT-CC - SA Type –SA Activation – this algorithm creates a Customer Contact
- SACR-AT - Activate service agreement

Process

- SAACT - SA Activation – activates and stops Service Agreements when all required information is available.

Entities to Configure

- SA Type
- Installation Options
- Customer Contact Class
- Customer Contact Type

5.5 Evaluate Pending Service Start Agreement

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User reviews the pending start Service Agreement. Prior to Service Agreement activation, it may be determined the Service Agreement needs to be canceled. The Customer may call and indicate they are not moving in to the given Premise. They may request to cancel the request to start.

5.6 Update SA/SP with Read

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User confirms the start date and updates the Service Agreement/Service Point Link with an associated Meter Read for the effective start date. Please refer to section 4.2.1.1a Read Meter for further details.

5.7 Request Activate SA

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User manually activates the Service Agreement in CC&B.

5.8 Initiate Cancel for Pending Start

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User cancels the Pending Start Service Agreement.

5.9 Cancel Pending Start

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: The Pending Start Service Agreement transaction is removed from CC&B. Any Pending Reciprocal Stop may also be removed.

6.0 Investigate and Resolve Error

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 3 on page 5 for the associated business process diagram.

Group: Field Activity /Field Order Completion Process

Actor/Role: CSR

Description: Based on established business rules, the CSR or Authorized User investigates possible solutions or workarounds for the missing or incomplete information related to Service Agreement Activation or Field Activity Completion. The CSR or Authorized User enters this information in CC&B.

6.1 Request Complete To Do

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 3 on page 5 for the associated business process diagram.

Group: Field Activity /Field Order Completion Process

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

6.2 Complete To Do Entry

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 3 on page 5 for the associated business process diagram.

Group: Field Activity /Field Order Completion Process

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

6.3 Obtain Meter Read Information

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 3 on page 5 for the associated business process diagram.

Group: Field Activity /Field Order Completion Process

Actor/Role: CSR

Description: The read may not be readily available. The CSR or Authorized User manually enters available information in CC&B. This may require creation of a new Field Activity, estimated read, or further investigation to provide necessary read information.

6.4 Analyze Active SA

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User may review the Active Service Agreement. Information becomes available that requires further evaluation. The Service Agreement may need to be canceled. The customer may call and indicate they are not moving in to the given Premise. The customer may request to cancel the original request after the Service Agreement is activated.

6.5 Evaluate Cancellation

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CSR

Description: As part of the cancellation process, the CSR or Authorized User determines if any financial transactions are associated with the Active Service Agreement.

6.6 Manage Meter Charges and Manage Payments

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CSR

Description: Subject to established business rules, the CSR or Authorized User cancels the existing Financial Transactions. An applicable Cancel Reason is selected. Refer to 4.2.2.2 CC&B.Manage Meter Charges and 4.3.1.1 CC&B.Manage Payments.

Entities to Configure

- Cancel Reason- for Bill, Payment or Adjustment

6.7 Initiate Cancel SA

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User changes the Service Agreement status to Canceled.

6.8 Cancel SA

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 3 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: The Service Agreement is transitioned to a canceled status. Canceled is a final status. If configured, a To Do entry can be created when a Service Agreement is canceled.

Available Algorithms

- SACA CRTODO – Create To Do Entry when SA Canceled

Entities to Configure

- To Do Role
- To Do Type

6.9 CCB.3.3.2.3 Stop Premise Based Service

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 4 on page 6 for the associated business process diagram.

Actor/Role: CSR – CC&B

Description: The Financial Transactions cannot be canceled. Refer to 3.3.2.3 CC&B.Stop Premise Based Service.

7.0 Perform Work

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 4 on page 6 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.

7.1 Send Field Activity/Field Order/ Results

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 4 on page 6 for the associated business process diagram.

Group: Field Activity /Field Order Completion Process

Actor/Role: Field Operations

Description: The Field Operations office communicates and returns the Field Activity/Field Order results. Refer to 5.3.2.1 Manage Field Activities and Field Orders, 4.2.1.1a Read Meters and 4.2.1.2a Load Meter Reads.

Process

- Process for Populating MR Upload Staging and FA Upload Staging are custom. MUP1 and MUP2 reference the background processes for populating the meter configuration and creating the meter read

7.2 Complete FA

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 4 on page 6 for the associated business process diagram.

Actor/Role: CC&B

Description: If fieldwork is required, a Field Activity is created. The Field Activity Type is configured based on specific profiles. Each Field Activity eligible for dispatch will have a specific Dispatch Group defined for every Service Point Type and Operations Area. The SA type SA/SP Fieldwork Creation algorithm determines if a Field Activity is necessary. The background process, Pending SA/SP Monitor, creates Field Activities for Pending Start and Stop Agreements shortly before the start/stop date if Field Activities have not already been created. Once the Field Activity is completed the start read is made available in CC&B. The background process, Service Agreement Activation, uses this Field Activity information to determine if the Pending Service Agreement can be activated. Refer to 5.3.2.1 Manage Field Activities and Field Orders.

Available Algorithms

- SA Type - SASP FW Creation SASP FW CRE – Create Field Activity – Check for Meter Read and Back to Back
- Installation Options FAIN-INFO – Field Activity Information
- FAAD-INFO – Field Activity Additional Information
- OFSDGRP DFLT algorithm - FA Type Dispatch Group Criteria –

- Field Activity Type - C1-FACCHARGE – Field Activity Completion – this algorithm applies charges by creating an adjustment
- FACMPL-FLATC – this algorithm levies a flat charge

Processes

- Pending SA/SP Monitor – PSASPM - Creates field activities shortly before the start/ stop date if field activities have not already been created.
- FANRMRCO - The complete field activity using a recent read process looks for pending start / stop field activities for a meter read recently. It prorates the read into an end read and starts read for the start and stop SA's.
- FA Completion - FACOMPL - The field activity completion process completes field activities and field orders using the records in the various field activity staging tables.
- SASP - The find read for SA/SP process updates SA/SP records of active service agreements with the appropriate start or stop read

Entities to Configure

- FA Types
- FA Type Profiles
- Operations Area
- Dispatch Group
- Field Service Class
- Field Service Control

7.3 Store Meter Read on SA/SP

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 4 on page 6 for the associated business process diagram.

Actor/Role: CC&B

Description: The meter read associated with the Start Service Agreement is stored in CC&B and available for the background process, Service Agreement Activation**,** to activate the Service Agreement. This read is now linked to the SA/SP.

Manual Process: The CSR or Authorized User uses this meter read information entered to manually complete the Field Activity.

Automated Process: CC&B links the read to the Service Point associated with the newly activated Service Agreement.

7.4 Investigate and Resolve Error

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 5 on page 7 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 the missing or incomplete information related to Service Agreement Activation or Field Activity Completion. The CSR or Authorized User enters this information in CC&B.

7.5 Obtain Meter Read Information

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 5 on page 7 for the associated business process diagram.

Actor/Role: CSR

Description: The read may not be readily available. The CSR or Authorized User manually enters available information in CC&B. This may require creation of a new Field Activity, estimated read, or further investigation to provide necessary read information.

7.6 Request Complete FA

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 5 on page 7 for the associated business process diagram.

Actor/Role: CSR

Description: The CSR or Authorized User manually completes the Field Activity using the meter read information.

7.7 Evaluate Errors

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 5 on page 7 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.

7.8 Resolve Exception

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 5 on page 7 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 creating a Field Activity, or updating a Meter record, Service Point record, or SP Meter/Item History records.

7.9 Update Data

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 5 on page 7 for the associated business process diagram.

Actor/Role: CC&B

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

8.0 Request Latest Alerts

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 5 on page 7 for the associated business process diagram.

Actor/Role: Customer

Description: Customer requests the latest alerts from OUCSS portal.

8.1 Process Request

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 5 on page 7 for the associated business process diagram.

Actor/Role: OUCSS

Description: OUCSS requests alerts from all of the different edge applications (CC&B, MDM, NMS).

Entities to Configure

- BPEL: OUCSSGetAlertsEBF

8.2 Check Alerts for Account

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 5 on page 7 for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B provides alerts for the specific account to OUCSS to render and display to the user.

Entities to Configure

- XAI Service: WXGetCCBAlerts

8.3 Send Response

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 5 on page 7 for the associated business process diagram.

Actor/Role: CC&B

Description: Send Alert information to OUCSS to render and display to the user.

8.4 Review Alerts

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 5 on page 7 for the associated business process diagram.

Actor/Role: Customer

Description: Customer reviews alerts in OUCSS Portal.

8.5 Work To Do

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 6 on page 8 for the associated business process diagram.

Actor/Role: CSR

Description: CSR evaluates the To Do and begins working on it.

8.6 Request Discard Task to Start Service

Reference: OUCSS-CCB Start a Premise-Based Service 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 discard and requests completion of the To Do Entry once discarded. The CSR or Authorized User may add comments or a log entry for future reference.

8.7 Transition Service Task to Discard Status

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 6 on page 8 for the associated business process diagram.

Actor/Role: CC&B

Description: Transition service task to discard status.

8.8 Contact Customer

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 6 on page 8 for the associated business process diagram.

Actor/Role: CSR

Description: See process 3.4.1.1 CC&B.Manage Customer Contacts.

8.9 Provide Additional Details

Reference: OUCSS-CCB Start a Premise-Based Service Process Model - Page 6 on page 8 for the associated business process diagram.

Actor/Role: Customer

Description: Customer provides CSR with additional details for the service request.