

**Oracle Utilities Customer Self Service
Release 2.1.0**

Utility Reference Model

3.4.3.1 OUCSS-CCB Manage Financial Queries

May 2016

Oracle Utilities Customer Self Service Release 2.1.0 Utility Reference Model 3.4.3.1 OUCSS-CCB Manage Financial Queries

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3.4.3.1 OUCSS-CCB Manage Financial Queries

This section provides a brief description of the “OUCSS-CCB Manage Financial Queries” business process. This includes:

- ♦ [Brief Description](#)
 - ♦ [Actors/Roles](#)
- ♦ [Business Process Diagrams](#)
 - ♦ [OUCSS-CCB Manage Financial Queries Process Model - Page 1](#)
 - ♦ [OUCSS-CCB Manage Financial Queries Process Model - Page 2](#)
- ♦ [OUCSS-CCB Manage Financial Queries Detailed Process Model Description](#)

Brief Description

Business Process: 3.4.3.1 OUCSS-CCB Manage Financial Queries

Process Type: Sub-Process

Parent Process: 3.4.3 OUCSS-CC&B.Provide Customer Service

Sibling Processes: n/a

This process takes place when a customer reviews account financial information via the self-service portal. The process allows understanding the relationship between the web-portal and financial information in CC&B.

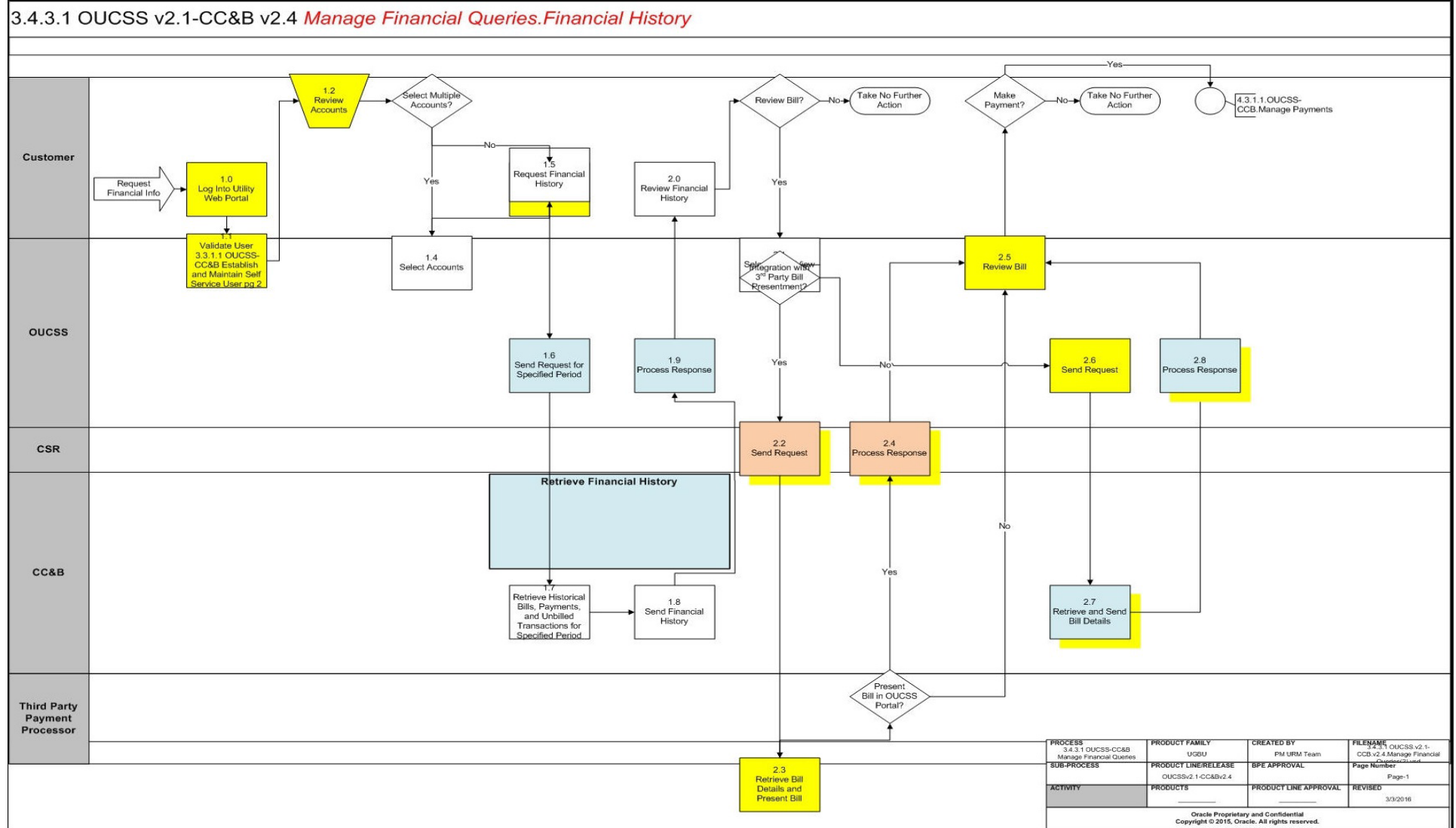
Actors/Roles

The OUCSS-CCB Manage Financial Queries 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.

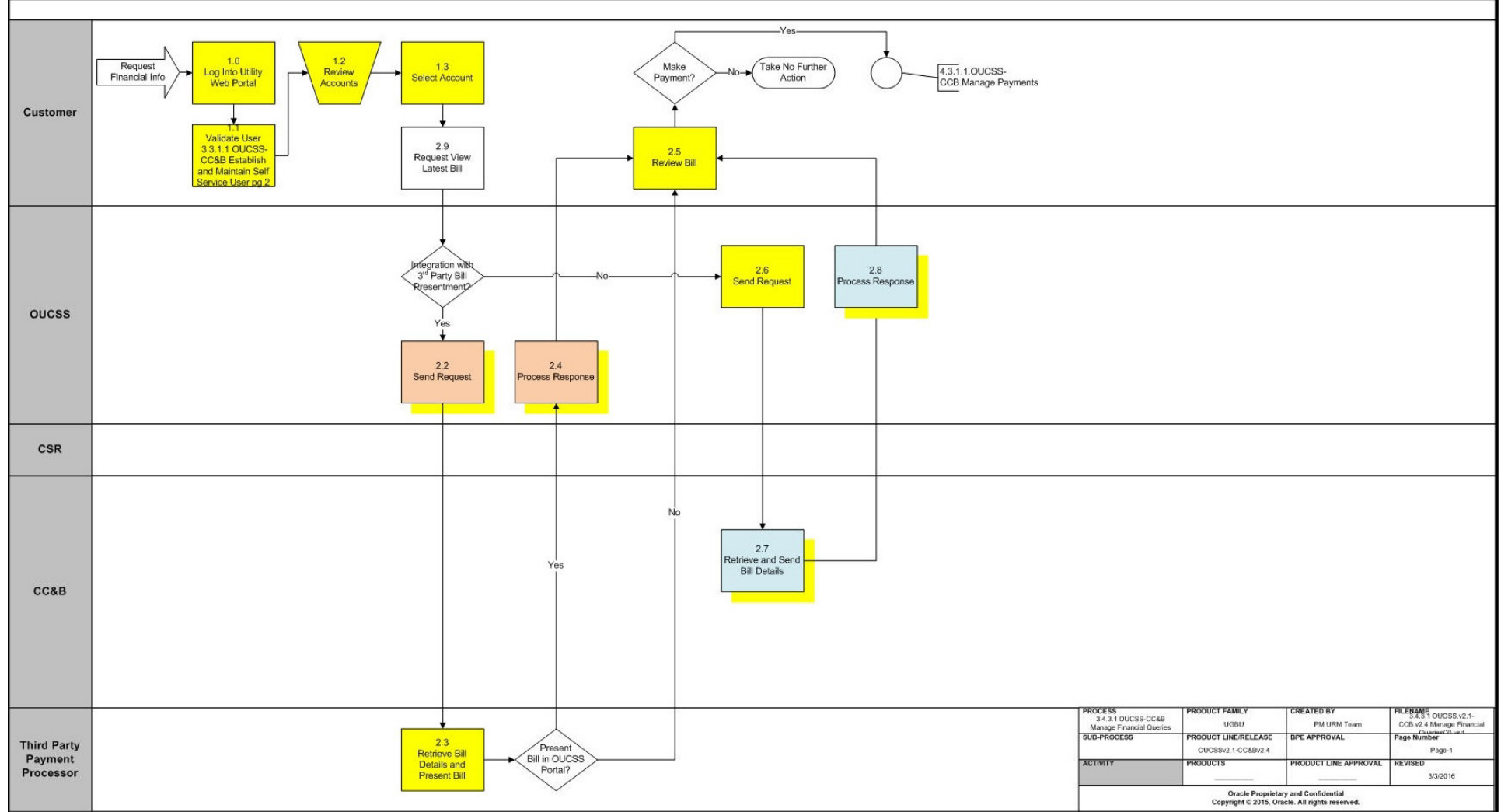
Business Process Diagrams

OUCSS-CCB Manage Financial Queries Process Model - Page 1



OUCSS-CCB Manage Financial Queries Process Model - Page 2

3.4.3.1 OUCSS v2.1-CC&B v2.4 *Manage Financial Queries.View Bill*



| | | | | | | | |
|-------------|---|----------------------|--------------------|-----------------------|-------------|-------------|--|
| PROCESS | 3.4.3.1 OUCSS-CC&B Manage Financial Queries | PRODUCT FAMILY | UGBU | CREATED BY | PM URM Team | FILENAME | OUCSS v2.1-CCB v2.4 Manage Financial Queries |
| SUB-PROCESS | | PRODUCT LINE/RELEASE | OUCSSv2.1-CC&Bv2.4 | BPE APPROVAL | | Page Number | Page-1 |
| ACTIVITY | | PRODUCTS | | PRODUCT LINE APPROVAL | | REVISED | 3/3/2016 |

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OUCSS-CCB Manage Financial Queries Detailed Process Model Description

This section provides a detailed description of the “OUCSS-CCB Manage Financial Queries” business process, including:

- ♦ 1.0 Log Into Utility Web Portal
- ♦ 1.1 Establish and Maintain Self Service User
- ♦ 1.2 Review Accounts
- ♦ 1.3 Select Account
- ♦ 1.4 Select Accounts
- ♦ 1.5 Request Financial History
- ♦ 1.6 Send Request for Specified Period
- ♦ 1.7 Retrieve Historical Bills, Payments, and Unbilled Transactions for Specified Period
- ♦ 1.8 Send Financial History
- ♦ 1.9 Process Response
- ♦ 2.0 Review Financial History
- ♦ 2.1 Select Bill to View Details
- ♦ 2.2 Send Request
- ♦ 2.3 Retrieve Bill Details and Present Bill
- ♦ 2.4 Process Response
- ♦ 2.5 Review Bill
- ♦ 2.6 Send Request
- ♦ 2.7 Retrieve and Send Bill Details
- ♦ 2.8 Process Response
- ♦ 2.9 Request View Latest Bill

1.0 Log Into Utility Web Portal

Reference: [OUCSS-CCB Manage Financial Queries 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 Manage Financial Queries 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 Review Accounts

Reference: [OUCSS-CCB Manage Financial Queries Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: Customer

Description: Customer reviews list of account(s) enrolled for self-service.

1.3 Select Account

Reference: [OUCSS-CCB Manage Financial Queries Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: Customer

Description: Customer selects a single account for which they want to review financial information.

1.4 Select Accounts

Reference: [OUCSS-CCB Manage Financial Queries Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: Customer

Description: Customer selects multiple accounts for which they want to review financial information.

1.5 Request Financial History

Reference: [OUCSS-CCB Manage Financial Queries Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: Customer

Description: Customer requests financial history for account(s).

1.6 Send Request for Specified Period

Reference: [OUCSS-CCB Manage Financial Queries Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: OUCSS

Description: OUCSS requests the financial history for the specified accounts and time period.

Entities to Configure

- OUCSS: Financial History Table Configuration

1.7 Retrieve Historical Bills, Payments, and Unbilled Transactions for Specified Period

Reference: [OUCSS-CCB Manage Financial Queries Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B retrieves financial history for the specified accounts and time period.

Available Algorithms

- WX-AcctFinHs
- WX-MuAcFinHs

Entities to Configure

- XAI Service: WXFinancialHistoryRetriever

1.8 Send Financial History

Reference: [OUCSS-CCB Manage Financial Queries Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B sends the financial history details for the specified accounts and time period to OUCSS.

1.9 Process Response

Reference: [OUCSS-CCB Manage Financial Queries Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: OUCSS

Description: OUCSS processes the financial history data and presents it to the end-user.

Entities to Configure

- OUCSS: Financial History Table Configuration

2.0 Review Financial History

Reference: [OUCSS-CCB Manage Financial Queries Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: Customer

Description: Customer reviews the financial history information.

2.1 Select Bill to View Details

Reference: [OUCSS-CCB Manage Financial Queries Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: Customer

Description: Customer selects a specific bill for detailed review.

2.2 Send Request

Reference: [OUCSS-CCB Manage Financial Queries Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: OUCSS

Description: OUCSS sends the request to a third-party payment processor to produce the bill view. This requires a custom integration based on the payment processor's APIs.

2.3 Retrieve Bill Details and Present Bill

Reference: [OUCSS-CCB Manage Financial Queries Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: Third Party Payment Processor

Description: The third-party payment processor takes the request and presents the bill to the customer.

2.4 Process Response

Reference: [OUCSS-CCB Manage Financial Queries Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: OUCSS

Description: OUCSS processes the bill view data and presents it to the end-customer. This requires a custom integration based on the payment processor's APIs.

Entities to Configure

- OUCSS: View Bill configuration

2.5 Review Bill

Reference: [OUCSS-CCB Manage Financial Queries Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: Customer

Description: Customer reviews the bill details.

2.6 Send Request

Reference: [OUCSS-CCB Manage Financial Queries Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: OUCSS

Description: OUCSS sends the bill view request to CCB.

2.7 Retrieve and Send Bill Details

Reference: [OUCSS-CCB Manage Financial Queries Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: CC&B

Description: CC&B retrieves bill information and sends the details to OUCSS.

Available Algorithms

- WX-ViewBill

Entities to Configure

- XAI Service: WXBillView

2.8 Process Response

Reference: [OUCSS-CCB Manage Financial Queries Process Model - Page 1 on page 3](#) for the associated business process diagram.

Actor/Role: OUCSS

Description: OUCSS processes the bill view data and presents it to the end-customer.

Entities to Configure

- OUCSS: View Bill configuration

2.9 Request View Latest Bill

Reference: [OUCSS-CCB Manage Financial Queries Process Model - Page 2 on page 4](#) for the associated business process diagram.

Actor/Role: Customer

Description: Customer requests to view the latest bill.