Oracle Utilities Customer Care and Billing Release 2.5.0

Utility Reference Model

4.2.2.1 Update Billing Information

August 2016

ORACLE

Oracle Utilities Customer Care and Billing Release 2.5.0 Utility Reference Model 4.2.2.1 Update Billing Information

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Contents

4.2.2.1 Update Billing Information 1
Brief Description 2
Actors/Roles 3
Business Process Diagrams 4
Update Billing Information Process Model - Page 1 4
Update Billing Information Process Model - Page 2 5
Update Billing Information Process Model - Page 3 6
Update Billing Information Process Model - Page 4 7
Update Billing Information Process Model - Page 5 8
Update Billing Information Detailed Process Model Description 9
1.0 Review Existing, Gather, Determine Requirements for Bill Cycle 11
1.1 Analyze and Coordinate with Service Schedule Information 11
1.2 Review and Verify Bill Period Information 11
1.3 Request Add Bill Cycle Information 12
1.4 Add Bill Cycle Information 12
1.5 Evaluate Information to Update Bill Cycle 12
1.6 Request Update Bill Cycle Information 12
1.7 Update Bill Cycle Information 12
1.8 Review Existing, Gather, Determine Requirements for Bill Period 12
1.9 Verify Bill Cycle Information 13
2.0 Review Final Requirements 13
2.1 Request Add Bill Period Information 13
2.2 Add Bill Period Information 13
2.3 Evaluate Information to Update Bill Period 13
2.4 Request Update Bill Period Information 13
2.5 Update Bill Period Information 14
2.6 Review Existing, Gather and Determine Requirements for Statement Cycle 14
2.7 Request Add Statement Cycle Information 14
2.8 Add Statement Cycle Information 14
2.9 Request Update Statement Cycle Information 15
3.0 Update Statement Cycle Information 15
3.1 Gather and Verify Rate Requirements and Service Rules 15
3.2 Evaluate Existing Rate Schedules 15
3.3 Design Rate Schedules 15
3.3.1.1 Design Rate Schedule 16
3.3.1.2 Request Add New Rate Schedule 16
3.3.1.3 Create New Rate Schedule 16
3.3.2.1 Design Classic Rate Schedule 17
3.3.2.2 Request Add New Classic Rate Schedule 17
3.3.2.3 Create New Classic Rate Schedule 17
3.4.1.1 Request Update Rate Schedule Data 17
3.4.1.2 Update Existing Rate Schedule 18
3.4.2.1 Request Update Classic Rate Schedule Data 18
3.4.2.2 Update Existing Classic Rate Schedule 18

3.5.1.1 Design New Calculation Group 18
3.5.1.2 Request Add New Calculation Group 18
3.5.1.3 Create New Calculation Group 19
3.5.2.1 Design New Classic Rate Version 19
3.5.2.2 Request Add New Classic Rate Version 19
3.5.2.3 Create New Classic Rate Version 19
3.6.1.1 Request Update Calculation Group Data 19
3.6.1.2 Update Existing Calculation Group 20
3.6.2.1 Request Update Classic Rate Version Data 20
3.6.2.2 Update Existing Classic Rate Version Data 20
3.7.1.1 Request Check Rate 20
3.7.1.2 Generate Rate Check Results 21
3.7.2.1 Request Classic Check Rate 21
3.7.2.2 Generate Classic Check Rate Results 21
3.8.1.1 Request Update Effective Date for Calculation Group 21
3.8.1.2 Activate Calculation Group for Rate Schedule 21
3.8.2.1 Request Update Status, Effective Date for Classic Rate Version 21
3.8.2.2 Activate Classic Rate Version for Rate Schedule 22
Classic Rates - Various Rate Schedule Algorithms and Major Configuration Information 23
Available Algorithms 23
Entities to Configure 24
New Style Rates - Various Rate Schedule Algorithms and Major Configuration Information 25
Available Algorithms 25
Related Training 27

4.2.2.1 Update Billing Information

This section provides a description of the "Update Billing Information" business process. This includes:

- Brief Description
  - Actors/Roles
- Business Process Diagrams
  - Update Billing Information Process Model - Page 1
  - Update Billing Information Process Model - Page 2
  - Update Billing Information Process Model - Page 3
  - Update Billing Information Process Model - Page 4
  - Update Billing Information Process Model - Page 5
- Update Billing Information Detailed Process Model Description
- Classic Rates - Various Rate Schedule Algorithms and Major Configuration Information
- New Style Rates - Various Rate Schedule Algorithms and Major Configuration Information
- Related Training

Brief Description

Business Process: 4.2.2.1 CC&B v2.5 Update Billing Information

Process Type: Sub-Process

Parent Process: 4.2.2 Manage Bill

Sibling Processes:

- 4.2.2.2 Manage Meter Charges
- 4.2.2.3 Manage Item Charges
- 4.2.2.4 Manage External and Miscellaneous Charges
- 4.2.2.5 Manage Loan Charges
- 4.2.2.6 Manage Deposit Charges
- 4.2.2.8 Manage Billing Disputes
- 4.2.2.9 Manage Billing Inquires
- 4.2.2.10a Manage Budget Billing
- 4.2.2.10b Manage Monitored and Unmonitored Non-Billed Budget Billing
- 4.2.2.12 Manage Payment Arrangement Charges
- 4.2.2.14 Manage Off Cycle Bill for External and Miscellaneous Charges
- 4.2.1.5 Maintain Meter Read Schedule
- 3.3.2.1 Start Premise Based Service
- 3.3.2.3 Stop Premise Based Service
- 3.3.2.2 Start Non-Premise Based Service
- 3.3.2.4 Stop Non-Premise Based Service

This process describes adding or updating various required schedules for billing customers.

Scheduled Bill Cycles allow for billing of customers over a given time period. Each customer must have a Bill Cycle. For example, some customers may be billed quarterly, some monthly, or some a specific date each month. Typically, customers with metered service have are billed shortly after the meter is read. The Bill Cycle corresponds to the Meter Read Cycle (Service Cycle). Changes to service cycles or service schedules may impact associated Bill Cycles. The number of Bill Cycles is dependent on the frequency the organization bills customers. More than one Bill Cycle or group of customers can be billed at the same time using the CC&B Batch Billing background processes. The Authorized User responsible for input of this bill schedule information must be aware of other related business requirements, rules and considerations prior to entry of new schedule information or updates to existing schedules.

Bill Period Schedules are used by non-metered Service Agreements when bill end dates need to fall on strict dates. If the organization has these Service Agreement types, coordination with Bill Cycle Schedules is also important.

A Statement is a summary of Service Agreement billing information from one or multiple accounts. Some customers have individual offices that pay the regular bill, however a central office may require a consolidated report of the financial activity for one or more Accounts and/or Service Agreements. A Statement Cycle is needed to accommodate sending this consolidated report. The Statement Cycle has a similar purpose to that of a Bill Cycle. It controls when Statements will be produced. Separate, unique Statement Cycles can accommodate monthly, quarterly or other time periods.

Rate Schedules are also needed for billing the customer for various Service Agreement types. When a Rate is required, it controls how:

- The service's charges are calculated.
- The charges appear on the customer's bills.
- The general ledger is impacted by the charges.

The process described here is a high level overview only as Rate Design is impacted by business rules and policies, service rules, and regulatory agencies.

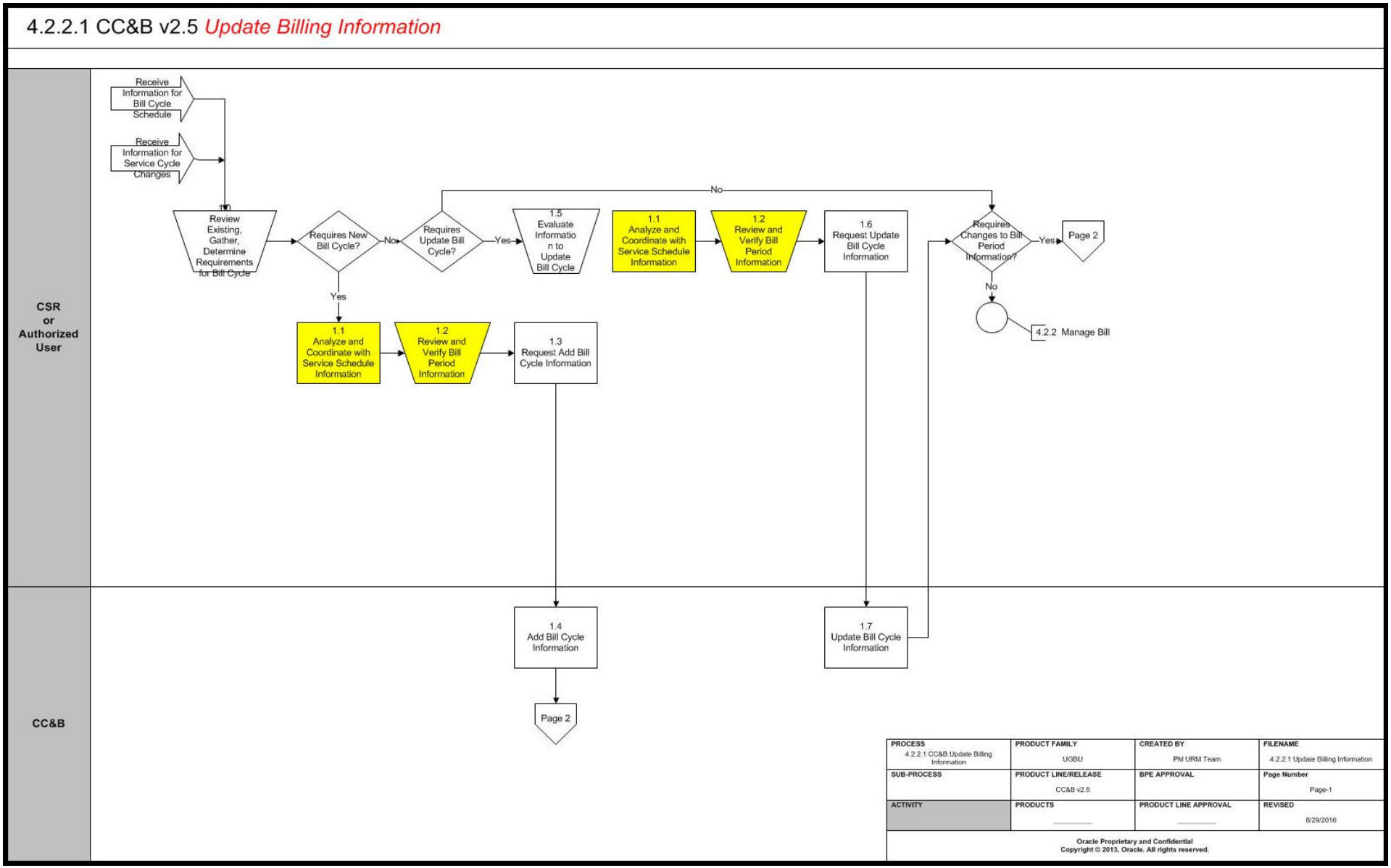
Actors/Roles

The Update Billing Information business process involves the following actors and roles:

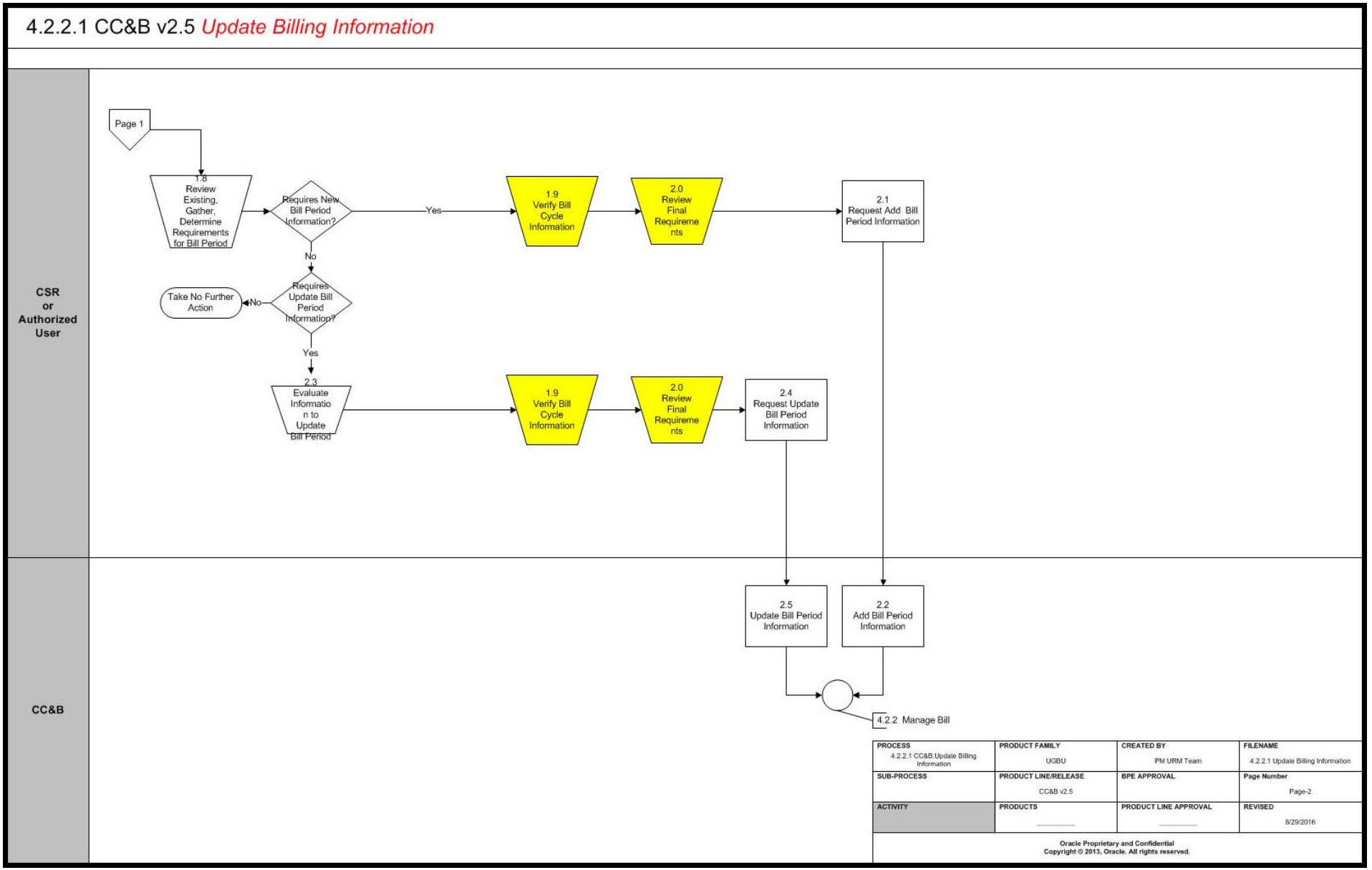
- **CC&B**: The Customer Care and Billing application. Steps performed by this actor/role are performed automatically by the application, without the need for user initiation or intervention.
- **CSR or Authorized User**: CSR or Authorized User of the Customer Care and Billing application.

Business Process Diagrams

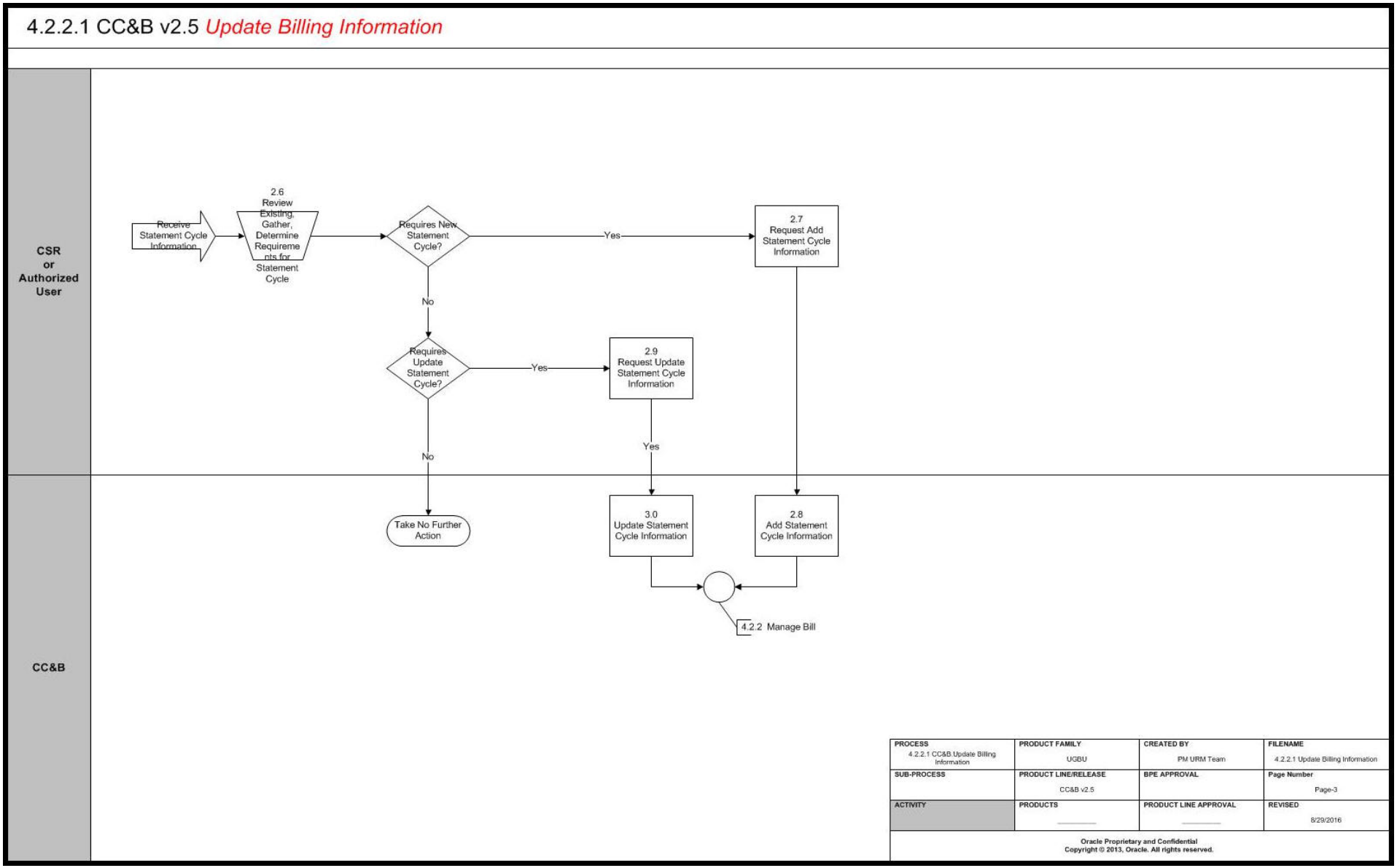
Update Billing Information Process Model - Page 1



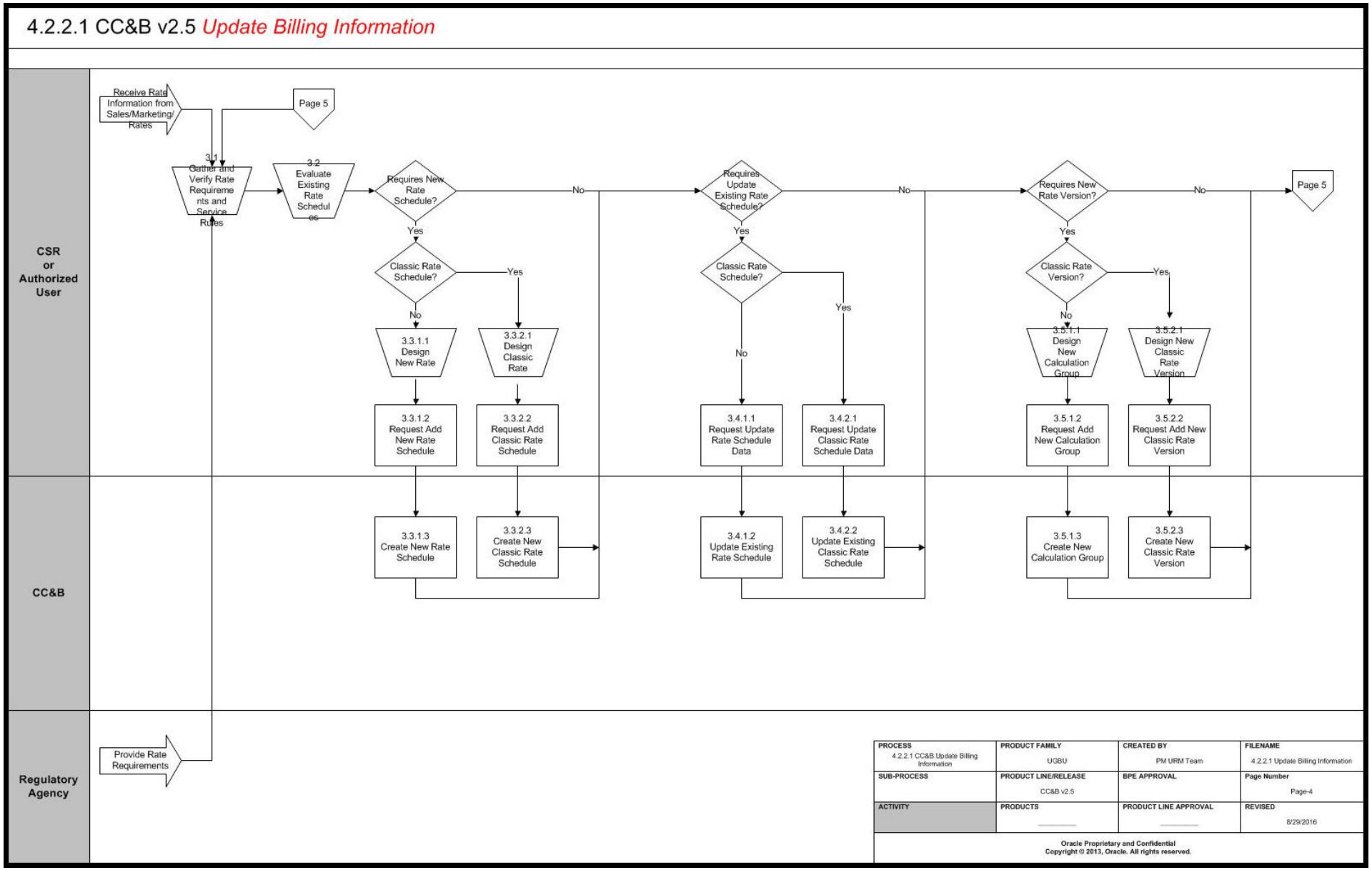
Update Billing Information Process Model - Page 2



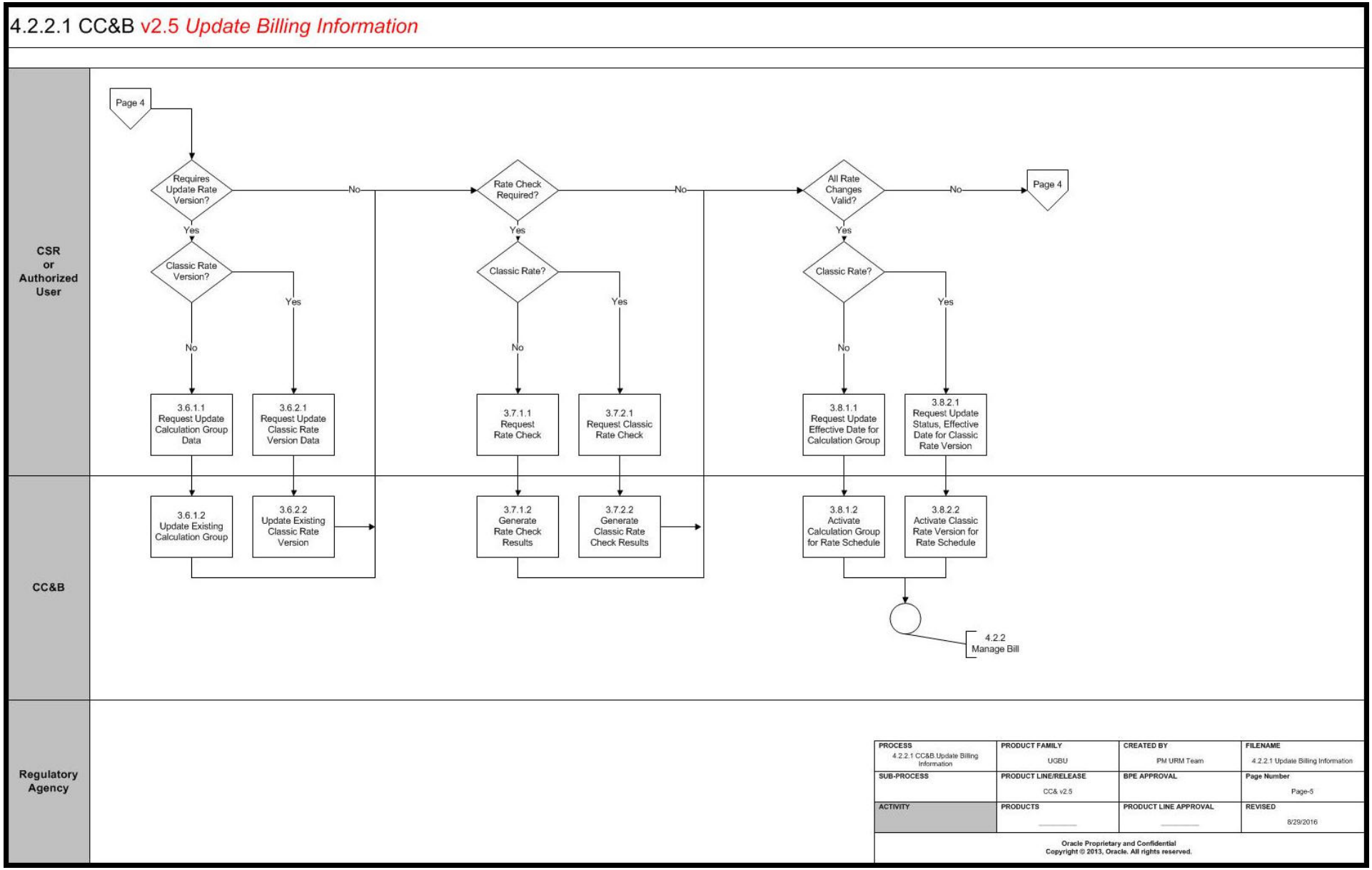
Update Billing Information Process Model - Page 3



Update Billing Information Process Model - Page 4



Update Billing Information Process Model - Page 5



Update Billing Information Detailed Process Model Description

This section provides a detailed description of the "Update Billing Information" business process, including:

- 1.0 Review Existing, Gather, Determine Requirements for Bill Cycle
- 1.1 Analyze and Coordinate with Service Schedule Information
- 1.2 Review and Verify Bill Period Information
- 1.3 Request Add Bill Cycle Information
- 1.4 Add Bill Cycle Information
- 1.5 Evaluate Information to Update Bill Cycle
- 1.6 Request Update Bill Cycle Information
- 1.7 Update Bill Cycle Information
- 1.8 Review Existing, Gather, Determine Requirements for Bill Period
- 1.9 Verify Bill Cycle Information
- 2.0 Review Final Requirements
- 2.1 Request Add Bill Period Information
- 2.2 Add Bill Period Information
- 2.3 Evaluate Information to Update Bill Period
- 2.4 Request Update Bill Period Information
- 2.5 Update Bill Period Information
- 2.6 Review Existing, Gather and Determine Requirements for Statement Cycle
- 2.7 Request Add Statement Cycle Information
- 2.8 Add Statement Cycle Information
- 2.9 Request Update Statement Cycle Information
- 3.0 Update Statement Cycle Information
- 3.1 Gather and Verify Rate Requirements and Service Rules
- 3.2 Evaluate Existing Rate Schedules
- 3.3 Design Rate Schedules
- 3.3.1.1 Design Rate Schedule
- 3.3.1.2 Request Add New Rate Schedule
- 3.3.1.3 Create New Rate Schedule
- 3.3.2.1 Design Classic Rate Schedule
- 3.3.2.2 Request Add New Classic Rate Schedule
- 3.3.2.3 Create New Classic Rate Schedule
- 3.4.1.1 Request Update Rate Schedule Data
- 3.4.1.2 Update Existing Rate Schedule
- 3.4.2.1 Request Update Classic Rate Schedule Data
- 3.4.2.2 Update Existing Classic Rate Schedule
- 3.5.1.1 Design New Calculation Group
- 3.5.1.2 Request Add New Calculation Group
- 3.5.1.3 Create New Calculation Group
- 3.5.2.1 Design New Classic Rate Version
- 3.5.2.2 Request Add New Classic Rate Version
- 3.5.2.3 Create New Classic Rate Version
- 3.6.1.1 Request Update Calculation Group Data
- 3.6.1.2 Update Existing Calculation Group
- 3.6.2.1 Request Update Classic Rate Version Data
- 3.6.2.2 Update Existing Classic Rate Version Data
- 3.7.1.1 Request Check Rate
- 3.7.1.2 Generate Rate Check Results

- 3.7.2.1 Request Classic Check Rate
- 3.7.2.2 Generate Classic Check Rate Results
- 3.8.1.1 Request Update Effective Date for Calculation Group
- 3.8.1.2 Activate Calculation Group for Rate Schedule
- 3.8.2.1 Request Update Status, Effective Date for Classic Rate Version
- 3.8.2.2 Activate Classic Rate Version for Rate Schedule

1.0 Review Existing, Gather, Determine Requirements for Bill Cycle

Reference: Update Billing Information Process Model - Page 1 on page 4 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: The CSR or Authorized User is provided with Bill Cycle information. The CSR or Authorized User researches and collects necessary information for the new or updated Bill Cycle schedule. The following information is required:

- Window Start Date - Date CC&B begins to create bills for accounts in the Bill Cycle.
- Window End Date - Date CC&B finishes creating bills for accounts in the Bill Cycle. This is the last possible date an available meter read is loaded in CC&B for the account.
- Accounting Date - Financial date associated with the bills' financial transaction. The accounting date defines the financial periods the bills are booked in the general ledger.
- Estimate Date - Date CC&B is allowed to start estimating consumption if a real read cannot be found. This date is blank if estimation is not allowed for the Bill Cycle date. When specified, this date is typically on or shortly before the window end date.
- Freeze and Complete - Is enabled if the system should freeze and complete any Bills created without errors, otherwise all Bills created by the billing process will be left in the unfinished state.

Process Names

- BILLING - Creates bills for open Bill Cycles

Entities to Configure

- Bill Cycle - Schedule

1.1 Analyze and Coordinate with Service Schedule Information

Reference: Update Billing Information Process Model - Page 1 on page 4 for the associated business process diagram.

Actor/Role: CSR

Description: There is analysis and coordination with the Service Schedule (Meter Read Schedule) Information. The CSR or Authorized User reviews and determines the optimum new Bill Cycle Schedule. The Bill Cycle's first and last days for Billing must coordinate with Service Schedule's Meter Read dates.

Entities to Configure

- Bill Cycle - Schedule

1.2 Review and Verify Bill Period Information

Reference: Update Billing Information Process Model - Page 1 on page 4 for the associated business process diagram.

Actor/Role: CSR

Description: There is coordination with the Bill Period Schedule to ensure all accounts are billed in a timely fashion.

Entities to Configure

- Bill Cycle - Schedule
- Bill Period Schedule

1.3 Request Add Bill Cycle Information

Reference: Update Billing Information Process Model - Page 1 on page 4 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: The Authorized User enters the Bill Cycle Schedule information in CC&B.

1.4 Add Bill Cycle Information

Reference: Update Billing Information Process Model - Page 1 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: The Bill Cycle Schedule information is added in CC&B.

Entities to Configure

- Bill Cycle - Schedule

1.5 Evaluate Information to Update Bill Cycle

Reference: Update Billing Information Process Model - Page 1 on page 4 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: The Authorized User evaluates and reviews current Bill Cycle Schedule information.

1.6 Request Update Bill Cycle Information

Reference: Update Billing Information Process Model - Page 1 on page 4 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: The Authorized user makes changes and updates Bill Cycle Schedule information in CC&B.

1.7 Update Bill Cycle Information

Reference: Update Billing Information Process Model - Page 1 on page 4 for the associated business process diagram.

Actor/Role: CC&B

Description: The Bill Cycle Schedule information is updated in CC&B.

1.8 Review Existing, Gather, Determine Requirements for Bill Period

Reference: Update Billing Information Process Model - Page 2 on page 5 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: The Authorized User is provided with Bill Period information. The Authorized User researches and collects necessary information for the new or updated Bill Period schedule. For each Bill Period a Bill Date and Bill Segment End Date must be defined.

Entities to Configure

- Bill Period - Schedule
- SA Type definition for Calendar Billing and Bill Period

1.9 Verify Bill Cycle Information

Reference: Update Billing Information Process Model - Page 2 on page 5 for the associated business process diagram.

Actor/Role: Authorized User

Description: The Authorized User verifies Bill Cycle Schedule information to ensure coordination with the Bill Cycle Schedule Window Dates.

2.0 Review Final Requirements

Reference: Update Billing Information Process Model - Page 2 on page 5 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: All requirements are reviewed and confirmed.

2.1 Request Add Bill Period Information

Reference: Update Billing Information Process Model - Page 2 on page 5 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: The Authorized User enters Bill Period Schedule information in CC&B.

Entities to Configure

- Bill Period - Schedule

2.2 Add Bill Period Information

Reference: Update Billing Information Process Model - Page 2 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: The Bill Period Schedule information is added in CC&B.

Entities to Configure

- Bill Period - Schedule

2.3 Evaluate Information to Update Bill Period

Reference: Update Billing Information Process Model - Page 2 on page 5 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: The Authorized User evaluates and reviews current Bill Period Schedule information.

Entities to Configure

- Bill Period - Schedule

2.4 Request Update Bill Period Information

Reference: Update Billing Information Process Model - Page 2 on page 5 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: The Authorized User enters information to update the Bill Period Schedule information.

Entities to Configure

- Bill Period - Schedule

2.5 Update Bill Period Information

Reference: Update Billing Information Process Model - Page 2 on page 5 for the associated business process diagram.

Actor/Role: CC&B

Description: The Bill Period Schedule information is updated in CC&B.

Entities to Configure

- Bill Period - Schedule

2.6 Review Existing, Gather and Determine Requirements for Statement Cycle

Reference: Update Billing Information Process Model - Page 3 on page 6 for the associated business process diagram.

Actor/Role: CSR or Authorized User Description

The Authorized User is provided with Statement Cycle schedule information. The Authorized User reviews existing Statement Cycle schedule information. The Authorized User researches and collects necessary information to determine if a new or updated Statement Cycle schedule is needed. The number of Statement Cycles is determined by a combination of the frequency requirements and how many Statement Cycles with the same frequency.

Available Algorithms

- ST for DOC1 - This algorithm is used to create extract records for Statements.

Process Names

- STMPRD - This background process creates Statements according to a predefined schedule.

Entities to Configure

- Statement Cycle - Schedule
- Statement Route Type
- Statement Construct

2.7 Request Add Statement Cycle Information

Reference: Update Billing Information Process Model - Page 3 on page 6 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: The Authorized User enters the new Statement Cycle information in CC&B.

2.8 Add Statement Cycle Information

Reference: Update Billing Information Process Model - Page 3 on page 6 for the associated business process diagram.

Actor/Role: CC&B

Description: The new Statement Cycle information is added in CC&B.

2.9 Request Update Statement Cycle Information

Reference: Update Billing Information Process Model - Page 3 on page 6 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: The Authorized User enters any changes in CC&B for the given Statement Cycle.

3.0 Update Statement Cycle Information

Reference: Update Billing Information Process Model - Page 3 on page 6 for the associated business process diagram.

Actor/Role: CC&B

Description: The Statement Cycle is updated in CC&B.

3.1 Gather and Verify Rate Requirements and Service Rules

Reference: Update Billing Information Process Model - Page 4 on page 7 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: The Authorized User collects various Rate requirements provided and reviews the existing Service Rules for the organization.

3.2 Evaluate Existing Rate Schedules

Reference: Update Billing Information Process Model - Page 4 on page 7 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: The Authorized User reviews various Rate Schedules to determine if an existing Rate Schedule meets needed requirements.

3.3 Design Rate Schedules

Reference: Update Billing Information Process Model - Page 4 on page 7 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: In CC&B v2.4, a new rate engine is available. The existing rate engine remains available, and either or both rate engine may be used. Setup of the rate engines is done through Master Configuration - Rate Engine Configuration. Rates can be designed to produce the same results using either rate engine. Rates based on the existing rate engine are referred to as Classic rates, while rates based on the new rate engine are referred to as New Style rates.

The Authorized User plans and prepares all the Rate Schedule requirements prior to entry in CC&B. Market requirements, seasonal rate fluctuations, rate increases due to changes in the service rules are considered. Rates are structured as follows in CC&B:

For the new style rates, the equivalent components are Rate Schedule, Calculation Group and Calculation Rules; or Classic rates, the components are Rate Schedule, Rate Version and Rate Components.

Entities to Configure

- Master Configuration - Rate Engine Configuration

  Bill Factors are used to specify the amount to charge when the amount is the same for many Rates. This allows for greater flexibility and fewer changes when updates

are required. The price may increase across many Rates however it is only necessary to change the price on the Bill Factor. The change is then effective across applicable Rates. Applicable SA Types for the Rate must be defined. The Rate moves from an in progress status while working on the Rate to a validated status when testing or checking the Rate. When the Rate is available for use in CC&B it is transitioned to a finished status.

3.3.1.1 Design Rate Schedule

Reference: Update Billing Information Process Model - Page 4 on page 7 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: The Rate Schedule contains information about the Rate that doesn't change over time. This includes the Rate's regulatory name and description.

A Rate's effective dated calculations are organized into Calculation Groups. Every Rate schedule has at least one Calculation Group. Multiple Calculation Groups exist when the effective dated calculations change, and it's important to keep the prior Calculation Group in order to recalculate historical bills.

A Calculation Group's calculations and charges are stored in Calculation Rules. Every Calculation Group will have at least one Calculation Rule. The number of Calculation Rules linked to a Calculation Group is dependent on the complexity of the calculation rules.

Available Algorithms

- New Style Rates - Algorithms to Configure (New Style Rates - Various Rate Schedule Algorithms and Major Configuration Information)

Entities to Configure

- New Style Rates - Entities to Configure (New Style Rates - Various Rate Schedule Algorithms and Major Configuration Information)

3.3.1.2 Request Add New Rate Schedule

Reference: Update Billing Information Process Model - Page 4 on page 7 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: Once designed, the Authorized User enters the new Rate Schedule information in CC&B.

Available Algorithms

- New Style Rates - Algorithms to Configure (New Style Rates - Various Rate Schedule Algorithms and Major Configuration Information)

Entities to Configure

- New Style Rates - Entities to Configure (New Style Rates - Various Rate Schedule Algorithms and Major Configuration Information)

3.3.1.3 Create New Rate Schedule

Reference: Update Billing Information Process Model - Page 4 on page 7 for the associated business process diagram.

Actor/Role: CC&B

Description: The new Rate Schedule information is added in CC&B.

3.3.2.1 Design Classic Rate Schedule

Reference: Update Billing Information Process Model - Page 4 on page 7 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: The Rate Schedule contains information about the Rate that doesn't change over time. This includes the Rate's regulatory name and description.

A Classic Rate's effective dated calculations are organized into a Rate Version. Every Rate schedule has at least one Rate Version. Multiple Rate Versions exist when the effective dated calculations change, and it's important to keep the prior Rate Version in order to recalculate historical bills.

A Classic Rate Version's calculations and charges are stored in Rate Components Every Rate Version will have at least one Rate Component. The number of Rate Components linked to a Rate Version, is dependent on the complexity of the calculation rules.

Available Algorithms

- Classic Rates - Algorithms to Configure (Classic Rates - Various Rate Schedule Algorithms and Major Configuration Information)

Entities to Configure

- Classic Rates - Entities to Configure (Classic Rates - Various Rate Schedule Algorithms and Major Configuration Information)

3.3.2.2 Request Add New Classic Rate Schedule

Reference: Update Billing Information Process Model - Page 4 on page 7 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: Once designed, the Authorized User enters the new Rate Schedule information in CC&B.

Available Algorithms

- Classic Rates - Algorithms to Configure

Entities to Configure

- Classic Rates - Entities to Configure

3.3.2.3 Create New Classic Rate Schedule

Reference: Update Billing Information Process Model - Page 4 on page 7 for the associated business process diagram.

Actor/Role: CC&B

Description: The new Rate Schedule information is added in CC&B.

3.4.1.1 Request Update Rate Schedule Data

Reference: Update Billing Information Process Model - Page 4 on page 7 for the associated business process diagram.

Actor/Role: Authorized User

Description: At times it may be necessary to update information in an existing Rate Schedule. It is important to consider how changes impact any historical rebilling. According to established business rules, the Authorized User enters updated Rate Schedule information as required.

Available Algorithms

- New Style Rates - Algorithms to Configure (New Style Rates - Various Rate Schedule Algorithms and Major Configuration Information)

Entities to Configure

- New Style Rates - Entities to Configure (New Style Rates - Various Rate Schedule Algorithms and Major Configuration Information)

3.4.1.2 Update Existing Rate Schedule

Reference: Update Billing Information Process Model - Page 4 on page 7 for the associated business process diagram.

Actor/Role: CC&B

Description: The existing Rate Schedule is updated in CC&B.

3.4.2.1 Request Update Classic Rate Schedule Data

Reference: Update Billing Information Process Model - Page 4 on page 7 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: At times it may be necessary to update information in an existing Rate Schedule. It is important to consider how changes impact any historical rebilling. According to established business rules, the Authorized User enters updated Rate Schedule information as required.

Available Algorithms

- Classic Rates - Algorithms to Configure (Classic Rates - Various Rate Schedule Algorithms and Major Configuration Information)

Entities to Configure

- Classic Rates - Entities to Configure (Classic Rates - Various Rate Schedule Algorithms and Major Configuration Information)

3.4.2.2 Update Existing Classic Rate Schedule

Reference: Update Billing Information Process Model - Page 4 on page 7 for the associated business process diagram.

Actor/Role: CC&B

Description: The existing Rate Schedule is updated in CC&B.

3.5.1.1 Design New Calculation Group

Reference: Update Billing Information Process Model - Page 4 on page 7 for the associated business process diagram.

Actor/Role: Authorized User

Description: The new Calculation Group information is added in CC&B.

3.5.1.2 Request Add New Calculation Group

Reference: Update Billing Information Process Model - Page 4 on page 7 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: Once designed, the Authorized User enters new Calculation Group information in CC&B.

Available Algorithms

- New Style Rates - Algorithms to Configure (New Style Rates - Various Rate Schedule Algorithms and Major Configuration Information)

Entities to Configure

- New Style Rates - Entities to Configure (New Style Rates - Various Rate Schedule Algorithms and Major Configuration Information)

3.5.1.3 Create New Calculation Group

Reference: Update Billing Information Process Model - Page 4 on page 7 for the associated business process diagram.

Actor/Role: CC&B

Description: The new Calculation Group information is added in CC&B.

3.5.2.1 Design New Classic Rate Version

Reference: Update Billing Information Process Model - Page 4 on page 7 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: The new Classic Rate Version information is added in CC&B.

3.5.2.2 Request Add New Classic Rate Version

Reference: Update Billing Information Process Model - Page 4 on page 7 for the associated business process diagram.

Actor/Role: Authorized User

Description: Once designed, the Authorized User enters new Classic Rate Version information in CC&B.

Available Algorithms

- Classic Rates - Algorithms to Configure (Classic Rates - Various Rate Schedule Algorithms and Major Configuration Information)

Entities to Configure

- Classic Rates - Entities to Configure (Classic Rates - Various Rate Schedule Algorithms and Major Configuration Information)

3.5.2.3 Create New Classic Rate Version

Reference: Update Billing Information Process Model - Page 4 on page 7 for the associated business process diagram.

Actor/Role: CC&B

Description: The new Classic Rate Version information is added in CC&B.

3.6.1.1 Request Update Calculation Group Data

Reference: Update Billing Information Process Model - Page 5 on page 8 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: At times it may be necessary to update information for an existing Calculation Group. It is important to consider how changes impact any historical rebilling. According to

established business rules, the Authorized User enters updated Calculation Group information as required.

Available Algorithms

- New Style Rates - Algorithms to Configure (New Style Rates - Various Rate Schedule Algorithms and Major Configuration Information)

Entities to Configure

- New Style Rates - Entities to Configure (New Style Rates - Various Rate Schedule Algorithms and Major Configuration Information)

3.6.1.2 Update Existing Calculation Group

Reference: Update Billing Information Process Model - Page 5 on page 8 for the associated business process diagram.

Actor/Role: CC&B

Description: The Calculation Group is updated in CC&B.

3.6.2.1 Request Update Classic Rate Version Data

Reference: Update Billing Information Process Model - Page 5 on page 8 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: At times it may be necessary to update information for an existing Classic Rate Version. It is important to consider how changes impact any historical rebilling. According to established business rules, the Authorized User enters updated Rate Version information as required.

Available Algorithms

- Classic Rates - Algorithms to Configure (Classic Rates - Various Rate Schedule Algorithms and Major Configuration Information)

Entities to Configure

- Classic Rates - Entities to Configure (Classic Rates - Various Rate Schedule Algorithms and Major Configuration Information)

3.6.2.2 Update Existing Classic Rate Version Data

Reference: Update Billing Information Process Model - Page 5 on page 8 for the associated business process diagram.

Actor/Role: CC&B

Description: The Rate Version is updated in CC&B.

3.7.1.1 Request Check Rate

Reference: Update Billing Information Process Model - Page 5 on page 8 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: The Authorized User makes use of Rate Check functionality to verify the new or updated Rate Schedule for accuracy. Rate Check functionality exists for both Classic rates and New Style rates. The Rate can be tested using existing customer information for comparison.

3.7.1.2 Generate Rate Check Results

Reference: Update Billing Information Process Model - Page 5 on page 8 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: The Authorized User makes use of Rate Check functionality to verify the new or updated Rate Schedule for accuracy. Rate Check functionality exists for both Classic rates and New Style rates. The Rate can be tested using existing customer information for comparison.

3.7.2.1 Request Classic Check Rate

Reference: Update Billing Information Process Model - Page 5 on page 8 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: The Authorized User makes use of Classic Rate Check functionality to verify the new or updated Rate Schedule for accuracy. Rate Check functionality exists for both Classic rates and New Style rates. The Rate can be tested using existing customer information for comparison.

3.7.2.2 Generate Classic Check Rate Results

Reference: Update Billing Information Process Model - Page 5 on page 8 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: The Authorized User makes use of Classic Rate Check functionality to verify the new or updated Rate Schedule for accuracy. Rate Check functionality exists for both Classic rates and New Style rates. The Rate can be tested using existing customer information for comparison.

3.8.1.1 Request Update Effective Date for Calculation Group

Reference: Update Billing Information Process Model - Page 5 on page 8 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: The Authorized User activates the updated Calculation Group by adding the Rate Version Calculation Group with its effective date to the Rate Schedule. The Calculation Group is now available for use in CC&B.

3.8.1.2 Activate Calculation Group for Rate Schedule

Reference: Update Billing Information Process Model - Page 5 on page 8 for the associated business process diagram.

Actor/Role: CC&B

Description: The updated Calculation Group is present on the Rate Schedule in CC&B.

3.8.2.1 Request Update Status, Effective Date for Classic Rate Version

Reference: Update Billing Information Process Model - Page 5 on page 8 for the associated business process diagram.

Actor/Role: CSR or Authorized User

Description: The Authorized User activates the updated Rate Version to a by setting the Rate Version status to finished with the requested effective date. The Rate Version is now available for use in CC&B.

3.8.2.2 Activate Classic Rate Version for Rate Schedule

Reference: Update Billing Information Process Model - Page 5 on page 8 for the associated business process diagram.

Actor/Role: CC&B

Description: The updated Rate Version is updated to a finished status with an effective date in CC&B.

Classic Rates - Various Rate Schedule Algorithms and Major Configuration Information

Available Algorithms

The following algorithms are available:

Value	Description
Bill Factor Rate Selection Date	
C1-BFRACCTG	Bill Factor Date based on Accounting Date
C1-BFREND	Bill Factor Date based on Bill Segment End Date
C1-BFRSTRT	Bill Factor Date based on Bill Segment Start Date
Rate Component Calculation	
C1-RC-CLAMT	Sum Calc Line Amounts
RCAM-CCL	Calculate CCL
DEEMEDPROF	Create Deemed Profile Data
RCAM-VAT	Standard Rate VAT
RCAM-VATR	Reduced Rate VAT
MAX3KW	Capture maximum three kW interval values
Rate Component Criteria Comparison	
RECC>=2YEARS	Check if date is at least two years old
Rate Component Criteria Field	
RECF-AUTOPAY	Return True If On Autopay
RECF-HASELEC	Return TRUE if account has electric service
RECF-HASGAS	Return TRUE if account has gas service
Rate Component Interval Pricing	
IPRC-CNALL	Continuous cons. curve * price curve (fast)
IPRC-NCNALL	Non continuous cons. curve * price curve (slower)
IPRC-NCNPOS	Non continuous OVERAGE curve * price curve
IPRC-NCNNEG	Non continuous UNDERAGE curve * price curve
Rate Component Interval Pricing Audit	
IPRCA-ALL	Show all consumption and prices
IPRCA-EXCESS	Only show excess (positive) consumption and prices
IPRCA-UNDER	Only show underage (negative) consumption and prices
Rate Component Step Algorithm	
MULT BY KW	Multiply step by KW
HIGHBP	Set step to high break point

Value	Description
LOW BP	Set step to low break point
Rate Component Time of Use (TOU) Pricing	
M&P CONS	Map & Price Continuous, Consumptive Int Data
M&P PEAK	Map & Price Continuous, Peak Interval Data
TOUMAP1	Create SQ entries by applying TOU map to int. cons
Rate Component Time of Use (TOU) Pricing Audit	
RCTPRSAU-CON	TOU Pricing Audit - Consumptive
RCTPRSAU-PK	TOU Pricing Audit - Peak
Rate Component Value Algorithm	
PX PRICE	Extract avg price from weekly spot market prices
RCVALTHRSHSQ	Calc. price based on threshold 400 KWH OFF
CI_RNDXRF	Round Cross-Reference Amount
Other Algorithms Related to Rates	
BSBS-RT-DFT	Create bill segment using rate application
ADJG-RT	Adjustment generation - apply rate
CI_ADJ-RT-TX	Adjustment generation - apply rate
CALL RATEAPP	Apply the rate to each billing scenario

Entities to Configure

The following entities are available to configure:

- Rate Schedule
- Rate Version
- Rate Components
- Service Quantity Rules
- Register Rules
- Service Quantity Identifiers
- Unit of Measure
- Frequency
- Bill Factors
- Characteristics
- Distribution Codes
- Various Algorithm Parameters
- Define Rates on Applicable SA Types
- Meter Configuration Type
- Bill Messages

New Style Rates - Various Rate Schedule Algorithms and Major Configuration Information

Available Algorithms

The following algorithms are available:

Value	Description
Master Configuration	
Rate Engine Configuration	C1-RateEngineConfig
Rate Schedule	C1-RateScheduleV2
BPA Script - Adjust Usage and Check Rate	C1-OvrInMain
External Communication Request Type	CI_MDM
Rate Schedule	
Bundling Add BO for Rate Schedule	C1-RateScheduleBundlingBO
Rate Schedule	C1-RateScheduleV2
Rate Schedule Lite	C1-RateScheduleLite
Physical BO for Rate Schedule	C1-RateSchedulePhysicalBO
Calculation Group	C1-CALC-GRP
Bundling Add BO for Calculation Group	C1-CalcGroupBundlingAddBO
Calculation Group	C1-CalcGroup
Physical BO for Calculation Group	C1-CalcGroupPhysicalBO
Calculation Rule	C1-CALC-RULE
Bundling Add BO for Calculation Rule	C1-CalcRuleBundlingAddBO
Calculation Rule Execution Resequencing	C1-CalcRuleExecReSeqLite
Execute Calculation Group	C1-CalcRuleReferredCalcGroup
Generic Calculation Rule	C1-GenericCalcRule
Physical BO for Calculation Rule	C1-CalcRulePhysicalBO
Apply To	C1-ApplyTo
Service Quantity	C1-ServiceQuantity
Stepped Service Quantity	C1-SteppedSQ
Summary	C1-Summary
Execute Calculation Group	C1-CalcRuleReferredCalcGroup
Calculate Service Quantity	C1-CalculateServiceQuantity
Flat Charge	C1-FlatCharge
Calculation Rule Eligibility Criteria	C1-CALC-R-EL
Calculation Rule Eligibility Criteria	C1-CalcRuleEligibilityCriteria

Value	Description
Calculation Line Category Type	C1-CL-CAT
Calc Line Category Type	C1-CalcLineCategoryType

The following table lists the type code, entity, and program type for all algorithm types:

Algorithm Type	Algorithm Type Code	Algorithm Entity	Program Type
Calculation Rule Sequence Validation	C1-CALCRLVAL	Business Object - Validation	Plug-In Script
Validate Calc Rule Eligibility Criteria	C1-VALCALCRT	Business Object - Validation	Plug-In Script
Validate Calculate Service Quantity Rule	C1-VALCALCSQ	Business Object - Validation	Plug-In Script
Calculate Final Reading Value	C1-CALCFNVL	Calc Rule BO - Apply Calc Rule	Java
Calculate Service Quantity	C1-CALC-SQ	Calc Rule BO - Apply Calc Rule	Java
Execute Calculation Group	C1-ACALR-RFG	Calc Rule BO - Apply Calc Rule	Java
Calculate SA Balance	CI_SABAL	Calculation Rule - Derive Value	Plug-In Script
Calculate days in billing period	C1-CALCBLDYS	Calculation Rule - Derive Value	Plug-In Script

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, Rating and Billing
- Oracle Utilities UPK for Customer Care and Billing, Rating and Billing for Interval Data
- Oracle Utilities UPK for Customer Care and Billing, User Tasks
- Oracle Utilities UPK for Customer Care and Billing, Credit and Collections