Oracle Utilities Customer Care and Billing Release 2.5.0

Utility Reference Model

5.6.3.1 Manage Meters

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ORACLE

Oracle Utilities Customer Care and Billing Release 2.5.0 Utility Reference Model 5.6.3.1 Manage Meters

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5.6.3.1 Manage Meters

This section provides a description of the "Manage Meters" business process, including:

- Brief Description
  - Actors/Roles
- Business Process Diagrams
  - Manage Meters Process Model - Page 1
  - Manage Meters Process Model - Page 2
- Manage Meters Detailed Process Model Description
- Related Training

Brief Description

Business Process: 5.6.3.1 CC&B v2.5 Manage Meters

Process Type: Sub-Process

Parent Process: 5.6.3 **CC&B v2.5** Manage Supplies

Sibling Processes:

- 5.6.3.1 CC&B v2.5 Manage Meters
- 5.1.5.1 CC&B v2.5 Manage Meter Site
- 5.1.5.2 CC&B v2.5 Manage Un-Metered Site

Items are uniquely identified devices considered badged or those without a unique identity considered unbadged. Items do not measure consumption however estimated consumption can be defined for an item such as a lamp. Items may impact billing or require fieldwork maintenance. Item records are also used to describe equipment that is linked to meters, service points, and other items. Items may be billed or placed at a Service Point for reference only.

When an organization purchases Items for inventory and installation the Items are recorded in CC&B. This process describes how Items are entered in CC&B inventory as well as maintenance of the Item Record in the system.

The CSR or Authorized User can add a single Item record or add multiple Item records at one time using a replication feature. The item's history can be tracked while in service, as well as stock location while in inventory.

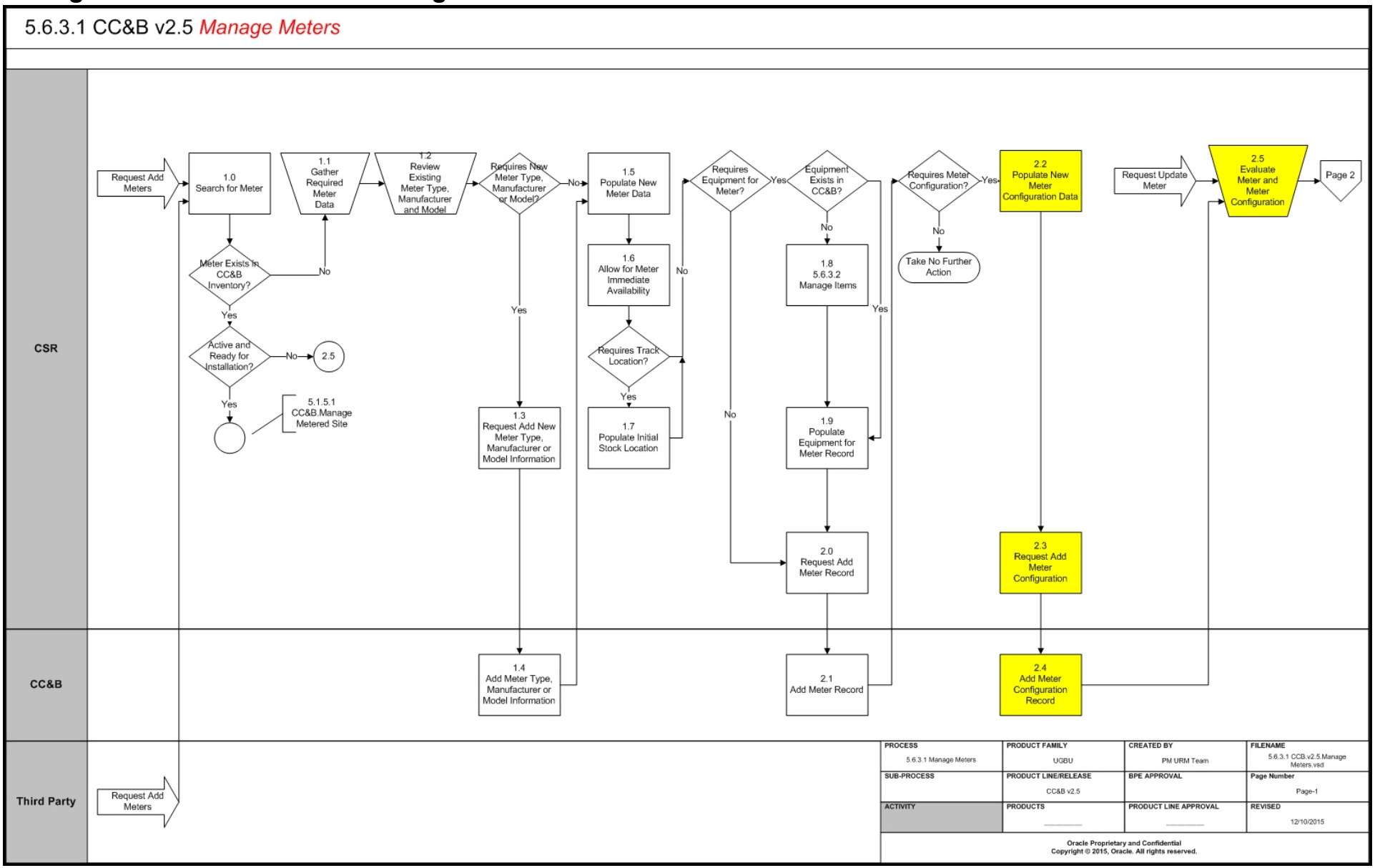
Actors/Roles

The Manage Items business process involves the following actors and roles:

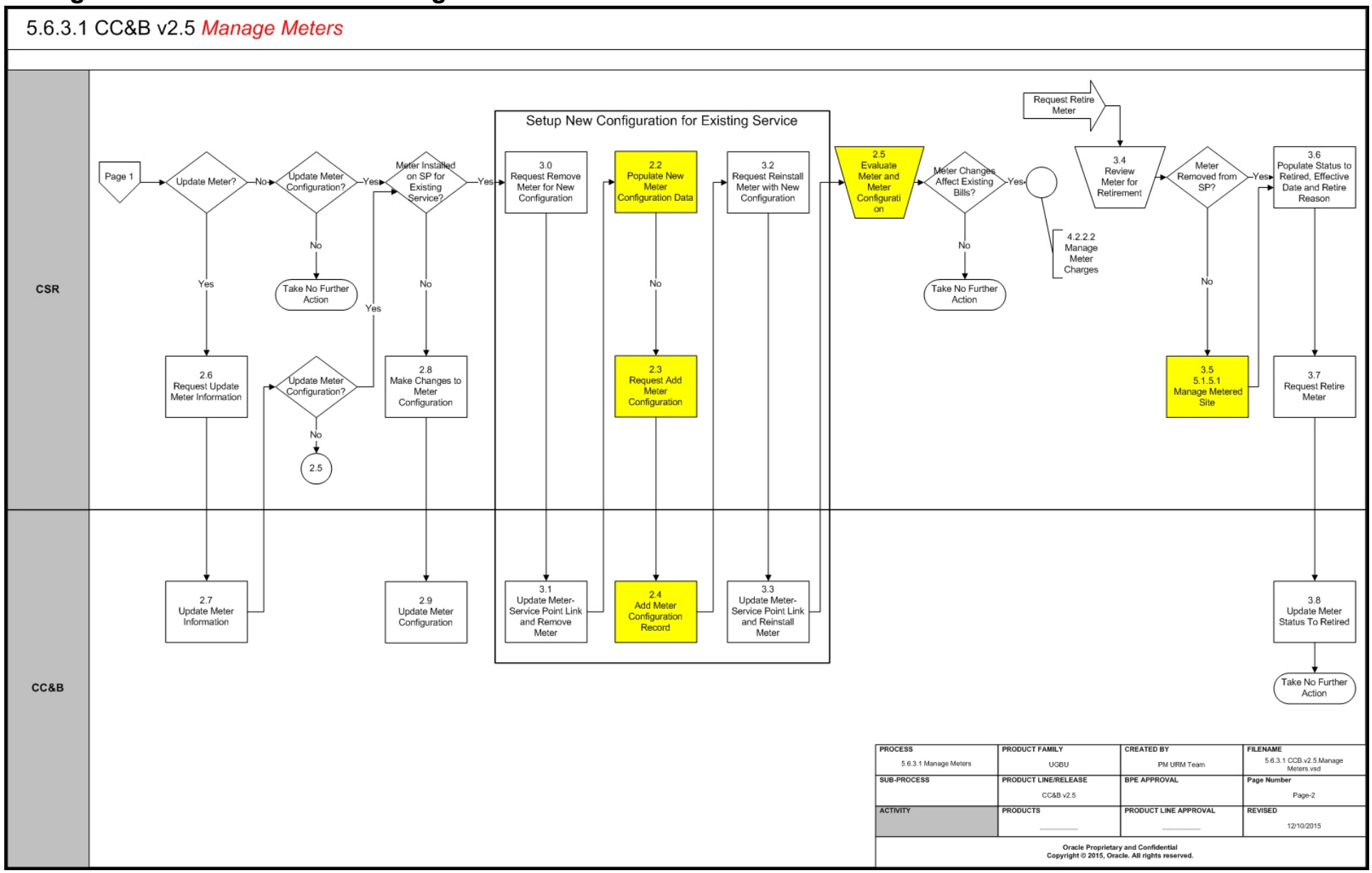
- **CSR**: CSR or Authorized User of the Customer Care and Billing application.
- **CC&B**: The Customer Care and Billing application. Steps per formed by this actor/role are per formed automatically by the application, without the need for user initiation or intervention.
- **Third Party**: Third Party application or User that can request to add and/or maintain meter or item data.

Business Process Diagrams

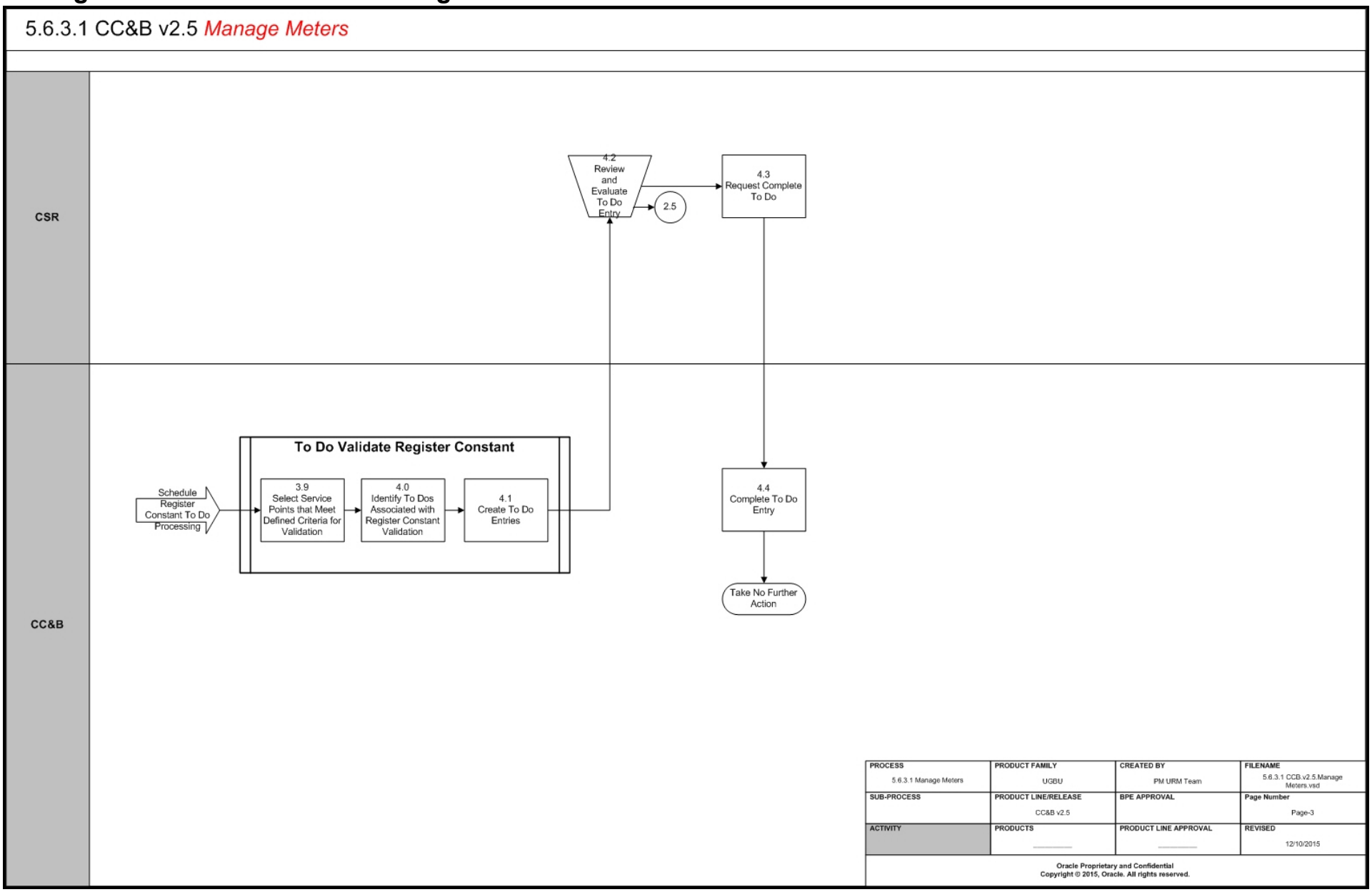
Manage Meters Process Model - Page 1



Manage Meters Process Model - Page 2



Manage Meters Process Model - Page 3



Manage Meters Detailed Process Model Description

This section provides a detailed description of the "Manage Meters" business process, including:

- 1.0 Search for Meter
- 1.1 Gather Required Meter Data
- 1.2 Review Existing Meter Type, Manufacturer and Model
- 1.3 Request Add New Meter Type, Manufacturer or Model Information
- 1.4 Add Meter Type, Manufacturer or Model Information
- 1.5 Populate New Meter Data
- 1.6 Allow for Immediate Meter Availability
- 1.7 Populate Initial Stock Location
- 1.7 Populate Initial Stock Location
- 1.8 5.6.3.2 Manage Items
- 1.9 Populate Equipment for Meter Record
- 2.0 Request Add Meter Record
- 2.1 Add Meter Record
- 2.2 Populate New Meter Configuration Data
- 2.3 Request Add Meter Configuration
- 2.4 Add Meter Configuration Record
- 2.5 Evaluate Meter and Meter Configuration
- 2.6 Request Update Meter Information
- 2.7 Update Meter Information
- 2.8 Make Changes for Meter Configuration
- Related Training
- 3.0 Request Removal of Meter for New Meter Configuration
- 3.1 Update Meter-Service Point Link and Remove Meter
- 3.2 Request Reinstall of Meter with New Meter Configuration
- 3.3 Update Meter-Service Point Link and Reinstall Meter
- 3.4 Review Meter for Retirement
- 3.5 5.1.5.1 Manage Meter Site
- 3.6 Populate Status to Retired, Effective Date and Retire Reason
- 3.7 Request Retire Meter
- 3.8 Update Meter Status to Retired
- 3.9 Select Service Points That Meet Defined Criteria for Validation
- 4.0 Identify To Dos Associated with Register Constant Validation
- 4.1 Create To Do Entries
- 4.2 Review and Evaluate To Do Entry
- 4.3 Request Complete To Do
- 4.4 Complete To Do Entry

1.0 Search for Meter

Reference: Manage Meters Process Model - Page 1 on page 3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User searches for the given Meter in CC&B to determine if it is in existing inventory. Searching for the Meter can be accomplished through Meter/Item Search using various search criteria.

Entities to Configure

- Geo Type
- Installation Options
- Stock Location

Available Algorithms

- C1-MTRI-DFLT - Meter Information. This algorithm formats the "Meter Info" that appears throughout the system:
  - Meter Type
  - Badge Number
  - Serial Number
  - Meter Status
  - Location Information

1.1 Gather Required Meter Data

Reference: Manage Meters Process Model - Page 1 on page 3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Using a purchase order, packing slip or other meter receipt information, the CSR or Authorized User reviews and collects the needed information for entering meters in CC&B. Information includes Meter type, badge numbers, serial numbers, Manufacturer, Model, and measuring component information.

Entities to Configure

- Meter Type
- Manufacturer
- Model

1.2 Review Existing Meter Type, Manufacturer and Model

Reference: Manage Meters Process Model - Page 1 on page 3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The new Meters may be from a new vendor or be a new type of Meter. The CSR or Authorized User determines if the new Meters require any new set up information configured in CC&B. Meter Type defines the type of service associated with this meter. It also defines characteristics common to all meters of a given type and the type of equipment that can be linked to the meter.

Entities to Configure

- Meter Type
- Manufacturer
- Model

1.3 Request Add New Meter Type, Manufacturer or Model Information

Reference: Manage Meters Process Model - Page 1 on page 3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: If new setup information is required, the CSR or Authorized User enters this information in CC&B.

Entities to Configure

- Meter Type
- Manufacturer
- Model

1.4 Add Meter Type, Manufacturer or Model Information

Reference: Manage Meters Process Model - Page 1 on page 3 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: Meter Type, Manufacturer, or Model Information is added in CC&B.

Entities to Configure

- Meter Type
- Manufacturer
- Model

Business Objects

- C1-MeterTypePhysicalBO - Physical BO for Meter Type

1.5 Populate New Meter Data

Reference: Manage Meters Process Model - Page 1 on page 3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User enters the new Meter Information for the Meter to be placed in inventory. A Badge Number is assigned. Typically this is the stamped number from the manufacturer. Serial Number, Date Received as well as Meter Type, Manufacturer, and Model are identified

Entities to Configure

- Meter Type
- Manufacturer
- Model
- Meter ID Type
- Characteristic Type

1.6 Allow for Immediate Meter Availability

Reference: Manage Meters Process Model - Page 1 on page 3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The Meter must be considered Active to be installed at a Service Point. Sometimes organizations track meters in inventory prior to receipt of the Meters. In this case the Meters are assigned an Ordered status and changed to Active when received.

1.7 Populate Initial Stock Location

Reference: Manage Meters Process Model - Page 1 on page 3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: If this Meter's location is being tracked, a physical stock location is identified.

Entities to Configure

- Stock Location

1.8 5.6.3.2 Manage Items

Reference: Manage Meters Process Model - Page 1 on page 3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: At times additional equipment may be added to the Meter record. The Equipment record must be in CC&B inventory. Refer to 5.6.3.2 Manage Items.

Entities to Configure

- Item Type

1.9 Populate Equipment for Meter Record

Reference: Manage Meters Process Model - Page 1 on page 3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User adds Equipment information to be included with the Meter record.

Entities to Configure

- Item Type

2.0 Request Add Meter Record

Reference: Manage Meters Process Model - Page 1 on page 3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: When all information is added for the Meter, the CSR or Authorized User saves the record.

2.1 Add Meter Record

Reference: Manage Meters Process Model - Page 1 on page 3 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Meter record is added in CC&B.

Entities to Configure

- Meter Type
- Manufacturer
- Model
- Meter ID Type
- Characteristic Type

- Meter Configuration Type

Business Objects

- C1-MeterBasic -Meter Lite. This business object can be used to read the fields of the MO's primary table - Meter.
- C1MeterPhysical - Meter Physical BO
- CC&B-MDM Integration
  - C1-MDM2Meter - MDM2 Meter CC&B-MDM. This business object contains the Meter elements that are relevant to the MDM2 Meter Sync. It is used to read the Meter information during the building of the initial and final snapshots for the sync request.
- CC&B-MDM Integration
  - C1-MDM2MtrSyncRequest - MDM2 Meter Sync Request. This business object defines the behavior of an outbound sync request for MDM2. The schema elements define information required by MDM2 to calculate bill determinants for CCB and to support other processes in the MDM system.

2.2 Populate New Meter Configuration Data

Reference: Manage Meters Process Model - Page 1 on page 3 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: In order to measure consumption and record Meter Reads, the Meter requires a Configuration record. The Meter's configuration defines how the system calculates consumption and how the billing process uses consumption. A Configuration record may change over time. Meter Configurations are effective dated and can impact previous existing Bills. It is recommended to add a new Meter Configuration when the Meter is reconfigured and has an impact on existing bills. The CSR or Authorized User enters the new Meter Configuration including: Effective Date, Configuration Type, Unit of Measure, Time of Use codes, Register Constants, Dial Format, and other information.

Entities to Configure

- Unit of Measure
- Time Of Use
- Time of Use Group
- Read Out Type
- Characteristic Type
- Characteristic Value
- Meter ID Type
- Protocol Codes

2.3 Request Add Meter Configuration

Reference: Manage Meters Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: When all information is added for the new Meter Configuration, the CSR or Authorized User saves the record.

2.4 Add Meter Configuration Record

Reference: Manage Meters Process Model - Page 1 on page 3 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The new Meter Configuration record is added in CC&B.

Entities to Configure

- Meter Configuration Type
- Unit of Measure
- Time Of Use
- Time of Use Group
- Read Out Type
- Characteristic Type
- Characteristic Value
- Meter ID Type
- Protocol Codes

Business Objects

- CI_MeterConfiguration - Meter Configuration. This business object is used to retrieve the registers for a meter configuration
- C1-MeterConfigurationBasic - Meter Configuration Lite. This business object can be used to read the fields of the MO's primary table - Meter Configuration.
- C1MeterConfigurationPhysical -Meter Configuration Physical BO
- C1-MeterConfigurationRegisters - Meter Configuration Registers. This business object maps the meter configuration basic information as well as its Register collection.
- CC&B-MDM Integration
  - C1-MDM2MeterConfiguration - MDM2 Meter Configuration. This business object contains the Meter Configuration elements that are relevant to the MDM2 Meter Configuration Sync. It is used to read the Meter Configuration information during the building of the initial and final snapshots for the sync request.
- CC&B-MDM Integration
  - C1-MDM2MtrConfigSyncRequest - MDM2 Meter Configuration Sync Request. This business object defines the behavior of an outbound sync request for MDM2. The schema elements define information required by MDM2 to calculate bill determinants for CCB and to support other processes in the MDM system.

2.5 Evaluate Meter and Meter Configuration

Reference: Manage Meters Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User reviews and verifies the accuracy of the newly entered Meter and Meter Configuration information. The CSR or Authorized User may use the Replication feature to enter a full shipment or group of meters at the same time. The CSR or Authorized User also reviews Meter and Meter Configuration information prior to making any changes for an existing Meter and Meter Configuration. Changes may or may not impact existing Bills. A new configuration is created when the Meter is reconfigured. All existing information was accurate at the time it was entered, but now something about the meter's configuration has

changed. The historical information is retained, and the new configuration has its own unique identity in the system.

2.6 Request Update Meter Information

Reference: Manage Meters Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: At times it may be necessary to update meter information. The CSR or Authorized User enters the required information for the change.

2.7 Update Meter Information

Reference: Manage Meters Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The meter information is updated in CC&B.

Business Objects

- C1-MeterBasic -Meter Lite. This business object can be used to read the fields of the MO's primary table - Meter.
- C1MeterPhysical - Meter Physical BO
- CC&B-MDM Integration
  - C1-MDM2Meter - MDM2 Meter CC&B-MDM. This business object contains the Meter elements that are relevant to the MDM2 Meter Sync. It is used to read the Meter information during the building of the initial and final snapshots for the sync request.
- CC&B-MDM Integration
  - C1-MDM2MtrSyncRequest - MDM2 Meter Sync Request. This business object defines the behavior of an outbound sync request for MDM2. The schema elements define information required by MDM2 to calculate bill determinants for CCB and to support other processes in the MDM system.

2.8 Make Changes for Meter Configuration

Reference: Manage Meters Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User determines to make changes for the existing Meter Configuration. These changes are required when some information was entered incorrectly prior to the billing process, can be changed without an impact to existing bills, or billing corrections will be made following the meter configuration changes.

2.9 Update Meter Configuration

Reference: Manage Meters Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Meter Configuration is updated in CC&B.

Business Objects

- CI_MeterConfiguration - Meter Configuration. This business object is used to retrieve the registers for a meter configuration

- C1-MeterConfigurationBasic - Meter Configuration Lite. This business object can be used to read the fields of the MO's primary table - Meter Configuration.
- C1MeterConfigurationPhysical -Meter Configuration Physical BO
- C1-MeterConfigurationRegisters - Meter Configuration Registers. This business object maps the meter configuration basic information as well as its Register collection.
- CC&B-MDM Integration
  - C1-MDM2MeterConfiguration - MDM2 Meter Configuration. This business object contains the Meter Configuration elements that are relevant to the MDM2 Meter Configuration Sync. It is used to read the Meter Configuration information during the building of the initial and final snapshots for the sync request.
- CC&B-MDM Integration
  - C1-MDM2MtrConfigSyncRequest - MDM2 Meter Configuration Sync Request. This business object defines the behavior of an outbound sync request for MDM2. The schema elements define information required by MDM2 to calculate bill determinants for CCB and to support other processes in the MDM system.

3.0 Request Removal of Meter for New Meter Configuration

Reference: Manage Meters Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The effective date of the Meter Configuration cannot overlap with the effective date period for any service point historical installation. This means a new Meter Configuration cannot be added while the Meter is installed and currently measuring consumption. The Meter is removed from the Service Point to add the new effective dated Meter Configuration. CSR or Authorized User installs a removal meter read in order to remove the meter from the Service Point.

3.1 Update Meter-Service Point Link and Remove Meter

Reference: Manage Meters Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: CC&B updates the SP-Meter link and removes the meter from the service point.

Business Objects

- C1-SPMeterHistoryEvents - SP/Meter History Events. This business object maps the SP/Meter History information and its Event collection.
- CC&B-MDM Integration
  - C1-MDM2SPMeterHistory - MDM2 SP/Meter History. This business object contains the SP/Meter History elements that are relevant to the MDM2 SP/Meter History Sync. It is used to read the SP/Meter History information during the building of the initial and final snapshots for the sync request.
- CC&B-MDM Integration
  - C1-MDM2SpMtrHistSyncRequest - MDM2 SP/Meter History Sync Request. This business object defines the behavior of an outbound sync request for MDM2. The schema elements define information required by MDM2 to calculate bill determinants for CCB and to support other processes in the MDM system.

3.2 Request Reinstall of Meter with New Meter Configuration

Reference: Manage Meters Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: CSR or Authorized User requests to install the meter with the updated configuration and populates a new meter read to the Meter-Service Point Installation Page .

3.3 Update Meter-Service Point Link and Reinstall Meter

Reference: Manage Meters Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: CC&B updates the SP-Meter link and installs the meter onto the Service Point. The new effective dated Meter Configuration is now available for the Meter.

Business Objects

- C1-SPMeterHistoryEvents - SP/Meter History Events. This business object maps the SP/Meter History information and its Event collection.
- CC&B-MDM Integration
  - C1-MDM2SPMeterHistory - MDM2 SP/Meter History. This business object contains the SP/Meter History elements that are relevant to the MDM2 SP/Meter History Sync. It is used to read the SP/Meter History information during the building of the initial and final snapshots for the sync request.
- CC&B-MDM Integration
  - C1-MDM2SpMtrHistSyncRequest - MDM2 SP/Meter History Sync Request. This business object defines the behavior of an outbound sync request for MDM2. The schema elements define information required by MDM2 to calculate bill determinants for CCB and to support other processes in the MDM system.

3.4 Review Meter for Retirement

Reference: Manage Meters Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: At times it is determined a Meter cannot be repaired or requires removal due to age of the meter. Some organizations' business rules require removal of Meters when they reach a certain age. Once the Meter is removed from the Service Point it is changed to Retired in CC&B.

3.5 5.1.5.1 Manage Meter Site

Reference: Manage Meters Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: Refer to 5.1.5.1 Manage Meter Site for steps to remove a Meter and/or install a Meter.

3.6 Populate Status to Retired, Effective Date and Retire Reason

Reference: Manage Meters Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User updates the Meter Status to Retired. A retire date and retire reason is entered.

Entities to Configure

- Retire Reason

3.7 Request Retire Meter

Reference: Manage Meters Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User saves the Meter Record with the updated retirement information.

Entities to Configure

- Retire Reason

3.8 Update Meter Status to Retired

Reference: Manage Meters Process Model - Page 2 on page 4 for the business process diagram associated with this activity.

Actor/Role: CC&B

Description: The Meter is updated to Retired Status in CC&B.

Business Objects

- C1-MeterBasic -Meter Lite. This business object can be used to read the fields of the MO's primary table - Meter.
- C1MeterPhysical - Meter Physical BO
- CC&B-MDM Integration
  - C1-MDM2Meter - MDM2 Meter CC&B-MDM. This business object contains the Meter elements that are relevant to the MDM2 Meter Sync. It is used to read the Meter information during the building of the initial and final snapshots for the sync request.
- CC&B-MDM Integration
  - C1-MDM2MtrSyncRequest - MDM2 Meter Sync Request. This business object defines the behavior of an outbound sync request for MDM2. The schema elements define information required by MDM2 to calculate bill determinants for CCB and to support other processes in the MDM system.

3.9 Select Service Points That Meet Defined Criteria for Validation

Reference: Manage Meters Process Model - Page 3 on page 5 for the business process diagram associated with this activity.

Group: To Do Validate Register Constant

Actor/Role: CC&B

Description: This background process selects all electric Metered Service Points for a given Service Cycle evaluating all Service Points defined with Current Transformers and Potential Transformers. Ratios are calculated for each. Anomalies are highlighted and To Do Entries

created. It then finds the meter currently installed at the service point and extracts its dial constant from an identified meter characteristic. It then calculates a register constant by taking the product of all CT ratios and PT ratios and multiplying this value by the meter's dial constant. It then compares the calculated register constant with the actual register constant of every register linked to the meter. Anomalies are highlighted and To Do entries created

Entities to Configure

- To Do Type
- To Do Role
- Characteristic Type
- Characteristic Value
- Meter Type
- Item Type

Process Names

- REGCNST- Register Constant Validation - This background process is used to validate Register Constants for specifically defined Meters

4.0 Identify To Dos Associated with Register Constant Validation

Reference: Manage Meters Process Model - Page 3 on page 5 for the business process diagram associated with this activity.

Group: To Do Validate Register Constant

Actor/Role: CC&B

Description: To Do's related to Register Constant anomalies are identified.

Entities to Configure

- To Do Type
- To Do Role
- Characteristic Type
- Characteristic Value
- Meter Type
- Item Type

Process Names

- REGCNST- Register Constant Validation - This background process is used to validate Register Constants for specifically defined Meters.

4.1 Create To Do Entries

Reference: Manage Meters Process Model - Page 3 on page 5 for the business process diagram associated with this activity.

Group: To Do Validate Register Constant

Actor/Role: CC&B

Description: To Do Entries are created in CC&B for review by a CSR or Authorized User.

Entities to Configure

- To Do Type
- To Do Role
- Characteristic Type
- Characteristic Value
- Meter Type

- Item Type

Process Names

- REGCNST- Register Constant Validation - This background process is used to validate Register Constants for specifically defined Meters.

4.2 Review and Evaluate To Do Entry

Reference: Manage Meters Process Model - Page 3 on page 5 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User reviews the To Do Entry information as well as the Meter and Service Point records. There is investigation and the CSR or Authorized User determines the next steps for resolution for the Register Constant discrepancy.

4.3 Request Complete To Do

Reference: Manage Meters Process Model - Page 3 on page 5 for the business process diagram associated with this activity.

Actor/Role: CSR

Description: The CSR or Authorized User marks the To Do Entry as complete and requests completion of the To Do Entry. The CSR or Authorized User may add comments or a log entry for future reference.

4.4 Complete To Do Entry

Reference: Manage Meters Process Model - Page 3 on page 5 for the business process diagram associated with this activity.

Actor/Role: CC&B

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

Related Training

The following User Productivity Kit (UPK) modules provide training related to this business process:

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