

Oracle Utilities Customer To Meter

Release Notes

Release 2.8.0.0.0

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Oracle Utilities Customer To Meter Release Notes

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Preface

These release notes provide an overview of the enhancements, known issues, and other changes in this release.

Audience

Release Notes is intended for anyone installing or using Oracle Utilities Customer To Meter.

Related Documents

For more information, refer to these Oracle documents:

Installation Guides and Release Notes

- *Oracle Utilities Customer To Meter Release Notes*
- *Oracle Utilities Customer To Meter Quick Install Guide*
- *Oracle Utilities Customer To Meter Installation Guide*
- *Oracle Utilities Customer To Meter Database Administrator's Guide*
- *Oracle Utilities Customer To Meter Database Changes Guide*
- *Oracle Utilities Customer To Meter Optional Products Installation Guide*
- *Oracle Utilities Customer To Meter Licensing Information User Manual*

Administrative and Business User Guides

- *Oracle Utilities Customer To Meter Administrative User Guide*
- *Oracle Utilities Customer To Meter Business User Guide*

Supplemental Documents

- *Oracle Utilities Customer To Meter Server Administration Guide*
- *Oracle Utilities Customer To Meter Security Guide*

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Acronyms

The following acronyms and terms are used in this document:

Acronym	Definition
CCB	Oracle Utilities Customer Care and Billing
C2M	Oracle Utilities Customer To Meter
SOM	Oracle Utilities Service Order Management
ODM	Oracle Utilities Operational Device Management
MDM	Oracle Utilities Meter Data Management
OAAF	Oracle Utilities Application Framework

Chapter 1

Release Notes

This document provides general information about this release of Oracle Utilities Customer to Meter, including new functionality, known issues, and other important information.

Refer to the *Quick Install Guide* and *Installation Guide* for information regarding supported platforms and installation steps.

This guide includes the following:

- [Release Overview](#)
- [Database Changes](#)
- [Enhancements in Oracle Utilities Customer to Meter](#)
 - [Customer Care and Billing Related Enhancements](#)
 - [Meter Data Management and Service Order Management Related Enhancements](#)
 - [Operational Device Management Related Enhancements](#)
 - [Additional Enhancements](#)
- [System Data Details](#)
- [Known Issues in This Release](#)
- [Known Issues in This Release](#)
- [Supported Integrations](#)
- [Demo Data Information](#)
- [Oracle Utilities Application Framework v4.4.0.3.0 Release Notes](#)

Release Overview

This section contains general information about this release of Oracle Utilities Customer to Meter v2.8.0.0.0. The release includes the following components:

- Oracle Utilities Customer to Meter v2.8.0.0.0
- Oracle Utilities Application Framework v4.4.0.3.0

Please visit My Oracle Support (<http://support.oracle.com>) and Oracle Software Delivery Cloud (<http://edelivery.oracle.com/>) for the most recent service packs and patches for Oracle Utilities Customer to Meter v2.8.0.0.0 to ensure you have the most current version of this product.

Supported Platforms

See the **Supported Platforms** section in the *Oracle Utilities Customer to Meter Quick Install Guide* (included in this release) for a list of supported platforms.

Supported Upgrades

This version of Oracle Utilities Customer to Meter supports the following upgrade paths:

- From Oracle Utilities Customer to Meter v2.6.0.1 to v2.8.0.0.0
- From Oracle Utilities Customer to Meter v2.7.0.0 to v2.8.0.0.0
- From Oracle Utilities Customer to Meter v2.7.0.1 to v2.8.0.0.0
- From Oracle Utilities Customer to Meter v2.7.0.3 to v2.8.0.0.0

Addition of Operational Device Management

Oracle Utilities Operational Device Management is included as part of Oracle Utilities Customer to Meter, providing functionality for asset configuration, configuration reports, asset management for devices, and asset replication.

Customers can disable the Oracle Utilities Operational Device Management functionality if desired. Refer to the *Oracle Utilities Customer To Meter Database Administrator's Guide* and the *Oracle Utilities Customer To Meter Installation Guide* for details related to disabling Oracle Utilities Operational Device Management in Oracle Utilities Customer To Meter.

Database Changes

The database enhancements for v2.8.0.0.0 are fully documented in *Oracle Utilities Customer to Meter Database Changes Guide*.

Enhancements in Oracle Utilities Customer to Meter

This section outlines enhancements added in this release of Oracle Utilities Customer to Meter including:

- [Customer Care and Billing Related Enhancements](#)
- [Meter Data Management and Service Order Management Related Enhancements](#)
- [Operational Device Management Related Enhancements](#)
- [Additional Enhancements](#)

Note: The **Steps To Enable**, **Tips and Considerations**, **Key Resources**, and **Role Information** sections provide guidelines for enabling each feature, where applicable.

Customer Care and Billing Related Enhancements

This section outlines relevant enhancements introduced in the v2.8.0.0.0. release of Oracle Utilities Customer Care and Billing that are applicable to this release of Oracle Utilities Customer to Meter, including:

- [Customer Information Enhancements](#)
- [Rating and Billing Enhancements](#)
- [Payment Processing Enhancements](#)
- [Credit and Collections Enhancements](#)
- [To Do Management Enhancements](#)
- [Deregulated Markets Enhancements](#)
- [DataConnect Enhancements](#)
- [Digital Self Service Integration Enhancements](#)
- [Financials Integration Enhancements](#)
- [Web Services Enhancements](#)

Customer Information Enhancements

Standalone Control Central Search Portal

The standalone **Control Central Search** portal provides a search experience for a person, account, and/or premise that is consistent with other portal-based features or modules.

Additionally, the **Control Central** menu item and button on the Application Toolbar are relabeled to **Control Central Search** but the existing behavior for selecting a record and the subsequent navigation remains the same.

Steps To Enable

No steps are required to enable this feature.

Global Setting for Person Name Separator

Algorithms based on the NMFMT-VALFMT (Person Name Format) algorithm type now use the following **Installation Options** settings for determining the person name separator format for a person in the system:

- **Use Name Separator:** Indicates whether to use a character to separate the last and first names
- **Person Name Separator Character:** The character that separates the person's last and first names

Previously, configuring the Person Name format was defined via the name separator parameters in algorithms based on the NMFMT-VALFMT (Person Name Format) algorithm type.

Steps To Enable

Configure the **Name Separator** settings in the **Person** tab of **Installation Options**.

Additional Person Contact Type and Person Contact Validations

A new validation prevents the current **Contact Routing** attribute of a Person Contact Type from being changed if at least one Person record associates the person contact type with a Person Contact.

Another new validation prevents the **Person Contact Type** on a Person record from being changed if the new person contact type has different **Contact Routing** information.

Steps To Enable

No steps are required to enable this feature.

Additional Person Identifier Validations

The **Person Identifier Type** (previously Identifier Type) includes new configuration options to define the format and validations for customer identification details such as the driver's license number, tax identification number, and so on:

- **Allow As Primary:** Indicates whether or not to use the **Person Identifier Type** as the main identifier. When selected, validation occurs upon updating details in the **Person** tab on the **Installation Options** page. The validation ensures the Person Identifier Type defined for the Person or Business is enabled to be used as the primary identifier type.
- **Identifier Prefix:** Specifies the prefix type and delimiter character to use for a **Person Identifier Type**.
 - The valid options are as follows:
 - **Country:** Codes defined in the Country table
 - **State:** Codes defined for the Country defined on the Installation Options page
 - **Lookup:** Codes defined in an implementation-specific Look Up field name

- When the new configuration options are specified and the applicable Identifier Format algorithm is defined, validation occurs upon the creation or updating of a Person record with an identifier value for that Person Identifier Type. The validation ensures the validity of the identifier value based on the **Allow As Primary** and **Identifier Prefix** values of the Person Identifier Type.

Additionally, the **Person Identifier Type** portal replaces the **Identifier Type** page to provide a user interface experience consistent with other portal-based features or modules.

Steps To Enable

Configure Person Identifier Types and options on the **Installation Options** page with the appropriate settings to activate additional validations.

Case Portal

The **Case** page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor.

Converting the **Case** page to a portal provides a user interface experience consistent with other portal-based features or modules.

Steps To Enable

No steps are required to enable this feature.

Configuring Alert Messages in Alerts Zones

An implementation can configure the **Alerts** zones in the **Dashboard** portal and **Control Central - Account Information** portal to only display messages associated with algorithms configured in the **Control Central Alert** system event on the **Installation Options - Framework** page. Previously, the **Alerts** zones displayed messages from hardcoded or legacy alerts and alerts from algorithms configured in the **Control Central Alert** system event on the **Installation Options - Framework** page.

In addition, hardcoded and legacy alerts have been converted to algorithm types, providing the capability to configure the associated algorithms in the **Control Central Alert** system event.

Steps To Enable

1. Ensure that the General System Configuration feature type is not configured with the **Use Legacy Alerts** option type.
2. Configure the applicable **Control Central Alert** algorithms into the **Control Central Alert** system event.

Process Flows for Starting, Stopping, and Transferring Service

New Process Flow Types and associated Customer Service Request Types are provided to guide users, step by step, via process flows through the common steps and actions associated with start, stop, and transfer service requests. The supporting capabilities include:

- Inline customer searching or matching, configurable alerts, additional person maintenance, and deposit calculation
- Tracking the progress of guided steps and generating a final summary at the end of a process flow
- Saving and resuming a process flow
- Credit check integration points
- Creating and updating service agreements
- Automatic customer contact creation (for example, to record customer interaction or send welcome letter)
- Various plug-in spots to configure specific logic to meet a variety of implementation specific requirements

These new Process Flow Types and associated Customer Service Request Types will help increase a user's productivity by providing guided steps, via process flows, for the most common steps or actions associated with start, stop, and transfer service requests.

Steps To Enable

Refer to the following sections in the *Oracle Utilities Customer to Meter Administrative User Guide* for more information:

- Contextual Insights
- Action Method
- Setting Up Start, Stop, and Transfer Request Types

Service Agreement Status Transition Processing Update

The system processing that transitions a service agreement from a status of Incomplete to Pending (via Order completion) has been updated to always check the **Create Field Activity Start Stop** setting in **Installation Options** to determine whether a field activity should be created when starting or stopping a service.

Previously, the **Create Field Activity Start Stop** attribute on **Installation Options** was not checked during Order completion, resulting in the creation of a field activity regardless of the attribute setting.

Steps To Enable

No steps are required to enable this feature.

Enhanced Landlord Reversion Processing

When starting service, a service agreement's default start option is derived from the most recent service agreement with service at the service point. Algorithms based on the STLR-LL REV (SA Type Landlord Reversion) SA Type – Landlord Reversion algorithm type optionally allows the start option to be overridden by a landlord-specific start option, via an algorithm parameter, when reverting service back to the landlord. When a non-landlord subsequently moved in, the non-landlord received the landlord-specific start option (for example, not paying for a new connection charge) which they may not have been entitled to.

In this release, the STLR-LL REV (SA Type Landlord Reversion) algorithm type has been enhanced to derive the start option from the most recent non-landlord service agreement when starting service for a non-landlord.

The Enabled Landlord Reversion Processing feature will enable the system to differentiate which start option to use when starting service for a landlord and which start option to use when starting service for a non-landlord.

Steps To Enable

No steps are required to enable this feature.

Customer 360 Portal and New Dashboard Portal Zones

The **Customer 360** portal incorporates new streamlined and redesigned portal zones based on many existing Control Central-related portal zones. The functionality provided by these portal zones includes the following:

- **Customer Activity History Zone:** Provides a timeline-style activity feed providing a clear view of various customer interactions by combining field activities, customer contacts, Oracle Utilities Digital Self Service-initiated self-service task transactions, cases, collection events, cash only notices, billing events, payment events, and so on.
- **Customer Insights:** New contextual insight user interface "treatments" enable implementations to tailor account alerts based on severity or notification purposes. This feature provides a large badge insight treatment for critical or high priority events, an alert with an icon and flexible message, and a small badge account alert.
- **Financial Details Zone:**
 - **Usage and Billing Graph View:** Allows users to easily identify usage and cost trends, supporting all commodity types. The graph enables users to view a tailored monthly usage graph and a 13-month bill trend graph to answer usage-related questions.
 - **Financial History View:** Simplified version of existing financial information related **Control Central** zones. The view provides a summary of all financial data for reviewing an account. The financial data summary may include account balance breakdown, previous bills, succeeding bills, and deposit information. A flexible table view provides a drill-down experience into each of the major financial transaction types, allowing overall readability of the Financial Transactions table.
- **New Dashboard Portal Zones:**
 - **Customer Zone:** Provides a simplified customer and account information summary section containing crucial account data about the customer.
 - **Premise Tree Zone:** Combined existing account and premise tree content for streamlined wayfinding. A user can still easily navigate to service agreements, service points, and related entities.

The **Customer 360** portal and new Dashboard portal zones enable customer service-facing roles to easily handle account maintenance requests and most common inquiries, and reduce the training required for these roles.

Steps To Enable

- Define configuration settings in the following master configuration options:
 - **Display Icon Override Configuration.** Refer to **Display Icon Override Configuration** in the *Oracle Utilities Customer to Meter Administrative User Guide* for more information.
 - **Billing and Usage Display Configuration.** Refer to **Billing and Usage Display Configuration** in the *Oracle Utilities Customer to Meter Administrative User Guide* for more information.
- Define configurations settings for Insight Types and Insight Groups related to the Customer Insights insight class. Refer to **Contextual Insights** in the *Oracle Utilities Customer to Meter Administrative User Guide* for more information.
- Define the **Customer 360 Portal** as a link in the **Favorite Links** dashboard zone. Refer to **Favorites Links Zone** in the *Oracle Utilities Customer to Meter Business User Guide* for more information.
- Add the new Customer and Premise Tree zones to the **Dashboard** portal and configure each applicable user's **Portal Preferences** to display these zones accordingly. Refer to **Configuring Zones for a Portal and User Portal Preferences** in the *Oracle Utilities Customer to Meter Administrative User Guide* for more information.

Log Entry for Customer Contact To Do Entry

The TD-CCCB (To Do for Customer Contact) batch control enables the creation of a To Do Entry for a Customer Contact on a future date. The new To Do Entry serves as a reminder for follow-up actions.

When the batch control creates the To Do Entry, the system now generates a corresponding log entry for the Customer Contact. You can use the log to verify the creation of the To Do Entry and its creation date.

Steps To Enable

No steps are required to enable this feature.

Service-based Zones Conversion

The following Service XSL Handler-based zones have been converted to Data Explorer zones to provide the capability to sort information based on dates instead of strings:

- **Account Activity History** on the **Control Central - Account Information** portal
- **Activity Account Summary** on the **Control Central - Customer Information** portal

Additionally, the **Payment Tender History** fixed page has been converted to a portal.

Steps To Enable

No steps are required to enable this feature.

New Self-Service Task Search Filters

The **Self-Service Task Query** portal provides two additional search filters to refine the self-service tasks to retrieve. The **Status** filter selects tasks in a specific processing state and the options appearing in the drop-down list are dependent on the selected **Service Task Type**. The **Non-Final Status Only** filter retrieves all the self-service tasks initiated by the customer or only the tasks in non-finalized states, and when selected grays out the **Status** drop-down.

Steps To Enable

No steps are required to enable this feature.

Self-Service Task User Interface Standardization

The following **Self-Service Task** portal changes provide a consistent user interface experience for reviewing and managing customer-initiated Payment Arrangement, Start/Stop, Charity Contribution Enrollment, Web User Invitation, Account Verification, Automatic Payment Set Up, Bill Due Notification, Bill Ready Notification, Late Payment Notification, Meter Read Creation, Payment Received Notification, and One Time Payment self-service tasks:

- Removal of the **Actions** zone
- A new **Record Actions** section in the **Self-Service Task** zone
- A new **Record Information** section in the **Self-Service Task** zone summarizing the task with the following information:
 - Service Task ID
 - Business Object
 - Create Date/Time
 - Status Date/Time

Steps To Enable

No steps are required to enable this feature.

Rating and Billing Enhancements

Calculate Final Value Calculation Rule Enhancements

The C1-CalculateFinalValue (Calculate Final Reading Values) business object enables the system to search for meter reading details based only on Unit of Measure (UOM). Previously, the system searched for meter reading details based on UOM, Time of Use (TOU), and Service Quantity Identifier (SQI).

An implementation can configure calculation rules based on the C1-CalculateFinalValue business object to only search for meter readings based on UOM by configuring the **SQ Source Option** attribute. Optionally, an implementation can configure the attribute to include TOU-based and SQI-based meter reading details.

Steps To Enable

Refer to the **Calculation Details** embedded help for the Calculate Final Reading Values Calculation Rule for more information.

Batch Billing Process to Bill Accounts Based on Bill Cycles

The C1-BLIEB (Include/Exclude Bill Cycles in Billing) batch control enables the billing of a subset of accounts by specific open bill cycle or cycles instead of accounts linked to any open bill cycles.

An implementation can add or configure parameters in the C1-BLIEB batch control to:

- Include bill cycles in batch processing
- Exclude bill cycles in batch processing
- Filter by CIS Division to determine the accounts eligible for billing

Steps To Enable

Configure the C1-BLIEB batch control with the appropriate batch submission parameters.

Multi-Threading Support for Billable Charge Upload Staging Records

The BCU1 (Billable Charge Upload 1 - Validate Staging) batch control now supports multi-threading, which splits the total number of billable charge upload staging records for processing into multiple individual batch threads. The BCU1 batch control validates and defaults information on pending billable charge upload staging records.

This feature reduces the elapsed runtime for processing large numbers of billable charge upload staging records.

Steps To Enable

Refer to **Determining Threads** in *Batch Best Practices for Oracle Utilities Application Framework Based Products* for more information.

Off Cycle Bill Generator User Interface Standardization

The standalone **Off Cycle Bill Generator Query** portal makes the search experience consistent with other portal-based features or modules, and includes the following new search filters to easily locate off cycle bill generator records:

- **Business Object:** To search records by business object for a particular customer account
- **Creation Date - From** and **Creation Date - To:** To search records by creation date range for a particular customer account
- **Only Show Outstanding:** To search outstanding records for a particular customer account

The following **Off Cycle Bill Generator** portal changes were implemented:

- Relabeled **Actions** zone to **Record Actions** zone
- Relocated the **Record Actions** zone to the **Off Cycle Bill Generator** zone

- Added the **Record Information** section to the **Off Cycle Bill Generator** zone and added a related business object hyperlink
- Transferred the **Off Cycle Bill Generator Log** zone to the **Log** tab
- Suppressed the **Adjustments**, **Billable Charges**, and **Service Agreement** sections in the **Off Cycle Bill Generator** zone when data is not present.

Steps To Enable

No steps are required to enable this feature.

Usage Request User Interface Standardization

The following **Usage Request** portal changes provide a user interface experience consistent with other portal-based features or modules:

- A two-column layout (previously a one-column layout) that efficiently uses screen real estate to present information with minimal vertical scrolling.
- A new Record Information section summarizing the usage request with the following information:
 - Usage ID (removed from the Main section)
 - Business Object
 - Create Date/Time (removed from the Main section)
 - Status Date/Time (removed from the Main section)
 - User ID (removed from the Usage Request Details section)
 - External Reference ID
 - Cancel Reason
- Renaming of field labels in several sections to appropriately and clearly indicate data:
 - **Main: Usage** to **Information**
 - **Scalar Processing Information: Cutoff Date/Time** to **End Date/Time**
 - **Usage Response Details: Estimate** to **Estimated**
- Relocating of **Usage Request Details** fields to the **Main** section:
 - Bill Cycle
 - Window Start Date
 - Accounting Date (if applicable)
- Displaying of the **Exception Details** section with or without information

Steps To Enable

No steps are required to enable this feature.

Payment Processing Enhancements

Configurable Upload Processing for Payments with Invalid Account Details

The PUGL (Payment Upload) batch control enables the creation of payment events, payments, and tenders through the use of records in the various payment upload staging tables. The PUGL batch control distributes each payment to the suspense service agreement defined on the payment's Tender Source for uploaded payments with invalid related account details. When the correct account details are known, follow up on payments and redistribution to the correct service agreements can be performed by a business user.

The new USE-PYMENT-DISTRIB (Use Payment Distribution for Suspense Payments) parameter of the PUGL batch control provides the capability to distribute uploaded payments for invalid accounts to either the:

- Suspense service agreement defined on the payment's Tender Source
- Alternative service agreement defined by the rules in the algorithms configured in the Payment Distribution and Overpayment Distribution plugin spots on the account's Customer Class for the suspense service agreement defined on the Tender Source (for example, to an Excess Credit related service agreement).

Steps To Enable

Configure the PUGL batch control with the appropriate batch submission parameters.

Receipt Printing Using Point-of-Sale Printers

Oracle Utilities Customer to Meter supports the integration with Point-of-Sale (POS) or special cashiering station printers, which enables implementations to endorse checks and print receipts. Receipt printing functions are available for the following transactions:

- Payment Event
- Payment Quick Add
- Payment Event Quick Add

These **Tender Source** attributes allow the configuration of the IP address and port number of a POS or special cashiering station printer:

- Printer IP Address
- Printer Port

Steps To Enable

This release provides sample UI maps and scripts that consider IP address and port for a **Tender Source**. The sample UI maps and scripts, JavaScript functions, and printer API may vary between printer models.

Refer to *Oracle Utilities Customer to Meter Optional Products Installation Guide* for more information.

Third Party Payment Processing Enhancements

The Third Party Payment Processing Integration master configuration includes a default Cancel Reason that the system uses when processing one-time payment cancellation or automatic payment cancellation from a third-party payment processing system. This release allows defining of multiple payment cancel reasons in Third Party Payment Processing Integration and setting one of the reasons as the default.

Additionally, this release includes the following enhancements for third-party one-time payment cancellation or automatic payment cancellation processing:

- The C1-ThirdPartyOneTimePayNotification (Third Party One Time Pay Notification) inbound web service captures the payment cancel reason from the third-party payment processing system and the service's associated script(s) use the captured cancel reason to stop the payment in Oracle Utilities Customer to Meter.
 - This allows an implementation to have more granularity on payment cancellations based on cancel reasons, enabling them to levy fees and affect credit rating to meet specific implementation requirements.
 - If the captured cancel reason does not match the cancel reasons in the Third Party Payment Processing Integration master configuration, the inbound web service will use the default cancel reason.
- The C1-TAPCN (Third Party Auto Pay Cancellations) batch control uses the default payment cancel reason defined by the implementation.

Steps To Enable

Refer to **Third Payment Processing Options** in the *Oracle Utilities Customer to Meter Administrative User Guide* and the embedded help in the **Third Party Payment Processing Master Configuration** for more information.

Credit and Collections Enhancements

Alternative Payment Arrangement Creation Processing

A new **Use Alternate PA Creation Logic** attribute has been added to SA Type which may be used by an implementation when payment arrangement SA Types share a debt class with other SA Types. When this attribute is checked, the current balance on the transfer adjustment on the payment arrangement service agreement is set to zero instead of using the adjustment type defined in the Adjustment Type (Current=0) attribute to set the current balance to zero.

When payment arrangements are in their own debt class, the additional credit adjustment offsets the transfer adjustment. This results in an offsetting credit and debit in the payment arrangement debt class and a single credit on the non-payment arrangement debt class. However, when a single debt class is used, the two credits inaccurately impact the way debt age (arrearage) is calculated and presented.

The **Use Alternate PA Creation Logic** field ensures that debt age is calculated and displayed accurately when a single debt class is used.

Steps To Enable

Refer to the **Defining Service Agreement Type (SA Types)** section in the *Oracle Utilities Customer to Meter Administrative User Guide*.

To Do Management Enhancements

Non-Duplication of To Do Entries for Bill Segments in Error

The TD-BSERR (To Do for Bill Segments in Error) batch control eliminates the duplication of To Do Entries for bill segments in error resulting to a reduced number of created To Do Entries. The batch control eliminates duplication by updating the drill value to reflect the regenerated Bill Segment ID when an existing To Do Entry is found for the original bill segment.

Previously, the TD-BSERR batch control duplicated To Do Entries for the regenerated bill segments in error after the batch billing process completed the To Do Entries for bill segments in error and created new exceptions when an error occurred during bill segment regeneration.

Steps To Enable

Configure the TD-BSERR batch control with the appropriate batch submission parameters.

Tips and Considerations

Prevent the automatic completion of To Do Entries by not configuring the Creation Process on the To Do Type for To Do Entries related to bill segments in error.

Assigning To Do Roles to To Do Entries Based on a Premise's CIS Division

This feature optionally assigns a To Do Entry to an override To Do Role based on the CIS Division of the related premise.

The system calls algorithms plugged in to the **Installation - To Do Pre-Creation** system event when adding a To Do Entry and uses the algorithms to set up additional information, such as Characteristics, for the To Do Entry. The system also overrides the plugged-in algorithms with pre-creation algorithms configured on the To Do Type, if applicable.

Previously, algorithms based on the C1-TDCR-DFRL (Default to To Do Role via Account) algorithm type attempted to assign an override To Do Role on a To Do Entry based on override attributes related to its account only. When assigning a To Do Entry to a To Do Role, the algorithm may now optionally use the related premise's CIS Division to check if an override To Do Role for the To Do Type should be assigned to the To Do Entry.

Steps To Enable

Configure an algorithm, based on the C1-TDCR-DFRL algorithm type, with the appropriate parameters and applicable CIS Division records with the applicable override configuration settings for To Do Types.

Auto-Completion of To Do Entries Related to Credit and Collection Processes

The C1-AUTOCTDE (Auto-Complete Collection To Do Entries) algorithm automatically completes To Do Entries linked to these inactive processes:

- Collection
- Severance
- Write Off
- Overdue

By completing To Do Entries from these inactive processes, the system reduces the number of *Open* and *Being Worked On* To Do Entries.

Steps To Enable

Configure the C1-AUTOCTDE algorithm in the To Do Monitor system event of the following To Do Types:

- TD-CEVT (Collection Events Require Attention)
- TD-SEVT (Severance Events Require Att)
- TD-WOEV (Write-Off Events Require Attention)

For overdue processes, configure the C1-AUTOCTDE algorithm in To Do Types that are defined as algorithm parameters for the C1-OE-TD (Create To Do) algorithm type.

To Do Entries Prioritization Based on Bill Cycle Window Closing

A To Do Type - Calculate Priority algorithm type can override the default priority of a To Do Entry and use factors (which can change over time) to impact priority. Prioritization allows easy identification of exceptions that will impact the completion of a customer's bill and the resolutions.

This release provides the following To Do Type - Calculate Priority algorithm types to automatically adjust the priority of To Do Entries based on proximity to the bill window end date of a bill cycle:

- C1INCTODOPRI (Increase To Do Entry Priority)
- C1DECTODOPRI (Decrease To Do Entry Priority)

Algorithms based on these algorithm types can be defined using the following parameters:

- **Priority:** Priority of the To Do Entry
- **Number of Days:** Minimum or maximum number of days from the bill window end date
- **Message Category** and **Message Number:** Optional attributes that identify To Do Entries whose priorities can be adjusted

Algorithms based on the C1INCTODOPRI and C1DECTODOPRI algorithm types use the Characteristics of To Do Entries to determine if the priority of a To Do Entry requires adjustment.

This release also provides the C1ADDBCCTDCH (Add Account Attributes as To Do Entry Characteristic) algorithm type that stamps optional characteristics on a To Do

Entry whose Account ID is a characteristic. This algorithm type is under the To Do Type - To Do Pre-Creation algorithm entity and stamps the following optional characteristics:

- Bill Cycle
- Customer Class
- CIS Division

Steps To Enable

To enable this feature, complete the following steps:

1. Configure the C1ADDBCCTDCH algorithm in the To Do Pre-Creation system event of the appropriate To Do Types.
2. Configure the C1INCTODOPRI- and C1DECTODOPRI-based algorithms.
3. Configure the C1INCTODOPRI- and C1DECTODOPRI-based algorithms in the Calculate Priority system event of the appropriate To Do Types.

Deregulated Markets Enhancements

Create and Manage Products and Contracts

The following maintenance and query portals enable the creation, management, and search of consumer products, contracts, and consumer service requests:

- Consumer Product
- Consumer Contract
- Consumer Product Version
- Consumer Product Component
- Consumer Contract Rule
- Customer Service Request

Consumer Product enables the management of products offered to customers and **Consumer Contract** records customer relationships that can encompass multiple services, sites, and accounts. For example, a consumer contract for a customer's gas and electricity supply at a single site or a customer's water supply at multiple sites.

Consumer Product Version and the associated **Consumer Product Components** allow the capture of attributes used on consumer contracts such as duration of fixed-price period, contractual change amount, and prices.

Consumer Contract Rule enables the set up of new consumer contracts or updating of existing consumer contracts. For example, consumer contract rules can create or stop service agreement.

The following summarizes the relationships between the consumer product and consumer contract objects:

- Consumer Contract can relate to one or more consumer product versions
- The Consumer Product Version linked to a consumer contract is the version applicable to the Consumer Contract

- Consumer Product Component can record consumer contract rules and include eligibility criteria that vary the attributes

Customer Service Request enable the orchestration of complex customer-related processes that can create or update multiple objects:

- Customer Service Request Person
- Customer Service Request Account
- Customer Service Request Premise
- Customer Service Request Contract
- Customer Service Request Contract Products
- Customer Service Request Service Location
- Customer Service Request Related Objects

Steps To Enable

Refer to the **Defining Consumer Contract Options** in the *Oracle Utilities Customer to Meter Administrative User Guide* for more information.

Market Service Provider Model

The existing Service Provider model enables an implementation to represent service providers (such as retailers, suppliers, and competitive retail electric service providers) in a deregulated utilities environment. With this model, an implementation can configure service providers if other companies provide a service to their customers and an implementation's role(s) in a market interacts with these companies. The model also allows an implementation to configure service providers with a number of specific options such as Billing, Payment, and Consumption relationships.

The new Market Service Provider model provides an alternative option to configure service providers for each of their unique market identifiers. This model applies to markets where service providers may operate under multiple billing/payment relationship/consumption relationship options within a single market.

The Market Service Provider model introduces the following enhancements to the Service Provider feature:

- Conversion of the **Service Provider** page to a portal.
- Conversion of the **Service Provider Search** fixed page into the **Service Provider Query** portal.
- Expansion of the **Service Provider** entity to accept the service provider's unique market identifier, like the Data Universal Numbering System, as a valid input.

- Addition of **Characteristics** to capture market and implementation-specific information such as the service provider's certification details.

The screenshot shows a web form titled "Service Provider". At the top right are buttons for "Bookmark", "Clear", "Save", and "Refresh". Below the title is a tabbed interface with "Main" selected. The form contains several input fields with search icons: "SERVICE PROVIDER", "DESCRIPTION", "EXTERNAL SYSTEM", "NOTIFICATION DL PROFILE", "PERSON ID", and "SERVICE AGREEMENT".

The screenshot shows a record view for "Service Provider: Electric Supplier 1 - WBFT RR". At the top right are buttons for "Add", "Search", "Bookmark", and "Refresh". Below the title is a tabbed interface with "Main" selected. The record details are shown in a list view with expandable sections: "Main", "SA Relationship Type", "Bill Messages", and "Characteristics". Below the tabs is a table header with columns: "EFFECTIVE DATE", "CHARACTERISTIC TYPE", and "CHARACTERISTIC VALUE".

- Addition of the C1-ServiceProvider (Service Provider - CCB) and C1-MarketServiceProvider (Market Service Provider) business objects that support the creation of a regular or market service provider record.

Select Business Object

The screenshot shows a dialog box titled "Select Business Object". It contains a label "SERVICE PROVIDER - CCB BUSINESS OBJECT" and a dropdown menu. The dropdown menu is open, showing two options: "Market Service Provider" (highlighted in blue) and "Service Provider". Below the dropdown are "OK" and "Cancel" buttons.

In addition, the Market Service Provider model adds the **Provider Configuration Option** portal that allows an implementation to group common Billing, Payment, and Consumption configuration settings for regular and market service providers.

The screenshot shows a table titled "Provider Configuration Option" with a "Main" tab. Below the title is a section for "Provider Configuration Options List". The table has the following columns: "PROVIDER CONFIGURATION OPTION", "DESCRIPTION", "BILLING RELATIONSHIP", "PAYMENT RELATIONSHIP", "EDIT", "DUPLICATE", and "DELETE".

	PROVIDER CONFIGURATION OPTION	DESCRIPTION	BILLING RELATIONSHIP	PAYMENT RELATIONSHIP	EDIT	DUPLICATE	DELETE
1	WBFT-RR-PAYB-DCGEN	Bill For Them, Rate Ready, Pay Bill, Cons Dnmld Gen	We Bill For Them, Rate Ready	Pay SPR At Billing Time			

Aside from the common configuration settings, this portal allows an implementation to define the following configuration settings for market service providers:

- Market and Service Agreement Relationship Types
- Market Relationship Service Provider

- CIS Division
- External System

For each **Market Provider Configuration Option**, an implementation can define various market options for each service provider including the Service Agreement ID for each of the service provider's Service Agreement Roles.

SA Type SA Relationship Types ensures the validity of the SA Relationship defined for a service agreement and that the associated Service Provider is based on the selected Service Provider Model. The Market Service Provider model introduces the following enhancements to the Service Agreement Relationship Type feature:

- Conversion of the **SA Type SA Relationship Type** page to a portal.
- Conversion of the **SA Type SA Rel Type Search** fixed page to a query portal.
- Addition of the C1-SATypeSARelationshipType (SA Type SA Relationship Type) and C1-MktSATypeSARelationshipType (Market SA Type SA Relationship Type) business objects that initialize the configuration of the SA Type SA Relationship Type by using the existing Service Provider Model or new Market Service Provider Model.
- Simplification of the sub-service agreement setup for service providers by allowing an implementation to specify or override the information used to create a sub-service agreement based on the related Provider Configuration Option.

In addition, an implementation can now add the type of Service Provider Model that applies to each service agreement relationship type through the **SA Relationship Type** page. The Service Provider Model type validates whether the Service Provider defined on an SA Relationship is similar to the Service Provider Model defined on the SA Type SA Relationship Type.

This release also introduces new algorithm types and batch controls to process SA Relationship Types for the Market Service Provider model:

- Algorithm Types
 - SA Type - FT Freeze System Event
 - C1STGUSG (Stage Usage / Consumption to General Process)
 - SA Type - Bill Completion System Event
 - C1STGCHG (Stage Charges to General Process)
- Batch Controls
 - C1MUSGDL (Create Market Usage Download Process)
 - C1MCHGDL (Market Charges Download Process)

Finally, this feature adds the **Market Usage** and **Market Charge** maintenance and search portals.

The Market Service Provider model provides an alternative way to configure a service provider with its unique market identifiers.

Steps To Enable

No steps are required to enable this feature.

Key Resources

Refer to **Defining SA Relationship Options** in *Oracle Utilities Customer to Meter Administrative User Guide* for more information.

DataConnect Enhancements

The DataConnect Extract capability enables the extraction of critical information from Oracle Utilities Customer to Meter and accelerates data distribution to other on-premises applications, cloud solutions, or third party vendors.

New and Updated Customer Data-based Extract Files

This release includes the following new customer-related, tab-delimited extracts:

- **Mailing Address Extract for DataConnect v1+** containing mailing address details of the main person for each account in the extract file
- **SA/SP Batch Extract** containing relationship details of service points linked to each service agreement in the extract file

The existing **Customer Data-based extract for DataConnect v1+** includes the following changes:

- Formatting of Date and Date/Time information in XML Schema Definition (XSD) format
- Exclusion of mailing address details of the account's main person
- Exclusion of service point relationship details linked to a service agreement
- Maximum number of phone numbers to include per account in an extract file is now only three
- Maximum number of email addresses to include per account in an extract file is now only three

The removed mailing address and service point relationship details are now included in dedicated extracts.

The following new batch controls support data extraction for loading to other on-premises and cloud solutions:

- C1-MADIL (Mail Address Initial Load DataConnect v1+)
- C1-MADTX (Mailing Address Extract DataConnect v1+)
- C1-SSDTX (SA/SP Batch Extract)

The existing C1-CDTIL (Customer Data Initial Load for DataConnect v1+) batch control creates the required service agreement / service point-related synchronization requests, and C1-SSDTX processes the requests for the initial load extract and incremental changes extract.

Steps To Enable

Refer to **Defining DataConnect Options** in the *Oracle Utilities Customer to Meter Administrative User Guide* for more information.

New Billing Data Extracts for DataConnect v1+

This release includes the following new tab-delimited extracts containing information related to customer bills:

- Bill Data Extract for DataConnect v1+
- Bill Segment Data Extract for DataConnect v1+
- Bill Segment Line Extract for DataConnect v1+
- Bill Segment SQ Extract for DataConnect v1+

The following new batch controls support data extraction for loading to other on-premises and cloud services:

- C1-BLDIL (Bill Data Initial Load for DataConnect v1+)
- C1-BLDTX (Bill Data Extract for DataConnect v1+)
- C1-BSDIL (Bill Segment Data Initial Load for DataConnect v1+)
- C1-BSDTX (Bill Segment Data Extract for DataConnect v1+)
- C1-BSLDX (Bill Seg Lines Extract - DataConnect v1+)
- C1-BSSQZ (Bill Segment SQ Extract - DataConnect v1+)

A new Billing Extract Master Configuration for DataConnect v1+ master configuration is provided to configure extraction options.

Steps To Enable

Refer to **Defining DataConnect Options** in the *Oracle Utilities Customer to Meter Administrative User Guide* for more information.

Additional Updates to Existing Extracts

This release includes updates to a number of existing extracts:

- An **Add Column Header (Y/N)** parameter is available in the following batch controls:
 - C1-SASYX (SA-Based Extract for DataConnect)

Implementations can configure batch processes based on these batch controls to include or exclude header records from the extract files which allow easier identification of the fields in the extract data records.
- The following extracts format Date and Date/Time information in XML Schema Definition (XSD) format.
 - Billing Data Extract for DataConnect

Steps To Enable

Refer to **Defining DataConnect Options** in the *Oracle Utilities Customer to Meter Administrative User Guide* for more information.

Digital Self Service Integration Enhancements

Web User Summary Zone

The Web User Summary zone in the Customer Information tab of the Control Central portal allows users to review and manage web users of Oracle Utilities Digital Self Service that are linked to a customer's account. For example, users can provide assistance to a web user attempting to unlink from an account or can launch Oracle Utilities Digital Self Service in masquerade mode to simulate, troubleshoot, and resolve concerns or problems from the perspective of the customer.

Additionally, users can perform the following actions using this zone:

- Unlink web users from accounts and remove the associated Account-Person relationships
- Navigate to the **Self-Service Task Query** portal to select the self-service task they want to view or take further action on in cases where multiple self-service tasks are open or self-service tasks are in non-final states
- Navigate to the **Self-Service Task** portal to select the self-service task they want to view or take further action on in cases where one self-service task is open or one self-service task in a non-final state

The **Web User Summary** zone provides the following information:

- Web users associated with the person in context
- Accounts link to each web user with summary information like the account's current balance
- List of web users financially responsible for accounts based on the Account-Person relationship
- Web user's relationship type or role with an account
- Summary of open self-service tasks or self-service tasks in a non-final state for web users and associated accounts

Steps To Enable

Refer to *Oracle Utilities Digital Self Service* documentation for more information.

Financials Integration Enhancements

General Ledger File Extract for Oracle Financials Cloud

The C1-GLFCX (GL Extract for Oracle Financial Cloud) batch control enables the creation of a new file containing extracted general ledger information from Oracle Utilities Customer to Meter to accelerate interfacing of general ledger information with Oracle Financials Cloud.

Steps To Enable

Configure the C1-GLFCX batch control with the appropriate batch submission parameters.

Accounts Payable File Extract for Oracle Financials Cloud

The C1-APFCX (Accounts Payable Extract for Oracle Financial Cloud) batch control enables the creation of a new file containing accounts payable information from Oracle Utilities Customer to Meter to accelerate the interfacing of account payable information with Oracle Financials Cloud.

Steps To Enable

Configure the C1-APFCX batch control with the appropriate batch submission parameters.

Web Services Enhancements

REST APIs

New REST API inbound web services for expose the following object schemas and provide the capability to view and manage stored data.

- Account
- Bill
- Bill Segment
- Customer Contact
- Payment
- Payment Event
- Payment Tender
- Person
- Premise
- Service Agreement
- Service Point

REST API inbound services have also been provided to return V-Model Relationships and Account Financial History.

Steps To Enable

Review the REST service definition in the REST API guides, once available from the Oracle Help Center > your utilities application service area of interest > REST API. If you are new to Oracle Utilities REST services, you may want to begin with the Quick Start section.

Tips and Considerations

The REST web service library requires a separate Integration Suite license. The REST inbound web service includes a service script that requires an Application Service to be enabled for system security purposes.

Role Information

System administrators should grant users submitting the REST service with security access to the Application Service. System administrators should also set New Inbound Web Services from Inactive to Active.

Meter Data Management and Service Order Management Related Enhancements

This section outlines relevant enhancements introduced in the v2.4.0.0.0. release of Oracle Utilities Meter Data Management and Oracle Utilities Service Order Management that are applicable to this release of Oracle Utilities Customer to Meter, including:

- [User Experience Enhancements](#)
- [Device and Service Point Enhancements](#)
- [Field Work Enhancements](#)
- [Integration and Data Extract Enhancements](#)
- [Miscellaneous Enhancements](#)

User Experience Enhancements

Business Flag Overlays

The event bars in the Overlay zones of the **360 Degree View** page can now display business flags alongside usage curves. Business flags can be used to highlight issues discovered by external systems, including the Oracle Utilities Analytics Insights service. For example, Oracle Utilities Analytics Insights uses machine learning-driven workflows to flag cases of loss, tamper, and theft.

Previously, the event bars can only show five event types. This release removes the five-event type limit to enable you to view a rich set of events alongside the usage date. The event bar dynamically displays the top event types with data for the selected time period when additional events are shown to ensure that you can easily find key issues. When there are no events for the configured event types, the event bar automatically collapses.

Note: Oracle Utilities Analytics Insights requires a separate license.

Steps To Enable

To enable this feature, complete the following steps:

1. Open D1-360EventBarProfile (360 View Event Bar Profile) in the **Extendable Lookup** maintenance portal.
2. Configure an Extendable Lookup Value with a business flag type by setting **Bar Type** to *Business Flags* and selecting the appropriate Business Flag Type.
3. Open the Measuring Component Type to which you want to add the updated Extendable Lookup Value.
4. Add the Extendable Lookup Value to the Event Bar Profiles list in the Display Configuration section.

Device and Service Point Enhancements

Measuring Component Level Communication Modules Support

Measuring Component Level Communication Modules support provides the capability to associate manual meter registers with communication equipment (such as an Encoder Recorder Transmitter (ERT)), dispatch and complete specific field tasks related to attaching and detaching equipment to and from a meter, load reads and events referencing communication module identifiers, and record the reads and events to the associated physical meter or register.

The following business objects enable the attachment (rather than installing) of communication equipment to manual meters:

- D1-DvcCommEquipment (Device Communication Equipment)
- D1-DvcCommEquipmentType (Device Communication Equipment Type)

With this feature, you can perform the following:

- Associate manual meter registers to the communication equipment or modules
- Dispatch and complete specific field tasks related to attaching and detaching equipment to and from a meter
- Load reads and events that reference communication module identifiers
- Record the load reads and events to the associated physical meter or register

Attaching communication equipment to a manual meter records readings to the installed manual meter.

Steps To Enable

Create new device types for the device communication equipment and configure the device types as tracked devices attached to meters.

Multi-Equipment Assignment

Multi-Equipment Assignment enables monitoring of untracked equipment types associated with a service point, linking the equipment to one or more service points at any time, and determining the number of equipment pieces associated with the service point through the Equipment Count attribute.

Note: Untracked equipment are created as devices or items and as such, not synchronized when linked to a service point.

Steps To Enable

Configure the Equipment Type or Item Type attribute of untracked equipment or item as "Not Tracked". Link the equipment or item and equipment count to one or more service points.

Restrict Service Point and Device Data by Division Code and Access Group

The Service Point Restriction by Division Code and Access Group feature determines the service points that you can access based on your assigned divisions. The conditions by which service points are secured are as follows:

- If the service point has an access group, only users belonging to the access group can access the service point
- If the service point does not have an access group or division, all users will have access to the service point
- If the service point does not have an access group, the service point has a division code, and Restrict by Division is set to "Yes" users belonging to the division can access the service point

The following queries now include security by Division Code:

- 360 Search
- Service Point
- Device
- Device Configuration
- Install Event
- Measuring Component
- Usage Subscription
- Usage Transaction
- Contact
- IMDs

The security feature also applies to devices not installed on a service point. Previously, security was only applied to devices installed on service points. The conditions by which uninstalled devices are secured are as follows:

- If the device has an access group, only users belonging to the group can access the device
- If the device does not have an access group, all users will have access to the device

The Service Point Restriction by Division Code and Access Group feature provides another layer of security on the service point and supplements the existing Data Access Group security.

Steps To Enable

To enable this feature, complete the following steps:

1. Set the **Restrict by Division** option to "Yes" on the MDM Master Configuration.
2. Assign an **Access Group** to each Division on the **Division** portal (for each Division to be used to restrict access).
3. Assign **Divisions** to users in the **User Miscellaneous Information** zone on the **User - Miscellaneous** page.

4. Enable the Service Point business object pre-processing algorithm that defaults the data access group (D1-DFSPACGRP) by creating a new version of the algorithm and setting the Perform Defaulting parameter to "Y."
5. Enable the Device meter and item business object pre-processing algorithms that default the data access group (D1-DFMTACGRP and D1-DFITACGRP for meter and item respectively) by creating a new version of the algorithm and setting the Perform Defaulting parameter to "Y." This enables security by data access group on devices not installed at a service point.
6. To secure standalone measuring components, enable the Measuring Component business object pre-processing algorithm (D1-DFSMCAFGU).
7. Enable the Asset business object pre-processing algorithm that updates the device data access group (X1UPDDVDAG) by creating a new version of the algorithm and set the Process parameter to "Y."

Tips and Considerations

For projects, populate the Service Point Latitude and Longitude.

Field Work Enhancements

Pass Additional Data from Service Order Management

This feature enables the inclusion of attributes from Accounts, Persons, Service Agreements, Service Points, Devices, and user-defined values to outbound field activity requests.

Steps To Enable

Build a custom business object lifecycle Enter algorithm to include user-defined values. Plug the algorithm into the *Awaiting Response* state of the D1-FieldActivityOBComm (Field Activity Outbound Communication) business object after the X1-POPCUSTDT (Service Order - Populate Customer Details) algorithm.

Limit Field Work by Service Point Type

You can now configure Service Point Types with applicable Field Task Types to shorten the list of available Field Task Types when creating field activities manually.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

You can use the D1-SPFTT (Populate SP Type Field Task Type Table) batch job to populate existing service point types' valid field task types from existing field activities.

Enable Field Task Type by Service Point Type in Activity Orchestration

Activity orchestration algorithms that determine the field task type based on the service point or device condition now include Service Point Type as one of the criteria to determine the field task. Additionally, this release provides the following updates to Activity Type maintenance and administration:

- The Activity Type maintenance object includes a child table that stores existing Service Point, and Service Point Type criteria.
- The **Activity Type** portal displays the **Field Task By Device Condition** and/or **Field Task By Service Point Condition** zones when the activity type is an orchestrator.

Steps To Enable

Run the D1-PopAcTFTT (Populate Activity Type Field Task Type Table with Orchestration Algorithm Parameter Values) BPA script select the appropriate Orchestration Type to populate the Activity Type parameter values.

Support Activity Type Mapping in Inbound Field Activity Sync Request

In this release, inbound field activity synchronization requests can directly map an orchestration activity type to an external application's or Oracle Utilities Customer Care and Billing's Field Activity Type and Oracle Utilities Meter Data Management's Activity Type enabling many-to-many relationship between the two objects. Previously, only one Service Order Management orchestration type could be mapped to Oracle Utilities Customer Care and Billing's Field Activity Type, which resulted in issues if Oracle Utilities Customer Care and Billing had another Field Activity Type that needed to be mapped to another instance of the Enable Service Orchestration of Oracle Utilities Meter Data Management.

Steps To Enable

For implementations with only one Oracle Utilities Customer Care and Billing Field Activity Type (orchestrator) mapped to the orchestration type of the base orchestration business object-type business object pair, map the Oracle Utilities Customer Care and Billing's Field Activity Type to the Oracle Utilities Meter Data Management's external Activity Type ID.

For implementations with custom orchestration business object-type business object pair, and orchestration types of the base and custom business object mapped to two different Customer Care and Billing Field Activity Types:

- Create the mapping values in the FA_Type_CD extendable lookup in Customer Care and Billing.
- Configure the Customer Care and Billing's Field Activity Type, external Activity Type ID (Meter Data Management value), and Meter Data Management's Orchestration Activity Type.

Saving Attachments

You can now attach pictures, documents, and videos as proofs for completed field work activities using new zones in the **Device**, **Service Point**, and **Field Activity** portals. You

can affix attachments with .JPG, .TXT, .DOC, .PDF, .MPEG, and .CSV file formats. Additionally, this release provides a new completion event for creating and linking attachments to a device, service point, or field activity, and updates the Field Activity Inbound Communication Payload schema to include a placeholder for attachments received from the field work application.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

Use D1-AttachmentCreation (Create Attachment) completion event business object to configure completion events on field task types, if applicable.

Manually Complete Field Activities

The **Field Activity** portal provides a new **Complete** option for field activities in the "Communication in Progress" state that opens the **Field Activity Manual Completion** page. This page dynamically displays or hides appropriate completion details sections based on the field task type of the field activity being completed. Implementations have the option to override the default settings and show more or fewer sections by supplying a custom service script on the field task type.

The **Field Activity Manual Completion** page provides an appropriate completion details section that make field activity completion intuitive and more easily performed.

Steps To Enable

No steps are required to enable this feature.

Communication of Service Order Appointment Information to the Field Management System

The list of Service Order data attributes passed to field work management systems like Oracle Field Service Cloud has been expanded. The new data attributes that the system captures when an appointment is booked are as follows:

- Taken By
- Taken Date
- Comments

This reduces customizations by capturing appointment information and sending this data to the field management system.

Steps To Enable

No steps are required to enable this feature.

Integration and Data Extract Enhancements

Configurable Consumption Extract

Configurable Consumption Extract provides configurable custom measurement exports to reduce project costs and implementation times. This is useful for deregulated market participants that share measurement and consumption data with additional market information on a daily basis. Configurable Consumption Extract can serve as an alternative when DataConnect and standard maintenance object measurement data exports do not meet the business requirements. The design provides scalability and efficiency to exporting current data and historical changes in JSON format.

Steps To Enable

To enable this feature, complete the following steps:

1. Set up the target location for the export results.
2. Identify the master data from which to extract the measurements.
3. Create a Consumption Extract Request Type record that will coordinate the daily extract process.
4. Define the type of data to extract, including identifiers to include, execution detail, and file parameters by creating a Consumption Extract Type based on the Extract US Consumption to File business object.
5. Create Interval Snapshot Mapping records.
6. Run the Create Daily Consumption Extract Request batch jobs to start the process of extracting consumption.

The results are JSON files written to Oracle Object Storage or an on-premises file system (refer to the sample below).

```
{ "usId": "995647003500", "usType": "E-RES", "pSpId": "458081", "spId": "458081_001", "dvcId": "SN823287793219", "uomTouSqi": "KWH//", "tz": "US/Eastern", "intPerDay": "288", "intSize": "300", "mktPart": "DIRECT_ENERGY", "stDtm": "2020-01-01T00:00:00-05:00", "q1": "1.325", "c1": "301000", "q2": "1.325", "c2": "301000", "q3": "1.325", "c3": "301000", "<intervening intervals>", "q300": "1.325", "c300": "301000" }
```

Tips and Considerations

- Tune batch jobs by running performance test and determine the optimum number of threads.
- Schedule the extract during off hours when possible.
- Establish cleanup processes to remove old files, as required.

DataConnect

DataConnect algorithms, business objects, and batch controls provide better support for Opower integration.

The following DataConnect file extract algorithms extract usage data and write results in tab-delimited flat files:

- D2-IDEXTPRDU (Extract Tab-Delimited Initial Load/Ongoing Consumption (with UTC Offset) - Retrieves the consumption of a service point for a given period.
- D2-IDEXTPTUU (Extract Tab-Delimited Initial/Ongoing Consumption and Apply TOU Map (with UTC Offset) - Retrieves the consumption of a service point for a given period and applies a TOU Map to the consumption.
- D2-IDEXTIMDU (Extract Tab-Delimited Historical Correction Consumption (with UTC Offset) - Retrieves historical correction consumption for a service point.
- D2-IDEXTTTUU (Extract Tab-Delimited Historical Corrections and Apply TOU Map (with UTC Offset) - Retrieves historical correction consumption for a service point and applies a TOU Map to the consumption.

Note: All DataConnect file extract algorithms support consumption adjustment based on Daylight Saving Time.

The following DataConnect business object and batch controls provide a new service point data file containing service point, premise, device, and measuring component information:

- Business Object
 - D1-ExternalRepositorySPMtrSync (SP/Meter Sync for DataConnect v1 or later) - Extracts service point and meter information.
- Batch Controls
 - D1-SPMIL (SP/Meter Initial Load for DataConnect v1 or later) - Creates initial synchronization requests for service points, device configurations, and devices.
 - D1-SPMSR (SP/Meter Extract for DataConnect) - Creates extract files containing service point, device configuration, and device information.

Steps To Enable

Refer to **DataConnect** in the *Oracle Utilities Customer to Meter Administrative User Guide* for more information.

REST Inbound Web Services for Master Data

New REST API inbound web services expose the following schemas to enable viewing and managing of stored data:

- Install Event
- Item
- Meter
- Service Point
- Usage Subscription
- Usage Transaction

Steps To Enable

Review the REST service definition in the REST API guides, once available from the Oracle Help Center > your utilities application service area of interest > REST API. If you are new to Oracle Utilities REST services, you may want to begin with the Quick Start section.

Tips and Considerations

The REST web service library requires a separate Integration Suite license. The REST inbound web service includes a service script that requires an Application Service to be enabled for system security purposes.

Role Information

System administrators should grant users submitting the REST service with security access to the Application Service. System administrators should also set New Inbound Web Services from Inactive to Active.

Miscellaneous Enhancements

Reduction of Redundant To Dos

In this release, updates to the Communication Out business object, Communication In business object, and to the following Oracle Utilities Meter Data Management objects decrease the number of To Do entries created when the system reprocesses failed transactions:

- Initial Measurement Data
- Usage Transactions
- Completion Events
- Activities
- Settlement Transactions
- Device Management

Previously, the retry processes closed outstanding To Do Entries associated with errors, recreated To Do Entries for the same errors, and skewed To Do Type statistics reporting.

The enhancements to exception processing reduce storage requirements, improve operational efficiency, and increase the accuracy of To Do Entry counts.

Steps To Enable

No steps are required to enable this feature.

Operational Device Management Related Enhancements

This section outlines relevant enhancements introduced in the v2.3.0.0.0. release of Oracle Utilities Operational Device Management that are applicable to this release of Oracle Utilities Customer to Meter, including:

- [Asset Management Enhancements](#)
- [Inventory Enhancements](#)
- [Resource Management Enhancements](#)
- [Miscellaneous Enhancements](#)

Asset Management Enhancements

Asset Location Description Search Filter

The Asset Information Search query option provides a new filter to retrieve assets based on asset location descriptions. You can enter part of the asset location description and use upper case or lower case as appropriate.

Steps to Enable

No steps are required to enable this feature.

Asset Replication Includes Asset Attributes for Operational Device Asset Types

The system automatically copies the asset attributes of the source smart meter, communication relay, or communication component to the new asset when using Asset Replication. When duplicating an Oracle Utilities Operational Device Management asset, manually entering the asset attributes of the source asset to the duplicated asset is not necessary if the template asset used already includes the appropriate attributes.

Steps To Enable

No steps are required to enable this feature.

Changes to Questionnaire Service History's Application Service

To adhere to the Oracle Utilities standard of one unique Application Service for one business object, the W1-QuestionnaireSvcHist business object now uses the W1-QSTSVCHISTBOAS Application Service.

Previously, the W1-QuestionnaireSvcHist (Questionnaire Service History) and W1-ServiceHistoryWAM (General Service History) business objects used the W1-SVCHSTWUBOAS (Service History BO) Application Service.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

This release provides an upgrade script that retains the same Questionnaire Service History access of User Groups with CM Owner Flags that previously accessed the W1-QuestionnaireSvcHist business object that uses the W1-SVCHSTWUBOAS Application Service.

Enable Questionnaire Service History for Operational Devices and Service Order Management Activities

Questionnaire Service History provides the capability to address test and inspection issues in Oracle Utilities Operation Device Management. Additionally, this feature supports Oracle Utilities Operational Device Management and Oracle Utilities Service Order Management interaction for device tests and inspections, and pass through field activities.

You can access the questionnaire from **Menu**, then **Asset Management**, and then **Question**. Previously, you selected **Menu**, the **Condition Assessment**, and the **Condition Assessment Question**.

Steps To Enable

No steps are required to enable this feature.

Mass Asset Disposition Update by Batch

The **Change Disposition in Batch** button in the **Mass Asset Disposition Update** portal allows you to perform disposition updates on a large number of assets through a batch job.

Steps to Enable

No steps are required to enable this feature.

Time Zone Support on Location Objects

Several Location-related objects like asset location, work location, out of service location, and storeroom now include a **Time Zone** field. The system derives the time zone for new location from the user's profile but if a time zone is not specified on the user's profile, the system uses the time zone defined on Installation Options. The system can also derive the time zone from the location of the activity and send this as part of the activity message sent to an external system.

Steps to Enable

No steps are required to enable this feature.

Inventory Enhancements

Shipping Memo

Shipping Memo provides a comprehensive list of asset tracking functions that allow you to monitor and track shipped assets. This feature adds these portals:

- Shipping Memo Query
- Shipping Memo

Steps To Enable

No steps are required to enable this feature.

Role Information

System administrators should add to the To Do Type of W1-ATATD (Approval Type - Adjustment) the custom To Do Role that tracks shipped assets.

Shipping Memo Report

The **Print** button in the **Shipping Memo** portal enables you to generate a shipping memo containing a list of stock items associated with the shipment.

Steps To Enable

No steps are required to enable this feature.

Resource Management Enhancements

Change Request Portal

The **Change Request** portal provides the capability to request changes to objects that cannot be updated directly, justify the request, and describe the impact of the changes. The portal routes the change requests to appropriate parties for approval and applies the changes once approved. The portal also enables the describing of changes unrelated to any single specific object and request approval.

Steps To Enable

Set the Change Request Types referencing the product's preconfigured metadata to enable change request for the following objects:

- General (not related to any specific object)

Miscellaneous Enhancements

Batch Loader Request

The new Batch Loader Request feature handles high volumes of data through batches. Previously, the generic Online Loader Request only handled low volume simple objects that were primarily admin objects. The new Batch Loader Request provides the same requirements in terms of the format for CSV files as the Online Loader Request, but a batch loader request record acts like a control record and only references the CSV file with data. The data file can be a file in the file system on the server or an attachment uploaded into the application. Loading data from the file into staging records requires one batch job and loading the staging records into the application requires another batch job.

Steps To Enable

To enable this feature, create a Batch Loader Request Type:

1. Select **Admin**, select **Request Type**, and select **Add**.
2. Choose the Batch Loader Request Type business object.

Data Security by Owning Organization

Data security relies on the entity's association with an Owning Organization wherein only users with access to the Owning Organization can access the entity. The user's association with an Owning Organization is through the access groups configured on the data access roles of the user's profile.

In this release, data access restriction is always set to restricted regardless of the usage status of the Owning Organization search filters. Previously, enforcement of data security by the Owning Organization was optional, enabling data security by Owning Organization that required several configuration steps, and data access restriction based on Owning Organization search filters.

With the new restricted data security, you can directly secure an entity by populating its Owning Organization attribute or indirectly secure the entity by associating it with another entity that is directly secured to an Owning Organization. You can also not secure other entities. For example, operation and technical entities not used by business users should not be set to always restricted but rather the system administrator should review all the data unfiltered by Owning Organization to properly address issues and exceptions.

The following business entities directly support security by Owning Organization:

- Asset
- Location - includes all classes of locations stored in the Node maintenance object such as asset locations, storerooms, and so on

The following administration entities directly support security by Owning Organization:

- Activity Type
- Asset Type
- Location Type - includes all classes of location types stored in the Node Type maintenance object such as asset location types, storeroom types, and so on
- Question
- Specification
- Service History Type

Steps to Enable

To enable this feature, complete these steps:

1. Set up user configuration.
2. For upgrading implementations, identify primary tables with incorrect Owning Organization values and correct these online or with a custom plugin-driven batch process.
3. Run the Apply Access Group VPD Policy batch process.

To set up user configuration:

1. Configure access groups and roles to fulfill your business requirements. Define a global access group and link this to all access roles if you are sharing several entities across all owning organizations.
2. Configure each online user with a default access group and link the user to valid access roles.
3. Do not configure batch and integration users with default access groups but link these to valid access roles.

For upgrades, ensure existing records in the primary tables of the directly secured supported maintenance objects have the correct value in the **Owning Organization** field. This only applies to the list of directly secured entities. You can update online or through a custom plugin-driven batch process depending on the volume of each table and the number of records that need corrections.

Tips and Considerations

For upgrading implementations, ensure the **Owning Organization** field has the correct value for existing records in the primary tables of directly supported maintenance objects. Depending on the volume of each table and number of records with incorrect **Owning Organization** values, you can update the incorrect values online or use a custom plugin-driven batch process.

Role Information

System administrators should have access to the W1APLVPD Application Service in order to enable this feature through the Apply Access Group VPD Policy batch process.

Additional Enhancements

This section outlines additional enhancements introduced in this release of Oracle Utilities Customer to Meter, including:

- [Data Synchronization Enhancements](#)
- [Service Order Management Enhancements](#)
- [Oracle Field Service Cloud Integration Enhancements](#)
- [Miscellaneous Enhancements](#)

Data Synchronization Enhancements

CIS Division and Division Synchronization Across Customer and Metering Objects and Entities

The **CIS Division** transaction maintains and synchronizes both CIS Division and Division entities, allowing you to define a specific business unit, jurisdiction, or operating company within a large conglomerate of utilities on customer and metering entities. Previously, CIS Division was only specified on customer entities and Division was only specified on metering entities.

Additionally, the system will automatically maintain Division in the background, hide the **Division** menu item, and hide the **User Miscellaneous Information - Edit User Division** zone from the **User** portal.

CIS Division and Division synchronization across Customer and Metering entities also enhances the creation and maintenance of the following:

- Service Agreement and corresponding Usage Transaction
- Service Point
- User

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

You can run the X1-PSDPD (Populate SP Division from CCB Premise CIS Division) batch control to populate the Service Point table with application information related to the CIS Divisions of premises.

Device Configuration Synchronization from Asset to Meter Objects

The Device Configuration Synchronization from Asset to Meter Objects feature enables Oracle Utilities Operational Device Management to expose asset configuration to an Oracle Utilities Meter Data Management device. Oracle Utilities Operational Device Management records the changes to a meter configuration by changing the asset configuration to a configuration referencing a template device. The change in the asset configuration results in a synchronization with Oracle Utilities Meter Data Management and the creation of a new device configuration for the meter.

Steps To Enable

No steps are required to enable this feature.

Support for Asset and Device Configuration Synchronization

Enhancements to these data synchronization business objects enable Oracle Utilities Operational Device Management to send asset measurement configuration and specification changes during initial and ongoing synchronization to Oracle Utilities Meter Data Management devices:

- W2-SmartMeter (Smart Meters)
- W2-ManualMeter (Analog Meters)
- W2-CommunicationComponent (Communication Component)

Previously, Oracle Utilities Operational Device Management only sent asset measurement configuration to Oracle Utilities Meter Data Management during the initial synchronization.

The enhancements include changes to the **Settings** zone in the **Asset** portal:

- **Initial Measurement Configuration** field label changed to **Measurement Configuration**. This change applies to an asset whose Asset Type is a smart meter, manual meter, analog meter, or communication component.
- A new **Configuration Effective Date/Time** field that captures the effective date and time of the measurement configuration. If left blank during asset creation, the value defaults to the **Effective Date/Time** of the **Asset Disposition Detail** zone. During an update, the system validates if the new configuration effective date is later than the current **Effective Date/Time**.

The enhancements include updates to Asset Sync Requests:

- Audit logs appear in the **Asset Sync Requests** zone of the **Log** tab when changes to **Specification** and/or **Measurement Configuration** occur.
- Changes to **Specification** and/or **Measurement Configuration**, and **External ID** (populated by device synchronization) automatically sends an asset synchronization request to Oracle Utilities Meter Data Management.

Steps To Enable

No steps are required to enable this feature.

Support Operational Device Management Configuration

You can use the Item business object to create assets in Oracle Utilities Operational Device Management and synchronize the created assets as items in Oracle Utilities Meter Data Management. Additionally, the Item Asset business object now supports Oracle Utilities Operational Device Management configuration which provides support for template device mapping in Oracle Utilities Meter Data Management. This enables the creation of Installation Events on items.

Oracle Utilities Operational Device Management configuration enables you to view and manage Item Device Configuration Types without accessing Oracle Utilities Meter Data Management, and synchronize the configuration types between Oracle Utilities Operational Device Management and Oracle Utilities Meter Data Management.

Steps To Enable

No steps are required to enable this feature.

Pass Through Field Activities

Pass Through Field Activities provide the capability to route asset activities without a node (service point) and an asset (meter, item, or so on) to Oracle Utilities Service Order Management when the field task is associated with an asset activity type. An address or geographic coordinates replaces the node to indicate the work site for the field crew.

A new **Search By** option for pass-through activities without a service point is available in the **Activity Query** portal. This option uses the address of the field work site to retrieve relevant records.

Steps To Enable

No steps are required to enable this feature.

Usage Transaction Status Update for Deleted Bill Segments

Deleting a bill segment linked to a usage request transitions the status of the request and its corresponding usage transaction to "Discarded." The system also updates the usage transaction to indicate its link to a discarded or unused usage request. Previously, the system did not update the usage transaction status to indicate the link to the discarded usage request.

This feature allows you to easily identify billed and unbilled usage transactions.

Steps To Enable

No steps are required to enable this feature.

Service Order Management Enhancements

Activity Type on Service Order Management Activities

The W1-SOMActivity (Server Order Management Activity) business object now renders the Service Order Management Activity Type as a hyperlink on activity maintenance portals. Additionally, the business object displays the Service Order Management Activity Type Description on activity maintenance portals and as a read-only text in add and edit activity windows.

Steps To Enable

No steps are required to enable this feature.

Send and Receive Questionnaire Details to and from Service Order Management

You can now create an Oracle Utilities Operational Device Management activity request that automatically includes a service history questionnaire for an asset, which leads to the creation of an Oracle Utilities Service Order Management activity.

The feature also enables the creation of service histories in Oracle Utilities Operational Device Management from completed questionnaire details received from Oracle Utilities Service Order Management.

Steps To Enable

No steps are required to enable this feature.

Service Order Management Activity Display Enhancements

The **Service Order Management Activity** portal enhancements are as follows:

- When creating an activity in Oracle Utilities Operational Device Management, you are no longer transferred to the **Activity** portal of Oracle Utilities Meter Data Management.
- The **Activity ID** field label is now **Activity**, and displays an activity information string and a hyperlink that opens the **Activity** portal of Oracle Utilities Meter Data Management.
- Editing and deleting activities in the Communication In Progress, Completion Error, Completed, and Discarded states are not permissible.

Steps To Enable

No steps are required to enable this feature.

Oracle Field Service Cloud Integration Enhancements

Field Work Completion for Equipment Related Activities

Oracle Field Service Cloud enables the viewing of equipment installed on service points, devices, or measuring components (for example, Encoder Receiver Transmitters) linked to Oracle Utilities Service Order Management field activities. Oracle Field Service Cloud also provides the capability to perform the following activities on service points, devices, or measuring components, and pass the corresponding details to Oracle Utilities Customer Cloud Service:

- Install new equipment
- Remove existing equipment
- Remove existing equipment and install new (exchange) equipment

Steps To Enable

Refer to *Oracle Utilities Cloud Service Integration to Oracle Field Service Cloud Documentation* for more information.

Attachment Support for Activities, Devices, and Service Points

Send pictures, documents, and/or customer signatures linked to an activity from a Field Service Cloud mobile device to create corresponding attachments in Oracle Utilities Customer Cloud Service. Attachments can be linked to the activity, device, or service point linked to that activity from the Field Service Cloud mobile device.

Steps To Enable

Refer to *Oracle Utilities Cloud Service Integration to Oracle Field Service Cloud Documentation* for more information.

Miscellaneous Enhancements

Hidden Redundant Fields on Field Activity Type

The **Field Activity Type** administration page will no longer display the following configuration settings that are not applicable to Oracle Utilities Customer Care and Billing implementations or may only have one preset default value defined:

- Field Service Class
- Fieldwork Orchestration
- Eligible for Dispatch
- Appointment Booking

Steps To Enable

No steps are required to enable this feature.

System Data Details

Refer to the **System Data Details** sections in the following documents for information about new and updated system data delivered in this release of Oracle Utilities Customer to Meter that may need to be reviewed for possible impact by implementations:

- *Oracle Utilities Customer Care and Billing v2.8.0.0.0 Release Notes*
- *Oracle Utilities Meter Data Management v2.4.0.0.0 Release Notes*
- *Oracle Utilities Operational Device Management v2.3.0.0.0 Release Notes*

Known Issues in This Release

There are no known issues in this release.

Supported Integrations

Refer to the **Supported Integrations** sections in the following documents for integrations that are supported in this version of Oracle Utilities Customer to Meter:

- *Oracle Utilities Customer Care and Billing v2.8.0.0.0 Release Notes*
- *Oracle Utilities Meter Data Management v2.4.0.0.0 Release Notes*
- *Oracle Utilities Operational Device Management v2.3.0.0.0 Release Notes*

Demo Data Information

The application delivers a demo database based on the application versions provided with the release, including Oracle Utilities Application Framework. Demo data provides sample configuration and data for key application features.

Demo data is included in the package and includes its own installation instructions. Please refer to the *Oracle Utilities Customer To Meter Database Administrator's Guide* for more information or contact Oracle Support.

Oracle Utilities Application Framework v4.4.0.3.0 Release Notes

This section describes enhancements, system data details and deprecation notices in Oracle Utilities Application Framework v4.4.0.3.0 including:

- [Page to Portal Conversion](#)
- [Product Usability](#)
- [Integration Enhancements](#)
- [Data Export](#)
- [To Do Management and Processing Enhancements](#)
- [Batch Processing Enhancements](#)
- [Content Migration Assistant \(CMA\) Enhancements](#)
- [Implementation Tool Enhancements](#)
- [Security Features](#)
- [Analytics](#)
- [Miscellaneous Enhancements](#)
- [Oracle Utilities Application Framework Deprecation Notices](#)
- [Technical Upgrade Notes](#)

Note: The **Steps To Enable**, **Tips and Considerations**, **Key Resources**, and **Role Information** sections provide guidelines for enabling each feature, where applicable.

Page to Portal Conversion

To Do Entry Portal

The **To Do Entry** page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor.

The following points highlight some improvements in the new portal functionality:

- In the new page, log entries are visible on the Log tab, which is the product standard for maintenance pages with logs.
- In the new page, there is a "related object" display. The system uses the drill keys associated with the To Do entry and determine the information string of that object and displays it to the user. A user can click this link to drill into the related object. Separately, a **Work** button is added to the page that performs the following functionality: if the To Do is "open", it gets assigned to the user; the To Do becomes the 'current To Do' and populates that dashboard zone; the user is brought to the target transaction (and if there is a BPA script associated with the To Do message, that script is launched). Previously, the **Message Text** was clickable and a user used this link to drill into the related key or launch the script.
- In the new page, the sort keys are shown on the main page instead of a separate tab. The drill keys are also shown on the **Main** tab, but within the **Record Information** section, which is initially collapsed.

- The characteristics linked to a To Do Entry are shown in a separate zone on the Main tab. However, when editing the To Do Entry, if you are allowed to make changes to the characteristics, they are maintained using the edit dialogue. Since this is a portal/zone based maintenance, foreign key characteristics use the Search Zone metaphor for searching. This is the standard for all maintenance objects going forward. This is an improvement from the previous page where the search was the old fixed page metaphor, causing issues when attempting to reference an object that did not have an old legacy fixed page search. In addition, when maintaining characteristics for an automatic To Do Entry, the new page presents valid characteristic types by first looking for valid characteristic types for the To Do Type and if no values are found, shows all the valid characteristic types for the To Do Entry entity.
- If there are related To Do entries for the To Do being shown, a badge insight is used to highlight the number of related To Dos, using the Contextual Insight feature introduced in this release. In addition, a zone displays a detailed list of the related To Do entries is included on the portal.

The following points highlight functionality that is the same as the previous version of the page:

- The To Do Entry query by To Do Type only shows the To Do Entries that are valid for the user: ones assigned to the user or ones that are Open in a To Do Role that the user is in.
- The To Do Entry query by ID allows the user to view that To Do entry.
- Any user may add a User Log.
- Any user may edit the To Do and change comments.
- Only users that are valid for the To Do (per the criteria in the first bullet) are allowed to change the priority or add or change Characteristic values or are allowed to Forward, Complete or Send Back. Note that as before, Send Back is only enabled if the To Do entry's Assigned By is populated.
- A user completing the To Do entry is able to add comments as part of the action.

Standardizing the layout of the **To Do Entry** page provides you with a user interface experience that is consistent with other portal-based pages.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

If there are any foreign key characteristics that are configured to be valid To Do Entry characteristics and users may manually add a link to one of these types of objects, be sure that there is a Search Zone defined for the FK Reference for this characteristic type.

Upgrade scripts ensure that users with Read access to the existing application service will have access to the new application service associated with the new portal. This table lists the existing and new application services.

Object	New Application Service	Access Added to Any User Groups with this Application Service/Read Access
To Do Entry Query Portal	F1TODOEQ	CILQTDEP
To Do Entry Portal	F1TODO	CILQTDEP

Note that any existing bookmarks for this page will take user to the previous version of the page. You need to take the following actions to move the bookmark to the new page:

1. Click the bookmark. Take note of the To Do Entry ID.
2. Navigate to the **To Do Entry** portal via the menu.
3. Search and select the To Do Entry from your bookmark. This takes you to the new page.
4. Delete the existing bookmark from the **Bookmark** dashboard zone.
5. Click the **Bookmark** page action button to add a bookmark for this record for the new page.

Message Category/Message Portal

The **Message** page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor. Users may view messages for a message category and perform actions on this page.

Message Category: To Do

Search Add Bookmark Refresh

Main

Message Category

Main

MESSAGE CATEGORY 11010

DESCRIPTION To Do

Record Actions

Edit Delete Duplicate

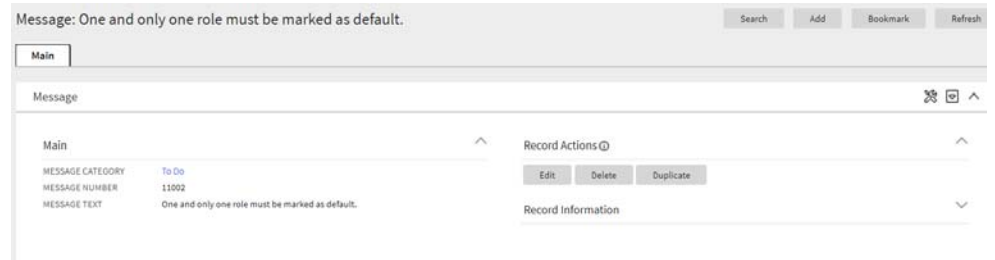
Record Information

Messages

Delete Edit

	MESSAGE NUMBER	MESSAGE TEXT	DETAILED DESCRIPTION
<input type="checkbox"/>	11001	At least one role must be provided.	
<input type="checkbox"/>	11002	One and only one role must be marked as default.	
<input type="checkbox"/>	11003	Duplicating a To Do Type resets the value of the Creation Process.	
<input type="checkbox"/>	11004	Creation process is already used by another to do type	
<input type="checkbox"/>	11005	Message is required if the to do type usage is manual.	
<input type="checkbox"/>	11006	Characteristics are not allowed for this to do type.	Characteristics are allowed only for to do types whose usage flag is set to manual.

Additionally, a separate Message maintenance portal is provided to view and update an individual message.



The new user interface pages include improved search criteria including searching by message text.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

Upgrade scripts ensure that users with Read access to the existing application service will have access to the new application service associated with the new portal. This table lists the existing and new application services.

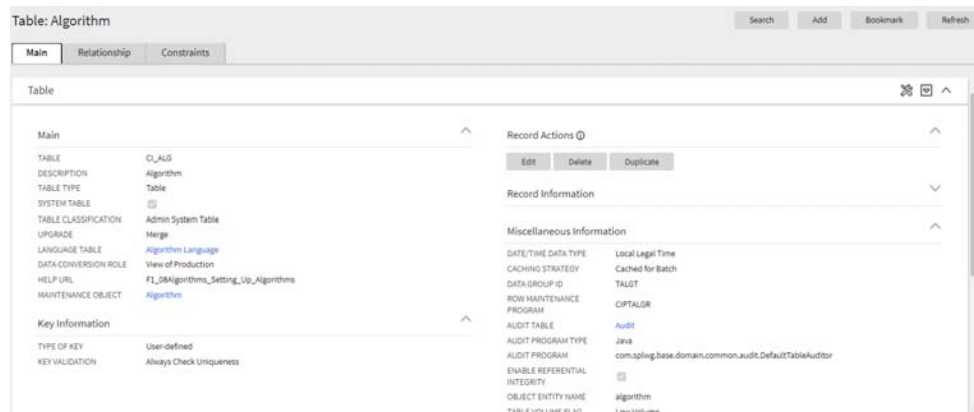
Object	New Application Service	Access Added to Any User Groups with this Application Service/Read Access
Message Category Query Portal	F1MSGQ	CILTMSGP
Message Category Portal	F1MSGC	CILTMSGP
Message Portal	F1MSG	CILTMSGP

Note that any existing bookmarks for this page will take user to the previous version of the page. You need to take the following actions to move the bookmark to the new page:

1. Click the bookmark. Take note of the Message Category.
2. Navigate to the **Message Category** portal via the menu.
3. Search and select the Message Category from your bookmark. This takes you to the new page.
4. Delete the existing bookmark from the **Bookmark** dashboard zone.
5. Click the **Bookmark** page action button to add a bookmark for this record for the new page.

Table Portal

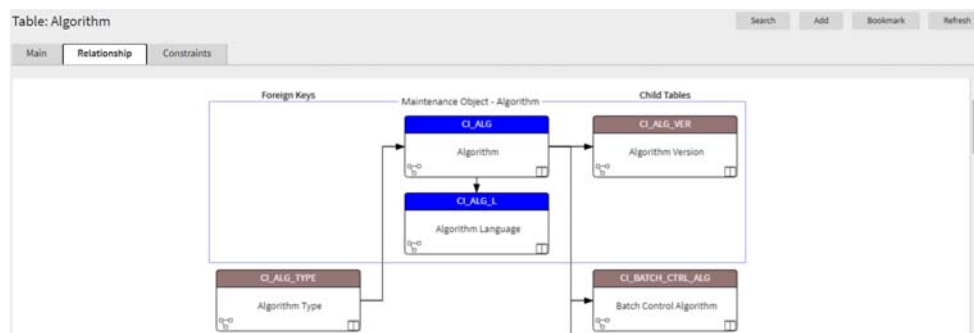
The **Table** page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor.



The following highlights some additional features in the new portal:

- The maintenance object(s) associated with the table are included in the display.
- Optional fields that are not populated are not shown for a cleaner view.
- The list of fields for the table is shown in a zone on the main tab. The zone indicates which fields are part of the primary key and which are foreign keys. The label of the field as defined in the Field record is displayed and the user may drill into the fields from this zone.
- The Constraints tab shows the constraints for this table and allows for maintenance of the information. In addition, other tables that have constraints that refer to this table are displayed in this tab.

As part of this enhancement, a new Relationship tab is introduced and includes an Entity Relationship Diagram (ERD). This is similar to what is shown in the Data Dictionary in the Application Viewer so users no longer need to launch the Application Viewer to get this information. Be aware that the Application Viewer is planned for deprecation. The zone highlights which related tables are part of the same maintenance object. A user can drill to the ERD of any of the tables in the diagram. Additionally, a user can navigate to the maintenance object page for any table in the diagram.



Standardizing the layout of the Table page provides you with a user interface experience that is consistent with other portal-based pages.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

Upgrade scripts ensure that users with Read access to the existing application service will have access to the new application service associated with the new portal. This table lists the existing and new application services.

Object	New Application Service	Access Added to Any User Groups with this Application Service/Read Access
Table Portal	F1TABLE	CILETBLP

Note that any existing bookmarks for this page will take user to the previous version of the page. You need to take the following actions to move the bookmark to the new page:

1. Click the bookmark. Take note of the Table.
2. Navigate to the **Table** page via the menu.
3. Search and select the Table from your bookmark. This takes you to the new page.
4. Delete the existing bookmark from the **Bookmark** dashboard zone.
5. Click the **Bookmark** page action button to add a bookmark for this record for the new page.

Time Zone Portal

The **Time Zone** page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor. It uses the All in One page metaphor that includes a list zone and display zone. The list zone includes a filter to narrow the results, if needed.

Standardizing the layout of the **Time Zone** page provides you with a user interface experience that is consistent with other portal-based pages.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

Upgrade scripts ensure that users with Read access to the existing application service will have access to the new application service associated with the new portal. This table lists the existing and new application services.

Object	New Application Service	Access Added to Any User Groups with this Application Service/Read Access
Time Zone Portal	F1TMZNM	CILTZNPN

Note that any existing bookmarks for this page will take user to the previous version of the page. You need to take the following actions to move the bookmark to the new page:

1. Click the bookmark. Take note of the Time Zone.
2. Navigate to the **Time Zone** portal via the menu.
3. Search and select the Time Zone from your bookmark. This takes you to the new page.

4. Delete the existing bookmark from the **Bookmark** dashboard zone.
5. Click the **Bookmark** page action button to add a bookmark for this record for the new page.

Work Calendar Portal

The **Work Calendar** page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor. The new user interfaces page includes more mass actions, including duplication capabilities for holiday dates.

Standardizing the layout of the **Work Calendar** page provides you with a user interface experience that is consistent with other portal-based pages.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

Upgrade scripts ensure that users with Read access to the existing application service will have access to the new application service associated with the new portal. This table lists the existing and new application services.

Object	New Application Service	Access Added to Any User Groups with this Application Service/Read Access
Work Calendar Entry Query Portal	F1WRKCLQ	CILTCLWP
Work Calendar Portal	F1WRKCAL	CILTCLWP

Note that any existing bookmarks for this page will take user to the previous version of the page. You need to take the following actions to move the bookmark to the new page:

1. Click the bookmark. Take note of the Work Calendar.
2. Navigate to the **Work Calendar** portal via the menu.
3. Search and select the Work Calendar from your bookmark. This takes you to the new page.
4. Delete the existing bookmark from the **Bookmark** dashboard zone.
5. Click the **Bookmark** page action button to add a bookmark for this record for the new page.

Access Group Portal

The Access Group page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor.

Converting the Access Group page to a portal provides a user interface experience that is consistent with other portal-based features or modules.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

Upgrade scripts ensure that users with Read access to existing application service will have access to the new application service associated with the new portal. The following lists the existing and new application services:

Object	New Application Service	Access Added to Any User Groups with this Application Service/Read Access
Access Group Query Portal	F1ACGRPQ	CILTASGP
Access Group Portal	F1ACGRPM	CILTASGP

An upgrade script is provided to update the Access Group's FK Reference (F1-ACCGP) with the new query zone (F1-ACGRPQ).

Note that any existing bookmarks for this page will take the user to the old page. You need to take the following actions to move the bookmark to the new page:

1. Click the bookmark. Take note of the Access Group.
2. Navigate to the **Access Group** page.
3. Search and select the Access Group from your bookmark. This step takes you to the new page.
4. Delete the existing bookmark from the **Dashboard's Bookmark** zone.
5. Click the **Bookmark** page action button to add a bookmark for this record for the new page.

Application Service Portal

The **Application Service** page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor.

As part of this change, the **Secured Objects** zone has been moved to the **Main** tab from the **Application Security** tab. The **Application Security** tab continues to have the zones showing the user groups with and without access.

Converting the **Application Service** page to a portal provides you with a user interface experience that is consistent with other portal-based features or modules.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

Upgrade scripts ensure that users with Read access to existing application service will have access to the new application service associated with the new portal. The following lists the existing and new application services:

Object	New Application Service	Access Added to Any User Groups with this Application Service/Read Access
Application Service Query Portal	F1APPSVQ	CILTAPSP
Application Service Portal	F1APPSVM	CILTAPSP

Note that any existing bookmarks for this page will take the user to the old page. You need to take the following actions to move the bookmark to the new page:

1. Click the bookmark. Take note of the Application Service.
2. Navigate to the **Application Service** page.
3. Search and select the Application Service from your bookmark. This step takes you to the new page.
4. Delete the existing bookmark from the **Dashboard's Bookmark** zone.
5. Click the **Bookmark** page action button to add a bookmark for this record for the new page.

Zone Portal

The **Zone** page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor.

The following highlights key changes to how a zone is maintained:

- The zone's portal links are now viewed and maintained on the **Main** tab.
- To support easier viewing and maintenance, the data explorer zone parameters are shown in three separate groups: **Filters**, **General Parameters**, and **SQLs**. The **SQLs** zone supports editing of SQL and its related parameters, including column definitions. In addition, the **SQLs** zone supports broadcasting to view related parameters, where each can be edited individually. When editing a Column parameter, the maintenance window has been streamlined by mapping the various mnemonics to separate fields with appropriate labels and search capability for foreign key references.
- A **Replicate** action has been added to the **Record Actions** section of the new user interface. In the previous zone page, the **Replicate** action was found in a special **Replicate Zone** dashboard zone.

Converting the **Zone** page to a portal provides you with a user interface experience that is consistent with other portal-based features or modules.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

Upgrade scripts ensure that users with Read access to existing application service will have access to the new application service associated with the new portal. The following lists the existing and new application services:

Object	New Application Service	Access Added to Any User Groups with this Application Service/Read Access
Zone Portal	F1ZONE	CILZZONP

Note that any existing bookmarks for this page will take the user to the old page. You need to take the following actions to move the bookmark to the new page:

1. Click the bookmark. Take note of the Zone.
2. Navigate to the **Zone** page via the menu.
3. Search and select the Zone from your bookmark. This step takes you to the new page.
4. Delete the existing bookmark from the **Dashboard's Bookmark** zone.
5. Click the **Bookmark** page action button to add a bookmark for this record for the new page.

Portal Maintenance

The **Portal** page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor. More specifically, the new portal provides easier access to other tab portals and context sensitive zones associated with a standalone portal.

Converting the **Portal** page to a portal provides you with a user interface experience that is consistent with other portal-based features or modules.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

Upgrade scripts ensure that users with Read access to existing application service will have access to the new application service associated with the new portal. The following lists the existing and new application services:

Object	New Application Service	Access Added to Any User Groups with this Application Service/Read Access
Portal	F1PRTL	CILZPORP

Note that any existing bookmarks for this page will take the user to the old page. You need to take the following actions to move the bookmark to the new page:

1. Click the bookmark. Take note of the Portal code.
2. Navigate to the **Portal** page via the menu.

3. Search and select the Portal from your bookmark. This step takes you to the new page.
4. Delete the existing bookmark from the **Dashboard's Bookmark** zone.
5. Click the **Bookmark** page action button to add a bookmark for this record for the new page.

Characteristic Type Portal

The **Characteristic Type** page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor.

Converting the **Characteristic Type** page to a portal provides you with a user interface experience that is consistent with other portal-based features or modules.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

Upgrade scripts ensure that users with Read access to existing application service will have access to the new application service associated with the new portal. The following lists the existing and new application services:

Object	New Application Service	Access Added to Any User Groups with this Application Service/Read Access
Characteristic Type Portal	F1CHRTYP	CILTCHTP

Note that any existing bookmarks for this page will take the user to the old page. You need to take the following actions to move the bookmark to the new page:

1. Click the bookmark. Take note of the Characteristic Type code.
2. Navigate to the **Characteristic Type** page via the menu.
3. Search and select the Characteristic Type from your bookmark. This step takes you to the new page.
4. Delete the existing bookmark from the **Dashboard's Bookmark** zone.
5. Click the **Bookmark** page action button to add a bookmark for this record for the new page.

Field Portal

The **Field** page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

Upgrade scripts ensure that users with Read access to existing application service will have access to the new application service associated with the new portal. The following lists the existing and new application service:

Object	New Application Service	Access Added to Any User Groups with this Application Service/Read Access
Field	F1FIELD	CILEFLDP

An upgrade script is provided to enable the following FK reference records with the Field search zone (F1-FLDSRCH) as opposed to using the fixed-page style search:

- F1BF-MO
- F1RF-MO
- F1SR-MO
- F1ST-MO
- F1TY-MO

Product Usability

User Dashboard Control

While using the system, if a user collapses the dashboard, the system retains this setting until the user changes it again. Previously, the collapsed state of the dashboard was only applicable during a user's session. The next time a user logged into the application, the dashboard would reset to the original settings.

While using the system, the user may adjust the width of the dashboard using the slider and the system retains this setting until the user changes it again. Previously, the user could only adjust the width of the dashboard in the user preferences.

Each user may now also choose to locate the dashboard zone on the left of the page rather than the right.

Steps To Enable

No steps are required to enable this feature.

To Do Dashboard Portal

The **To Do Dashboard** portal is intended to be used by both supervisor and non-supervisor To Do users. For supervisors, the charts consider To Do entries that are in a role which the supervisor is a member. For non-supervisors, the charts consider open To Do entries that are in a role of which the user is a member or entries currently assigned to the user.

The **To Do Dashboard** portal provides a high level summary of open To Do entries and To Do entries currently being worked on by various criteria using analytic charts.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

Supervisors are those users with security access to the "supervisor" access mode for the To Do Dashboard application service.

Upgrade scripts are provided to automatically allow users with Read access to either of the existing To Do Summary page and Supervisor To Do Summary page application services to have access to the new application service associated with the new portal. Note that the new portal does not replace any existing portal. It is provided as an additional summary portal to assist users with To Do management.

This table list the existing and new application services.

Object	New Application Service	Access Added to Any User Groups with this Application Service/Read Access
To Do Dashboard	F1DDASH	CILQTDSP, CILQTSSP In addition, users with access to the Supervisor Summary page will get supervisor access to the Dashboard portal

Create Tab Portals

When creating a new portal page in the product, it is common to want to add additional tab portals for the same page. For example, it is common to use a separate Log tab portal for viewing log entries. Previously, it was not possible to create the tab portal and link it to the appropriate standalone portal.

You can insert new tabs when creating a new portal a page without the need to perform programming or coding.

Steps To Enable

No steps are required to enable this feature.

Inbound Web Service Deployment - Filters Added

The **Deployment Status** zone on the **Inbound Web Service Deployment** portal has been enhanced to include filters. You may narrow down the results by Inbound Web Service name and/or description.

This enhancement allows you to easily retrieve deployment status data filtered by inbound web service names and descriptions.

Steps To Enable

No steps are required to enable this feature.

Admin Menu Hidden if User has no Admin Items

If a user does not have security for any entries in the Admin menu drop-down, the menu itself is suppressed from the toolbar. Previously, if a user did not have security for any admin menu entries, the Admin menu was still visible in the toolbar and it would show an empty line when clicked.

This feature provides the appropriate administrative menu items in the product's toolbar based on the user's assigned security access.

Steps To Enable

No steps are required to enable this feature.

Increased SQL Parameter Size

This feature increases the size of the following parameters to Varchar2 (32767) to provide more space for defining complex SQL statements to be used by zones or by the Select Records algorithm of a plugin-driven batch program:

- ZONE_PARM_VAL: Parameter Value on the Zone Parameters table (CI_ZONE_PRM)
- ALG_PARM_VAL: Value on the Algorithm Parameters table (CI_ALG_PARM)

The increased parameter size provides more space for defining complex SQL statements for data explorer zones and Select Record algorithms.

Steps To Enable

No steps are required to enable this feature.

Date and Time Field Improvements

Date, time, or combined date and time input fields have been enhanced with new and improved icons. In addition, the arrows to move the date or time forward or backward one day or hour have been removed. These changes have been applied to portal-based maintenance pages and query filters. Fixed pages are not impacted by this change.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

If you include JavaScript that targets the forward or backward arrows, it should be removed since those icons are no longer included in the generated HTML.

Additional Context Labels for Date and Time Fields

A date/time field has a single label throughout the application, but there are contexts in which a separate label may be needed for its "date" and "time" parts. An example of such context is when the field is used by the operational analytics product.

In the same way, date and time fields are associated with additional elements in the operational analytics product describing their various time aspects such as their month, year, hour, minutes, parts, and so on. These elements share a common part of the field's

label as their prefix. For example, for a **Creation Date/Time**, **Creation Date**, or **Creation Time** field, you may provide "Creation" as the field's base context label.

In this release, the definition of a Field is enhanced to support up to three sets of context-related alternate labels and corresponding labels for "Date", "Time", and "Date/Time" field types.

In the framework product, the following fields that are currently referenced by operational analytics tables are updated to include the context labels:

- ASSIGNED_DTTM: Assigned Date/Time
- COMPLETE_DTTM: Completion Date/Time
- CRE_DTTM: Create Date/Time

Steps To Enable

No steps are required to enable this feature.

Query Portals Introduced for Existing Pages

Previously, many configuration objects used the fixed page user interface metaphor. Fixed pages use popup search windows to locate records. Many of these configuration objects now provide query portals instead of popup search windows. Additionally, the Search menu item for these configuration objects open a query portal rather than a popup search window.

The query portals provide a more intuitive search interface with several criteria fields and a single search button as compared to the popup search window that featured a separate search button for each criteria group. When selecting a record from the results, the user is brought to the existing maintenance page. The navigation through the menu in Add mode bring the user to the maintenance page with a blank form (as before). The query portal includes an **Add** button to add a record from there.

The following provides additional detail of where this functionality has been added:

- **Algorithm:** In addition to algorithm and description, the query portal includes algorithm and parameter related search criteria.
- **Algorithm Type**
- **Batch Control:** Besides batch control, description, and category, the query portal includes related batch control information search criteria.
- **Business Object:** Besides business object code, description, and maintenance object, the query portal includes related business object information search criteria.
- **Business Service:** In addition to business service and description, the query portal includes service and schema related search criteria.
- **Characteristic Type:** The query portal provides searching by characteristic type, description, type of characteristic, and characteristic entity.
- **Data Area:** In addition to data area and description, the query portal include schema related search criteria.
- **Feature Configuration:** In addition to feature name and description, the query portal includes feature option and value related search criteria.

- **Field:** Besides field and description, the query portal includes related field information search criteria.
- **Foreign Key Reference:** In addition to foreign key reference code and description, the query portal includes additional search criteria.
- **Lookup:** The query portal provides field name and related field description search criteria.
- **Maintenance Object:** In addition to maintenance object, description, and table, the query portal includes maintenance object option search criteria.
- **Managed Content:** In addition to managed content, description, and type, the query portal includes managed content related search criteria
- **Menu:** In addition to menu name, description, and type, the query portal includes menu related search criteria.
- **Navigation Key:** In addition to navigation key and program component identifier, the query portal includes navigation key information related search criteria.
- **Navigation Option:** In addition to navigation option and description, the query portal includes navigation option information related search criteria
- **Portal:** In addition to portal code and description, the query portal includes portal information related search criteria.
- **Script:** Besides script, description algorithm entity, and script type, the query portal includes related step type information search criteria.
- **Table:** In addition to table and description, the query portal includes related table information search criteria
- **UI Map:** In addition to map code and description, the query portal includes map information related search criteria
- **Zone:** In addition to zone, description, and zone type, the query portal includes zone parameter search criteria

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

Upgrade scripts ensure that users with Read access to existing application services will have Read access to the new application services associated with the new query portals. The following lists the application services associated with the existing fixed pages and the corresponding application services for the new query portal:

Object	New Application Service	Access Added to Any User Groups with this Application Service/Read Access
Algorithm	F1ALGQ	CILTALGP
Algorithm Type	F1ALGT1	CILTALTP
Batch Control	F1BTCHQ	CILBTCP
Business Object	F1BOQ	FWLTBOJP

Object	New Application Service	Access Added to Any User Groups with this Application Service/Read Access
Business Service	F1BSVQ	FWLTBSVP
Characteristic Type	F1CHRTYQ	CILTCHTP
Data Area	F1DTARQ	FWLTDARP
Feature Configuration	F1FCFGQ	CILTWSDP
Field	F1FLDQ	CILEFLDP
Foreign Key Reference	F1FKRFQ	CILEFKRP
Lookup	F1LKUPQ	CILTLKFP
Maintenance Object	F1MOQ	CILEMOBP
Managed Content	F1MANCQ	FWLTMGCT
Menu	F1MENUQ	CILEMNUP
Navigation Key	F1NAVKQ	CILENAV
Navigation Option	F1NAVOQ	CILENVOP
Portal	F1PRTLQ	CILZPORP
Script	F1SCRQ	CILZSCR
Table	F1TBLQ	CILETBLP
UI Map	F1UIMPQ	FWLTUIMP
Zone	F1ZONEQ	CILZZONP

Integration Enhancements

HTTP Method

Parameters Supported for POST HTTP Method in REST Services

The REST engine supports defining path and query parameters for POST operations. Previously, POST operations did not support parameters. The assumption had been that all information was included in the payload.

This feature provides URL parameters for POST HTTP methods.

Steps To Enable

No steps are required to enable this feature.

Delete HTTP Method for REST Web Services

The REST Inbound Web Service was enhanced to support the DELETE HTTP method.

The actual actions and functionality that are triggered by a given REST service call are still controlled by the business object, business service, or service script that is configured on the operation. For example, if you configure an operation with the DELETE HTTP method and you reference a service script that is simply reading a record, the system will

perform the action of the service script and read the record. The HTTP methods are meant as external documentation.

Steps To Enable

No steps are required to enable this feature.

Additional REST APIs

In this release, the following inbound REST web services are available:

- **F1-BusinessInsights:** The Common Business Insights API enables adding business flag records.
- **F1-SubmitJob:** The Batch Job Submission API allows external batch scheduling systems to submit an adhoc batch submission request.
- **F1-SyncRequest:** The Master Data Synchronization API enables adding inbound synchronization request records.
- **F1-HealthCheckREST:** The Health Check API invokes the health check service and returns the health check results.
- **F1-Cache:** The System Cache Management API invokes the service that flushes the server cache.
- **C1-CustomerContact:** The Customer Contact API enables retrieval of customer contact records.

Steps To Enable

Make the feature accessible by assigning or updating privileges and/or job roles. Details are provided in Role Information. If you need additional information about this API, contact your Delivery Team.

Role Information

The service called by the operation on the REST web service references a specific Application Service. The administrator must grant security access to that application service to the user submitting the REST service.

Support for Tracing REST Inbound Web Services

The REST Inbound Web Service object exposes tracing configuration to enable tracing. Enable tracing for an inbound web service record creates log information for the record on future REST call executions.

Steps To Enable

No steps are required to enable this feature.

Submit Job REST Web Service Returns Job ID

The F1-SubmitJob REST Inbound Web Service now returns the resulting Batch Job ID. This allows calling systems to use that ID to get subsequent information about the Batch Job.

Steps To Enable

No steps are required to enable this feature.

User Redirection to Separate Target System

Your implementation may want to support the ability for a customer to authorize a customer service representative (CSR) to view the customer's account information in a customer facing portal. This would allow the CSR see exactly what the end customer is seeing or experiencing.

When the request for the CSR to view the customer information is received, the following steps occur:

- The security server for the customer facing portal is contacted to obtain a temporary grant code.
- The redirection response returns the grant code and the URL of the target customer facing portal.
- The browser redirects to the user to this URL with the grant code which is further authenticated and automatically exchanged for an authorization token, allowing the CSR to log in.

Standard security measures with private/public key encryption using JSON Web Tokens (JWT) ensure that only the implementation's application is allowed to communicate with the implementation's customer facing portal server. The system also provides a plug-in spot to allow for additional information, such as the customer's name and email address, to be included in the call to the security server.

This feature allows customers to authorize a customer service representative (CSR) to view the customer's account information in a customer facing portal and enable the CSR to see exactly what the end customer is seeing or experiencing.

Steps To Enable

Add a master configuration record using the F1-RedirectionTargetsConfig business object and configure the record with the following:

- URL of the target application
- URL of the security server
- Keystore alias for the public/private key stored in the application keystore used for secure communication with the security endpoint

Your product may also provide an algorithm to populate additional context information. If so, that algorithm may also be referenced in this configuration.

Tips and Considerations

Note that this feature works in conjunction with functionality provided by Oracle Utilities Customer To Meter.

Role Information

System administrators should grant access to the F1-REDIRECT (Redirect Service) Application Service to secure the call to this feature.

New REST Engine Version Setting for Inbound REST Web Services

In this release, a new REST Engine Version flag has been added to REST Inbound Web Services. All existing REST Inbound Web Services are marked with a REST Engine Version value of 1.0 for backward compatibility and all new services are assigned version 2.0 as a default. The following provide details of how the behavior will differ for each engine version:

- Root Node for Payload
 - REST Inbound Web Service records with a REST Engine Version value of 2.0 do not have a root node around the payload.
 - Although the common practice for data that uses JSON is to not include a root node, previously a root node was expected. For backward compatibility reasons, any REST Inbound Web Service records marked as version 1.0 should continue to supply a root node in the request, and responses will continue to return the root node.
- Default Format
 - REST Inbound Web Service records with a REST Engine Version value of 2.0 default to JSNO format. If required, this can be overridden by including the 'application/xml' parameter in the Accept header. REST Inbound Web Service records with a REST Engine Version value of 1.0 default to XML format. This is for backward compatibility. If needed, this can be overridden by including the 'application/json' parameter in the Accept header.
- Format for Numbers and Booleans in the Response
 - JSON format returns strings with the value surrounded by quotes while numbers and Booleans do not have quotes. Previously, the system was incorrectly treating numbers and Booleans as strings in the response in JSON format.
- Backward Compatibility
 - For Inbound Web Service records marked as REST Engine Version 1.0, the system provides override support to indicate that for specific Inbound Web Service records you would like to continue to receive quotes for numbers and Booleans in the JSON response. This is only applicable if your implementation has existing integrations that have worked around this issue and would fail if the response returns the corrected format. A feature configuration is provided to identify the Inbound Web Service records that fall into this category.
 - An explicit REST Engine Version setting helps customers account for functional differences between versions when implementing Inbound Web Services.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

If your implementation has integrations that have worked around the issue that numbers and Booleans were treated as strings and therefore had quotes in the JSON response, do the following to identify the Inbound Web Service records that should retain the old, incorrect format:

1. Select **Admin**, then **General**, then **Feature Configuration**.
2. Look for an existing feature configuration with the feature type External Messages. If one does not exist, create one.
3. Add an option for the option type **IWS JSON Data Type Exceptions**.
4. In the value, indicate the Inbound Web Service record that is an exception. Note that multiple options for the option type may be added. Additionally, the option value supports a comma delimited list.

JSON Response Correctly Handles Arrays

The REST response correctly returns list as arrays for JSON format regardless of the number of instances.

Previously, if a list included only one instance, the JSON response returned the single instance as a JSON object rather than a JSON array. If a list included more than one instance, the JSON response returned an array.

Steps To Enable

No steps are required to enable this feature.

Parameters Supported for POST HTTP Method in REST Services

The REST engine supports defining path and query parameters for POST operations. Previously, POST operations did not support parameters. The assumption had been that all information was included in the payload.

This feature provides URL parameters for POST HTTP methods.

Steps To Enable

No steps are required to enable this feature.

Data Export

Data Export Tools

New set of tools are provided that allow customers to export their data to files that can be consumed by downstream applications like Data Lakes or any other system that needs the data.

The application supports the following classes of export methods for a maintenance object:

- **Generalized:** Applies to maintenance objects with low to medium volume and update activities. Most maintenance objects in the system are eligible for this method. This method involves an initial export of the object's entire data followed by an ongoing export of the changes that occur over time. Note that the ongoing export functionality is only supported in a Cloud installation.
- **Specialized:** Applies to maintenance objects with high volume or frequent update activities. This method uses a specific batch process for each maintenance object to optimally export data. This type of export involves an initial export of the

object's existing data. The initial run of the batch process exports the entity's existing data. Subsequent runs of the batch process exports data incrementally based on a timestamp field.

New batch controls are provided for eligible maintenance objects based on their export method classification.

The **Generalize Export Dashboard** portal allows you to select eligible entities to export and review their export state and configuration at a glance.

Steps To Enable

Make the feature accessible by assigning or updating privileges and/or job roles. Details are provided in Role Information.

Tips and Considerations

The ongoing export feature of the Generalized Data Export method is only supported in a Cloud installation.

Role Information

System administrators that handle data export activities must have access to the following Secured Entity Application Services:

- F1-DATAEXPORT (Batch Controls) - All data export batch controls are associated with this application service
- F1-DATAEXPORTCTRL (Data Export Control Maintenance Object and Business Objects)
- F1DEXCNT (Data Export Control Portal)
- F1DEXCNS (Data Export Control Query Portal)
- F1GEXDAS (Generalized Export Dashboard Portal)

To Do Management and Processing Enhancements

Assign To Do Role Based on Access Group

In this release, the Access Group has been enhanced to include To Do Assignment Override configuration. This allows you to define special To Do Roles that you have created for your access groups and use the Assignment Override to indicate which To Do Types should have the To Do entry directed to the special To Do Role. The To Do entry functionality is heavily driven by To Do Role. Users are only allowed to view and work To Do entries that are assigned to a role that user is in. If your implementation has configured row level security for certain objects using an Access Group, you may want to ensure that only certain users can view To Do entries for those objects.

Defining special To Do Roles for access groups ensure that only certain users can view To Do entries for objects using an Access Group, you may want to ensure that only certain users can view To Do entries for those objects.

Steps To Enable

When configuring the To Do Roles, determine if To Do Entries for objects linked to certain access groups should be directed to specific groups of users.

- Define appropriate To Do Roles based on your To Do Types and your access groups, and link the appropriate user to each role.
- For each To Do Role, configure the To Do Types to which the role is valid.
- On each access group, configure the To Do Type/To Do Role override so that any To Do entry created for the indicated To Do Type will be assigned the indicated To Do Role for objects linked to this access group.

Configure the appropriate To Do pre-creation algorithm. A To Do pre-creation algorithm is needed to check for this override configuration and assign the appropriate role. This algorithm could be plugged in at the To Do Type (if only certain To Do Types require this functionality) or could be plugged in at the installation level (if a larger number of To Do Types require this type of override). The algorithm needs to identify the object related to the To Do entry that is governed by an Access Group. This object may be the Drill Key or may be related to the To Do Entry via a characteristic. Once the object is identified, the algorithm determines its access group and then checks if there is an override role for the To Do Types for this To Do entry.

Specific cloud services may already provide a To Do pre-creation algorithm to assign a To Do Role based on an identified access group. If one is provided and satisfies your business case, use that algorithm. Otherwise, an appropriate algorithm needs to be determined.

To Do Supervisor Actions

Supervisors can now reopen To Do Entries assigned to other users. Previously, only the user currently assigned to the To Do entry could reopen the To Do. Supervisors must be valid users in a To Do Role for the To Do Type to use this feature.

Steps To Enable

Make the feature accessible by assigning or updating privileges and/or job roles. Details are provided in Role Information.

Role Information

A supervisor must be a member of a User Group with *Supervisor Assignment* access mode on the To Do Management and To Do Search application services.

Batch Processing Enhancements

File Integration Extract Configuration

The application provides the following file integration administrative objects that define the processing needed to create a specific type of extract using a plugin-driven background process:

- File Integration Type: Describes and classifies the extract configuration.
- File Integration Record Type: Captures the sequence, format, and logic for extracting the data required by the extract record.

The File Integration Type defines the record types that make up the extract. Each file integration record uses a data area to define the record's format and a collection of extract algorithms that populate the data area. The file integration types are extendable through the addition of customer record type details or custom file integration records.

A new batch parameter defines the file integration type that is applicable to a batch control. The batch parameter works with the base-package Process Records algorithm that retrieves the file integration type configuration and processes in sequence for each record type of the configuration.

Steps To Enable

Make the feature accessible by assigning or updating privileges and/or job roles. Details are provided in Role Information.

Role Information

Implementers that view and define file integration types must have access to the following Secured Entity Application Services:

- F1-FILEINT (File Integration Type MO)
- F1-FLINREC (File Integration Record MO)
- F1FLINTS (File Integration Type Query Portal)
- F1FLINTP (File Integration Type Portal)

Ability to Skip Records in Plugin-driven Extract

The Process Record algorithm can prevent writing empty rows to extract file using the *skipped* parameter.

- File Integration Type: Describes and classifies the extract configuration.
- File Integration Record Type: Captures the sequence, format, and logic for extracting the data required by the extract record.

The recommended best practice when designing plugin-driven batch is to ensure that the SQL in the Select Records algorithm is only selecting the records that are relevant to the process. Previously, the extract plugin-driven batch process expected each call to the Process Records plugin to return at least one schema to write to the extract file. In use cases where the Process Record algorithm checks a condition of the given record and finds that it does not need to be extracted after all, an empty row was written to the extract file. In this release, for this situation, the Process Record algorithm can now configure the *is skipped* output parameter, which will ensure that no empty row is written.

Steps To Enable

Add logic to the Process Record algorithm that detects a condition where no extract details should be written and set the *is skipped* parameter to *True*.

Define Record XML Node for Plugin-driven Extract

You can define a record XML node when multiple schemas are returned for a plugin-driven extract that should be output in XML format.

The record XML node output parameter resolves issues where:

- The Process Record plugin returns multiple schemas (rows) for a given record.
- The plugin-driven extract batch process (whose output format is XML) is not able to determine which schemas belong together logically.

The output parameter 'record XML node' in the schema collection should be used to indicate the outer XML node to use to group related information together. All schemas returned from a single call to the Process Record plugin that have the same record XML node will be grouped in the written output within that XML tag.

Steps To Enable

To take advantage of this functionality, a Process Record algorithm that returns multiple schemas for a given record where all information in the schemas should be grouped within an XML tag should return the same Record XML Node value.

Thread Pool Name Batch Parameter

The Thread Pool Name parameter is available in all base-delivered batch controls. The parameter allows implementations to designate the batches to be run on a thread pool different from the default thread pool.

The record XML node output parameter resolves issues where:

- The Process Record plugin returns multiple schemas (rows) for a given record.
- The plugin-driven extract batch process (whose output format is XML) is not able to determine which schemas belong together logically.

The output parameter 'record XML node' in the schema collection should be used to indicate the outer XML node to use to group related information together. All schemas returned from a single call to the Process Record plugin that have the same record XML node will be grouped in the written output within that XML tag.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

Implementations with custom batch controls can add the Thread Pool Name parameter to their batch controls.

Root Node Element Optional on Plug-in Driven Extract

The plug-in driven extract batch program now supports configuration to suppress the inclusion of a Root Node Element by entering the word "suppress" in the XML Root Name parameter.

Steps To Enable

No steps are required to enable this feature.

Manifest File Creation

The batch framework now supports the ability to request the creation of a manifest file. Batch jobs that support the creation of the manifest file now include a "Manifest Option" batch parameter.

Manifest file information is provided in JSON format and includes information about the batch run, number of files, number of records processed, and details about each file including name, size, and SHA-256 hash value.

The following batch programs supplied by Oracle Utilities Application Framework were enhanced to support the new Manifest option:

- F1-GEXPI: The Generalized Initial Export Initiator batch control includes this new option and defaults to "Y."
- F1-GEEXO: The Generalized Ongoing Export batch control includes this new option and defaults to "Y."
- F1-GEIXP: The Generalized Initial Export Template batch control includes this new option and defaults to "Y." In addition, an upgrade script finds all the batch controls that were created from this template and inserts the new parameter on those records. The value defaults to "Y."
- F1-PDBEX: The Plug-in Driven Extract Template batch control includes this new option and defaults to blank. In addition, an upgrade script finds all the batch controls that were created from this template and inserts the new parameter on those records. The value is set to blank.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

If product delivered batch programs include the Manifest Option parameter, set this option to "Y" to produce a manifest file when running the batch job.

If your implementation has any custom background processes that produce extract files and you would like to include a manifest option, add the batch parameter "manifestOption". To set this up, complete the following steps:

1. Select **Admin**, select **System**, select **Batch Control**, and select **Search**.
2. Search for and select the Batch Control.
3. Add a new batch parameter and set the parameter name to "manifestOption" (it is important to use this value), description to "Manifest Option", and security type to "None."
4. Set the sequence to an appropriate value.
5. Note that for the detailed description, the recommendation is to follow the pattern of the base delivered options: "If set to 'Y' a manifest file is created with the following name: {batchCode}_ {batchNumber}_ {rerunNumber}_manifest.json"

Support for File Compression and Decompression

File compression when extracting and decompression when uploading is now supported. Not every batch program that manages extracts or uploads automatically supports this

functionality. Each batch program that supports it must explicitly indicate that the functionality is supported.

The following highlights additional information about the functionality:

- The system supports both GZIP compression/decompression and ZIP compression/decompression.
- If an extract program supports file concatenation, ZIP compression is not supported. Only GZIP compression is supported.
- To indicate that an extract file should be compressed, you should simply use .zip or .gz as the suffix of the file name. The system will use the compression method based on the chosen suffix. For example, myFile.gz will produce a GZIP compressed CSV file.
- For upload programs that support decompression, the file name's suffix will similarly trigger the appropriate decompression method.

The following programs provided by Oracle Utilities Application Framework support compression and decompression:

- Batch controls that use the same batch program as F1-PDBEX (Plug-in Driven Extract Template). Note that this batch program supports compression and concatenation. The combination of ZIP compression and concatenation is not supported.
- Batch controls that use the same batch program as F1-PDUPL (Plug-in Driven Upload Template).

Individual products (such as Oracle Utilities Customer Cloud Service or Oracle Utilities Meter Solution Cloud Service) may also include batch upload or extract programs. The batch control will explicitly state that compression or decompression is supported.

- F1-GEEXO: Generalized Ongoing Export
- The various Initial Data Export batch controls for each maintenance object

Steps To Enable

No steps are required to enable this feature.

Submission Method and User for Batch Jobs

New fields have been added to batch jobs to capture the submission method for a batch job and the user who submitted the job, if applicable. The Submission User is captured to have an audit of the user that created the submission. This may be different from the batch user (existing field) that is provided to all the processes executed by the batch program. Note that there are some use cases where this field is not applicable. For example, timed batches and batch submission records created by a scheduler do not have a "submission user."

The **Submission Method** field is a customizable lookup. The base supported values are:

- Online: Populated when a user manually creates a batch job submission
- Generated: Populated by algorithms that submit a batch job and by "initiator" batch jobs that submit other batch jobs

- **Scheduled:** Populated by the DBMS scheduler. Note that for other schedulers, it is not advised to use this value as there may be logic and validation related to records created with this value that may not apply to other schedulers
- **Timed:** Populated by the batch daemon that submits timed jobs
- **Other:** Populated when no other value is provided

Note: Existing batch job submission records were not updated to populate either of these two new fields.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

If your implementation has any algorithms or "initiator" type batch controls that create a batch job submission record, consider updating your code to populate the Submission Method of "Generated." Otherwise, the value of "Other" will be used.

Support Cancellation of In Progress Batch Job Submission

In this release, you can request to cancel a batch job submission record for a job that is in progress. Previously, you could only cancel a pending batch job submission. The following points highlight additional information regarding this feature:

- The new Pending Cancel status allows you to cancel a Pending or Started job submission record. The status transitions to Pending Cancel. This is a signal to the batch processor. For pending jobs, it removes the job from the queue. For in progress jobs, it discontinues the processing. Once the batch processor confirms that all the work or pending work is canceled, it updates the status of the batch job submission record to Canceled.
- Batch job submission records will only transition to Ended if the batch run completed. Previously, when you canceled a Pending batch job submission record, the status would be changed to Canceled and then once the batch processor removed the job from the queue, the status would be updated to Ended.
- Batch jobs that were initiated by the DBMS Scheduler do not support this functionality. An existing business service may be used to cancel a DBMS job.
- The new Cancel operation of the F1-SubmitJob Inbound REST Web Service allows an implementation to request the cancellation of a job from an external system.

You can now cancel a batch job submission record with an In Progress or Pending status.

Steps To Enable

No steps are required to enable this feature.

Additional Batch Categories

The Batch Category flag has been enhanced to add two additional values: Upload and Upgrade.

- **Upload** may be used to categorize batch controls that are responsible for uploading data.
- **Upgrade** may be used to categorize batch controls that are responsible for upgrading some set of data based on other data.

The new Batch Category options allow you to categorize batch controls used for uploading and upgrading data.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

Note that for batch controls delivered with the base package, the **Batch Category** field should have a base value defined. This value can be overridden by an implementation. For upgrading clients, existing batch controls are not updated to use new categories. For example, if there are existing batch controls that upload data but were originally delivered with a 'Process What's Ready' category, your data will remain with the 'Process What's Ready' category.

Support for Interrupting DBMS Job Steps

The system provides a new business service that receives a DBMS Job Name and finds all the running batch jobs for the Job's chain. For each one found, it cancels the batch job submission entry and marks the step "failed" in DBMS without stopping the DBMS Job. The steps in the chain can subsequently be restarted using the DBMS Scheduler - Restart Failed Chain business service.

This feature allows you to easily restart a DBMS job by interrupting a DBMS Job Step.

Steps To Enable

No steps are required to enable this feature.

Start Date, End Date, and Time Added to Batch Thread Instance

The start date/time and end date/time of a batch thread instance are captured.

Previously, this information was only available in informational messages linked to batch thread instance. The informational messages are still included but now that start and end date/time stamps are captured directly on the instance record.

This feature will make it much easier for implementation to do analysis about batch timings at the instance level, if desired.

- The Process Record plugin returns multiple schemas (rows) for a given record.
- The plugin-driven extract batch process (whose output format is XML) is not able to determine which schemas belong together logically.

The output parameter 'record XML node' in the schema collection should be used to indicate the outer XML node to use to group related information together. All schemas returned from a single call to the Process Record plugin that have the same record XML node will be grouped in the written output within that XML tag.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

For existing batch thread instance records created prior to upgrading to this version, the system does not automatically populate the new columns. There is an upgrade background process provided to upgrade records if an implementation would like to do analysis of older records. The batch control is F1-BTIDT (Upgrade Batch Thread Instance Date / Time). It includes parameters to limit the upgrade to certain batch controls and/or a specific date range so that only the records you plan to include in your analysis are affected. Review the batch control detailed description for more information.

This batch control has its own application service. In order to run the batch job, you must have privileges to this application service: F1-BTIDT, access mode F1EX.

Environment Information Added to Batch Email

The email sent when a batch program completes now includes information related to the installation configuration for the environment where the batch was run. This will help users that may be working in more than one environment (for example, development and test or two different testing regions), users that are working in more than one version of a product, or users that are working with more than one product.

The email now includes:

- The product name taken from the row in the Installed Products collection on the Installation Options that is marked at the 'display' product. This is the product name visible in the application heading.
- The product version taken from the same installed products row.
- If configured, the Domain Name taken from the Messages collection on the Installation Options. Refer to the description of the new Define an Environment Domain Name feature for more information.

Information related to the installation configuration of the environment that ran the batch job helps users working in more than one environment, in more than one product version, or with more than one product.

Steps To Enable

To take advantage of this functionality, a Process Record algorithm that returns multiple schemas for a given record where all information in the schemas should be grouped within an XML tag should return the same Record XML Node value.

Content Migration Assistant (CMA) Enhancements

Default User Support for CMA

The new Default User attribute in the Migration Assistant Configuration (Master Configuration) record prevents errors from occurring when the system references a non-existing user ID in the target environment during a data import.

You have the option of defining a Default User. The Configuration Migration Assistant tool uses the defined Default User when a record has constraints on the User table and the referenced user ID is invalid.

Steps To Enable

In the **Master Configuration** portal, update the Migration Assistance Configuration with a Default User ID.

Migration Configuration Enhancements

A migration plan has been provided for the Table object, allowing for changes to customizable fields to be copied to another environment. The F1-SystemConfig (Framework System Configuration) migration request has been updated to include the new migration plan.

Steps To Enable

No steps are required to enable this feature.

Test Data Migration and Other Improvements

Various enhancements were made to the Content Migration Assistant tool (formerly known as Configuration Migration Assistant) to better handle migration of selected business entities for testing or other purposes. As such its name has been slightly changed to emphasize that it can be used to migrate any type of content, not just configuration data.

The following points highlight key export related improvements and changes:

- An **Entity Summary** zone listing how many entities were exported by maintenance object is shown on the Migration Data Set Export portal.
- A new **Collect Entity** dashboard zone is available to provide an easier way to collect entities to export onto an Entity List type of migration request. The zone appears on the dashboard once a migration request is in context, allowing the user to add any entity to the request list while reviewing information on the entity's maintenance portal.
- Entities specified using their prime keys on a Criteria-based migration request are listed in a zone to allow easy navigation to these entities.
- Search by a data set identifier is now supported.

The following points highlight key import related improvements and changes:

- The performance of the Apply Objects batch process is significantly improved when migrating master and transaction entities. This is mainly achieved using a new extendable lookup that guides the tool in processing objects in the order that better reflects their referential dependency on other entities, thus reducing significantly the number of retries needed to successfully import an entity. In addition, migration objects that belong to master and transaction entities inherit part of their system generated key from the migration transaction they are linked to, thus contributing to having all objects that depend on each other be processed by the same batch process thread.

- The **Migration Objects In Error** zone now lists objects based on their processing order, allowing the user to resolve issues in a more intuitive sequence.
- An **Entity Summary** zone listing all imported entities by maintenance object and status is shown on the **Migration Data Set Import** portal. A similar zone is also available at the transaction portal.
- A navigation link to the currently active import related batch process is shown on the data set portal, providing a visual indication as to whether that process is in progress or not.
- Transaction and object related zones are now shown on designated tabs on the migration data set portal, supporting a more intuitive organization of import information.
- Search options by a data set identifier or by migration object are now supported.

Enhancements to the Content Migration Assistant tool provides better migration of business entities for testing and other purposes..

Steps To Enable

No steps are required to enable this feature.

CMA Performance Improvements

The Apply Objects step in CMA has been enhanced to more efficiently apply master and transaction objects. Less retries are used when applying master and transaction objects. When the process of applying an object results in an error, the system keeps retrying that object for a fixed number of times. Master and transaction data are more likely to be processed in the correct dependency order and therefore require less retries.

An import log record is not added when importing a master or transaction entity. Capturing a log record on the imported maintenance object log table is more relevant when importing configuration entities, especially when the import is to a higher environment like production. When importing master and transaction data it is mainly for testing purposes and usually involves higher data volumes so adding an extra log record to every entity unnecessarily consumes time and resources.

The enhancement to the Apply Objects step in CMA efficiently applies master and transaction objects, which results in less retries and errors.

Steps To Enable

No steps are required to enable this feature.

Implementation Tool Enhancements

Data Explorer Graph Support

Info Data Explorer - Single SQL and Info Data Explorer - Multiple SQLs zones now include five data visualization option parameters that may be configured to show the zone data in one or more graphical formats. Option types of Grid, Chart and Map are supported, If a zone defines visualization options, the data explorer will provide icon buttons to toggle between the various views. These buttons are presented in the same

order they are defined in the parameter list. Note that if more than one visualization option is present, one option must be of type Grid, allowing for a maximum of four graphical options. The graphs support broadcasting of values from the chart to other zones as filters.

The new data visualization option parameters provide various graphical formats to present zone data.

Steps To Enable

No steps are required to enable this feature.

New Action Method

The Action Method feature provides edge products and implementations the ability to define an object that captures configuration for determining a value, such as an administrative code or an algorithm based on criteria. For example, the appropriate customer service request type to use for starting service for a customer can be determined based on the account's customer class and the CIS division.

Each use case that takes advantage of this functionality is defined using an Action Method Role, defined via an extendable lookup. In the above example, there is an action method role for Start Service. Each Action Method Role value defines one and only one Action Method record, which is where the criteria is defined along with the values determined by the criteria. In the above example, the Action Method for the Start Service action method role provides configuration for indicating the Customer Service Request Type based on a combination of CIS Division and Customer Class. The action method's business object defines a special algorithm plug-in spot called 'Retrieved Action Method Details'. The algorithm receives the criteria and returns the details as per the use case. In the above example, the caller would provide the CIS Division and Customer Class, and the algorithm would use that information to return the correct Customer Service Request Type.

The framework provides several components to help your product or your implementation to define its use cases. Your specific product may provide some functionality that uses the Action Method.

The Action Method feature enables implementations to define an object that captures configuration for determining a value.

Steps To Enable

Your implementation must define the appropriate action method records if your product supports one or more action method roles.

1. Select **Admin**, select **System**, then select **Action Mode** in Add mode. If your product provides more than one action method business object, select the appropriate business object for the use case.
2. Identify the appropriate Action Method Role and fill in the details appropriate for your implementation's business requirements.

Note: The type of details defined here are dependent on the specific use case. Refer to your product's documentation for more information.

You can design you own action method functionality:

- If your implementation has use cases that require or would benefit from an action method and your cloud service does not already define an Action Method Role.
- If your business requirements differ from the supplied functionality.

Enforce Data Type with Ad-hoc Characteristics

An ad-hoc characteristic type may now be explicitly associated with an MD field to enforce data type validation. When characteristics of this type are captured, the system ensures that the entered value complies with the data type of the MD field if specified on the characteristic type record. This validation is performed in addition to existing validation methods such as using a validation algorithm on the characteristic type record or associating a flattened characteristic with an MD field as part of a business object schema.

The system ensures that the captured ad-hoc characteristic type complies with the data type of the MD field.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

When associating an existing ad-hoc characteristic type with an MD field, make sure existing data complies with the MD field's data type to avoid errors at update time.

Additional SQL Functions Supported

The following functions have been added to the SQL Allowlist:

- CAST
- EXTRACT
- GREATEST
- LEAST
- NUMTODSINTERVAL
- LEFT JOIN
- RIGHT JOIN
- INNER JOIN
- add_months

The enhancement added commonly used SQL functions to F1-SQLFunctionWhiteList (Managed Content). In addition, support is provided for the WITH clause, the AT TIME ZONE clause, hierarchal queries, CASE Expressions, and Datetime data types.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

When associating an existing ad-hoc characteristic type with an MD field, make sure existing data complies with the MD field's data type to avoid errors at update time.

Contextual Insights

Contextual Insights provide a way to surface focused intelligence and alerts to users in the context of the core screens for any applications built on Oracle Utilities Application Framework. There are many useful configuration options for Contextual Insights.

There are a number of visual patterns that are supported:

- Badges Insights have a quick text notice with a solid background that is meant to alert the user to crucial summary information or attributes.

Life Support Sensitive Load

- Inline Insights display a message with an icon that is meant to be more descriptive about the context for crucial information to surface.



Existing Person(s) were found matching some or all of your criteria.

- List Insights are intended to exist in a list of insights that provide a message about related data as well as allow user actions to be configured. This type of insight supports an icon and supports primary and secondary text.

3 Related To Dos

2 are assigned to you; 1 is open.

View

Add To Do Entry

- Card Insights are the most information rich with the option for showing both primary and secondary text for an insight, a related large icon to call attention to the insight, as well as user actions that can be configured. Often a Card Insight can be used at the top of a list of insights to call more attention to the most important insights.

Warning

Minimum payment amount of \$242.00 required to avoid shutoff

Threshold for non-shutoff is \$200.00

Take a Payment

Action

New color palettes are provided for configuration for Contextual Insights that insecure consistency in user interface when surfaced.

Actions that users can perform are defined in the insight algorithm and include additional configuration on the new Insight Type object. Settings allow you to define what should occur when the action is selected, the text to display, and the emphasis that should be placed on the button.

Insight types may be delivered by your base product. Oracle Utilities Application Framework provides a base badge insight that is visible on the new **To Do Entry** portal if the To Do Entry has related To Dos. Your specific product may include additional insight types for other use cases. In addition, you can introduce your own insight types.

In addition, the product provides the Insight Group object as a convenient way to group multiple insight types together. Insight groups are not delivered by the base product. However, every insight group references a unique insight class (lookup value). The insight class is the reference used when configuring insights to appear on a specific user interface component. Your product may include one or more base insight classes that are ready to use on a user interface component. Your implementation would set up an insight group for this class and choose which insight types to include.

Contextual Insights provide a way to surface focused intelligence and alerts to users in the context of the core screens for any applications built on Oracle Utilities Application Framework.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

Users must be granted access to the following new application services in order to use this functionality:

Secured Object	Application Service	Access Modes
Insight Type MO	F1INSIGHTTYP	A, C, D, R
Insight Type Portal	F1INSTYP	R
Insight Group MO	F1INSIGHTGRP	A, C, D, R
Insight Group Portal	F1INSTGP	R
Color Option MO	F1COLOROPTION	A, C, D, R
Color Option Portal	F1COLOPT	R

Tree Metadata

New tree metadata allows use of user interface tree structures to display hierarchical data in many of the Oracle Utilities Application Framework products.

The Tree metadata encapsulates a number of visual patterns that are common to tree displays:

- Icons
- Broadcast function
- Configurable text for the tree nodes, with multiple options, including a user override
- Support for navigation via hyperlink and context menus
- Support for auto expansion of a tree node on load
- Support for inclusion of implementation specific nodes in trees supplied out-of-the-box

Previously, a tree could only be defined using HTML within a UI map. The Oracle Utilities Application Framework provides user interface tools and services that work in conjunction with the Tree metadata to perform many of the functions that were formerly in HTML.

Algorithms are responsible for the processing that populates the tree node key data and to allow override of the information text, if needed.

Metadata is provided to define configuration for displaying information in a tree format.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

Users must be granted access to the following new application services in order to use this functionality:

Secured Object	Application Service	Access Modes
Tree MO	FTREE	A, C, D, R
Tree Query Portal	FTREEQ	R
Tree Portal	FTREEM	R

Icon Configuration Support

The product now provides support for Scalable Vector Graphic (SVG) images. These images can be scaled without reduction of quality and can take on color. The new Contextual Insight and Tree Metadata features support icons and the recommendation is to use SVG images for these features. The product also provides many base SVG images in the display icon table.

The product provides a Maintenance Object Option to define a default Display Icon for an object. Functionality such as the tree configuration may use this option to retrieve the default icon for an object. An analogous Business Object Option is provided for those maintenance objects that are used for different classes of objects that may warrant different icons at the business object level.

The Icon Configuration Support enables you to use scalable and high resolution SVG images as icons on your product.

Steps To Enable

No steps are required to enable this feature.

Expanded Maintenance Object and Business Object Information

The Maintenance Object Information (MO Info) and Business Object Information (BO Info) plug-in spots now support returning an icon, if requested. The icon may be determined by the algorithm or alternatively, the plug-in drivers return the default Display Icon defined as a maintenance object option or business object option.

In addition, the plug-in spots support alternate detail for the information string itself:

- **Short information:** The algorithm can optionally return shorter, more concise information.
- **Detailed information:** The algorithm can optionally return up to four lines of information, allowing the algorithm to return different pieces of information in different lines. This is useful for user interfaces that support displaying information this way. Additionally, the algorithm can return an "overline" text, which is short text that can appear above the primary information text.

Note that the standard user interface metaphor that displays an information string for an object continues to use the standard information string returned by the algorithm. The additionally supported information may be used by specific use cases.

This feature enables you to request and retrieve short or detailed icon information.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

The F1-GetFKReferenceDetails and F1-GetForeignKeyReference business services have been enhanced to return the additional information, if provided by the algorithm. If an icon is requested, it is returned, if provided by the algorithm or found on the Maintenance Object or Business Object option.

Number Format Routine may Suppress Trailing Zeros

The F1-NumberAmountFormatter business service is enhanced to include an input parameter to suppress trailing zeros. For example, if a number has a scale of 5 and the value is 1.12300, depending on the business use case, it may be preferred to show this number as 1.123 instead of 1.12300.

The F1-NumberAmountFormatter business service that formats numbers now suppresses trailing zeros.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

Your specific product may already be using this new feature in existing user interface zones to control the display of numbers. If you have any custom code that formats numbers and would like to take advantage of this feature, the call to the above business service can be modified to set the new input parameter to true.

Security Features

Secured Objects Zone Enhancements

The Secured Objects list may now include the following objects:

- **Menu Items:** Included if the menu item references the application service.

- **UI map:** Included if the application service is referenced in the HTML of the UI map using the oraHasSecurity function.
- **Schema UI hints:** Included if the application service is found in a business object, business service, data area, service script, or UI map schema referencing the oraHasSecurity function.
- **Script Step:** Included if the application service is found in the Edit Data of the script step with a reference to the F1-CheckApplicationSecurity business service.

An option to filter the list by object code or description replaces the zone's pagination function to provide a more targeted list. An increased zone width accommodates lengthy descriptions and prevents scrolling to view information.

Steps To Enable

No steps are required to enable this feature.

Key Resources

You can review the HTML or schema of the IU map to understand the objects being secured by the oraHasSecurity function.

You can review the script to understand the objects being secured by the F1-CheckApplicationSecurity business service.

Analytics

Metadata Extension for Analytics Tables (Oracle Utilities Analytics Visualization)

The metadata describing the product's data model is extended to define tables and views that represent dimension and fact tables in the operational analytics product. New entities and portals are introduced to capture analytics table definitions.

Steps To Enable

Make the feature accessible by assigning or updating privileges and/or job roles.

Tips and Considerations

Support for custom analytics dimensions and facts is currently not available. Extending the definitions of analytics dimensions is available only through characteristics mapping.

Key Resources

Refer to **Operational Analytics** in the *Oracle Utilities Customer Care and Billing Administrative User Guide*.

Role Information

System administrators must have access to the following Secured Entity - Application Services if implementations integrate with Oracle Utilities Analytics Visualization:

- Analytics Table Maintenance Object and Business Objects - F1-ANALYTICS
- Analytics Table Query Portal - F1ANLYTS

- Analytics Dimension Portal - F1ANALYT
- Analytics Fact Portal - F1ANFACT

Characteristics Mapping

The Characteristics Mapping feature maps characteristics to user-defined fields provided by Oracle Utilities Analytics Visualization for each characteristics table associated with an analytics dimension table. Characteristics mapping records can be directly maintained on the **Analytics Dimension** portal.

This release renames the **ETL Mapping Control** menu item to **Characteristics Mapping** and provides standard query and maintenance portals for the maintenance object. Support for ETL Mapping Control is still available for existing implementations integrated with Oracle Utilities Analytics.

Steps To Enable

Make the feature accessible by assigning or updating privileges and/or job roles.

Tips and Considerations

The **Characteristic Mapping Query** portal is associated with the new F1CHRMAP application service. Upgrade scripts ensure that users with Read access to the existing Application Service will receive Read access to the new application service.

Secured Entity	Application Service	Access Added to Any User Groups with this Application Service/Read Access
Characteristic Mapping Query Portal	F1CHRMAP	F1ETL

System administrators must have access to this application service if implementations integrate with Oracle Utilities Analytics Visualization:

Secured Entity	Application Service
Characteristic Mapping BO	F1-CHARMAPBOAS

Key Resources

Refer to **Operational Analytics** and **Defining Characteristic Mapping** in the *Oracle Utilities Customer Care and Billing Administrative User Guide*.

Role Information

System administrators must have access to the F1-CHARMAPBOAS (Characteristic Mapping BO) application service if implementations integrate with Oracle Utilities Analytics Visualization.

Additional Business Flag Configuration Values

The Confidence attribute on Business Flag records now includes a Missed option, which can denote a false negative or a condition missed by the analysis tool.

Additionally, numeric values from *10* to *90* replace the *Low*, *Medium*, and *High* options of the *Priority* attribute. For backward compatibility, an upgrade step will adjust existing *Priority* values of *Business Flags* and *Business Flag Types* to the following:

- From *High* to *10*
- From *Medium* to *50*
- From *Low* to *90*

Steps To Enable

No steps are required to enable this feature.

Support Analytics Dimension Hierarchy Definition

The metadata needed to support hierarchical dimensions can now be captured as part of the definition of an analytics dimension.

Steps To Enable

No steps are required to enable this feature.

Analytics Fact Logical Name

In this release, the name of the fact is explicitly captured as part of its definition record. Previously, the logical name of an analytics fact was incorrectly derived from its description in English.

Steps To Enable

No steps are required to enable this feature.

Analytics Calendar Dimensions

The following database views are available to support analytics reports that are based on various calendar dimensions, for example reports that summarize information by week, by month, by year, and so on:

- F1_CAL_WEEK_D (Calendar Week Dimension)
- F1_CAL_MONTH_D (Calendar Month Dimension)
- F1_CAL_QUARTER_D (Calendar Quarter Dimension)
- F1_CAL_YEAR_D (Calendar Year Dimension)
- F1_CAL_FISC_PERIOD_D (Fiscal Calendar Period Dimension)
- F1_CAL_FISC_QUARTER_D (Fiscal Calendar Quarter Dimension)
- F1_CAL_FISC_YEAR_D (Fiscal Calendar Year Dimension)

Analytics reports based on calendar dimensions provide summaries in different periods of time.

Steps To Enable

No steps are required to enable this feature.

Analytics Fact Relationship to a Logical Dimension

The operational analytics visualization tool was enhanced to support drilling from one fact to another for performance reasons when they are indirectly linked via the same logical dimension but at different aggregation levels. In order to support this relationship between analytic fact tables, the aggregated fact table explicitly references the corresponding logical dimension as part of its definition record.

The enhancement improves the performance of the operational analytics visualization tool in drilling from one fact to another fact when indirectly linked through the same logical dimension but at different aggregation levels.

Steps To Enable

No steps are required to enable this feature.

Miscellaneous Enhancements

Support Health Check Customization

The new Health Check installation-level System Event enables other product layers and implementations to add algorithms to check for additional conditions. The System Event also includes a base algorithm that checks the Batch Control - Level of Service algorithms. Previously, the Health Check portal and web service only supported checking the Batch Control - Level of Service algorithms.

Steps To Enable

Go to the **Algorithms** tab of the **Installation Options - Framework** page and find or add the Health Check System Event, then add the algorithms appropriate to your business.

Tips and Considerations

For backward compatibility, the system automatically references the Batch Control - Level of Service algorithm in the Health Check System Event in the installation algorithm collection for upgrading clients.

For implementations providing additional checks for other system components, refer to **Introducing Health Check Conditions** in the *Administrative User Guide* for more information.

ILM Configuration Adjustments

The default value of the ILM Restrict by Status business object option is set to Y for the following maintenance objects:

- F1-BUSFLG (Business Flag)
- F1-MKTMSGIN (Inbound Market Message)
- F1-MKTMSGOUT (Outbound Market Message)
- F1-MKTPRCEVT (Market Process Event)
- F1-MKTPROC (Market Process)

- F1-OBJERSCH (Object Erasure Schedule)
- F1-PROSTR (Process Flow)
- F1-REMOEMSG (Mobile Remote Message)
- F1-STSSNPSHT (Statistics Snapshot)
- F1-SVCTASK (Service Task)
- F1-SYNC REQ (Sync Request)
- F1-SYNCREQIN (Inbound Sync Request)

Defaulting **ILM Restrict by Status** to “Y” allows the Information Lifecycle Management Eligibility algorithm of the maintenance objects to restrict archiving based on the status of the record.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

Implementations using Information Lifecycle Management that do not require archiving restrictions based on status should add the **ILM Restrict by Status** option type, assign it a higher sequence number, and set its value to “N”.

Conversion Entity Dashboard

The implementation tools for reviewing data conversion information include the following:

- Conversion Entity Query: Facilitates the selection of maintenance objects eligible for data conversion.
- Conversion Entity Dashboard: Lists the data conversion settings of the queried maintenance object and the current status of maintenance objects in the overall data conversion process.

Steps To Enable

Make the feature accessible by assigning or updating privileges and/or job roles. Details are provided in Role Information.

Role Information

System administrators that handle data conversion activities must have access to the following Secured Entity Application Services:

- F1CVENTD (Conversion Entity Dashboard Portal)
- F1CVENTQ (Conversion Entity Query)

Ability to Delay Algorithm Execution

The F1PRFMDELAY algorithm type creates a delay in processes that perform asynchronous actions and continue upon receiving a response.

Implementations can use this Business Object Status - Enter algorithm type to delay (counted in seconds) processes that expect a near immediate response to an asynchronous request. The design of the processes using this algorithm type must also consider responses not arriving in a timely manner.

Steps To Enable

For business objects that include a step that sends a message and expects an asynchronous response, create an algorithm for the F1PRFMDELAY algorithm type. Configure the algorithm with the appropriate number of seconds to delay in the parameter. Configure this new algorithm on a status that includes an algorithm that checks for the receipt of the asynchronous response.

User Documentation Enhancements

In this release, the **Defining Algorithms** and **Defining Script Options** chapters of the online help are now under the **Configuration Tools** chapter. Reorganizing the chapters improves the searchability and usability of the algorithm and script topics as these are highly relevant components of the configuration tools.

In this release, the following are highlights of updates to the user documentation (online help):

- The **Database Options** chapter (renamed from "Database Tools") now has an overview section describing relationships of Maintenance Objects, Tables, Fields, and other metadata used to define objects in the system. As part of this update, the Characteristic Type help topics and FK Reference help topics have been moved to the "Database Options" chapter.
- The **Using Groovy Within Scripts** help topic has been updated to clarify best practices for referencing Java classes. The topic indicates that you should reference the class using the fully qualified package name or use an import step type to import the class and declare an alias.

Steps To Enable

No steps are required to enable this feature.

Warning Handling Change

Standard warning processes for business object-driven maintenance show warnings a pop-up dialog boxes, allowing you to click **OK** or **Cancel**. **OK** indicates that the system should proceed with the add, update, or delete operation. **Cancel** returns you to the maintenance map, allowing you to make changes or to cancel the maintenance dialogue altogether. This is consistent with warning handling for fixed pages. Note that, after canceling, the warning message continues to display inline.

Previously, warnings were shown as messages in the maintenance dialog, allowing you to make changes before clicking Save again. The warning conditions were not checked again even though you could have changed something that should have triggered an additional check.

Steps To Enable

No steps are required to enable this feature.

Generic APIs for the Utilities Test Automation (UTA) Tool

The following new Inbound Web Services are introduced to simplify the configuration of UTA test plans:

- Generic Data Explorer (F1-GenericDataExplorer) - This service may be used to call any data explorer zone that returns specific counts or any other type of information before a test is executed and afterwards for the purpose of comparing and evaluating test results.
- Copy Entity (F1-CopyEntity) - This service may be used to duplicate simple test entities.

Steps To Enable

Make the feature accessible by assigning or updating privileges and/or job roles. Details are provided in Role Information.

Role Information

The new UTA application service F1-UTASVC (Automated Testing Service) secures new services. System administrators should only grant access to this service on environments where the UTA tool is allowed to use.

BI Publisher Report Uses External Reference

The algorithm F1-BIPR-INV uses the external report reference to generate the URL. Previously, the algorithm used the internal report code rather than the external reference.

Most sample reports provided by the product populated the same value into the Report Code and the External Reference. Implementations following that pattern will see no impact to this change.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

If your implementation uses BI Publisher for reports and uses this algorithm type to generate the URL, be sure that the External Reference on your existing report codes matches the Report Code value to ensure that the URL will continue to be built as before.

Term Allowlist Used for Accepted Artifacts List

Product descriptions and documentation referencing the term 'Whitelist' are updated to use 'Allowlist' instead. Use inclusive term to identify a list of allowed artifacts.

Steps To Enable

No steps are required to enable this feature.

Define an Environment Domain Name

A new installation message type was introduced for implementations to label the specific environment with a desired domain name. For example, you can use "DEV" to identify your development region and "Test01" to identify one of your test environments.

Refer to the "Environment Information Added to Batch Email" feature for functionality that uses the new installation message in this release. In the future, other base features may take advantage of this information to help users that work in different environments to easily identify the current environment.

The new installation message type allows you to label environments with domain names.

Steps To Enable

To enable this feature:

1. Navigate to the **Installation** page: select **Admin**, select **General**, then select **Installation Options - Framework**.
2. Navigate to the **Messages** tab.
3. Add a new row and choose an Installation Message Type of Domain Name.
4. Enter text that identifies the environment. The recommendation is to keep the text short and concise.

Language Pack Installation Process Change

The procedure for installing a language pack has changed. When downloading the language pack, you are instructed to post the files in a specific directory. After the files have been posted, run the F1-LANG (Apply New Language) batch job for the desired language. This batch job now performs two steps. It created new language rows in the metadata and then applies the translated strings by looking for the language pack that you installed in the specified directory.

Previously, the process steps were to run the Apply New Language batch to create the new language rows and then use a blueprint-like process to apply the translated strings from the downloaded language pack.

The language pack installation procedure now applies the translated strings by looking at the installed language pack instead of the downloaded language pack.

Steps To Enable

No steps are required to enable this feature.

HTML Code not Included in Excel Export

When exporting data explorer results to Microsoft Excel, cells will no longer include HTML code. For cells that contain text where the HTML is used to emphasize or otherwise adjust the appearance of the text in the online page, in Microsoft Excel only the text is included. For cells that only include HTML, for example cells that display an icon, in Microsoft Excel these cells are now empty.

Previously, if HTML code was used for any reason in a cell, the HTML code would be included in the export to Microsoft Excel.

This feature exports data explorer results to spreadsheets instead of HTML code.

Steps To Enable

No steps are required to enable this feature.

Oracle Utilities Application Framework Deprecation Notices

This section provides information on functionality that has been removed, is no longer supported by Oracle Utilities Application Framework v4.4.0.3.0, or is planned for removal.

- [Deprecated Items](#)
- [Items Planned for Future Deprecation](#)

Deprecated Items

This is a list of functionality / system data that Oracle already removed from the Oracle Utilities Application Framework.

Application Viewer Links

The Application Viewer links in the online help and several maintenance object, business object, business service, and function pages have been removed. You can now navigate directly from the application to metadata pages to view additional content.

Mobile Application

In this release, Oracle Utilities Application Framework no longer supports the built-in mobile application and documentation is no longer available.

Cube Viewer

The Cube Viewer is now only accessible and supported through the Market Settlements product.

Substring Function

The system now uses the database function “substr” for SQL queries and information data explorer zones. Support for the "substring" function has been removed.

Xalan Library

The system now uses the native XSL engine of Java. The changes impacted internal XSLs and XSLs used by implementations that include integration and UI override XSLs if applicable.

Batch Parameter Security Value of None

The Security flag of a batch control parameter is optional and includes the ENCR (Encrypt) and NONE (None) options. The NONE value has been removed because it is redundant and given the flag is optional.

Security Token in REST Container

In Oracle Utilities Application Framework 4.4.0.3.0, REST functionality was properly split out from the web to its own container. This allows REST to have its own authentication and security. By design, the Oracle Utilities Application Framework

security token functionality was not added to this REST container because the token is used for CSRF protection for online web container only.

Items Planned for Future Deprecation

This is a list of functionality / system data that Oracle plans to deprecate in a future release.

UI Metadata Related to Converted Pages

UI metadata related to fixed pages converted to portals will be removed in a future release. The following navigation keys related to the maintenance page will be removed:

- **Field:** impFldTabMenu, metaDataFieldMainPage, metaDataFieldMaint, metaDataFieldTableGrid, metaDataFieldTablePage, and any help keys
- **Access Group:** accessGroupMainPage, accessGroupMaint, accessGroupTabMenu, accessGroupDARGrid, and any help keys
- **Application Service:** applicationServiceMainPage, applicationServiceMaintNew, and any help keys
- **Portal:** portalTabMenu, portalMainpage, portalmainPopup, portalOptsGrid, portalOptsPage, and any help keys
- **Zone:** portalZoneTabMenu, portalZoneMainPage, portalZoneGridPage, portalZoneParameterGrid, portalZonePortalGrid, portalZonePortalPage, and any help keys

In this release, the following navigation keys related to the maintenance page will be removed:

- **To Do Entry:** toDoEntryCharGrid, toDoEntryDrillKeyValuesListGrd, toDoEntrySortKeyValuesListGrid, todoentrykeyvalue, todoentrymain, toDoEntryMaint, toDoEntryPopupAdd, toDoEntryPopupForward, toDoEntryPopupSendBack, and any help navigation keys
- **Table:** metaDataTableFieldsGrid, metaDataTableMainPage, metaDataTableCFldsGrid, metaDataTableConstPage, metaDataTableMaint, metaDataTableRefByConstPage, metaDataTableFieldPage, and any help navigation keys
- **Characteristic Type:** charTypeMenucharValuesGrid, charValuesPage, charEntityGrid, charEntitiesPage, and any help navigation keys
- **Work Calendar:** workCalendarMaint, workCalendarMainPage, workCalendarHolidayGrid, and any help navigation keys
- **Message:** msgMaintDetailsPage, msgMaintGrid, msgMaintPage, msgMaintTabMenu, and any help navigation keys
- **Time Zone:** timeZoneMainPage, timeZoneTabMenu, and any help navigation keys

Navigation keys related to search will be removed:

- **Field:** metaDataFieldSearchData and metaDataFieldSearchPage
- **Access Group:** accessGroupSearchData and accessGroupSearchPage

- **Application Service:** applicationServiceSearchData and applicationServiceSearchPage
- **Portal:** portalSearchData and portalSearchPage
- **Zone:** portalZoneSearchData and portalZoneSearchPage

In addition, the UI program component metadata related to Field, Access Group, Application Service, Portal, and Zone navigation will be cleaned up in a future release.

The UI program component metadata related to To Do Entry, Table, Characteristic Type, Work Calendar, Message, and Time Zone navigation will be cleaned up in a future release. Note that metadata related to the search pages will not be removed at this time in case these are used on other fixed pages.

XSLT Managed Content Type

The Managed Content table entries related to XSL should use the XSLTC managed content type instead of the XSLT managed content type. Support for the XSLT managed content type will be deprecated in a future release

REST IWS - Original REST Servlet

The original URL supplied for invoking IWS-based REST services included the IWS Service name in its makeup. We continue to support this for backward compatibility purposes, but we will deprecate it in a future release. As defined in the documentation, you should adjust your existing integrations to use the currently supported URL.

Append Setting In Pagination

There are several known issues with the functionality of the 'append' option in pagination such that it is not recommended to use this pagination setting. This functionality will be deprecated in a future release.

Support for Master / Subordinate Services for Web Services Catalog

The Service Catalog Configuration (master configuration) supports defining subordinate servers. This functionality is no longer applicable for the Oracle Integration Cloud and will be removed in a future release.

Selected Functionality of the Batch Run Statistics Portal

The **Batch Run Statistics** portal provides some additional information about batch runs. However, some of the functionality provided on this page is related to capturing additional information from an external tool. This information is stored in a Fact record.

The functionality related to capturing additional information will no longer be supported in a future release. This information will still be available to existing clients, but the functionality will no longer be maintained.

Miscellaneous System Data

- Environment Reference. This administrative maintenance object was related to ConfigLab and Archiving, which are no longer supported. In a future release, the following will be removed:

- Migration Plan F1-EnvironmentRef. Note that no base migration request references this plan. Implementations should ensure that no custom migration request references this plan.
- F1-EnvironmentRefPhysicalBO business object
- ENV REF maintenance object
- The following metadata related to the legacy LDAP import pages will be removed in a future release: Services CILTLDIP, CILTLDIL, CILTLDIS, Application Service: CILTLDIP
- The following algorithm types and algorithms provided for the current LDAP import functionality do not include any logic. They will be removed in a future release.
 - Algorithm Type / Algorithm F1-LDAPIMPRT
 - Algorithm Type / Algorithm F1-LDAPPREPR
- The To Do Type F1-SYNRQ (Sync Request Error) is not in use and will be deleted in a future release. Errors for the Sync Request Monitor (that also has the name F1-SYNRQ) are reported using the To Do Type F1-SYNTD (Sync Request Monitor Errors).
- The lookup value CHAR_ENTITY_FLG / F1SE (Characteristic Entity / Sync Request Inbound Exception) is not in use and will be removed in a future release.
- The scripts F1-BundleInf, F1-GENPRINFO, and F1-MgPlnInf will be removed in a future release.
- The zones F1-IWSSCHS, F1-IWSSCHS1, F1-IWSSCHS2, F1-IWSSCHS3 and F1-MGRREQDSP will be removed in a future release.

CMA Migration Requests

The migration requests F1-FrameworkAdmin (Framework Admin) and F1-SchemaAdmin (Schema Admin) are no longer recommended and are not going to be updated with new administration / control tables in future releases. The product may deprecate them in a future release.

CMA Import Algorithm

In a future release, the CMA Import algorithm plug-in spot will be deprecated. As an alternative, review any existing algorithms and create appropriate Pre-Compare algorithms.

Business Object Read in F1-MainProc When Pre-Processing Exists

In the original implementation of configuration tools, if a pre-processing script was linked to the business object via options, the main framework maintenance BPA (F1-MainProc) would not perform a Read of the business object (leaving it to the responsibility of the pre-processing script).

In a subsequent release, to solve a UI Hints issue related to child business objects, a business object Read was included in F1-MainProc even if a pre-processing script existed. This solution introduced a problem only visible for specific scenarios and a different fix has been introduced. In the meantime, the business object Read is no longer necessary in F1-MainProc. Since there are many pre-processing scripts that are properly performing

the Read of the business object, ideally the business object Read should be removed from F1-MainProc so that multiple reads are not performed.

However, there may have been pre-processing scripts introduced after the business object Read was included in F1-MainProc that were coded to not perform a business object read in the pre-processing script. Due to this situation, the business object Read is still performed as part of the processing of F1-MainProc.

The product plans to remove the business object Read from F1-MainProc logic when a pre-processing script exists. Review your custom pre-processing scripts that are linked to your business object options to ensure that it properly performs a Read of your business object.

OJet Support for Bind Architecture

OJet previously supported a bind architecture for their components and this format is deprecated in OJet V7.

Example:

```
<input id="text-input"
  type="text"
  data-bind="ojComponent: {component: 'ojInputText',
    textInput: value}"/>
```

Example:

```
<oj-input-text value="value text" label-hint="enabled"></oj-input-
text>
```

The Oracle Utilities Application Framework applications are targeting to stay current on OJet upgrades as newer releases incorporate more features, better performance, and high integration with the Redwood Design System. In this release, Oracle Utilities Application Framework uses OJet V9.1 and with each release, an OJet upgrade will be applied when applicable.

As the bind format has been deprecated, support for the format will be removed from up-coming releases. This results in a smaller file size for OJet components but any existing code in Oracle Utilities Application Framework applications using the bind format will completely stop working. It is anticipated that this could happen as soon as OJet V11, but it could also be a later version. For this reason, it is imperative that any existing OJet code that uses the bind format be updated to use the Web Component format. There can be a direct replacement available (as in the above example) but OJet provides different options so there may be a better alternative.

Technical Upgrade Notes

JavaScript DOM “top” Property

Internal restructuring of the Oracle Utilities Application Framework has removed the use of the JavaScript DOM ‘top’ property to better encapsulate the JavaScript variables and functions, and reduce or remove the use of the Global Namespace. This technical upgrade has minimal effects on coding as filters have been provided to dynamically update the JavaScript at runtime and remove references to 'top'. All references to 'top' now refer to 'main', which already existed as a "pointer variable" to variables and

functions. In addition, some functions that obtained pointers to UI objects are now direct references and therefore are no longer functions, for example:

Existing Code	New Code	Comments
<code>var x = top.getNavigationInfo(navOpt)</code>	<code>var x = main.getNavigationInfo(navOpt)</code>	The function names remain the same, only the location has changed
<code>var x = top.main.getNavigationInfo(navOpt)</code>	<code>var x = main.getNavigationInfo(navOpt)</code>	No need for a double reference
<code>var x = top.tabMenu().document</code>	<code>var x= main.tabMenu.document</code>	tabMenu is now a direct reference as well as tabPage, workSpace, and model
<code>var x = top.getMain()</code>	<code>var x = main</code>	getMain() is a redundant function as 'main' is globally available

Should you need to get the 'top' for some reason such as obtaining window dimensions, the new `main.getOUAFTop()` function has been made available. Alternately, you can code "window.top" which the code changing filter will ignore. Note that the even if the code changing filter is extensive, there are many ways to write JavaScript and therefore some of your functions may still fail. Changing the offending line of code using the above examples as a guide should resolve the issues that arise.

Edge Product Uptake

Similar to customer code, the base Edge Application code is "filtered" to adjust existing code, which removes the need to revisit all existing code and perform updates in order to retain a functioning application. However, new code should follow these standards and the standards presented in relevant guides. It is also best practice to "upgrade" existing code when the opportunity is available.

Note that references to the 'ouafTop' variable are possible when looking at Oracle Utilities Application Framework JavaScript. Do not use this variable as this is an interim to ease the path towards a better clean-up of the existing Oracle Utilities Application Framework code. The 'ouafTop' variable will be removed when no longer needed and therefore can break your code when used. Oracle Utilities Application Framework will not provide a filter to change 'ouafTop' dynamically.

DOM4J API Upgrade

As part of the Oracle Utilities Application Framework's effort to update 3rd parties to the latest version, edge apps and customers can run into an issue when directly invoking the APIs in the 3rd party's library.

Oracle Utilities Application Framework upgraded the DOM4J API to the 2.1.1 version, which include a large number of changes as part of cleaning up methods to take more restrictive parameters and return more concrete versions. The previous version returned more generic return types and took more open arguments for example, a return type of List was returned from certain APIs. The 2.1.1 version returns nongeneralized versions of the exact type like List<Element> that could result in compile errors and require edge apps or customers to modify the code to fix the API calls.

In order to make code changes, go to the GitHub code repository for dom4j (<https://github.com/dom4j/dom4j/blob/master/src/main/java/org/dom4j>) and perform the following:

1. Look at the API change to <https://github.com/dom4j/dom4j/blob/master/src/main/java/org/dom4j/Element.java> setContent() api.
2. Click **History**. This opens all the log of changes that have been made to a class.
3. Click the hexadecimal revision number and review the set of changes made.
4. Click **Split** to see a more visual representation of the changes. You can directly search for the file, for example Element.java, and directly go to the changes to that file in the browser window.
5. Using the changes, make appropriate adjustments to your code. Note that once you find a change to the API, you can also look at code changes made to the other classes that were using the API. Your changes should be inline with the other invokers of the API to ensure that there are no regressions as part of the change that you would make.

Groovy Upgrade

Oracle Utilities Application Framework upgraded to the latest Groovy version and compilation of some of your scripts could fail. For example, one of Oracle Utilities Application Framework's script performed arithmetic and this code was compiled successfully with the previous Groovy version:

- `BigDecimal.valueOf(Long.valueOf(batchRunTime.getTotalMilliseconds()/1000))`

The latest Groovy version does not compile this code because the it evaluates the division results in an expression as a BigDecimal and the compile error indicates that a valueOf api is not available in the Long class.

To resolve the issue, your code must perform an explicit cast to inform Groovy that the result is a long. For example, this code fixes the compile error and retains the original intention of the code line:

- `BigDecimal.valueOf(Long.valueOf((long)(batchRunTime.getTotalMilliseconds()/1000)))`

Edge Product Uptake

For edge apps, Oracle recommends that you manually upgrade to the latest Groovy version before taking the official Oracle Utilities Application Framework fix and then run GroovySanityTest (unit testing) to ensure no compilation errors are reported. If there are issues reported, make minor code changes to the script to compile successfully.