

# **Oracle Utilities Billing Cloud Service**

Overview Guide

Release 24B

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Oracle Utilities Billing Cloud Service Release 24B Overview Guide

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# Chapter 1

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## Billing Cloud Service Overview Guide

Welcome to the Oracle Utilities Billing Cloud Service Overview Guide. This document provides an overview of Oracle Utilities Billing Cloud Service, including:

- [Billing Cloud Service Overview](#)
- [Implementation Support and Live Operate Services](#)
- [Oracle Utilities Cloud Services Third Party Software and Licenses](#)

# Chapter 2

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## Billing Cloud Service Overview

This chapter provides an overview of the Oracle Utilities Billing Cloud Service, including:

- [Welcome to Oracle Utilities Billing Cloud Service](#)
- [Oracle Utilities Billing Cloud Service Applications](#)
- [Oracle Utilities Billing Cloud Service Documentation](#)
- [Supported Client Platforms and Browsers](#)
- [Supported Integrations](#)
- [High-Level Roles and Responsibilities](#)
- [Performance Guidelines](#)
- [Operational Readiness Advisory](#)

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# Welcome to Oracle Utilities Billing Cloud Service

Oracle Utilities Billing Cloud Service provides access to specific billing capabilities and supporting billing-related functions in Oracle Utilities Customer to Meter, which is the foundational component of Oracle Utilities Billing Cloud Service.

Oracle Utilities Billing Cloud Service is intended for:

- Organizations requiring a billing solution but do not require a full customer information system implementation
- Organizations whose legacy customer information system does not support specific billing capabilities that they may now require such as net-metered billing, billing for electric vehicle charging events, advanced billing for specific customer segments (commercial or industrial), and so on.

Oracle Utilities Billing Cloud Service provides access to specific billing capabilities and supporting billing-related functions including:

- Managing customer information
  - Customer and geographic data management for residential, commercial, and industrial customers
  - Customer care interactions for inbound communications (such as phone calls) and outbound communications (such as letters or notifications)
- Managing device information
  - Device management such as meters at customer locations, device configurations for measurement collection, and device installations details
- Managing billing-related measurement and device event data
  - Processing loaded scalar and interval metered measurement data for billing purposes; including validating, editing, and estimating of such data for billing purposes
    - This also includes the pre-built MV-90 Adapter and Adapter Development Kit
  - Processing loaded non-metered measurement data (e.g., weather data) including validating / editing / estimating of such data for billing purposes
  - Processing loaded device event data for billing purposes
- Rating and billing
  - Configuring and testing rate calculations via the user interface
  - Bill generation and bill calculations via online transactions and batch processing
  - Calculating and publishing bill determinants and other transactions from billing-related meter reading data
  - Aggregating billing related data
  - Billing corrections
  - Capturing financial transactions / general ledger related details (related to bill segments, adjustments, and impact of payments)
- Creating billing related extracts

- 
- Oracle Utilities Cloud Service Foundation: tools used to orchestrate and automate infrastructure related processes, migrate data from legacy applications into the cloud service, and manage batch scheduling and processing using the SaaS Batch Scheduler.
  - Oracle Utilities Analytics Visualization: a suite of analytics applications that provides access to data for self service exploration, discovery, visualization, and analysis. It includes rich pre-built analytical data models, metrics, and key performance indicators that allow you to derive strategic insights from your data.

Oracle Utilities Billing Cloud Service excludes the use of other processes and capabilities, including, but not limited to:

- Payment management (including automatic payments, cashiering, third party payment processing integration)
- Processing data for device events for non-billing purposes, Internet of Things (IoT) devices, and smart meter commands
- Non-billing aggregations
- Non-billing usage related data export capabilities

## Billing Cloud Service User Access

Access to the specific billing capabilities and supporting billing-related functions in Oracle Utilities Billing Cloud Service is controlled through the following user groups:

- Billing Cloud Services: A user group that provides access to the specific pages, portals, and features included with the cloud service
- Billing Cloud Service Batch Services: A user group that enables users to run batch processes used by the cloud service

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# Oracle Utilities Billing Cloud Service Applications

Oracle Utilities Billing Cloud Service includes the following applications:

- Oracle Utilities Customer to Meter
- Oracle Utilities Cloud Service Foundation
- Oracle Utilities Analytics Visualization
- Oracle Utilities Testing Accelerator
- Oracle Analytics Publisher
- Oracle REST Data Services

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# Oracle Utilities Billing Cloud Service Documentation

Configuration and use of Oracle Utilities Billing Cloud Service is described in the following documentation:

- Oracle Utilities Billing Cloud Service User Guides, comprising:
  - Oracle Utilities Customer to Meter v24.2.0.0.0 Business User Guide
  - Oracle Utilities Customer to Meter v24.2.0.0.0 Administrative User Guide
- Oracle Utilities Cloud Services 24B documentation, including:
  - Oracle Utilities Cloud Service Foundation Administrative User Guide
  - Oracle Utilities Cloud Services Administration Guide
  - Oracle Utilities Cloud Services Database Changes Guide
  - Oracle Utilities Cloud Services Frequently Asked Questions Guide
  - Oracle Utilities Cloud Services Implementation Guide
  - Oracle Utilities Cloud Services Live Operations Guide
  - Oracle Utilities Cloud Services Security Guide
- Oracle Utilities Cloud Services Activation Guide
- Oracle Utilities Cloud Services Cloud Operations Guide
- Oracle Utilities Cloud Services Update Policy Guide
- Oracle Utilities Testing Accelerator documentation
- Oracle Utilities Analytics Visualization User Guide

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# Supported Client Platforms and Browsers

Users access Oracle Utilities Billing Cloud Service via a supported web browser.

Oracle Utilities Billing Cloud Service supports the following operating system & web browser combinations:

| Operating System | Web Browser                                                                                                                                                                  |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Windows 10       | Firefox ESR 102+<br>Google Chrome for Enterprise 108+<br>Microsoft Edge (Chromium-based) 108+ (see the <a href="#">Microsoft Edge Release Schedule</a> for more information) |
| Windows 11       | Firefox ESR 102+<br>Google Chrome for Enterprise 108+<br>Microsoft Edge (Chromium-based) 108+ (see the <a href="#">Microsoft Edge Release Schedule</a> for more information) |

The recommended monitor resolution is 1920 X 1080 or higher with the browser zoom level set at 100%. The application can be used with lower resolution monitors and/or at a greater than 100% browser zoom level, but users may need to use horizontal scrolling on some pages.

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# Supported Integrations

Oracle Utilities Billing Cloud Service supports integration with a number of other products. See the following section for details:

- [Using Oracle Utilities Testing Accelerator with Oracle Utilities Billing Cloud Service](#)

## Using Oracle Utilities Testing Accelerator with Oracle Utilities Billing Cloud Service

Oracle Utilities Testing Accelerator (OUTA) is a testing framework based on Java and Selenium used for automated testing of Oracle Utilities applications and cloud services. It allows for developing, managing and executing web service and user interface based automated tests, using meta-data based approach, without any programming language. Oracle Utilities Testing Accelerator has a user friendly graphical web interface that enables people without much programming knowledge to develop automated test flows.

Along with the automation framework, Oracle Utilities Testing Accelerator includes an accelerator that supports automated testing of Oracle Utilities cloud services, such as Oracle Utilities Customer Cloud Service and Oracle Utilities Work and Asset Cloud Service. The accelerator contains several hundred re-usable components that are the modular building blocks of an automated test flow. The Oracle Utilities Testing Accelerator user interface allows for these components to be laced together to form an automated test flow. The test data can then be coupled to the automated test flow and executed using the browser-based execution engine within the Oracle Utilities Testing Accelerator web application.

The browser-based test execution engine should be used for the execution of web service based test automation flows. In addition to the web interface, Oracle Utilities Testing Accelerator includes an eclipse IDE plugin that supports the execution of tests from local desktops or laptops. This mode should be used for executing user interface based tests that are developed using the Oracle Utilities Testing Accelerator web application. The script generation engine in the Oracle Utilities Testing Accelerator web interface auto generates the scripts for user interface based tests, which can then be executed via the Eclipse IDE (with the Oracle Utilities Testing Accelerator plugin).

The following features of Oracle Utilities Testing Accelerator have been enhanced so that they work with Oracle Utilities cloud services:

1. For executing the web service based test automation flows, the Flow Configuration that contains the web service URL along with additional properties such as smtp server, etc is pre-defined to work with Oracle Utilities cloud services. Users need not create a new Flow Configuration.

See the **Executing Test Flows** and **Executing Test Flows Using a Browser** sections in the *Oracle Utilities Testing Accelerator User Guide* for more information.

2. For generating components using the component generator tool, the complete WSDL URL need not be specified in the field, only the web service end point name needs to be provided.

See the **Development Accelerator Tools** and **Component Generation Tool** sections in the *Oracle Utilities Testing Accelerator User Guide* for more information.

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3. For fetching test data from the Oracle Utilities cloud services, the WSDL URL need not be specified, only the web service end point name should be specified.

See the **Fetching Test Data From an Utilities Application** section in the *Oracle Utilities Testing Accelerator User Guide* for more information.

4. Oracle Utilities Testing Accelerator is integrated with Oracle Cloud Infrastructure Identity and Access Management (IAM) with Identity Domains when using it with cloud services. The management of users in Oracle Utilities Testing Accelerator web application should be done through IAM. See **Identity and Access Management with Identity Domains** in the *Oracle Utilities Cloud Services Administration Guide* for more information about creating and managing users.

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# High-Level Roles and Responsibilities

This section outlines high-level roles and responsibilities involved in the deployment, configuration, and maintenance of Oracle Utilities cloud services, and the party responsible for each. The **Owner** column in the tables below indicates the party responsible for each role and responsibility.

## Hardware, Storage, Technology, and Application Software

| Role and Responsibility                                                                                                                  | Owner  |
|------------------------------------------------------------------------------------------------------------------------------------------|--------|
| Provide, deploy and monitor hardware and storage                                                                                         | Oracle |
| Provide, deploy, run and monitor all required technology (e.g containers, operating systems, databases, clustering, monitoring, tracing) | Oracle |
| Provide, deploy, run and monitor all Oracle Utilities base application software                                                          | Oracle |

## Security

| Role and Responsibility                                                                                                                                                                                    | Owner    |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| Monitor cloud service infrastructure security                                                                                                                                                              | Oracle   |
| Administer Oracle network security                                                                                                                                                                         | Oracle   |
| Administer customer network security, including integrating with the Oracle networks                                                                                                                       | Customer |
| Configure & maintain cloud service users and access                                                                                                                                                        | Customer |
| Integrate with Oracle networks                                                                                                                                                                             | Customer |
| Pro-actively monitor and maintain unexpired, secured, and valid TLS / SSL Certificates on customer-specific DNS entries requested for outbound traffic from the Oracle Cloud Infrastructure (OCI) network. | Customer |

## Database

| Role and Responsibility                                            | Owner  |
|--------------------------------------------------------------------|--------|
| Database administration services (monitoring, administration, etc) | Oracle |
| Backup and Restore                                                 | Oracle |
| Backup retention                                                   | Oracle |
| Data replication for Disaster Recovery (where applicable)          | Oracle |

| <b>Role and Responsibility</b>                                                                                                                                                                                                                                          | <b>Owner</b>        |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| Disaster Recovery database fail-over                                                                                                                                                                                                                                    | Oracle              |
| Refresh of a target environment from an existing environment, such as from PROD to TEST (upon customer request and within prescribed limits)                                                                                                                            | Customer and Oracle |
| Information Lifecycle Management                                                                                                                                                                                                                                        | Customer            |
| Provide a daily off-peak time window during which Oracle can perform required database maintenance activities, and during which the customer will minimize the usage of the cloud service so as to avoid any performance-related issues during the defined time window. | Customer            |

## Implementation, Configuration, and Extensions

| <b>Role and Responsibility</b>                                                           | <b>Owner</b> |
|------------------------------------------------------------------------------------------|--------------|
| Plan and execute implementation project                                                  | Customer     |
| Perform configuration of enterprise software features and functions                      | Customer     |
| Execute functional, system, load and performance testing of configuration and extensions | Customer     |
| Ensure operational readiness                                                             | Customer     |

## Patching and Upgrading

| <b>Role and Responsibility</b>                                                          | <b>Owner</b> |
|-----------------------------------------------------------------------------------------|--------------|
| Patch and upgrade underlying infrastructure software                                    | Oracle       |
| Patch and upgrade Oracle Utilities base application software                            | Oracle       |
| Decide the cloud service upgrade schedule (within prescribed limits)                    | Customer     |
| Trigger environment upgrades (Development, Test and Production)                         | Customer     |
| Perform regression testing of configuration and extensions after patching / upgrades    | Customer     |
| Make changes as needed in custom configuration and extensions after patching / upgrades | Customer     |

## Batch Processing

| <b>Role and Responsibility</b>          | <b>Owner</b> |
|-----------------------------------------|--------------|
| Monitor underlying batch infrastructure | Oracle       |

| <b>Role and Responsibility</b>                         | <b>Owner</b> |
|--------------------------------------------------------|--------------|
| Provide infrastructure logs for batch incidents        | Oracle       |
| Resolve infrastructure batch issues                    | Oracle       |
| Determine batch schedule                               | Customer     |
| Monitor batch stream/job completion                    | Customer     |
| Perform first level investigation of batch issues      | Customer     |
| Provide customer logs of batch incidents               | Customer     |
| Resolve functional batch issues and stream/job restart | Customer     |
| Resolve data issues                                    | Customer     |

## Cloud Service Delivery and Performance

| <b>Role and Responsibility</b>                                                                                                                                                                                                                                                                                                                                                    | <b>Owner</b> |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|
| Provide scalable and elastic cloud services                                                                                                                                                                                                                                                                                                                                       | Oracle       |
| Provide core services and tools, including: <ul style="list-style-type: none"> <li>• Embedded infrastructure and platform services</li> <li>• An extensible application framework</li> <li>• Highly configurable product features and functions</li> <li>• Content Migration Assistant</li> <li>• Data Migration Tools</li> <li>• Generalized/Specialized Data Extract</li> </ul> | Oracle       |
| Ensure quality of maintenance packs and updates                                                                                                                                                                                                                                                                                                                                   | Oracle       |
| Resolve performance issues related to core services and tools                                                                                                                                                                                                                                                                                                                     | Oracle       |
| Configure features, and implement extensions                                                                                                                                                                                                                                                                                                                                      | Customer     |
| Perform functional and performance testing of configuration and extensions                                                                                                                                                                                                                                                                                                        | Customer     |
| Perform analysis of performance issues                                                                                                                                                                                                                                                                                                                                            | Customer     |
| Resolve performance issues related to configuration, extensions and data                                                                                                                                                                                                                                                                                                          | Customer     |
| Subscribe to any additional resources required                                                                                                                                                                                                                                                                                                                                    | Customer     |

## Support

| <b>Role and Responsibility</b>                             | <b>Owner</b> |
|------------------------------------------------------------|--------------|
| Triage, analyze, and resolve issues with the cloud service | Oracle       |

| Role and Responsibility                                                            | Owner    |
|------------------------------------------------------------------------------------|----------|
| Triage, analyze, and resolve issues with configuration and extensions              | Customer |
| Raise Service Requests via My Oracle Support and provide all requested information | Customer |

## Data Migration

| Role and Responsibility                                                                                                                                         | Owner    |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| Provide data migration tools (SQL Loader, validation batch controls and so on)                                                                                  | Oracle   |
| Provide guidelines on data migration via online documentation                                                                                                   | Oracle   |
| Triage, analyze, and resolve issues with the data migration tools via My Oracle Support                                                                         | Oracle   |
| Define, review and execute data migration strategy in-line with the provided data migration tools                                                               | Customer |
| Review and follow documentation on data migration                                                                                                               | Customer |
| Validate the Cloud Subscription Metrics with data migration scope metrics                                                                                       | Customer |
| Configuration and development work required for data migration                                                                                                  | Customer |
| Data cleansing                                                                                                                                                  | Customer |
| Plan and execute data migration mock runs (Oracle suggests a minimum of three) to confirm successful testing results and ensure a clean data migration process. | Customer |
| Triage, analyze, and resolve data migration issues                                                                                                              | Customer |
| Plan, review and execute cut-over activities                                                                                                                    | Customer |
| Create and execute plug-in driven batch programs to correct data errors during critical project milestones and after go-live, if needed                         | Customer |

## Integration

| Role and Responsibility                                                                                   | Owner    |
|-----------------------------------------------------------------------------------------------------------|----------|
| Provide productized integrations (where explicitly agreed).                                               | Oracle   |
| <b>Note:</b> Productized integrations require customer-specific configuration and (optionally) extension. |          |
| Integrate Oracle Utilities cloud services with all other services or applications                         | Customer |

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# Performance Guidelines

This section provides a number of performance-related guidelines and recommendations to take into account when implementing Oracle Utilities Billing Cloud Service. This includes guidelines related to the following:

- [Benchmarking, Scalability, Elasticity and Performance](#)
- [User Interfaces](#)
- [General Topics](#)

## Benchmarking, Scalability, Elasticity and Performance

Oracle Utilities cloud services such as Billing Cloud Service, Customer Care and Billing Cloud Service, Customer Cloud Service (with Advanced Meter Solution) and Meter Solution Cloud Service are important components of a utility's solution set, and are:

- **Mission critical** in terms of revenue generation
- **Highly configurable** as many aspects of the solution are designed to be configured to meet market specific requirements
- **Compute intensive**, as many validation and calculation rules need to be applied during daily processing
- **Time sensitive**, as processing must be completed daily, on schedule and within a predefined (and strict) batch window

These cloud services have been designed and built from the ground up with all of these concepts in mind, but successfully implementing and operating them depends on a *shared responsibility model* with respect to Benchmarking, Scalability and Performance.

### Who is Responsible for Scalability, Elasticity and Performance?

This is a shared responsibility between Oracle and the customer/implementer.

Oracle is responsible for the following in terms of the *base cloud service*:

- Scalability
- Elasticity
- Benchmarking
- Configurability
- Extensibility
- Performance of base product functionality, including:
  - Embedded infrastructure and platform services
  - Application framework
  - Base product features and functions
  - Content Migration Assistant
  - Data Migration Tools
  - Generalized/Specialized Data Extract

---

To verify the above, Oracle performs regular scalability benchmarking to confirm general solution scalability and elasticity, including:

- Vertical (scaling up), such as effectively utilizing more power (CPU, RAM, etc)
- Horizontal (scaling out), such as effectively utilizing more machines/servers

This scalability benchmarking is run on reference configurations and on very high data volumes, for example:

- 10M Billable Service Customers (CCS)
- 20M+ Utilities Device Data Channels for (MSCS)

The customer/implementer is responsible for the following in terms of the *specific implementation*:

- Performance optimization of customer configuration & extension logic
- Correction of customer data issues
- Functional testing
- Performance testing (initial and regression)
- Analysis of performance related issues

Customers/implementers should plan to run performance testing to verify that their final configuration (that is, the implementation specific workload) meets expectations and preserves general solution scalability and elasticity.

Performance testing is:

- Executed by the customer/implementer
- Uses customer specific (final) configuration
- Run on final expected customer data migration volumes and so requires data migration to be complete, configuration to be finalized / functionally tested, and the solution running in a production sized environment (a full sized Test environment is provided for this purpose)

## User Interfaces

- **Zones:** For better performance, user interface zones should be initially collapsed when not required for 90% or more of business processes. The initial state of zones (collapsed or not) can be controlled via the **Portal Preferences** tab on the **User** portal.
- **Number of Records:** The number of records returned to the user interface for a zone should be limited to 50 rows when building custom zones against large transactional tables.
- **Screen Troubleshooting:** To troubleshoot a screen in the user interface, click **Preferences** in the top right corner of the application and choose the **Portal Preferences** tab. Choose the appropriate portal and set all zones to "Initially Collapsed". Navigate back to the screen that has performance issues, expand the zones one by one, and measure the execution time of each zone. This should be an accurate step-by-step representation of the full screen execution.
- **Performance Optimization:** For optimal user interface performance, laptop users should ensure their computer is in high performance mode.

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## General Topics

- **Solution Updates:** Oracle should be consulted before significant solution changes are made. For example, configuration and solution extensions, adding a large number of customers, network changes, new integrations, etc.

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# Operational Readiness Advisory

This section outlines suggested validations as part of operational readiness testing:

- Confirm batch stability, day over day execution according to your production schedule, and that performance is within acceptable production window.
- Leverage production converted data, along with actual production files for critical batch inputs, including input files when testing batch execution
- Review and confirm that key output files are acceptable
- Review daily To Do entry volumes and confirm them to be acceptable based on available staffing
- Update database partitioning prior to go live. See **Go-Live Checklist** in the **Information Lifecycle Management** chapter of the *Oracle Utilities Cloud Services Implementation Guide*.

# Chapter 3

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## Implementation Support and Live Operate Services

This chapter describes implementation support and live operate services for Oracle Utilities Billing Cloud Service:

- [Implementation Support Services](#)
- [Live Operate Services](#)

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# Implementation Support Services

Implementation Support Services are services that relate to the initial set up of Oracle Utilities cloud services. If Implementation Support Services are included in your Oracle Utilities cloud service(s), it will be stated in the relevant services descriptions.

The scope of the Implementation Support Services provided by Oracle is limited and currently includes (but is not limited to) the following:

Oracle will work to:

- Provide pre-configured templates (where available). These templates may be limited in scope (and may not completely align with the scope of the implementation project) and may only be available in the English language.
- Provide Utility Reference Model and other documentation describing the business processes that are the basis for the template configuration.
- To the extent necessary and under exceptional circumstances, execute scripts (authored by the customer) to resolve data issues.
  - Scripts submitted for execution to correct data issues will be subject to review for compliance with Oracle's Software Security Assurance standards. Scripts that do not comply will be returned for correction; resubmission will require a further compliance review with approval before execution will be scheduled.
  - There is a limit of four (4) script reviews in any calendar month. Review requests beyond this entitlement may be subject to additional fees.

Customers/Implementers retain complete responsibility for all other aspects of implementing the cloud service, including (but not limited to):

- Overall setup project management, including responsibility for management of the scope, the project plan/schedule and budget.
- End-user training activities and organizational change management.
- Leading and managing the user system review.
- Designing and testing all configurations and extensions to ensure they do not adversely affect performance.
- Identifying, designing, documenting and implementing any business process changes and system operation processes.
- Coordinating with external vendors or service providers to manage dependencies that could impact the overall project scope and schedule.
- Designating a project manager who shall be responsible for coordinating all customer/implementation related activities and responsibilities with respect to provisioning these Oracle Cloud Services.
- Business process change activities including end-user communication (e.g., status updates, newsletters, forums, etc.).
- Planning and executing all testing activities.
- All cut-over and roll-out activities.
- Business intelligence or data warehouse implementation/integration (if required).

- 
- Procuring, setting up or otherwise provisioning any additional hardware, software or services as required.
  - Providing any network hardware and/or software that may be required to connect to the Oracle Utilities cloud service(s).
  - All data conversion/migration/cleansing activities such as:
    - Extracting, transforming and loading data into migration staging tables
    - Using cloud service data conversion tools (where available) to load data into the production environment
    - Creating or updating any required validation scripts
    - Any/all data cleansing activities that may be required (NB: these must be done in the source application(s) and not directly in the cloud service environment(s))
  - Providing all in-scope data conversions and interfaces in formats supported by the relevant Oracle Utilities cloud service(s).
  - The following interface/integration related activities:
    - Building and testing of any interfaces to or from the Oracle Utilities cloud service(s) (unless stated otherwise)
    - Any ongoing synchronization and interface monitoring activities between customer owned Customer Information System(s) (CIS) and Oracle Utilities cloud service(s)
    - Complete end to end integration flows using template interfaces
    - Any configuration of interfaces external to the Oracle Utilities cloud service(s) that are required to match the published specification for interfacing with the Oracle Utilities cloud service(s)

The provision of these Implementation Support Services is contingent on the following:

- Any integration middleware used to implement any integration will not be hosted within any Oracle Utilities cloud service(s).
- Turnaround time will be no longer than two (2) working days unless otherwise agreed. Turnaround time refers to time taken by the customer/implementation team to respond to and confirm design elements and decision points during the performance of the Implementation Support Services.

---

# Live Operate Services

Live Operate services are services that Oracle provides to assist you with the ongoing operation of supported Oracle Utilities cloud services, once live and in production. If Live Operate Services are included in your Oracle Utilities cloud service(s), it will be stated in the relevant services descriptions.

The scope of the Live Operate Services provided by Oracle is limited and currently includes the following:

Oracle will work to:

- Assign a Customer Success Manager ("CSM") to manage delivery of the Oracle Utilities cloud service(s). The CSM will be the primary point of contact, will act as the first point for escalations, will monitor the progress of any related service requests ("SR") and confirm that all Oracle Utilities cloud services are performed in accordance with targets.
- Provide access to information about incidents and changes made to any of your Oracle Utilities cloud service environment(s).
- Upon request, create and deliver a Quarterly Status Report summarizing the activities undertaken over the past quarter and those scheduled as major future events.
- Upon request, offer quarterly meetings with customer/implementation oversight team to present, review and discuss the Quarterly Status Report.
- Monitor infrastructure and application availability and resolve any incident that is within Oracle's scope or responsibility.
- Provide primary Help Desk Services from 08:00 to 17:00 your local time on Oracle working days.
- Respond to severity 1 incidents 24 hours per day, 365 days per year.
- Provide incident management and problem management services for events related to Oracle Utilities Cloud Services, including:
  - Analyzing issues and resolving any incidents that are within Oracle's scope or responsibility
  - Escalating any issues not within Oracle's scope or responsibility to you for resolution
  - Provide infrastructure logs to assist in the diagnosis and remediation of incidents within your scope or responsibility. NB: these logs may be scrubbed for security purposes and other sensitive data.

Customers remain completely responsible for all other aspects of using or otherwise operating the cloud service. Examples of customer obligations in this regard would be to:

- Assign a manager to act as the primary conduit for all issues relating to the delivery of these services.
- Provide Oracle with the dates for key business and technology events (i.e. testing calendar, refresh schedule etc.) at least thirty (30) days prior to the event.
- Assign appropriate resources to support your activities.
- Support scheduling of meetings as required.
- Participate in all scheduled meetings.

- 
- Manage all activities, including:
    - Prioritizing work activities
    - Providing coordination across any teams and/or interested parties external to Oracle.
    - Escalation of issues to the Oracle CSM in a timely manner.
    - Providing any information required to progress service requests. Oracle is not responsible for meeting any agreed (or stated) targets or objectives if required or requested information is not forthcoming in a timely manner.
    - Assigning appropriate resources to conduct all required acceptance testing for all software packages delivered.
    - Accepting all software packages prior to promotion to the Production environment.
    - Maintaining a contact list for all persons performing governance functions.
    - Participating in Oracle's internal quality assurance processes on a mutually agreed schedule.
  - Manage the Oracle Utilities cloud services, including:
    - Defining and (as necessary) modifying batch schedules to meet business needs.
    - Monitoring batch and interface processes to confirm and verify completion.
    - Defining, implementing, testing and deploying any changes to the configuration and extensions required to:
      - Resolve incidents or problems within the customers scope or responsibility
      - Meet evolving business needs
      - Conform with upgrades, patches or any other Oracle Utilities cloud service requirements or prerequisites.
  - Notify Oracle of any incidents detected.
  - Action each SR in accordance with the relevant Oracle Cloud Hosting and Delivery Policies.
  - Establish the method of communication between the incident management team and the Oracle team for each incident.
  - Redirect any SRs to the correct (non- Oracle) support team if the SR is not within the scope of the Oracle Utilities cloud service(s).
  - Assist the Oracle team with SR analysis of data originating outside the applications.
  - Correct business data as reasonably requested by Oracle to achieve closure of an identified problem.
  - Monitor customer network and network connections to ensure sufficient bandwidth and performance.
  - Conduct all functional, regression, performance, system integration, acceptance and/or user acceptance testing as appropriate, and accept and approve all software changes, prior to the production roll out of any change, in accordance with any agreed-on release management process, for any change resulting from:

- 
- An incident remedy or fix, or
  - Any service pack update or upgrade.
  - Provide authorizations and/or validations for data correction and/or adjustments to the supported environments.
  - Apply configuration changes that are within the customer's or implementation's scope as recommended by Oracle to prevent recurring incidents.
  - At Oracle's request, provide approval through the environment change management process for the installation of fixes to prevent recurring incidents.
  - Initiate documented escalation processes when the urgency of the incident has increased due to business requirements.
  - Provide incident support where the remediation is within Oracle's scope or responsibility, specifically:
    - Provide Oracle with access to the user who reported the problem.
    - Provide all information as reasonably requested by Oracle and participate in diagnostics.
    - Provide a test case and access to an environment where the SR incident is reproducible.
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  - Acknowledge that the supplied break-fix resolves the incident or problem and accept the SR closure.
  - Provide internal approvals to Oracle before the migration of any change recommended by Oracle into a production environment.
  - When an incident or problem is determined by Oracle to be unrelated to an Oracle Utilities cloud service or to be caused by data problems arising from data conversion or some other error, a separate, paid contract may be required to cover Oracle's time spent investigating and, if relevant, correcting the problem at Oracle's prevailing time and materials rates, and to reimburse Oracle for all reasonable out of pocket expenses.

# Chapter 4

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This chapter information regarding third-party software used in Oracle Utilities cloud services, including:

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