Oracle Utilities: Service Order Management Fundamentals Ed 1

Oracle Utilities

DURATION	MODULES	COURSE CODE
5 Days	**10 Lectures**	**—**

Course Overview

Oracle Utilities: Service Order Management Fundamentals Ed 1

What You Will Learn

- Lesson 1: Introduction
- Safe Harbor Statement
- Agenda
- Introductions
- Introductions Product Management Team
- Introductions Some questions to consider answering
- Agenda A Broad Presentation of Content
- What this workshop is…and what it isn’t!
- Questions and Discussion
- Lesson 2: Functional Overview
- Safe Harbor Statement
- Agenda
- Service Order Process Evolution
- What is a service order?
- The Traditional Service Order Process
- The Evolving Service Order Process
- The need for a smarter integration solution
- The Metering Application Evolution
- Service Order Management Functional Overview
- Service Orders Span Systems
- The Oracle Solution
- Targeted Initial Release Functionality
- Doesn’t CC&B Process Field Activity Today? What gaps does SOM address?
- A more complete integration Leveraging the Smart Grid Gateway investment

What is the purpose of an “Orchestration Activity” ? Project accelerators for

- completing common business processes
- Orchestrators
- CCB Field Activity Type Profile – Current
- Service Order Orchestration – New
- Which Oracle Applications Are Required?
- Required Versions if Oracle Apps are used
- Product Demonstration
- Summarizing Benefits of the Oracle Solution
- Questions and Discussion
- Lesson 3: Technical Architecture Overview
- Safe Harbor Statement
- Agenda
- The Integrated Solution
- Oracle Utilities Integrated Suite
- Creation of a New Site or Service at a Site
- Creation of a New Site
- Service Location Data Synchronization
- Receipt of Meters and Similar Assets
- Creation of a New Asset (Device)
- Device Asset Data Synchronization
- Set Up a New Customer
- Update Account or Service Agreement
- Create a Service Request
- Update or Complete Service Request
- Install a Device
- Service Data Synchronization
- Device Installation Data Synchronization
- Practice 3-1 (30 minutes)
- Practice 3-2 (30 minutes)
- Architecture History and Overview
- Service Order Management
- AMI Integration Framework Today
- AMI Integration Framework in the Future
- Integration Framework
- Integration Platform Beyond AMI Integration
- A Smarter Integration Platform
- SOM – Technical Overview
- Architectural Scope and Common Objects
- What's The Purpose? Continuing the integrated architecture vision
- What's The Scope?
- A Few Terms You Will Hear
- A Few Terms You Will Hear (cont.)
- A Sample Data Flow
- A deeper dive into some of the key OUAF Objects
- Maintenance Objects in SGG for SOM
- Business Objects in SOM

- Orchestration Activities
- Orchestrator Activities (Review)
- Service Point States

Manual Meters: Correlation Between Installation Event State and the Install Status

- for Service Order Requests Option Type

Smart Meters: Correlation Between Installation Event State and the Install Status for

- Service Order Requests Option Type
- Enable Service Orchestrator Activity – Business Object Lifecycle
- Specific Activities
- Specific Activities (Review)
- Activities Spawn Other Activities This Is Already Part Of The Activity in SGG
- Specific Activity Lifecycles for BO’s that create OB Communications
- Specific Activities That Don't Create O/B Comms
- No O/B Communication Activity BO Lifecycle
- Field Activity Task Type
- Completion Events
- Completion Events – Continued
- Specific Activities Will Have Completion Events
- Questions and Discussion
- Lesson 4: Enable Service Deep Dive
- Safe Harbor Statement
- Agenda
- Introduction
- Enable Service Introduction
- Enable Service Introduction (continued)
- Enable Service How Does Starting Service Work Today?
- Enable Service How Does Starting Service Work Using Service
- Order Management?
- Functional Overview
- Enable Service Functional Overview
- Enable Service Functional Overview (continued)
- Enable Service High-Level Process Flow Diagram
- Enable Service Orchestrator Activity – Business Object Lifecycle
- Enable Service “Are SP and Device Ready?” State
- Enable Service Start Service Example
- Enable Service Start Service Example (Part 1)
- Enable Service Start Service Example (Part 2)
- Key Design Concepts
- Enable Service “Are SP and Device Ready?” State
- Enable Service Customer-Device Compatibility Check – Algorithm Logic
- Enable Service Customer-Device Compatibility Check – Algorithm
- Logic (continued)
- Enable Service Customer-Device Compatibility Check Example
- Enable Service Customer-Device Compatibility Check Example (continued)
- Enable Service Connect SP and/or Install Device – Algorithm Logic
- Enable Service Connect SP and/or Install Device – Algorithm Soft Parameters

- Enable Service Connect Device – Algorithm Logic
- Enable Service Connect Device – Algorithm Logic (continued)
- Enable Service Connect Device – Algorithm Logic
- Enable Service Connect Device – Algorithm Soft Parameters
- Enable Service Check for Measurement – Algorithm Logic
- Enable Service Check for Measurement – Algorithm Logic (continued)
- Enable Service Check for Measurement – Algorithm Soft Parameters
- Enable Service Update US/SP's Override Start Date Time for Enable
- Service – Algorithm Logic
- Enable Service Specific Activities and Completion Events
- Questions and Discussion
- Practice Exercises
- Practice 4-1 (30 minutes)
- Practice 4-2 (30 minutes)
- Lesson 5: Disable Service Deep Dive
- Safe Harbor Statement
- Agenda
- Introduction
- Disable Service Introduction
- Disable Service How Does Stopping Service Work Today?
- Disable Service How Does Stopping Service Work Using Service
- Order Management?
- Functional Overview
- Disable Service Functional Overview
- Disable Service Functional Overview (continued)
- Disable Service High-Level Process Flow Diagram
- Disable Service Orchestrator Activity – Business Object Lifecycle
- Disable Service "Are SP and Device Ready?" State
- Key Design Concepts
- Disable Service "Are SP and Device Ready?" State
- Disable Service Disconnect Device – Algorithm Logic
- Disable Service Disconnect Device – Algorithm Logic
- Disable Service Disconnect Device – Algorithm Soft Parameters
- Disable Service Check for Measurement – Algorithm Logic
- Disable Service Check for Measurement – Algorithm Logic (continued)
- Disable Service Check for Measurement – Algorithm Soft Parameters
- Disable Service Update US/SP's Override Stop Date Time for Disable
- Service – Algorithm Logic
- Disable Service Specific Activities and Completion Events
- Questions and Discussion
- Lesson 6: Cut Service for Non-Payment Deep Dive
- Safe Harbor Statement
- Agenda
- Introduction
- Cut Service for Non-Payment Introduction
- Cut Service for Non-Payment How Does Cut Service for Non-Payment

- Work Today?
- Cut Service for Non-Payment How Does Cut Service for Non-Payment Work Using
- Service Order Management?
- Functional Overview
- Cut Service for Non-Payment Functional Overview
- Cut Service for Non-Payment High-Level Process Flow Diagram
- Cut Service for Non-Payment Orchestrator Activity – Business
- Object Lifecycle
- Cut Service for Non-Payment “Are SP and Device Ready?” State
- Cut Service for Non-Payment Restrictions
- Cut Service for Non-Payment Restrictions – Business Day/Hour
- Cut Service for Non-Payment Restrictions – Business Day/Hour (continued)
- Cut Service for Non-Payment Restrictions – Seasonal
- Cut Service for Non-Payment Restrictions – Seasonal (continued)
- Cut Service for Non-Payment Restrictions – Life Support
- Cut Service for Non-Payment Restrictions – Life Support (continued)
- Cut Service for Non-Payment Restrictions – Always Dispatch Field Activity
- Cut Service for Non-Payment Restrictions – Always Dispatch Field
- Activity (continued)
- Cut Service for Non-Payment Field Activity Enrichment
- Cut Service for Non-Payment Field Activity Enrichment (continued)
- Key Design Concepts
- Cut Service for Non-Payment “Are SP and Device Ready?” State
- Cut Service for Non-Payment Disconnect Device for Non
- Payment – Algorithm Logic
- Cut Service for Non-Payment Disconnect Device for Non
- Payment – Algorithm Logic (continued)
- Cut Service for Non-Payment Disconnect Device for Non
- Payment – Algorithm Logic
- Cut Service for Non-Payment Disconnect Device for Non-Payment – Algorithm
- Soft Parameters
- Cut Service for Non-Payment Check for Measurement – Algorithm Logic
- Cut Service for Non-Payment Check for Measurement – Algorithm
- Logic (continued)
- Cut Service for Non-Payment Check for Measurement – Algorithm
- Soft Parameters

Cut Service for Non-Payment Update US/SP’s Override Stop Date Time for Disable

- Service – Algorithm Logic
- Cut Service for Non-Payment Specific Activities and Completion Events
- Questions and Discussion
- Practice Exercises
- Practice 6-1 (15 minutes)
- Practice 6-2 (5 minutes)
- Practice 6-3 (30 minutes)
- Lesson 7: Reconnect Service for Payment Deep Dive
- Safe Harbor Statement

- Agenda
- Introduction
- Reconnect Service for Payment Introduction
- Reconnect Service for Payment Introduction (continued)
- Reconnect Service for Payment How Does Reconnect for Payment
- Work Today?
- Reconnect Service for Payment How Does Reconnect for Payment Work Using
- Service Order Management?
- Functional Overview
- Reconnect Service for Payment Functional Overview
- Reconnect Service for Payment High-Level Process Flow Diagram
- Reconnect Service for Payment Orchestrator Activity – Business
- Object Lifecycle
- Reconnect Service for Payment “Are SP and Device Ready?” State
- Key Design Concepts
- Reconnect Service for Payment “Are SP and Device Ready?” State
- Reconnect Service for Payment Reconnect Device for
- Payment – Algorithm Logic
- Reconnect Service for Payment Reconnect Device for Payment – Algorithm
- Logic (continued)
- Reconnect Service for Payment Reconnect Device for
- Payment – Algorithm Logic
- Reconnect Service for Payment Reconnect Device for Payment – Algorithm
- Soft Parameters
- Reconnect Service for Payment Initialize US/SP’s Override Stop Date
- Time – Algorithm Logic
- Reconnect Service for Payment Specific Activities and Completion Events
- Questions and Discussion
- Practice Exercises
- Practice 7-1 (15 minutes)
- Lesson 8: Back to Back Service Deep Dive
- Safe Harbor Statement
- Agenda
- Introduction
- Back to Back Service Introduction
- Back to Back Service Introduction (continued)
- Back to Back Service How Does Starting Service Work Today?
- Back to Back Service How Does Starting Service Work Using Service
- Order Management?
- Functional Overview
- Back to Back Service Functional Overview
- Back to Back Service High-Level Process Flow Diagram
- Back to Back Service Orchestrator Activity – Business Object Lifecycle
- Back to Back Service “Are SP and Device Ready?” State
- Key Design Concepts
- Back to Back Service “Are SP and Device Ready?” State

- Back to Back Service Customer-Device Compatibility Check – Algorithm Logic
- Back to Back Service Customer-Device Compatibility Check – Algorithm
- Logic (continued)
- Back to Back Service Connect Device – Algorithm Logic
- Back to Back Service Connect Device – Algorithm Logic (continued)
- Back to Back Service Connect Device – Algorithm Logic
- Back to Back Service Connect Device – Algorithm Soft Parameters
- Back to Back Service Remote Turn Off Turn On – Algorithm Logic
- Back to Back Service Remote Turn Off Turn On – Algorithm Soft Parameters
- Back to Back Service Check for Measurement – Algorithm Logic
- Back to Back Service Check for Measurement – Algorithm Logic (continued)
- Back to Back Service Check for Measurement – Algorithm Soft Parameters
- Back to Back Service Update Usage Subscription for Back to Back
- Service – Algorithm Logic
- Back to Back Service Specific Activities and Completion Events
- Questions and Discussion
- Lesson 9: Meter Exchange Deep Dive
- Safe Harbor Statement
- Agenda
- Introduction
- Meter Exchange Introduction
- Meter Exchange Introduction (continued)
- Meter Exchange How Does Meter Exchange Work Today?
- Functional Overview
- Meter Exchange Functional Overview
- Meter Exchange High-Level Process Flow Diagram
- Meter Exchange Orchestrator Activity – Business Object Lifecycle
- Meter Exchange “Are SP and Device Ready?” State
- Meter Exchange Meter Exchange Role
- Meter Exchange Meter Exchange Role (continued)
- Key Design Concepts
- Meter Exchange “Are SP and Device Ready?” State
- Meter Exchange Connect Only If Previously Connected – Algorithm Logic
- Meter Exchange Create Meter Exchange Field Activity – Algorithm Logic
- Meter Exchange Connect Device – Algorithm Logic
- Meter Exchange Connect Device – Algorithm Logic (continued)
- Meter Exchange Connect Device – Algorithm Logic
- Meter Exchange Connect Device – Algorithm Soft Parameters
- Meter Exchange Decommission Removed Meter – Algorithm Logic
- Meter Exchange Specific Activities and Completion Events
- Questions and Discussion
- Lesson 10: Appointment Booking Process
- Safe Harbor Statement
- Agenda
- Appointment Booking Process Overview
- Appointment Booking Process Appointment Booking Process Overview

- Appointment Booking Process Basic Appointment Functionality
- Overview (continued)
- Appointment Booking Process How Does Appointment Booking Process Work Using
- Service Order Management?
- Missed Appointment Notification
- Appointment Booking Process Missed Appointment Notification
- Appointment Booking Process Missed Appointment Notification (continued)
- Appointment Handling by Non-Requesting System
- Appointment Booking Process Appointment Handling by
- Non-Requesting System
- Appointment Booking Process Appointment Handling by Non-Requesting
- System (continued)
- Appointment Booking Process How Does Appointment Handling by Non-Requesting
- System Using Service Order Management?
- Configuration & Demonstration
- Appointment Booking Process Master Configuration Setup
- Appointment Booking Process Field Task Type Setup
- Appointment Booking Process Appointment Portal
- Questions and Discussion
- Lesson 11: Management Dashboard
- Safe Harbor Statement
- Program Agenda
- Management Dashboard Overview
- Management Dashboard Requirements
- Management Dashboard Target Users
- Management Dashboard
- Management Dashboard Design Approach
- Service Order Operational Dashboard KPI’s
- Practice 11-1 (30 minutes)
- Service Order Trends Dashboard KPI’s
- Practice 11-2 (30 minutes)
- A Closer Look at the Design
- Management Dashboard High-Level Design Approach
- Management Dashboard Design Approach
- Embedded Analytics – Design Approach Accumulators versus Snapshots
- Demo Data Setup for Each of these MC Types
- Master Configuration Setup Management Dashboard
- Tolerances and Content
- Look and Feel
- Appendix Charts and Graphs Screenshots and Explanations
- In-Flight Activities By Type
- In-Flight Activity Trend
- In-Flight Activities with Issues
- In-Flight Activity Status Distribution
- Efficiency Trend for In-Flight Activities
- Service Order To Do Summary

- Management Dashboard Sample Charts and Graphs Service Order
- Trends Dashboard
- Orchestration Issues Trend
- Field Issue Distribution Over Time
- Activity Success Trend
- Activity Creation Trend
- Activity Completion Efficiency Over Time
- Questions and Discussion
- Lesson 12: Additional Items: FA Remarks, Update, and Cancel
- Safe Harbor Statement
- Program Agenda
- Field Activity Remarks
- Field Activity Remarks – Design Approach
- Service Order Management – Field Activity Remark Type Configuration
- Cancel Field Activity
- Cancel Orchestration Introduction
- Source-Initiated Cancellation High-Level Overview
- Source-Initiated Cancellation MWM Causes A Challenges
- Source-Initiated Cancellation Cancel Orchestrator Will Be Linked To One Or
- Two Activities
- Source-Initiated Cancellation Orchestrator Activity – Business
- Object Lifecycle
- Source-Initiated Cancellation Cancel Orchestrator Algorithm Summary
- Field-Initiated Cancellation Requires Manual Efforts
- Update Field Activity
- Update Orchestration Introduction
- Source-Initiated Update High-Level Overview
- Source-Initiated Update Processing Logic with MWM
- Source-Initiated Update Orchestrator Activity – Business Object Lifecycle
- Source-Initiated Update Field Activity – Reschedule Appointment
- Field-Initiated Update Interim Status Update from MWM
- Where to go to get more information
- OPN Knowledge Zone SGG and SOM specific Content
- Demo Data Scenarios Examples of Many Orchestrators
- Questions and Discussion
- Lesson 13: Advanced Topics: Extensibility Patterns
- Safe Harbor Statement
- Service Order Management Extensibility
- Product Delivery Strategy
- Service Order Management Extensibility – Activity Data
- Activity Data Extension
- Service Order Management Extensibility – Processing
- Configuration Baseline Objects
- Three Tiers of Extension Complexity
- Tier 1 Extensions
- Tier 1 Activity Extension – Admin Configuration

- Tier 1 Activity Extension – Field Task Type Configuration
- Tier 1 Activity Extension – Meter Exchange
- Meter Exchange Orchestration Type
- Device Install Special Role Extendable Lookup
- Tier 2 Extensions
- Tier 2 Extensions Examples
- Tier 2 Extensions Examples (Continued)
- Tier 2 Extensions Field Task Type Behaviors
- Tier 3 Extensions
- Service Order Management Exception Handling
- Retrying from Error States
- Discard Reason
- Third Party Applications
- A Third-Party Mobile Workforce System
- Questions and Discussion