

**Oracle Utilities Analytics Dashboards for  
Customer Analytics, Revenue Analytics,  
and Credit & Collections Analytics**

Metric Reference Guide

Release 2.5.0.0.2

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Oracle Utilities Analytics Dashboards for Customer Analytics, Revenue Analytics, and Credit & Collections  
Analytics Metric Reference Guide

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# Contents

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- Preface..... i-i
  - Audience ..... i-i
  - Related Documents ..... i-i
  - Notational Conventions ..... i-i
  
- Chapter 1**
- Dashboard Content Reference..... 1-1**
  - Credit & Collections Analytics ..... 1-1
    - Overview ..... 1-1
    - Arrears..... 1-5
    - Collectibles ..... 1-9
    - Write Offs..... 1-18
    - Pay Plans..... 1-24
    - Payment Arrangements ..... 1-29
  - Customer Analytics ..... 1-37
    - Overview ..... 1-37
    - Customers..... 1-39
    - Cases..... 1-42
    - Customer Contacts..... 1-47
  - Revenue Analytics..... 1-51
    - Overview ..... 1-51
    - Billed Usage..... 1-56
    - Revenue ..... 1-59
    - Billing ..... 1-65
    - Unbilled SAs ..... 1-75

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# Preface

This document describes the Oracle Utilities Customer Care and Billing Analytics metrics (such as dashboards, analyses, and subject areas) available in Oracle Utilities Analytics Dashboards. These metrics are used in pre-built analyses, and/or available for customers to use via OBIEE Answers in building new analyses or extending existing analyses.

## Audience

This guide is intended for all users of Oracle Utilities Analytics Dashboards for Oracle Utilities Customer Care and Billing.

## Related Documents

For more information, see the following documents:

- *Oracle Utilities Analytics for Oracle Utilities Extractors and Schema and Oracle Utilities Analytics Dashboards Installation Guide*
- *Oracle Utilities Analytics for Oracle Utilities Extractors and Schema and Oracle Utilities Analytics Dashboards Quick Install Guide*
- *Oracle Utilities Analytics for Oracle Utilities Extractors and Schema and Oracle Utilities Analytics Dashboards Release Notes*
- *Oracle Utilities Analytics for Oracle Utilities Extractors and Schema and Oracle Utilities Analytics Dashboards User's Guide*
- *Oracle Utilities Analytics for Oracle Utilities Extractors and Schema and Oracle Utilities Analytics Dashboards Administration Guide*

**See Also:**

- Oracle Utilities Customer Care and Billing Documentation Library

## Notational Conventions

The following notational conventions are used in this document:

| <b>Notation</b> | <b>Indicates</b>   |
|-----------------|--|
| <b>boldface</b> | Graphical user interface elements associated with an action, terms defined in text, or terms defined in the glossary |

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| <b>Notation</b> | <b>Indicates</b>   |
|-----------------|--|
| <i>italic</i>   | Book titles, emphasis, or placeholder variables for which you supply particular values                       |
| monospace       | Commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter |

# Chapter 1

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## Dashboard Content Reference

Oracle Utilities Analytics Dashboards, Release 2.5.0.0.2, provides analysis of and data from Oracle Utilities Customer Care and Billing using Oracle Business Intelligence Enterprise Edition (OBIEE) built-in metrics. Non-spatial analytics, information that is not tied to geography, is represented in a series of dashboards showing tables, bar graphs, pie charts, and gauges. Spatial analytics, or information that is geographically related, use OBIEE integrated Map Viewer technology to represent events, map data, and other geographical information.

This chapter describes the Oracle Utilities Analytics Dashboards content for Oracle Utilities Customer Care and Billing. The dashboards are grouped by the following analytics:

- **Credit & Collections Analytics**
- **Customer Analytics**
- **Revenue Analytics**

### Credit & Collections Analytics

This section describes the metrics available in Credit & Collections Analytics of Oracle Utilities Analytics Dashboards. The metrics analyze accounts in arrears, and write offs to the customers.

Oracle Utilities Analytics Dashboards for Oracle Utilities Customer Care and Billing provides the Credit & Collections analytics content in the following dashboards:

- **Overview**
- **Arrears**
- **Collectibles**
- **Pay Plans**
- **Payment Arrangements**
- **Write Offs**

### Overview

The Overview dashboard provides a high-level overview of arrears, collectibles, write offs data, pay plans, and payment arrangements for the selected period.

To access this dashboard:

1. Go to the **Home** page.
2. Select **Dashboards > Credit & Collections Analytics > Overview**.

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The dashboard includes the following dashboard pages. The data for current fiscal or calendar year and month is displayed by default. You may modify the criteria per requirement.

- **Overview - Arrears**
- **Overview - Collection**

## Overview - Arrears

The Overview - Arrears dashboard page compares arrears against revenue.

### Arrears (31+ Days) Compared to Revenue

| Property           | Details  |
|--------------------|--|
| Description        | <p>This analysis provides a percentage of the arrears for 31+ days compared against the total revenue amount in the selected fiscal period.</p> $\text{Percentage} = 100 * (\text{Arrears (31+ days)} / \text{Revenue})$   |
| Purpose            | Business users can get an insight into how well payments are made on time.   |
| Representation     | <p>The gauge shows the percentage, using different colors to denote how the business users perceive the calculated result. The needle movement in the gauge towards yellow or red indicates a need to pay more attention on the payment collection scenarios.</p> <p><b>Note:</b> The ranges for green, yellow, and red can be customized.</p> <p>The table shows the calculated result and the relevant data.</p> |
| Drill Down         | The <b>Arrears (31+ Days)/ Revenue</b> column link drills down to the <b>Arrears</b> dashboard for more details about the respective arrears.  |
| Source Object      | SA Snapshot Fact   |
| OBIEE Subject Area | CCB - SA Snapshot  |
| Metrics            | 31+ Days, Revenue Amount, Arrears (31+ Days) / Revenue   |

## Overview - Collection

The Overview - Collection dashboard page provides an overview of the effectiveness of collection and write off processes, and also pay plans and payment arrangements.

### Collection Process Effectiveness

| Property    | Details   |
|-------------|---|
| Description | <p>This analysis shows the level of success in collecting the arrears payments, in the selected month, in relationship to collections.</p> $\text{Collection Process Effectiveness \%} = 100 (1 - (\text{Arrears at Start} / \text{Arrears at End}))$ |
| Purpose     | This analysis provides insight into the success rate of collecting arrears payments. Business users can determine the effectiveness of the collection processes used to collect the arrears payments.   |

| Property           | Details   |
|--------------------|---|
| Representation     | <p>The gauge shows the percentage, using different colors to denote how the business users perceive the calculated result. The needle movement in the gauge towards yellow or red indicates a need to pay more attention on the payment collection scenarios.</p> <p><b>Note:</b> The ranges for green, yellow, and red can be customized.</p> <p>The table shows the percentage of successful collection amount versus the original arrears amount, and the relevant data.</p> |
| Drill Down         | The <b>Collection Process Effectiveness</b> column link drills down to the <b>Collectibles</b> dashboard to view the respective collectibles in detail.   |
| Source Object      | Collectible Process Fact  |
| OBIEE Subject Area | Collectible Process   |
| Metrics            | Collection Process Effectiveness, Arrears at Start, Arrears at End  |

### Write Off Process Effectiveness

| Property       | Details  |
|----------------|--|
| Description    | <p>“Arrears at start” specifies the amount of arrears being collected by the write off process (captured when a write off process is initiated). “Arrears at end” is the amount of arrears remaining when the write off process completes (ideally, this should be zero if the outstanding debt is collected from the customer).</p> <p>This analysis shows the level of success in collecting the arrears payments, in the selected month, in relationship to write offs.</p> <p>Write Off Process % = <math>100 * (1 - (\text{Arrears at End} / \text{Arrears at Start}))</math></p> |
| Purpose        | This analysis provides insight into the success rate of write off arrears payments. Business users can determine the effectiveness of the write off processes used to collect the arrears payments. It is typically used to measure the effectiveness of 3rd party collections vendors.  |
| Representation | <p>The gauge shows the percentage, using different colors to denote how the business users perceive the calculated result.</p> <p>The needle movement in the gauge towards yellow or red indicates a need to pay more attention on the payment collection scenarios.</p> <p><b>Note:</b> The ranges for green, yellow, and red can be customized.</p> <p>The table shows the percentage of successful write offs versus the original arrears amount, and the relevant data.</p>  |
| Drill Down     | The <b>Collection Process Effectiveness</b> column link drills down to the <b>Collectibles</b> dashboard to view the respective collectibles in detail.  |
| Source Object  | Uncollectible Process Fact   |



| Property           | Details   |
|--------------------|---|
| OBIEE Subject Area | CCB - Uncollectible Process                                       |
| Metrics            | Write Off Process Effectiveness, Arrears at Start, Arrears at End |

## Pay Plans

| Property           | Details   |
|--------------------|---|
| Description        | <p>A “pay plan” is an agreement with a customer to make scheduled payments on specific dates to clear off the customer’s debt.</p> <p>This analysis shows the total number of pay plans classified by their statuses for the previous three months.</p>         |
| Purpose            | This analysis provides a bird’s eye view of the pay plans in the last three months, along with their statuses. Business users can identify the recently happening trends based on the statuses.   |
| Representation     | <p>The bar graph displays the number of pay plans active or ended in a month and their status, for the previous three months.</p> <p>The X-axis represents the month. The Y-axis represents the number of pay plans. Hover over the graph for more details.</p> |
| Drill Down         | The graph bars drill down to the <b>Current Status</b> dashboard page in the <b>Pay Plans</b> dashboard for the status of pay plans created in that month.  |
| Source Object      | Pay Plan Snapshot Fact  |
| OBIEE Subject Area | CCB - Pay Plan Snapshot   |
| Metrics            | Pay Plan Count  |

## Payment Arrangement Success Rate

| Property    | Details   |
|-------------|---|
| Description | <p>A “payment arrangement” is an agreement with a customer to pay off their debt as installments as part of their future bills (sometimes referred to as “current bill plus”).</p> <p>This analysis shows the success rate of payment arrangement for the selected month.</p> <p>Payment Arrangement Success Rate = <math>100 * ((\text{Active} + \text{Kept Payment Arrangement}) / \text{Total Payment Arrangement})</math></p> |
| Purpose     | Business users can analyze the rate at which customers are paying off their debts and bringing the payment arrangements to a closure.   |

| Property           | Details  |
|--------------------|--|
| Representation     | <p>The gauge shows the percentage, using different colors to denote how the business users perceive the calculated result.</p> <p>The needle movement in the gauge towards yellow or red indicates a need to pay more attention to customers paying off their debt through payment arrangements and the various payment arrangement scenarios that are implemented.</p> <p><b>Note:</b> The ranges for green, yellow, and red can be customized.</p> |
| Drill Down         | The gauge drills down to the <b>Overview</b> page of <b>Payment Arrangements</b> dashboard.  |
| Source Object      | Payment Arrangement Snapshot Fact  |
| OBIEE Subject Area | CCB - Payment Arrangement Snapshot   |
| Metrics            | Success Rate   |

## Arrears

The Arrears dashboard provides an overview of the distribution and trends of arrears in a geographical region for the selected period.

To access this dashboard:

1. Go to the **Home** page.
2. Select **Dashboards > Credit & Collections Analytics > Arrears**.

The dashboard provides the following dashboard pages. The data for current fiscal year and month is displayed by default. You may modify the criteria per requirement.

- **Distribution**
- **Arrears Map**
- **Trend**
- **Details**

### Distribution

The Distribution dashboard page provides a snapshot of the comparison between revenue and arrears, and also shows how the arrears are distributed across various customer classes, jurisdiction, premise types, and service types.

### Arrears Compared to Revenue

| Property    | Details  |
|-------------|--|
| Description | <p>This analysis shows the comparison between arrears and revenue in the selected month and for each service type, thus facilitating a quick view of the outstanding debt in that month.</p> <p>Comparison % = <math>100 * (\text{Arrears for 31+ days} / \text{Total Revenue})</math></p> <p><b>Note:</b> The arrears buckets can be configured to include values, such as &gt; 60 days, &gt; 90 days, etc.</p> |

| Property           | Details  |
|--------------------|--|
| Purpose            | Business users can determine the outstanding debt across various service types in the selected month.  |
| Representation     | The <b>View By</b> drop down slices the data by customer class, jurisdiction, premise type, or service type.<br><br>The table shows the comparison between the arrears for 31+ days and the total revenue for each service type. |
| Drill Down         | The <b>31+Days Arrears</b> column link drills down to the <b>Trend</b> dashboard page to view the respective bill cycle details.   |
| Source Object      | SA Snapshot Fact   |
| OBIEE Subject Area | CCB - SA Snapshot  |
| Metrics            | 31+ Days Arrears / Revenue, 31+ Days Arrears, Revenue  |

### Arrears Distribution

| Property           | Details   |
|--------------------|---|
| Description        | This analysis shows how the arrears pending for 91+ days are distributed in each service type and in each service agreement type.<br><br>For example: You can chose different buckets, such as 31+ days, 15-30 days, 31-60 days, 61-90 days, 91+ days.<br><br>$\% = \text{Bucket Amount in Arrears for View By Choice} / (\text{Sum of all buckets for View By}) * 100$ |
| Purpose            | Business users can view the total arrears, and their distribution, by various age buckets and customer segments for the selected period.  |
| Representation     | The <b>View By</b> drop down slices the data by customer class, jurisdiction, premise type, or service type, with the corresponding age buckets.<br><br>The pie chart shows how the arrears in each service type are distributed.<br><br>The table shows the percentage distribution of each service agreement type against each service type for the selected period.  |
| Drill Down         | The <b>91+ Days</b> and the <b>Percentage</b> column links drill down to the <b>Details</b> dashboard page for more specific details.   |
| Source Object      | SA Snapshot Fact  |
| OBIEE Subject Area | CCB - SA Snapshot   |
| Metrics            | Arrears Total, Percentage of Arrears  |

---

## Arrears Map

The Arrears Map dashboard page provides a bird's eye view of arrears by region.

### Arrears by Region

| Property           | Details  |
|--------------------|--|
| Description        | This analysis provides a geographical view to quickly analyze the outstanding debts in a specific region and in the selected period.   |
| Purpose            | This analysis shows the customer debt broken down by various regions, thus helping the business users to plan effective collection processes.  |
| Representation     | <p>The color-coded region on the map shows the arrears amount by age buckets in that area. The postal code shows the master-detail implementation in the table.</p> <p>The <b>View By</b> drop down slices the data by customer class, jurisdiction, premise type, or service type.</p> <p>The <b>Postal Code</b> drop down lists the various postal codes on the map.</p> <p>The table displays the current outstanding arrears amount and the arrears amount in respective age buckets, against each customer segment. The data is based on the postal code selected on the map.</p> |
| Drill Down         | Click <i>any</i> of the table links (corresponding to the age buckets) to drill down to the <b>Details</b> dashboard page for arrears-specific details.  |
| Source Object      | SA Snapshot Fact   |
| OBIEE Subject Area | CCB - SA Snapshot  |
| Metrics            | Current Balance, 15-30 days, 31+Days, 31-60 Days, 61-90 Days, 91+ Days   |

## Trend

The Trend dashboard page summarizes the customer arrears' trend as a percentage of billed revenue for the selected period.

### Arrears as % of Billed Revenue

| Property    | Details   |
|-------------|---|
| Description | This analysis provides a snapshot of the customer debt as a percentage of revenue over a 15-month period (earlier to the selected month). |
| Purpose     | Business users can determine how well the bills are being paid by customers.  |

| Property           | Details   |
|--------------------|---|
| Representation     | <p>The first stacked bar graph shows the percentage of debt against the total revenue. This information provides an indication of how well the bills are being paid.</p> <p>The second stacked bar graph shows the actual amount of debt against the total revenue to analyze how well the bills are being paid.</p> <p>Revenue contains only billed amount. The table displays the debt stored in various buckets based on its age - 31-60 days, 61-90 days, and 91+ days.</p> |
| Drill Down         | The <b>31-60 Days</b> , <b>61-90 Days</b> , and <b>91+ Days</b> column links drill down to the <b>Details</b> dashboard for more specific details.  |
| Source Object      | SA Snapshot Fact  |
| OBIEE Subject Area | CCB - SA Snapshot   |
| Metrics            | Revenue Amount, 31-60 Days, 61-90 Days, 91+ Days  |

## Details

The Details dashboard page provides detailed information about the arrears at account level.

### Arrears Detail

| Property           | Details  |
|--------------------|--|
| Description        | This analysis shows a list of the top 100 accounts (in each customer class) with the highest 31+ days' arrears amounts in the selected month.                |
| Purpose            | The accounts at the top of the list are the ones with highest arrears. Business users can plan effective collection processes to collect the arrears amount. |
| Representation     | The table displays the customer class and various age buckets for each customer account.   |
| Drill Back         | The <b>Account</b> column link drills back to the <b>Account Maintenance</b> page in the Oracle Utilities Customer Care and Billing system.                  |
| Source Object      | SA Snapshot Fact   |
| OBIEE Subject Area | CCB - SA Snapshot  |
| Metrics            | <p>Current Balance, 15-30 Days, 31-60 Days, 61-90 Days, 91+ Days, 31+ Days</p> <p><b>Note:</b> Additional arrears measures (buckets) can be customized.</p>  |

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## Collectibles

The Collectibles dashboard provides an overview of the collection amount and various processes initiated to collect that amount.

To access this dashboard:

1. Go to the **Home** page.
2. Select **Dashboards > Credit & Collections Analytics > Collectibles**.

The dashboard provides the following dashboard pages. The data for current calendar year and month is displayed by default. You may modify the criteria per requirement.

- **Distribution**
- **Collection Process**
- **Process Template**
- **Collectible Amount**
- **Collection Duration**
- **Analysis**
- **Details**

### Distribution

The Distribution dashboard page provides a snapshot of the distribution of collection processes.

### Collection Process Effectiveness Distribution

| Property           | Details  |
|--------------------|--|
| Description        | <p>This analysis helps to understand any variations in collection process effectiveness across multiple dimensions, such as jurisdiction, premise type, city, postal code, and customer class, or a combination of any of these.</p> <p>Effectiveness % = <math>100 * ((\text{Arrears at Start} - \text{Arrears at End}) / \text{Arrears at Start})</math></p> |
| Purpose            | <p>The collection process effectiveness is broken down by various customer segments, helping the business users to identify if there is a need to adopt tailored collection processes for different segments.</p>  |
| Representation     | <p>The <b>View By</b> drop down slices the data by customer class, premise type, or jurisdiction.</p> <p>The table shows the percentage of successful collections amount versus the original arrears amount.</p>   |
| Drill Down         | <p>The <b>Premise Type, Customer Class, or Jurisdiction</b> column links drill down to the <b>Collection Process</b> and <b>Collection Duration</b> dashboard pages for more details.</p>  |
| Source Object      | Collectible Process Fact   |
| OBIEE Subject Area | CCB - Collectible Process  |
| Metrics            | Arrears at Start, Arrears at End, Effectiveness  |

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## Active Collection Process Volume

| Property           | Details   |
|--------------------|---|
| Description        | This analysis provides a summary of the count of collection processes created (to collect arrears payments from the customers) in the selected month.   |
| Purpose            | This analysis compares the volume of the current month against the average of the last three months. Business users can analyze the count of accounts ending up in the collection compared to previous periods.   |
| Representation     | <p>The gauge shows the percentage of collection processes in the current month compared to the average of the previous three months. It uses different colors to denote how the users perceive the calculated result.</p> <p>The needle movement in the gauge towards yellow or red indicates a need to pay more attention on payment collection scenarios.<br/><b>Note:</b> The ranges for green, yellow, and red can be customized.</p> <p>The table shows the collection processes created in the last three months, their collective average, and a calculated value (collection processes in the current month divided by the average of last three months).</p> |
| Drill Down         | The <b>Current Month / Average of Last 3 Months</b> column link drills down to the <b>Collection Process</b> dashboard page for more specific details.  |
| Source Object      | Collectible Process Fact  |
| OBIEE Subject Area | CCB - Collectible Process   |
| Metrics            | Current Month / Average of Last 3 Months, Average of Last 3 Months  |

## Collection Process

The Collection Process dashboard page shows the trend of collection processes created and their effectiveness in a 15-month period across various segments.

## Collection Process Effectiveness

| Property    | Details   |
|-------------|---|
| Description | <p>This analysis provides a detailed view of how effectively the collection processes are used to collect arrears payments from customers for the previous 15 months.</p> <p><math display="block">\text{Effectiveness \%} = 100 * ((\text{Arrears at Start} - \text{Arrears at End}) / \text{Arrears at Start})</math></p> |
| Purpose     | This analysis shows the effectiveness trend across various segments. Business users can pinpoint the segments which are least successful in collecting debts, and thus analyze the need for additional efforts.   |

| Property           | Details   |
|--------------------|---|
| Representation     | <p>The <b>View By</b> drop down slices the data by customer class or jurisdiction.</p> <p>The bar graph displays the effectiveness of the collection processes in the selected customer segment for the previous 15 months.</p> <p>The table shows the arrears at the start and end of each month, along with the collection process effectiveness, in the selected customer segment.</p> |
| Drill Down         | The <b>Effectiveness</b> column link drills down to the <b>Process Template, Analysis, and Details</b> dashboard pages for respective details.  |
| Source Object      | Collectible Process Fact  |
| OBIEE Subject Area | CCB - Collectible Process   |
| Metrics            | Arrears at Start, Arrears at End, Collection Process Effectiveness  |

### Active Collection Process Volume

| Property           | Details  |
|--------------------|--|
| Description        | This analysis provides insight into the distribution of the total number of collection processes run to collect all the outstanding customer debt, for previous 15 months (from the selected month), across various customer segments. |
| Purpose            | Higher number of collection processes indicates higher efforts in collecting the billed amount.  |
| Representation     | <p>The <b>View By</b> drop down slices the data by customer class or jurisdiction.</p> <p>The bar graph shows the count of collection processes run to collect arrears in the selected segment and in the selected period.</p>         |
| Drill Down         | The <b>Collection Processes</b> column link drills down to the <b>Collectible Amount</b> dashboard page for more details.  |
| Source Object      | Collectible Process Fact   |
| OBIEE Subject Area | CCB - Collectible Process  |
| Metrics            | Count of Collection Processes  |

### Process Template

The Process Template dashboard page provides a snapshot of the performance, usage, and effectiveness of the collection process templates.



## 5 Worst Performing Collection Process Templates

| Property           | Details   |
|--------------------|---|
| Description        | This analysis shows the top five worst performing collection process templates in the selected month.   |
| Purpose            | Business users can identify the collection process templates that are not performing well.  |
| Representation     | <p>The bar graph shows the percentage of arrears collected in a month across various collection process templates. The X-axis represents the templates. The Y-axis represents the percentage. Hover over the bars for specific details.</p> <p>The table displays the completed or cancelled processes for each collection process template in the selected month. It also shows the arrears at start, at end, and the percentage of arrears collected.</p> $\% \text{ of Arrears Collected} = 100 * ((\text{Arrears At End} - \text{Arrears At Start}) / \text{Arrears At Start})$ |
| Drill Down         | The labels on the X-axis of the bar graph have the master-detail interaction with the <b>Event Effectiveness</b> analysis on the same dashboard page. Clicking on the label of a specific template name will refresh the <b>Event Effectiveness</b> analysis to show the data for this specific template.   |
| Source Object      | Collectible Process Fact  |
| OBIEE Subject Area | CCB - Collectible Process   |
| Metrics            | Arrears At Start, Arrears At End, Number of Completed or Canceled Processes, % of Arrears Collected   |

## 5 Best Performing Collection Process Templates

| Property       | Details   |
|----------------|---|
| Description    | This analysis shows the top five best performing collection process templates in the selected month.  |
| Purpose        | Business users can identify the collection process templates that are performing the most.  |
| Representation | <p>The bar graph shows the percentage of arrears collected in a month across various collection process templates. The X-axis represents the templates. The Y-axis represents the percentage. Hover over the bars for specific details.</p> <p>The table displays the completed or cancelled processes for each collection process template in the selected month. It also shows the arrears at start, at end, and the percentage of arrears collected.</p> $\% \text{ of Arrears Collected} = 100 * ((\text{Arrears At End} - \text{Arrears At Start}) / \text{Arrears At Start})$ |

| Property           | Details   |
|--------------------|---|
| Drill Down         | <p>The labels on the X-axis of the bar graph have the master-detail interaction with the <b>Event Effectiveness</b> analysis of the same dashboard page.</p> <p>Clicking on the label of a specific template name will refresh the <b>Event Effectiveness</b> analysis to show the data for this specific template.</p> |
| Source Object      | Collectible Process Fact  |
| OBIEE Subject Area | CCB - Collectible Process   |
| Metrics            | Arrears At Start, Arrears At End, Number of Completed or Canceled Processes, % of Arrears Collected   |

### 5 Most Used Collection Process Templates

| Property           | Details   |
|--------------------|---|
| Description        | This analysis shows the top five collection process templates that are most used to collect customer debts. The data is displayed for the selected month.   |
| Purpose            | Business users can identify the collection process templates that are used frequently.  |
| Representation     | <p>The bar graph shows the number of collection or canceled processes in each template. The X-axis represents the templates. The Y-axis represents the number of collection processes. Hover over the bars for specific details.</p> <p>The table displays the completed or canceled processes for each collection process template in the selected month. It also shows the arrears at start, at end, and the percentage of arrears collected.</p> <p><math>\% \text{ of Arrears Collected} = 100 * ((\text{Arrears At End} - \text{Arrears At Start}) / \text{Arrears At Start})</math></p> |
| Drill Down         | <p>The labels on the X-axis of the bar graph have the master-detail interaction with the <b>Event Effectiveness</b> analysis of the same dashboard page.</p> <p>Clicking on the label of a specific template name will refresh the <b>Event Effectiveness</b> analysis to show the data for this specific template.</p>   |
| Source Object      | Collectible Process Fact  |
| OBIEE Subject Area | CCB - Collectible Process   |
| Metrics            | Arrears At Start, Arrears At End, Number of Completed or Canceled Processes, % of Arrears Collected   |

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## Event Effectiveness

| Property           | Details   |
|--------------------|---|
| Description        | This analysis shows the effectiveness of the collection event types based on the percentage of arrears collected on its related collection processes. The data is shown for the selected month.   |
| Purpose            | Business users can analyze which types of collection events are more effective and which types are not.   |
| Representation     | <p>The first <b>Template</b> drop down box filters the pie chart to show event effectiveness slices for the selected collection process template.</p> <p>The pie chart shows the distribution of collection event types in the selected template and in the selected month.</p> <p>The second <b>Template</b> drop down box filters the tabular report to show event effectiveness details for the selected collection process template.</p> <p>The table displays the number of effective processes against each collection event type in the selected template. It also shows the arrears at start, at end, and the percentage of arrears collected, along with the duration.</p> <p><math>\% \text{ of Arrears Collected} = 100 * (\text{Arrears at Start} - \text{Arrears at End} / \text{Arrears at Start})</math></p> |
| Drill Down         | The <b>Collection Event Type</b> column link drills down to the <b>Details</b> dashboard page for specific details.   |
| Source Object      | Collectible Process Fact  |
| OBIEE Subject Area | CCB - Collectible Process   |
| Metrics            | Effective Processes, % of Total, Duration (Days), Arrears at Start, Arrears at End, % of Arrears Collected  |

## Collectible Amount

The Collectible Amount dashboard page provides a snapshot of the distribution of the collectible amount in the selected month.

## Collectible Amount

| Property       | Details   |
|----------------|---|
| Description    | Collectible amount is the amount due from a customer for which an organization initiates collection processes. This analysis displays the maximum, minimum, and average collectible amounts for the previous 15 months. |
| Purpose        | Business users can identify any unusual collectible amounts or emerging trends in a particular month.   |
| Representation | Both the graph and the table show the maximum, minimum, and average collectible amounts for each of the previous 15 months.   |

| Property           | Details  |
|--------------------|--|
| Drill Down         | No drill down                                  |
| Source Object      | Collectible Process Fact                       |
| OBIEE Subject Area | CCB - Collectible Process                      |
| Metrics            | Maximum Amount, Minimum Amount, Average Amount |

### Collectible Amount Distribution

| Property           | Details   |
|--------------------|---|
| Description        | This analysis provides insight into the distribution of collection amounts broken down by various customer segments for the previous 15 months.   |
| Purpose            | Business users can analyze how the arrears at the start of each month are distributed in the selected customer segment.   |
| Representation     | <p>The <b>View By</b> drop down slices the details by customer class or jurisdiction.</p> <p>Both the graph and the table display the arrears at the start of each month for the previous 15 months and across the selected customer segment.</p> <p>Use the slider to view the arrears at the start of a particular month.</p> |
| Drill Down         | No drill down   |
| Source Object      | Collectible Process Fact  |
| OBIEE Subject Area | CCB - Collectible Process   |
| Metrics            | Arrears at Start  |

### Collection Duration

The Collection Duration dashboard page provides an overview of the time taken to complete the collection processes and also shows the distribution across various segments.

#### Collection Duration

| Property    | Details  |
|-------------|--|
| Description | This analysis displays the maximum, minimum, and average collection durations for the previous 15 months. It provides insight into the time taken by the collection processes to collect the arrears amount for the selected period. |
| Purpose     | This analysis shows how long the collection processes take at a minimum, maximum, and average to close. Business users can thus analyze the lead time in collecting debt.  |

| Property           | Details   |
|--------------------|---|
| Representation     | Both the graph and the table display the maximum, minimum, and average collection duration for each month, for the previous 15 months. If the organization has data for fewer months, the graph displays values for only those existing months. Hover over the graph for the month and duration (in hours) details. |
| Drill Down         | The <b>Average Duration (Hours)</b> column link drills down to the <b>Details</b> dashboard page for more specific details.   |
| Source Object      | Collectible Process Fact  |
| OBIEE Subject Area | CCB - Collectible Process   |
| Metrics            | Maximum Duration (Hours), Minimum Duration (Hours), Average Duration (Hours)  |

### Collection Duration Distribution

| Property           | Details  |
|--------------------|--|
| Description        | This analysis shows the distribution of collection duration broken down by the selected customer segment for the previous 15 months. It provides insight into the distribution of the time taken by the collection processes to collect the arrears amount for the selected period.  |
| Purpose            | Business users can analyze the lead time in collecting debts across various customer segments.   |
| Representation     | <p>The <b>View By</b> drop down slices the details by customer class or jurisdiction.</p> <p>Use the slider to display the collection duration distribution against each customer segment for a particular month.</p> <p>The graph displays the collection duration against each customer segment in the selection month (from the slider). Hover over the graph for the customer segment and duration (in hours) details.</p> <p>The table displays the collection duration against each customer segment for the previous 15 months.</p> |
| Drill Down         | The graph and the <b>Collection Duration (Hours)</b> column link drill down to the <b>Details</b> dashboard page for respective details.   |
| Source Object      | Collectible Process Fact   |
| OBIEE Subject Area | CCB - Collectible Process  |
| Metrics            | Collection Duration (Hours)  |

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## Analysis

The Analysis dashboard page primarily generates ad hoc reports where business users can pick the dimension attributes and view the effectiveness based on the selected attributes.

### Collection Analysis

| Property           | Details   |
|--------------------|---|
| Description        | This analysis provides insight into the collection process effectiveness in more detail by allowing users to group data by various customer segments and geography.<br><b>Note:</b> The result is the percent of successful collection amount versus the original arrears amount.   |
| Purpose            | Business users can analyze how effectively the collection processes are operating in various areas in the selected customer segments.   |
| Representation     | The <b>View By</b> drop down slices the data by customer class or jurisdiction, with a combination of city or postal code.<br><br>The table displays the arrears at the start and end of the selected period, and the collection process effectiveness against the selected customer segments. The effectiveness percentages in red and yellow indicate a need for higher efforts in collecting debts.<br><br>$\text{Effectiveness \%} = 100 * ((\text{Arrears at Start} - \text{Arrears at End}) / \text{Arrears at Start})$ |
| Drill Down         | The <b>Effectiveness</b> column link drills down to the <b>Details</b> dashboard page for more specific details.  |
| Source Object      | Collectible Process Fact  |
| OBIEE Subject Area | CCB - Collectible Process   |
| Metrics            | Collection Duration (Hours)   |

## Details

The Details dashboard page provides detailed information about the collectibles at account level.

### Effectiveness Details

| Property       | Details  |
|----------------|--|
| Description    | This analysis shows a list of the first 100 accounts (in each customer class) with highest collection process effectiveness in the selected month.   |
| Purpose        | The accounts at the top of the list are the ones that the user is least successful in collecting payments for arrears. Business users can plan effective collection processes to collect the arrears amount. |
| Representation | The table displays the customer class, arrears at start, arrears at end, and collection process effectiveness for each customer account.   |

| Property           | Details   |
|--------------------|---|
| Drill Back         | The <b>Account</b> column link drills back to the <b>Control Central</b> page in the Oracle Utilities Customer Care and Billing system. |
| Source Object      | Collectible Process Fact  |
| OBIEE Subject Area | CCB - Collectible Process   |
| Metrics            | Arrears at Start, Arrears at End, Effectiveness   |

## Write Offs

The Write Offs dashboard provides insight into the write off processes and the effectiveness of the third-party programs in collecting debts.

To access this dashboard:

1. Go to the **Home** page.
2. Select **Dashboards > Credit & Collections Analytics > Write Offs**.

The dashboard provides the following dashboard pages. The data for current calendar year and month is displayed by default. You may modify the criteria per requirement.

- **Distribution**
- **Write Off Process**
- **Write Off Amount**
- **Write Off Duration**
- **Analysis**
- **Details**

### Distribution

The Distribution dashboard page provides a snapshot of the distribution of write off processes in the selected month.

#### Write Off Process Effectiveness Distribution

| Property       | Details  |
|----------------|--|
| Description    | <p>This analysis shows how the write off process effectiveness is distributed across various customer segments in the selected period.</p> $\text{Effectiveness \%} = 100 * ((\text{Arrears at Start} - \text{Arrears at End}) / \text{Arrears at Start})$ |
| Purpose        | At this point all collection efforts have been exhausted and the utility turns the collection efforts over to a 3rd party collection agency.   |
| Representation | <p>The <b>View By</b> drop down slices the data by customer class, jurisdiction, or premise type.</p> <p>The table shows the percentage of successful collections amount versus the original arrears amount.</p>   |

| Property           | Details   |
|--------------------|---|
| Drill Down         | The <i>customer segment</i> table link drills down to the <b>Write Off Process</b> and <b>Write Off Duration</b> dashboard pages for more specific details. |
| Source Object      | Uncollectible Process Fact  |
| OBIEE Subject Area | CCB - Uncollectible Process   |
| Metrics            | Arrears at Start, Arrears at End, Effectiveness   |

### Write Off Process Volume

| Property           | Details   |
|--------------------|---|
| Description        | This analysis provides a summary of the count of write off processes created (to collect debts from the customers) in the selected month.   |
| Purpose            | This analysis compares the current month's volume against the average of the last three months. Business users can analyze how effective the third-party programs are in collecting debts.  |
| Representation     | <p>The gauge shows the percentage of write off processes in the current month compared to the average of the previous three months. It uses different colors to denote how the users perceive the calculated result.</p> <p>The needle movement in the gauge towards yellow or red indicates a need to pay more attention on debt collection scenario.</p> <p><b>Note:</b> The ranges for green, yellow, and red can be customized.</p> <p>The table shows the write off processes created in the last three months, their collective average, and a calculated value (write off processes in the current month divided by the average of last three months).</p> |
| Drill Down         | The <b>Current Month / Average of Last 3 Months</b> column link drills down to the <b>Write Off Process</b> and <b>Write Off Amount</b> dashboard pages for more specific details.  |
| Source Object      | Uncollectible Process Fact  |
| OBIEE Subject Area | CCB - Uncollectible Process   |
| Metrics            | Count, Current Month / Average of Last 3 Months, Average of Last 3 Months   |

### Write Off Process

The Write Off Process dashboard page shows the trend of write off processes created and their effectiveness in a 15-month period.



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## Write Off Process Effectiveness

| Property           | Details  |
|--------------------|--|
| Description        | <p>When a business is not able to collect the outstanding customer debt by running write off processes, third-party collection agencies get involved in the process.</p> <p>This analysis provides a detailed view of how effectively the third-party programs are used to collect debts from customers for the previous 15 months.</p> <p><b>Note:</b> The result is the percent of successful write off amount versus the original arrears amount.</p> |
| Purpose            | <p>Business users can analyze the outstanding customer debt for a specific period and propose necessary measures pertaining to the situation.</p>  |
| Representation     | <p>The bar graph shows the write off process effectiveness for rolling 15 months. Hover over the graph for the write off effectiveness in a particular month.</p> <p>The table displays the arrears at the start and end of each month, along with the write off process effectiveness.</p> <p><math display="block">\text{Effectiveness \%} = 100 * ((\text{Arrears at Start} - \text{Arrears at End}) / \text{Arrears at Start})</math></p>            |
| Drill Down         | <p>The <b>Effectiveness</b> column link drills down to the <b>Analysis</b> and <b>Details</b> dashboard pages for specific details.</p>  |
| Source Object      | <p>Uncollectible Process Fact</p>  |
| OBIEE Subject Area | <p>CCB - Uncollectible Process</p>   |
| Metrics            | <p>Arrears at Start, Arrears at End, Effectiveness</p>   |

## Write Off Process Volume

| Property       | Details  |
|----------------|--|
| Description    | <p>This analysis provides insight into the distribution of the total number of write off processes (created in the specific period) run to collect customer debts for the previous 15 months.</p>  |
| Purpose        | <p>Higher number of write off processes indicates higher efforts in collecting the outstanding customer debt. Business users can analyze how to collect the write off amount for these processes.</p>  |
| Representation | <p>The bar graph shows the count of write off processes created (in rolling 15 months) to collect the outstanding debt from customers. Hover over the graph to view the count of write off processes in a particular month.</p> <p>The table displays the number of write off processes created in each of the previous 15 months.</p> |

| Property           | Details   |
|--------------------|---|
| Drill Down         | The <b>Write Off Processes</b> column link drills down to the <b>Write Off Amount</b> dashboard page for more details about outstanding debt. |
| Source Object      | Uncollectible Process Fact  |
| OBIEE Subject Area | CCB - Uncollectible Process   |
| Metrics            | Write Off Processes   |

## Write Off Amount

The Write Off Amount dashboard page provides a snapshot of the distribution of write off amount for 15 months prior to the selected month.

### Write Off Amount

| Property           | Details  |
|--------------------|--|
| Description        | This analysis shows a monthly trend (maximum, minimum, and average) of the debt that is being written off after the third-party agencies try to collect the outstanding customer debt. The data is shown for the previous 15 months. |
| Purpose            | Business users can identify any unusual write off amounts in a particular month.   |
| Representation     | Both the graph and the table show the maximum, minimum, and average write off amount for each of the previous 15 months. Hover over the graph to view the write off amount details in a particular series.                           |
| Drill Down         | No drill down  |
| Source Object      | Uncollectible Process Fact   |
| OBIEE Subject Area | CCB - Uncollectible Process  |
| Metrics            | Maximum Amount, Minimum Amount, Average Amount   |

### Write Off Amount Distribution

| Property    | Details   |
|-------------|---|
| Description | This analysis provides insight into the distribution of write off amounts broken down by various customer segments. The data is shown for the previous 15 months. |
| Purpose     | Business users can analyze how the write off amounts in each month are distributed in the selected customer segment.  |

| Property           | Details  |
|--------------------|--|
| Representation     | <p>The <b>View By</b> drop down slices the details by customer class, city, jurisdiction, postal code, or state.</p> <p>Use the slider to view the total write offs in the selected segment for a particular month.</p> <p>Both the graph and the table show the total write off process amount collected in each of the previous 15 months, in the selected segment. Hover over the graph to view the total write off amount details in a particular group.</p> |
| Drill Down         | No drill down  |
| Source Object      | Uncollectible Process Fact   |
| OBIEE Subject Area | CCB - Uncollectible Process  |
| Metrics            | Total Write-offs   |

## Write Off Duration

The Write Off Duration dashboard page provides an overview of the time taken to complete the write off processes for the selected period.

### Write Off Duration

| Property           | Details  |
|--------------------|--|
| Description        | This analysis shows how long the write off processes took to close before the debt is either written off or collected. Only the closed write off processes for the previous 15 months are considered.  |
| Purpose            | This analysis displays the minimum, maximum, and average duration of the write off processes in each month. Business users can thus analyze the effectiveness of the third-party programs in collecting debts.                                   |
| Representation     | Both the graph and the table display the maximum, minimum, and average duration taken for collecting the outstanding debt amount for each month, for the previous 15 months. Hover over the graph for the month and duration (in hours) details. |
| Drill Down         | The <b>Average Duration (Hours)</b> column link drills down to the <b>Details</b> dashboard page for more specific details.  |
| Source Object      | Uncollectible Process Fact   |
| OBIEE Subject Area | CCB - Uncollectible Process  |
| Metrics            | Maximum Duration (Hours), Minimum Duration (Hours), Average Duration (Hours)   |

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## Analysis

The Analysis dashboard page primarily generates ad hoc reports where business users can pick the dimension attributes and view the write off effectiveness based on the selected attributes.

### Write Off Analysis

| Property           | Details   |
|--------------------|---|
| Description        | <p>This analysis provides insight into the write off process effectiveness in more detail by allowing users to group data by various customer segments and geography.</p> <p><math display="block">\text{Effectiveness \%} = 100 * ((\text{Arrears at Start} - \text{Arrears at End}) / \text{Arrears at Start})</math></p>   |
| Purpose            | Business users can analyze the effectiveness in debt collection across various customer segments and regions.   |
| Representation     | <p>The <b>View By</b> drop down slices the data by customer class or jurisdiction with a combination of city or postal code.</p> <p>The table displays the arrears at the start and end of the selected period, and the write off process effectiveness against the selected customer segments. The effectiveness percentages in red and yellow indicate a need for higher efforts in collecting debts.</p> |
| Drill Down         | The <b>Effectiveness</b> column link drills down to the <b>Details</b> dashboard page for more specific details.  |
| Source Object      | Uncollectible Process Fact  |
| OBIEE Subject Area | CCB - Uncollectible Process   |
| Metrics            | Effectiveness, Arrears at Start, Arrears at End   |

## Details

The Details dashboard page provides detailed information about the write offs at account level.

### Write Offs Detail

| Property       | Details   |
|----------------|---|
| Description    | This analysis shows a list of the first 100 accounts (in each customer class) with debts being written off. The customers with least write off process effectiveness in the selected month are displayed first. |
| Purpose        | The accounts at the top of the list are the ones that the user is least successful in attempting to collect the debts. Business users can plan effective collection processes to collect the debts.             |
| Representation | The table displays the customer class and the write off process effectiveness for each customer account.  |
| Drill Back     | The <b>Account</b> table link drills back to the <b>Account Maintenance</b> page in the Oracle Utilities Customer Care and Billing system.  |
| Source Object  | Uncollectible Process Fact  |

| Property           | Details               |
|--------------------|-----------------------|
| OBIEE Subject Area | Uncollectible Process |
| Metrics            | Effectiveness         |

## Pay Plans

The Pay Plans dashboard provides insight into the current status, trends, and collection effectiveness of the pay plans. Users can also drill back to the source Oracle Utilities Customer Care and Billing system for further details about a specific pay plan or account.

To access this dashboard:

1. Go to the **Home** page.
2. Select **Dashboards > Credit & Collections Analytics > Pay Plans**.

The dashboard provides the following dashboard pages. The data for the last completed calendar month is displayed by default. You may modify the criteria as per the requirement.

- **Current Status**
- **Trend**
- **Details**

### Current Status

The Current Status dashboard page shows the latest status of pay plans, their collection effectiveness, and the amount remaining for collection.

### Pay Plans by Status

| Property       | Details  |
|----------------|--|
| Description    | <p>A “pay plan” is an agreement with a customer to make payments on specific dates to clear off the customer's debt.</p> <p>This analysis helps to view the number of pay plans classified by their status in the respective payment grouped by payment methods, pay plan type, debt class, and customer class. The data is shown as of last extraction time.</p>  |
| Purpose        | Business users can analyze the status of pay plans against each segment.   |
| Representation | <p>The <b>View By</b> drop down slices the data by pay method, pay plan type, debt class, and customer class into various statuses.</p> <p>The stacked bar graph shows the total number of pay plans against each segment, grouped under various status buckets (kept, cancelled, broken, or active). The X-axis represents the selected dimensional attribute. The Y-axis represents the pay plan count. Hover over the bars for specific values.</p> <p>The table shows the number pay plans in each status bucket against the selected dimensional attribute.</p> |

| Property           | Details                     |
|--------------------|-----------------------------|
| Drill Down         | No drill down               |
| Source Object      | Pay Plan Accumulation Fact  |
| OBIEE Subject Area | CCB - Pay Plan Accumulation |
| Metrics            | Pay Plan Count              |

### Effectiveness of Non-Cancelled Pay Plans

| Property           | Details   |
|--------------------|---|
| Description        | This analysis shows the effectiveness of non-canceled pay plans on the last extraction date.  |
| Purpose            | Business users can analyze the effectiveness of the active pay plans.   |
| Representation     | <p>The <b>View By</b> drop down slices the data by pay method, pay plan type, debt class, and customer class.</p> <p>The graph displays the pay plan effectiveness against each customer segment. The X-axis represents the selected dimensional attribute. The Y-axis represents the play plan effectiveness. Hover over the bars for specific details.</p> <p>The table shows the scheduled payments, collected payments, and play plan effectiveness for the selected dimensional attribute.</p> |
| Drill Down         | No drill down   |
| Source Object      | Pay Plan Accumulation Fact  |
| OBIEE Subject Area | CCB - Pay Plan Accumulation   |
| Metrics            | Scheduled Payments, Collected Payments, Pay Plan Effectiveness  |

### Remaining Amount

| Property    | Details   |
|-------------|---|
| Description | This analysis shows the remaining scheduled payment amount based on the various dimensional attributes, as on last extraction date. |
| Purpose     | Business users can get a picture of the money to be paid back by the customers.   |

| Property           | Details   |
|--------------------|---|
| Representation     | <p>The <b>View By</b> drop down slices the data by pay method, pay plan type, debt class, and customer class.</p> <p>The graph displays the remaining amount to be paid classified by the selected dimensional attribute. The X-axis represents the selected dimensional attribute. The Y-axis represents the remaining amount to be cleared. Hover over the bars for specific details.</p> <p>The table shows the remaining amount and average remaining amount for active pay plans classified by the selected dimensional attribute.</p> <p>Average Remaining Amount = Remaining Amount / Active Pay Plans</p> |
| Drill Down         | No drill down   |
| Source Object      | Pay Plan Accumulation Fact  |
| OBIEE Subject Area | CCB - Pay Plan Accumulation   |
| Metrics            | Remaining Amount, Average Remaining Amount  |

## Trend

The Trend dashboard page provides insight into the trends in status changes, collection effectiveness, and the remaining amounts of the pay plans.

## Pay Plans by Status

| Property           | Details   |
|--------------------|---|
| Description        | This analysis shows the count of the pay plans classified by their status for the previous 15 months.   |
| Purpose            | Business users can identify trends between the status changes amongst the pay plans. Any rise in the number of broken pay plans can be easily identified and corrective actions can be initiated.   |
| Representation     | <p>The stacked bar graph shows the number of pay plans scheduled in each month, for the previous 15 months, against each status bucket. The X-axis represents the month and year. The Y-axis represents the pay plan count. Hover over the bars for specific details.</p> <p>The table displays the number of pay plans categorized under each status bucket (active, broken, canceled, or kept) in each month.</p> |
| Drill Down         | The <i>status</i> column link drills down to the <b>Details</b> dashboard page for more details.  |
| Source Object      | Pay Plan Snapshot Fact  |
| OBIEE Subject Area | CCB - Pay Plan Snapshot   |
| Metrics            | Pay Plan Count  |

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## Effectiveness of Non-Canceled Pay Plans

| Property           | Details  |
|--------------------|--|
| Description        | This analysis shows the monthly trend of the effectiveness of the non-canceled pay plans scheduled in the previous 15 months.  |
| Purpose            | Business users can analyze the effectiveness of the active pay plans.  |
| Representation     | <p>The line graph shows the pay plan effectiveness in each month, for the previous 15 months. The X-axis represents the month and year. The Y-axis represents the pay plan effectiveness. Hover over the bars for specific details.</p> <p>The table displays the scheduled and collected payments, and also the respective pay plan effectiveness.</p> <p>Plan Effectiveness = <math>100 * ((\text{Collected Payments} / \text{Scheduled Payments}))</math></p> |
| Drill Down         | No drill down  |
| Source Object      | Pay Plan Snapshot Fact   |
| OBIEE Subject Area | CCB - Pay Plan Snapshot  |
| Metrics            | Scheduled Payments, Collected Payments, Pay Plan Effectiveness   |

## Remaining Amount

| Property           | Details   |
|--------------------|---|
| Description        | This analysis shows the trend in remaining amount that customers need to pay towards the pay plans. The data is shown for each month, for the previous 15 months.   |
| Purpose            | Business users can determine trends in the balance amount that are to be paid by customers.   |
| Representation     | The bar graph shows the remaining amount to be paid by the customers in each month. The X-axis represents the month and year. The Y-axis represents the remaining amount. Hover over the bars for specific details. |
| Drill Down         | The graph bars drill down to the <b>Details</b> dashboard page for granular details.  |
| Source Object      | Pay Plan Snapshot Fact  |
| OBIEE Subject Area | CCB - Pay Plan Snapshot   |
| Metrics            | Remaining Amount  |



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## New Pay Plans

| Property           | Details   |
|--------------------|---|
| Description        | This analysis shows the number of pay plans created in each month, for the previous 15 months.  |
| Purpose            | Business users can determine the rate at which new pay plans are created in a month.  |
| Representation     | The line graph shows the number of pay plans created in each month. The X-axis represents the month and year. The Y-axis represents the pay plan count. Hover over the bars for specific details. |
| Drill Down         | No drill down   |
| Source Object      | Pay Plan Fact   |
| OBIEE Subject Area | CCB - Pay Plan  |
| Metrics            | Pay Plan Count  |

## Details

The Details dashboard page provides detailed information about the pay plans at account level.

## Pay Plan Detail

| Property           | Details   |
|--------------------|---|
| Description        | This analysis shows a list of the first 100 pay plans with the highest remaining amounts.   |
| Purpose            | The accounts at the top of the list with the highest remaining amounts are the ones which pose a potential risk if the pay plans break. If the remaining amounts are also on the higher side, business users can drill back to the source system for specific details of the individual.                                |
| Representation     | The table displays the pay plan duration, number of installments left, average payment amount, scheduled payments, collected payments, and remaining amount for each customer account.<br><br>$\text{Average Payment Amount} = \frac{\text{Total Scheduled Payment Amount}}{\text{Number of Total Scheduled Payments}}$ |
| Drill Back         | The <b>Pay Plan</b> and <b>Account</b> column links drill back to the <b>Pay Plan Maintenance Search</b> and <b>Control Central</b> pages respectively in the Oracle Utilities Customer Care and Billing system.  |
| Source Object      | Pay Plan Snapshot Fact  |
| OBIEE Subject Area | CCB - Pay Plan Snapshot   |
| Metrics            | Pay Plan Duration, Installments Left, Average Payment Amount, Scheduled Payments, Collected Payments, Remaining Amount  |

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## Payment Arrangements

The Payment Arrangement dashboard helps users analyze the key metrics related to the payment arrangements, such as pay off balances, successful payments, payment trends, etc. Users can also drill back to the source Oracle Utilities Customer Care and Billing system for further details about a specific payment arrangement or account.

To access this dashboard:

1. Go to the **Home** page.
2. Select **Dashboards > Credit & Collections Analytics > Payment Arrangements**.

The dashboard provides the following dashboard pages. The data for the last completed calendar month is displayed by default. You may modify the criteria as per requirement.

- **Overview**
- **Analysis**
- **Trend**
- **Details**

### Overview

The Overview dashboard provides insight into the successful payment arrangements, payoffs, remaining amount to be paid by the customer, and the periods in which collections are expected.

### Successful Payment Arrangements

| Property    | Details  |
|-------------|--|
| Description | <p>A “payment arrangement” denotes an agreement with a customer to pay off their debt as part of their future bills (sometimes referred to as “current bill plus”).</p> <p>This analysis helps to view the payment arrangements that currently active or have been successfully kept by customers in the selected month.</p> |
| Purpose     | <p>Business users can analyze the rate at which debts are converted into payment arrangements and how many of them are successfully paid by the customers.</p>   |

| Property           | Details  |
|--------------------|--|
| Representation     | <p>The <b>View By</b> drop down slices the data by installment amount and number of installments.</p> <p>The bar graph compares the percentage of successful payments in the selected month with that of the 12-month average, against each customer segment. The X-axis represents the buckets available for the selected dimensional attribute. The Y-axis represents the percentage of successful payments. Hover over the bars for specific values.</p> <p>The table shows the number of payment arrangements in various status buckets, and also the success rate at which the payments were made. The data is shown against the selected dimensional attribute for the selected month and the average for a rolling 12-month period.</p> <p>&lt;Selected Month&gt; Success Rate = 100 * ((Kept + Active) Payment Arrangements / Non-Canceled Payment Arrangements for Selected Month)</p> <p>12-Month Average Success Rate = 100 * ((Kept + Active) Payment Arrangements / Non-Canceled Payment Arrangements for Last 12 Months)</p> |
| Drill Down         | The <Selected Month> <b>Success Rate</b> column link drills down to the <b>Analysis</b> and <b>Trend</b> dashboard pages for granular details.   |
| Source Object      | Payment Arrangement Snapshot Fact  |
| OBIEE Subject Area | CCB - Payment Arrangement Snapshot   |
| Metrics            | Payment Arrangement Count by Status, Success Rate of Selected Month Year, 12 Month Average Payment Arrangement Count, 12 Month Average Success Rate  |

### Successful Payoffs

| Property    | Details   |
|-------------|---|
| Description | This analysis shows the percentage of payment arrangements that have been successfully kept by the customers. The data is shown for the selected month. |
| Purpose     | Business users can compare the rate at which payment arrangements were kept for the selected month against the 12-month average.                        |

| Property           | Details   |
|--------------------|---|
| Representation     | <p>The <b>View By</b> drop down slices the data by installment amount and number of installments.</p> <p>The bar graph compares the percentage of successful payoffs in the selected month with that of the rolling 12-month average, against each customer segment. The X-axis represents the buckets available for the selected dimensional attribute. The Y-axis represents the percentage of successful payoffs. Hover over the bars for specific values.</p> <p>The table shows the number of payoffs in various status buckets, and also the success rate at which the payments were made. The data is shown against the selected dimensional attribute for the selected month and the average for a rolling 12-month period.</p> <p>&lt;Selected Month&gt; % Success Rate = 100 * (Kept Payment Arrangements / (Kept + Broken) Payment Arrangement)</p> <p>12-Month Average % Success Rate = 100 * (Kept Payment Arrangements / (Kept + Broken) Payment Arrangement)</p> |
| Drill Down         | The <Selected Month> <b>Success Rate</b> column link drills down to the <b>Analysis</b> and <b>Trend</b> dashboard pages for granular details.  |
| Source Object      | Payment Arrangements Snapshot Fact  |
| OBIEE Subject Area | CCB - Payment Arrangements Snapshot   |
| Metrics            | Current Month (Selected Month Year) Payment Arrangement %, 12 Month Average Payment Arrangements %  |

### Payoff Balance

| Property           | Details  |
|--------------------|--|
| Description        | This analysis shows the balance amount of payment arrangements in the previous three months.   |
| Purpose            | Business users can analyze the recent monthly trend in the balance amounts to be paid by customers.  |
| Representation     | The bar graph shows the trend in payoff balance of payment arrangements in the previous three months. The X-axis represents the month and year. The Y-axis represents the payoff balance amount. Hover over the bars for specific details. |
| Drill Down         | The graph bars drill down to the <b>Trend</b> dashboard page for granular details.   |
| Source Object      | Payment Arrangement Snapshot Fact  |
| OBIEE Subject Area | CCB - Payment Arrangement Snapshot   |
| Metrics            | Payoff Balance Amount  |

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## Expected Future Collections

| Property           | Details   |
|--------------------|---|
| Description        | This analysis shows the amount that is pending for collection from the active payment arrangements. The data is shown as of last extraction date.   |
| Purpose            | Based on the various cash inflows expected in the future months, business users can plan accordingly.   |
| Representation     | The bar graph shows the amount that has to be collected in future. The data is shown across various payment buckets, such as 0-30 days, 30-60 days, etc. The X-axis represents the age buckets for the payments. The Y-axis represents the future payment amount. |
| Drill Down         | No drill down   |
| Source Object      | Payment Arrangement Accumulation Snapshot Fact  |
| OBIEE Subject Area | CCB - Payment Arrangement Accumulation  |
| Metrics            | Expected Future Collection Amount   |

## Analysis

The Analysis dashboard provides the details of successful payments and payoffs.

## Successful Payment Arrangements

| Property    | Details   |
|-------------|---|
| Description | The analysis focuses on the success rate of payment arrangements based on the active and kept ones, grouped by the various installment amount buckets and the installment count buckets. The data is shown for the selected month and a rolling 12-month average.   |
| Purpose     | Business users can analyze the success rate at which customers are clearing off their debts for the current month. The rate of this month can be compared against the 12-month average. The rates can also be compared between the various installment amount buckets and the installment count buckets to determine which buckets show better success rates. |

| Property           | Details   |
|--------------------|---|
| Representation     | <p>The table shows the success rate for the selected month and the 12-month average. It shows the number of payment arrangements in each status bucket (active, kept, or broken) grouped by installment amount buckets and the installment count buckets. It also displays the success rate for each category.</p> <p>(Current Month %) Success Rate = <math>100 * ((\text{Kept} + \text{Active}) \text{ Payment Arrangement} / \text{Non Canceled Payment Arrangement for selected month})</math></p> <p>The table also displays the average details for the rolling 12 months.</p> <p>(12-Month Average %) Success Rate = <math>100 * ((\text{Kept} + \text{Active}) \text{ Payment Arrangement} / \text{Non Canceled Payment Arrangement for last 12 months})</math></p> |
| Drill Down         | The <Selected Month> <b>Success Rate</b> column link drills down to the <b>Trend</b> dashboard page for granular details.   |
| Source Object      | Payment Arrangement Snapshot Fact   |
| OBIEE Subject Area | CCB - Payment Arrangement Snapshot  |
| Metrics            | Number of Payment Arrangements in the States - Kept, Broken, Total, (Current Month %) Success Rate, % Success Rate  |

### Successful Payoffs

| Property    | Details  |
|-------------|--|
| Description | The analysis focuses on the success rate of payment arrangements based on the kept ones, grouped by the various installment amount buckets and the installment count buckets. The data is shown for the selected month and a rolling 12-month average.   |
| Purpose     | Business users can analyze the success rate at which customers are clearing off their debts for the current month. The rate of this month can also be compared against the 12-month average. The rates can also be compared between the various installment amount buckets and the installment count buckets to determine which buckets show better success rates. |

| Property           | Details  |
|--------------------|--|
| Representation     | <p>The table shows the payoff details for the selected month. It shows the total payment amount, number of installments in which the debt was cleared, amount paid in each installment, and the number of payoffs in each bucket (active, kept, or broken). It displays the success rate for each category.</p> <p>(Current Month %) Success Rate = <math>100 * (\text{Kept Payment Arrangement} / (\text{Kept} + \text{Non Canceled Payment Arrangement}))</math></p> <p>The table also displays the average details for the rolling 12 months.</p> <p>(12-Month Average %) Success Rate = <math>100 * (\text{Kept Payment Arrangement} / (\text{Kept} + \text{Non Canceled Payment Arrangement}))</math></p> |
| Drill Down         | The <Selected Month> <b>Success Rate</b> column link drills down to the <b>Trend</b> dashboard page for granular details.  |
| Source Object      | Payment Arrangement Snapshot Fact  |
| OBIEE Subject Area | CCB - Payment Arrangement Snapshot   |
| Metrics            | Number of Payment Arrangements in the States - Kept, Broken, Total, (Current Month %) Success Rate, % Success Rate   |

## Trend

The Trend dashboard page focuses on the trend in payments, payoffs, and pay off balances.

## Successful Payments and Payoffs

| Property       | Details  |
|----------------|--|
| Description    | This analysis shows the trend in how successfully payments are made by the customers and how successfully payment arrangements have been paid off. The data is shown for the previous 15 months.   |
| Purpose        | Business users can analyze the success rate at which payments are made and payment arrangements are being paid off over a 15-month period.   |
| Representation | <p>The line graph shows the success rate of payments and payoffs in a specific month. The X-axis represents the month and year. The Y-axis represents the success rate. Hover over the lines for specific values.</p> <p>The table shows the percentage of both successful payments and successful payoffs in a month, against each month for a 15-month period. The number of payment arrangements in each status of active, kept and the total is also shown.</p> <p><math>\% \text{Successful Payments} = 100 * (\text{Kept} + \text{Active Payment Arrangements} / \text{Kept} + \text{Active} + \text{Broken Payment Arrangements})</math></p> <p><math>\% \text{Successful Payoffs} = 100 * (\text{Kept Payment Arrangements} / (\text{Kept} + \text{Broken Payment Arrangements}))</math></p> |

| Property           | Details  |
|--------------------|--|
| Drill Down         | The <b>Active</b> , <b>Kept</b> , and <b>Broken</b> column links drill down to the <b>Details</b> dashboard page for granular details. |
| Source Object      | Payment Arrangement Snapshot Fact  |
| OBIEE Subject Area | CCB - Payment Arrangement Snapshot   |
| Metrics            | Percentage of Successful Payments, Percentage of Successful Payoffs, Active, Broken, Kept and Total Payment Arrangements               |

## Payoff Balance

| Property           | Details   |
|--------------------|---|
| Description        | <p>“Payoff balance” is the balance that the customer has to pay towards a payment arrangement to clear off the debt and bring the payment arrangement to a closure.</p> <p>This analysis shows the trend in the payoff balance amount that has to be paid by the customer as of specific month. The data is displayed for the previous 15 months.</p> |
| Purpose            | Business users can analyze any trends in the balance amount to be paid from customers. They can identify procedures to collect the debts from those customers.  |
| Representation     | The bar graph shows the payoff balance amount for each month, for the previous 15 months. The X-axis represents the month and year. The Y-axis represents the payoff balance amount. Hover over the bars for specific values.   |
| Drill Down         | The graph bars drill down to the <b>Details</b> dashboard page for granular details.  |
| Source Object      | Payment Arrangement Snapshot Fact   |
| OBIEE Subject Area | CCB - Payment Arrangement Snapshot  |
| Metrics            | Payoff Balance  |

## Details

The Details dashboard page provides detailed information about the payment arrangements at account level.

## Payment Arrangements Details

| Property    | Details   |
|-------------|---|
| Description | This analysis shows a list of the first 100 payment arrangements based on the percentage of payment amount collected. |
| Purpose     | The accounts at the top of the list are the ones that the user is most successful in attempting to clear the debts.   |



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| Property           | Details  |
|--------------------|--|
| Representation     | <p>The table displays the payment arrangement, total number of installments, collected payments, arranged payment amount, and percentage collected from each customer.</p> <p>Percentage Collected = (Amount Collected / Arranged Payment Amount)* 100</p> |
| Drill Back         | <p>The <b>Pay Arrangement</b> and <b>Account</b> column links drill back to the <b>Payment Arrangement</b> and <b>Control Central</b> pages respectively in the Oracle Utilities Customer Care and Billing system.</p>                                     |
| Source Object      | Payment Arrangement Snapshot Fact  |
| OBIEE Subject Area | CCB - Payment Arrangement Snapshot   |
| Metrics            | Arranged Payment Amount, Number of Installments, Amount Collected, Percentage Collected  |

## Customer Analytics

This section describes the metrics available in Customer Analytics of Oracle Utilities Analytics. The metrics analyze customer specific information.

Oracle Utilities Analytics Dashboards for Oracle Utilities Customer Care and Billing provides the Customer analytics content in the following dashboards:

- **Overview**
- **Customers**
- **Cases**
- **Customer Contacts**

### Overview

The Overview dashboard provides a high-level overview of customer information for the current month, such as customer loss and gain, customer contacts, and customer case information.

To access this dashboard:

1. Go to the **Home** page.
2. Select **Dashboards > Customer Analytics > Overview**.

The dashboard provides the following analyses. The data for current calendar year and month is displayed by default. You may modify the criteria per requirement.

- **Customer Growth**
- **Customer Contact Volume**
- **Cases**
- **Average Case Duration**

#### Customer Growth

| Property           | Details   |
|--------------------|---|
| Description        | This analysis provides insight into the net customer growth (customer gain/loss) for the current month and previous two months.         |
| Purpose            | Business users can analyze and interpret customer gains and losses for the selected period.   |
| Representation     | The bar graph shows the net customer gain/loss for the current month and previous two months. Hover over the bars for specific details. |
| Drill Down         | The graph drills down to the <b>Customers</b> dashboard to display a detailed analysis about customers for the selected period.         |
| Source Object      | Service Agreement Fact  |
| OBIEE Subject Area | CCB - Service Agreement   |
| Metrics            | Net Gain/Loss of Last 3 Months  |

## Customer Contact Volume

| Property           | Details  |
|--------------------|--|
| Description        | This analysis summarizes the total number of customer contacts created in the current month and previous two months.   |
| Purpose            | This analysis compares the customer contact volume of the current month against the previous two months. Business users can analyze the trend in creating new customers. |
| Representation     | The bar graph shows the number of customer contacts created in the current month and previous two months. Hover over the bars for specific details.                      |
| Drill Down         | The graph drills down to the <b>Customer Contacts</b> dashboard for detailed information about customer contacts.  |
| Source Object      | Customer Contact Fact  |
| OBIEE Subject Area | CCB - Customer Contact   |
| Metrics            | Count of Customer Contacts   |

## Cases

| Property           | Details   |
|--------------------|---|
| Description        | <p>This analysis shows the total number of customer cases against each case type for the current month and previous three months. It also shows the average case count for the previous three months.</p> $\text{Cases \%} = 100 * ((\text{Average case duration} / 24) / \text{Average of last three months})$ |
| Purpose            | Business users can analyze customer case information, such as the rate at which cases get opened and closed, case resolution, and case duration statistics.   |
| Representation     | The table shows the customer case count in the current month and last three months, the average of the last three months, a calculated result, against each case type.  |
| Drill Down         | The <b>Case Type</b> column link drills down to the <b>Cases</b> dashboard for more detailed information about customer cases.  |
| Source Object      | Case Fact   |
| OBIEE Subject Area | CCB - Case  |
| Metrics            | Case Count  |

## Average Case Duration

| Property           | Details  |
|--------------------|--|
| Description        | <p>This analysis provides a summary of the case duration against each case type for the selected month and previous three months. It also shows the average case duration for the last three months.</p> <p>The case duration percentage is calculated as the case duration for the current month divided by the average of the last three months.</p> |
| Purpose            | This analysis provides a clear picture of how quickly the customer cases were handled over the past few months. Business users can interpret the metrics for cases based on final outcomes.  |
| Representation     | The table shows the case duration against each case type for the current month and last three months, the average for the last three months, and a calculated result.  |
| Drill Down         | The <b>Case Type</b> table link drills down to the <b>Status and Duration</b> dashboard page for detailed information about customer cases.  |
| Source Object      | Case Fact  |
| OBIEE Subject Area | CCB - Case   |
| Metrics            | Average Case Duration  |

## Customers

The Customers dashboard provides insight into customer information, such as customer gains and/or losses.

To access this dashboard:

1. Go to the **Home** page.
2. Select **Dashboards > Customer Analytics > Customers**.

The dashboard provides the following dashboard pages. The data for current calendar year and month is displayed by default. You may modify the criteria per requirement.

- **Customers Map**
- **Trend**
- **Details**

### Customers Map

The Customers Map dashboard page identifies the areas with highest number of customers gained or lost.

### Customer Net Gain/Loss

| Property    | Details  |
|-------------|--|
| Description | This analysis provides a spatial representation of the number of customers gained or lost in a specific region for the selected month. |

| Property           | Details  |
|--------------------|--|
| Purpose            | Business users can identify and analyze the areas with maximum, minimum, and average customer gain/loss.   |
| Representation     | <p>The color-coded region on the map shows the net customer gain/loss in that area, along with its postal code.</p> <p>The postal code link broadcasts the postal code value to the <b>Customer Gain/Loss Distribution</b> and <b>Customer Net Gain/Loss by Month</b> analyses on the same dashboard page.</p> |
| Drill Down         | No drill down  |
| Source Object      | Service Agreement Fact   |
| OBIEE Subject Area | CCB - Service Agreement  |
| Metrics            | Net Gain/Loss  |

### Customer Gain/Loss Distribution

| Property       | Details  |
|----------------|--|
| Description    | <p>This analysis provides insight into the distribution of customers in a geographical area (postal code) across various customer classes and service types, in the selected month.</p> <p>The data is based on the postal code selected on the <b>Customer Net Gain/Loss</b> map.</p>   |
| Purpose        | Business users can analyze the distribution of customer gains/losses in a geographical area for the selected period.   |
| Representation | <p>The <b>View By</b> drop down slices the data by customer class or service type.</p> <p>The <b>Postal Code</b> drop down slices the data for the area with the respective postal code.</p> <p>The table displays the customer gain, loss, and net gain/loss against the selected customer segment for the selected postal code and in the selected period.</p>   |
| Drill Down     | <p>The <b>Gain</b> column link drills down to the <b>Trend</b> dashboard page to show the trend for gain in customers for the selected period and in the selected area.</p> <p>The <b>Loss</b> column link drills down to the <b>Trend</b> dashboard page to show the trend for loss of customers in the selected period and in the selected area.</p> <p>The <b>Net Gain/Loss</b> column link drills down to the <b>Trend</b> dashboard page to show the trend for net customer gain/loss for the selected period and in the selected area.</p> |
| Source Object  | Service Agreement Fact   |

| Property           | Details                   |
|--------------------|---------------------------|
| OBIEE Subject Area | CCB - Service Agreement   |
| Metrics            | Gain, Loss, Net Gain/Loss |

### Customer Net Gain/Loss by Month

| Property           | Details   |
|--------------------|---|
| Description        | <p>This analysis displays a 15-month trend for the number of customers gained and lost and the net customer gain/loss in a geographical area.</p> <p>The data is based on the postal code selected on the <b>Customer Net Gain/Loss</b> map.</p>                      |
| Purpose            | Business users can identify the geographical areas with minimum and maximum customer loss/gain.   |
| Representation     | <p>The <b>Postal Code</b> drop down slices the data for the area with the respective postal code.</p> <p>The bar graph shows the net customer gain or loss for the respective months in the selected geographical area. Hover over the bars for specific details.</p> |
| Drill Down         | The graph drills down to the <b>Trend</b> dashboard page to display trend-specific details for the selected month.  |
| Source Object      | Service Agreement Fact  |
| OBIEE Subject Area | CCB - Service Agreement   |
| Metrics            | Gain, Loss, Net Gain/Loss   |

### Trend

The Trend dashboard page provides a snapshot of the trend for net customer gain and loss.

### Customer Net Gain/Loss Trend

| Property    | Details  |
|-------------|--|
| Description | This analysis displays a 15-month trend for the customers gained and lost across various customer segments.                        |
| Purpose     | Business users can identify the trend for customer gain or loss and take necessary measures to prevent from customer loss, if any. |

| Property           | Details   |
|--------------------|---|
| Representation     | <p>The <b>View By</b> drop down slices the data by customer class or service type.</p> <p>The graph shows the customer gain/loss against the selected segment for previous 15 months, one month at a time. Hover over the graph bars to view the actual details.</p> <p>Use the slider to view the data for a specific month.</p> |
| Drill Down         | The graph drills down to the <b>Details</b> dashboard page for account specific details.  |
| Source Object      | Service Agreement Fact  |
| OBIEE Subject Area | CCB - Service Agreement   |
| Metrics            | Gain, Loss, Net Gain/Loss   |

## Details

The Details dashboard page provides detailed information about the service agreements started and ended at account level.

### Customer Details

| Property           | Details   |
|--------------------|---|
| Description        | This analysis shows the account level details of the top 100 customers (in each customer class) with service agreements that started and/or ended on the selected month.  |
| Purpose            | The accounts at the top of the list are the ones with highest number of service agreements that started in the selected month. Business users can login to the source application and analyze the data further. |
| Representation     | The table displays the customer class and the start/end of the service agreements for each customer account.  |
| Drill Back         | The <b>Account</b> table link drills back to the <b>Account Maintenance</b> page in the Oracle Utilities Customer Care and Billing system.  |
| Source Object      | Service Agreement Fact  |
| OBIEE Subject Area | CCB - Service Agreement   |
| Metrics            | Counts of SA Started and SA Ended   |

## Cases

The Cases dashboard provides customer case information, such as the rate at which cases get opened and closed, case resolution, and case duration statistics.

To access this dashboard:

1. Go to the **Home** page.
2. Select **Dashboards > Customer Analytics > Cases**.

The dashboard provides the following dashboard pages. The data for current calendar year and month is displayed by default. You may modify the criteria per requirement.

- **Case Map**
- **Status and Duration**
- **Details**

## Case Map

The Case Map dashboard page identifies the areas with highest number of open cases.

### Cases

| Property           | Details  |
|--------------------|--|
| Description        | This analysis provides a spatial representation of the number of customer cases opened in a specific region in the selected month.   |
| Purpose            | Business users can identify and analyze the areas where maximum customer cases are opened in the selected month.   |
| Representation     | The color-coded region on the map shows the number of customer cases in that area, along with its postal code.<br><br>The <i>postal code</i> link broadcasts the postal code value to the <b>Cases Distribution</b> and <b>Cases by Month</b> analyses on the same dashboard page. |
| Drill Down         | No drill down  |
| Source Object      | Case Fact  |
| OBIEE Subject Area | CCB - Case   |
| Metrics            | Case Count   |

### Cases Distribution

| Property    | Details  |
|-------------|--|
| Description | This analysis provides insight into the distribution of customer cases in a geographical area (postal code) across various case types and customer classes, for the selected month. The data is based on the postal code selected on the <b>Cases</b> map. |
| Purpose     | Business users can analyze the distribution of cases opened in an area under a specific case type, in the selected month.  |



| Property           | Details  |
|--------------------|--|
| Representation     | <p>The <b>View By</b> drop down slices the data by customer class or case type.</p> <p>The <b>Postal Code</b> drop down slices the data for the area with the respective postal code.</p> <p>The pie chart shows the distribution of customer cases categorized under each customer segment for the selected postal code and in the selected period.</p> |
| Drill Down         | The pie chart drills down to the <b>Details</b> dashboard page to display account specific information for the selected customer segment.  |
| Source Object      | Case Fact  |
| OBIEE Subject Area | CCB - Case   |
| Metrics            | Case Count   |

### Cases by Month

| Property           | Details  |
|--------------------|--|
| Description        | This analysis shows a 15-month trend on how customer cases are opened or closed on a monthly basis, in the selected geographical area. The data is based on the postal code selected on the <b>Cases</b> map.  |
| Purpose            | Business users can analyze the rate at which customer cases are opened or closed in a particular geographical area.  |
| Representation     | <p>The <b>Postal Code</b> drop down slices the data for the area with the respective postal code.</p> <p>The bar graph shows the count of open or closed cases per month, for rolling 15 months, in the selected postal code. Hover over the lines for specific details.</p> |
| Drill Down         | The graph drills down to the <b>Details</b> dashboard page to display account specific information.  |
| Source Object      | Case Fact  |
| OBIEE Subject Area | CCB - Case   |
| Metrics            | Opened Case Count, Closed Case Count   |

### Status and Duration

The Status and Duration dashboard page presents the metrics for cases based on the final outcome and the durations.

## Case Final Outcomes

| Property           | Details  |
|--------------------|--|
| Description        | This analysis displays the total count of cases against each final outcome (resolved, rejected, literature sent, cancelled, etc), per month, for the previous 15 months.   |
| Purpose            | The business users can analyze the case count, final outcomes, and case types for the selected period.   |
| Representation     | <p>The bar graph shows the number of customer cases against each final outcome (resolved, rejected, literature sent, cancelled, etc) for the previous 15 months. Hover over the bars for specific details.</p> <p>The table shows the number of cases per each final outcome against each case type. The data is displayed for the current month and previous 14 months.</p> |
| Drill Down         | The <b>Cases</b> column link drills down to the <b>Details</b> page to display account specific details.   |
| Source Object      | Case Fact  |
| OBIEE Subject Area | CCB - Case   |
| Metrics            | Case Count   |

## Case Duration Statistics

| Property           | Details   |
|--------------------|---|
| Description        | This analysis shows the monthly trend in maximum, minimum, and average duration for the customer cases created in the previous 15 months.   |
| Purpose            | The business users can identify any patterns, over time, in the duration taken for closure of customer cases.   |
| Representation     | <p>The graph shows the maximum, minimum, and average case duration as a monthly trend, for the 15 previous months. Hover over the lines for specific details.</p> <p>The table shows the maximum, minimum, and average case duration values for each month.</p> |
| Drill Down         | No drill down   |
| Source Object      | Case Fact   |
| OBIEE Subject Area | CCB - Case  |
| Metrics            | Maximum Duration, Average Duration, Minimum Duration  |

## Case Duration Distribution

| Property           | Details  |
|--------------------|--|
| Description        | This analysis shows the distribution of average case duration as a 15-month trend broken down into various customer segments (case type, customer class, or jurisdiction).   |
| Purpose            | Business users can analyze the distribution metrics for the respective case durations.   |
| Representation     | <p>The <b>View By</b> drop down slices the data by case type, customer class, or jurisdiction.</p> <p>The bar graph shows the average case duration (in days) for the respective groups in the selected customer segment. Hover over the graph bars for specific details.</p> <p>Use the slider to view the data for a specific month.</p> |
| Drill Down         | No drill down  |
| Source Object      | Case Fact  |
| OBIEE Subject Area | CCB - Case   |
| Metrics            | Average Case Duration  |

## Details

The Details dashboard page provides detailed information about the customer cases at account level.

## Case Detail

| Property           | Details   |
|--------------------|---|
| Description        | This analysis shows the account level details of the top 100 customers (in each customer class) with the highest number of cases opened and closed. The data is shown for the selected month. |
| Purpose            | The accounts at the top of the list are the ones with highest number of cases opened or closed. Business users can login to the source application and analyze the data further.              |
| Representation     | The table displays the customer class and the count of open/closed cases, for each customer account.  |
| Drill Back         | The <b>Account</b> column link drills back to the <b>Account Maintenance</b> page in the Oracle Utilities Customer Care and Billing system.   |
| Source Object      | Case Fact   |
| OBIEE Subject Area | CCB - Case  |
| Metrics            | Cases Opened, Cases Closed  |

## Customer Contacts

The Customer Contacts dashboard provides a detailed insight into customer contact information.

To access this dashboard:

1. Go to the **Home** page.
2. Select **Dashboards > Customer Analytics > Customer Contacts**.

The dashboard provides the following dashboard pages. The data for current calendar year and month is displayed by default. You may modify the criteria per requirement.

- **Distribution**
- **Trend**
- **Details**

### Distribution

The Distribution dashboard page provides a snapshot of the distribution of customer contact volumes.

#### Contacts by Class

| Property           | Details   |
|--------------------|---|
| Description        | This analysis displays the contact volume (in the selected month) by contact class and contact type.  |
| Purpose            | Business users can analyze the data and accordingly plan resources to attend to all customer requests/contacts.   |
| Representation     | The pie chart shows the percentage of customer contacts for each contact class in the selected month.<br><br>The table shows the total contact count and its percentage against various contact types in each contact class. The data is shown for the month. |
| Drill Down         | The <b>Contacts</b> column link drills down to the <b>Trend</b> or <b>Details</b> dashboard pages. These dashboard pages provide detailed information about the customer contact trend and also account level details of each contact.                        |
| Source Object      | Customer Contact Fact   |
| OBIEE Subject Area | CCB - Customer Contact  |
| Metrics            | Customer Contacts, Number of Contacts, % of Total   |

#### Top 5 Contact Types by Volume

| Property    | Details  |
|-------------|--|
| Description | This analysis displays the top five contact types with the highest number of customer contacts created in the selected period. |

| Property           | Details   |
|--------------------|---|
| Purpose            | These statistics help the business users to monitor resource allocation to handle the customer contacts for the specific period.  |
| Representation     | The table shows the number of customer contacts created against each contact type in the selected month. The contact types are ranked per the highest customer contacts in each contact type. |
| Drill Down         | Click the <b>Contacts</b> column link to navigate to the <b>Details</b> dashboard page for specific account level details of the selected record.   |
| Source Object      | Customer Contact Fact   |
| OBIEE Subject Area | CCB - Customer Contact  |
| Metrics            | Contacts  |

### Top 10 Customers by Volume

| Property           | Details  |
|--------------------|--|
| Description        | This analysis displays the top ten customers that have been contacted the most in the selected month.  |
| Purpose            | These statistics help the business users to identify the customers with more interactions.   |
| Representation     | The table shows the names of customers and the number of contacts made to each customer in the selected period. The customers are ranked based on the highest contacts made. |
| Drill Down         | The <b>Contacts</b> column link drills down to the <b>Details</b> dashboard page to show specific account level information about the selected record.                       |
| Source Object      | Customer Contact Fact  |
| OBIEE Subject Area | CCB - Customer Contact   |
| Metrics            | Contacts   |

### Trend

The Trend dashboard page summarizes the customer contact volume in the selected time period.

### Contacts by Day of Week

| Property       | Details   |
|----------------|---|
| Description    | This analysis shows the total number of customer contacts made on each day of the week for the selected month.  |
| Purpose        | Business users can analyze the resource allocation for customers. More resources will be allocated on the days when there are more contacts from customers. |
| Representation | The graph shows the number of customer contacts made on each day of the week. Hover over the bars for specific values.                                      |

| Property           | Details                |
|--------------------|------------------------|
| Drill Down         | No drill down          |
| Source Object      | Customer Contact Fact  |
| OBIEE Subject Area | CCB - Customer Contact |
| Metrics            | Number of Contacts     |

### Contacts by Day of Week Hourly Summary

| Property           | Details   |
|--------------------|---|
| Description        | This analysis shows the total number of customer contacts made on each day of the week (in the selected month) broken down into an hourly summary.  |
| Purpose            | For each day, the customer contact count is broken down into time periods that help the business users to analyze whether or not that time of day is adequately staffed.  |
| Representation     | <p>The <b>Day of Week</b> drop down allows you to select the week day for which you want to view the data. The weekday selected is broken down to various time buckets (12 am - 4 am, 5 am - 8 am, etc).</p> <p>The <b>Select View</b> drop down allows you to view the data either as a bar chart or as a radar chart.</p> <p>The graph shows the number of customer contacts made in each time bucket for the selected weekday. Hover over the graph to view specific details for the selected time bucket.</p> <p>The table shows the number of customer contacts made in each hour of the selected day of the week.</p> |
| Drill Down         | No drill down   |
| Source Object      | Customer Contact Fact   |
| OBIEE Subject Area | CCB - Customer Contact  |
| Metrics            | Number of Contacts  |

### Details

The Details dashboard page provides detailed information about the customer contacts at account level.

### Contact Detail

| Property    | Details  |
|-------------|--|
| Description | This analysis shows the account level details of the top 100 customers based on the customer contacts. The data is shown for the selected month. |

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| <b>Property</b>    | <b>Details</b>  |
|--------------------|---|
| Purpose            | The accounts at the top of the list are the ones for which the highest number of customer contacts have been made. Business users can login to the source application and analyze the data further. |
| Representation     | The table displays the customer information details based on the customer contacts made in the selected period.   |
| Drill Back         | The <b>Account</b> column link drills back to the <b>Account Maintenance</b> page in the Oracle Utilities Customer Care and Billing system.   |
| Source Object      | Customer Contact Fact   |
| OBIEE Subject Area | CCB - Customer Contact  |
| Metrics            | Contacts  |

# Revenue Analytics

This section describes the metrics available in Revenue Analytics of Oracle Utilities Analytics Dashboards. The metrics analyze revenue and billed usage specific information.

Oracle Utilities Analytics Dashboards for Oracle Utilities Customer Care and Billing provides the Revenue analytics content in the following dashboards:

- **Overview**
- **Billed Usage**
- **Revenue**
- **Billing**
- **Unbilled SAs**

## Overview

The Overview dashboard provides a high-level overview of revenue and customer segmentation for a specified period.

To access this dashboard:

1. Go to the **Home** page.
2. Select **Dashboards > Revenue Analytics > Overview**.

The dashboard provides the following dashboard pages. The data for current calendar year and month is displayed by default. You may modify the criteria per requirement.

- **Overview - Revenue**
- **Overview - Billed Usage**
- **Overview - Billing**

## Overview - Revenue

The Overview - Revenue dashboard page provides revenue and billing information for the selected period.

## Revenue Comparison

| Property       | Details   |
|----------------|---|
| Description    | This analysis shows a comparison of revenues for three months, including the current month.   |
| Purpose        | Business users can use this analysis to gauge the business growth in the last three months.   |
| Representation | The graph shows the revenue for each of the three months. The X-axis represents the revenue amount. The Y-axis represents the month and year. Hover over the bars for specific values.<br><br>The table shows the total revenue for each of the three months. |
| Drill Down     | The <i>fiscal</i> period table link drills down to the <b>Revenue</b> dashboard to show specific revenue information for the selected record.   |
| Source Object  | Financial Fact  |



| Property           | Details         |
|--------------------|-----------------|
| OBIEE Subject Area | CCB - Financial |
| Metrics            | Revenue Amount  |

### Payments as a Percentage of Bills and Adjustments

| Property           | Details   |
|--------------------|---|
| Description        | This analysis provides insight into the success rate of completing payments in the current month, with 100% completion as the target. Analytics include details about payments, bills, and adjustments.   |
| Purpose            | Business users can analyze how well the payments are made in the current month and further identify collection processes accordingly.   |
| Representation     | <p>The gauge shows the percentage of bills and adjustments in the current month, using different colors to denote how the business users perceive the calculated result.</p> <p>The needle movement in the gauge towards yellow or red indicates a need to pay more attention on the payment collection scenarios.<br/> <b>Note:</b> The ranges for green, yellow, and red can be customized.</p> <p>The table shows the payments, bills and adjustments, and the percentage for the current month.</p> |
| Drill Down         | The <b>Payments as % of Bills and Adjustments</b> column link drills down to the <b>Bills and Payments</b> dashboard page for specific details about bills and payments for the selected record.  |
| Source Object      | Financial Fact  |
| OBIEE Subject Area | CCB - Financial   |
| Metrics            | Payments, Bills and Adjustments, Payments as % of Bills and Adjustments   |

### Overview - Billed Usage

The Overview - Billed Usage dashboard page provides a snapshot of the billed usage.

#### Billed Usage

| Property    | Details   |
|-------------|---|
| Description | This analysis compares the usage that was billed for the selected period with the same period in the previous year.                                 |
| Purpose     | Business users can gauge if the Kilowatt-Hours increased when compared to the same month last year, as well as an average of the last three months. |

| Property           | Details  |
|--------------------|--|
| Representation     | <p>The gauge shows the percentage of billed usage using different colors to denote how the users perceive the calculated result. The needle movement in the gauge towards yellow or red indicates a need to pay more attention on the usage scenarios.</p> <p><b>Note:</b> The ranges for green, yellow, and red can be customized.</p> <p>The table shows usage that was billed for the current month and the same period last year, along with the average billed usage.</p> |
| Drill Down         | The <b>Billed Usage (Kilowatt-Hours) Current Month</b> column link drills down to the <b>Billed Usage</b> dashboard to show specific usage information about the selected record.  |
| Source Object      | Financial Fact   |
| OBIEE Subject Area | CCB - Billed Usage   |
| Metrics            | Compared to Last Year, Billed Usage (UOM) Selected Month<br>Selected Year, Billed Usage (UOM) Same Period Last Year, Average Billed Usage for Last Three Periods (UOM)   |

## Overview - Billing

The Overview - Billing dashboard page provides a bird's eye view of the customer billing process and its key measures, such as bill cycle effectiveness, first day billing efficiency, and days of unbilled usage.

## Bill Cycle Effectiveness

| Property       | Details   |
|----------------|---|
| Description    | This analysis details the bill cycle effectiveness by comparing the bill segments frozen in window with the total/target bill segments in the selected month.   |
| Purpose        | Business users can gauge if the billing effectiveness is increased or decreased. Higher effectiveness would mean the configuration and billing process setup are working correctly; else business users would need to review the bill process delays.   |
| Representation | <p>The gauge shows the percentage, using different colors to denote how the business users perceive the calculated result.</p> <p>The needle movement in the gauge towards yellow or red indicates a need to pay more attention on the clearing of bill segments. Hover over the gauge for specific values.</p> <p><b>Note:</b> The ranges for green, yellow, and red can be customized.</p> <p>The table shows the target bill segments that need to be cleared, the number of bill segments that were frozen/cleared in the window, and the effectiveness of bill cycle.</p> <p>Bill Cycle Effectiveness = <math>(100 * \text{Bill Segments Frozen in Window}) / \text{Target Bill Segments}</math></p> |

| Property           | Details   |
|--------------------|---|
| Drill Down         | The <b>Bill Cycle Effectiveness</b> column link drills down to the <b>Bill Cycle Effectiveness</b> dashboard page to show specific billing information. |
| Source Object      | Service Agreement Billing Fact  |
| OBIEE Subject Area | CCB - Service Agreement Billing   |
| Metrics            | Target Bill Segments, Bill Segments Frozen in Window, Bill Cycle Effectiveness  |

### First Day Billing Efficiency

| Property           | Details   |
|--------------------|---|
| Description        | This analysis shows the billing efficiency on the first day of the bill cycle for the selected month.   |
| Purpose            | Business users can gauge the rate at which bill segments are frozen on the first day of the bill cycle.   |
| Representation     | <p>The gauge shows the percentage, using different colors to denote how the business users perceive the calculated result.</p> <p>The needle movement in the gauge towards yellow or red indicates a need to pay more attention on the clearing of bill segments on the first day of bill cycle. Hover over the gauge for specific values.</p> <p><b>Note:</b> The ranges for green, yellow, and red can be customized.</p> <p>The table shows the target bill segments that need to be cleared, the number of bill segments that were frozen/cleared on the first day, and the billing efficiency on the first day.</p> <p>First Day Billing Efficiency = (Bill Segments Frozen on First Day * 100) / Target Bill Segments</p> |
| Drill Down         | The <b>First Day Billing Efficiency</b> column link drills down to the <b>First Day Billing Efficiency</b> dashboard page to show specific billing information.   |
| Source Object      | Service Agreement Billing Fact  |
| OBIEE Subject Area | CCB - Service Agreement Billing   |
| Metrics            | Target Bill Segments, Bill Segments Frozen on First Day, First Day Billing Efficiency   |

### Estimated Bill Segments

| Property    | Details  |
|-------------|--|
| Description | This analysis shows the estimated bill segments in the selected month. |

| Property           | Details  |
|--------------------|--|
| Purpose            | Business users can gauge the percentage of estimated bill segments from the total bill segments.   |
| Representation     | <p>The gauge shows the percentage, using different colors to denote how the business users perceive the calculated result.</p> <p>The needle movement in the gauge towards yellow or red indicates a need to pay more attention to the billing process on why usage is not being calculated. Hover over the gauge for specific values.</p> <p><b>Note:</b> The ranges for green, yellow, and red can be customized.</p> <p>The table shows the frozen bill segments, estimated bill segments, and the percentage of estimated bill segments.</p> <p><math>\% \text{ Estimated} = 100 * (\text{Estimated Bill Segments} / \text{Frozen Bill Segments})</math></p> |
| Drill Down         | The <b>% Estimated</b> column link drills down to the <b>Estimated Bill Segments</b> dashboard page to show specific billing information.  |
| Source Object      | Service Agreement Billing Fact   |
| OBIEE Subject Area | CCB - Service Agreement Billing  |
| Metrics            | Frozen Bill Segments, Estimated Bill Segments, % Estimated   |

### Bill Segment Cancellation

| Property           | Details   |
|--------------------|---|
| Description        | This analysis shows the percentage of bill segments that were canceled in the selected month.   |
| Purpose            | Business users can gauge bill segments that were canceled and analyze the reason behind the cancellation.   |
| Representation     | <p>The gauge shows the percentage, using different colors to denote how the business users perceive the calculated result.</p> <p>The needle movement in the gauge towards yellow or red indicates a need to pay more attention towards the cancellation reasons for the bill segments. Hover over the gauge for specific values.</p> <p><b>Note:</b> The ranges for green, yellow, and red can be customized.</p> <p>The table shows the target bill segments, canceled bill segments, bills pending for cancellation, and the percentage of canceled bill segments.</p> <p><math>\% \text{ Canceled} = 100 * (\text{Canceled Bill Segments} / \text{Target Bill Segments})</math></p> |
| Drill Down         | The <b>% Canceled</b> column link drills down to the <b>Canceled Bill Segments</b> dashboard page to show specific billing information.   |
| Source Object      | Service Agreement Billing Fact  |
| OBIEE Subject Area | CCB - Service Agreement Billing   |

| Property | Details  |
|----------|--|
| Metrics  | Target Bill Segments, Pending Cancellation, Canceled Bill Segments, % Canceled |

### Average Days of Unbilled Usage

| Property           | Details  |
|--------------------|--|
| Description        | This analysis shows the average number of days for which the usage was not billed. The data is shown for the previous three months.  |
| Purpose            | Business users can analyze the unbilled usage in the selected month and compare the usage with other months.   |
| Representation     | The bar graph shows the average days of unbilled usage in each month, for the previous three months. The X-axis represents the month and year. The Y-axis represents the average days. Hover over the bars for specific details. |
| Drill Down         | The graph bars drill down to the <b>Unbilled SAs</b> dashboard to show specific billing and usage information.   |
| Source Object      | Service Agreement Billing Fact   |
| OBIEE Subject Area | CCB - Service Agreement Billing  |
| Metrics            | Average Days of Unbilled Usage   |

## Billed Usage

The Billed Usage dashboard provides insight into various patterns of quantities of usage that were billed both in terms of the amount billed and the amount of usage.

To access this dashboard:

1. Go to the **Home** page.
2. Select **Dashboards > Revenue Analytics > Billed Usage**.

The dashboard provides the following dashboard pages. The data for current fiscal and/or calendar year and month is displayed by default. You may modify the criteria per requirement.

- **Billed Usage**
- **Analysis**
- **Details**

### Billed Usage

The Billed Usage dashboard page provides a snapshot of the consumption across geographical regions.

## Billed Usage by Region

| Property           | Details   |
|--------------------|---|
| Description        | This analysis provides a spatial representation of the actual billed usage in a geographical area (postal code) for the selected month.                             |
| Purpose            | Business users can identify the areas with very high or low billed usages.  |
| Representation     | The color-coded region on the map shows the billed usage in that area and the total calculated amount for the usage, along with its postal code.                    |
| Drill Down         | The postal code link broadcasts the postal code value to the <b>Billed Usage Distribution</b> and <b>Billed Usage by Month</b> analyses on the same dashboard page. |
| Source Object      | Billed Usage Fact   |
| OBIEE Subject Area | CCB - Billed Usage  |
| Metrics            | Billed Usage, Calculated Amount   |

## Billed Usage Distribution

| Property           | Details   |
|--------------------|---|
| Description        | <p>This analysis shows the distribution of billed usage in a geographical area (postal code) across various customer classes, in the selected month.</p> <p>The postal code for which the data is shown on this analysis can also be broadcast from the <b>Billed Usage by Region</b> map on the same dashboard page.</p> |
| Purpose            | Business users can analyze how the customer billed usage in the selected month is distributed in an area for various customer classes.  |
| Representation     | <p>The <b>Postal Code</b> drop down slices the data for the area with the respective postal code.</p> <p>The pie chart shows the distribution of billed usage in the selected month for different customer classes in the selected postal code.</p>   |
| Drill Down         | The pie chart drills down to the <b>Analysis</b> dashboard page to display the billed usage and billed amount details for the selected customer segment.  |
| Source Object      | Billed Usage Fact   |
| OBIEE Subject Area | CCB - Billed Usage  |
| Metrics            | Billed Usage  |

## Billed Usage by Month

| Property           | Details  |
|--------------------|--|
| Description        | <p>This analysis shows a 15-month trend in the usage amount that was billed for the customers in the selected region (postal code).</p> <p>The postal code for which the data is shown on this analysis can also be broadcast from the <b>Billed Usage by Region</b> map on the same dashboard page.</p> |
| Purpose            | Business users can identify the geographical areas with minimum and maximum billed usage in the previous 15 months.  |
| Representation     | <p>The <b>Postal Code</b> drop down slices the data for the area with the respective postal code.</p> <p>The graph displays the actual billed usage for the respective months in the selected geographical area. Hover over the bars for specific details.</p>   |
| Drill Down         | The bar graph drills down to the <b>Analysis</b> dashboard page for billed usage and billed amount details for the selected customer segment.  |
| Source Object      | Billed Usage Fact  |
| OBIEE Subject Area | CCB - Billed Usage   |
| Metrics            | Billed Usage   |

## Analysis

The Analysis dashboard page provides a snapshot of the billed usage and billed amount in a month.

## Billed Usage Analysis

| Property       | Details   |
|----------------|---|
| Description    | This analysis provides insight into the actual billed usage of the customers in the selected month across different dimensions.   |
| Purpose        | Viewing usage from this perspective helps to highlight any unusual consumption and allows the business users to analyze customer segments in specific geographical areas based on the consumption patterns.   |
| Representation | <p>The <b>View By</b> drop down slices the data by customer class, with a combination of rate, premise type, jurisdiction, service type, city, or postal code.</p> <p>The table shows the billed usage, billed amount, and average price per unit for the selected <b>View By</b> options the selected month.</p> |
| Drill Down     | The <b>Billed Usage (Kilowatt-Hours)</b> column link drills down to the <b>Analysis</b> dashboard page for detailed information about the billed usage at account level.  |
| Source Object  | Billed Usage Fact   |

| Property           | Details   |
|--------------------|---|
| OBIEE Subject Area | CCB - Billed Usage                                  |
| Metrics            | Billed Amount, Billed Usage, Average Price Per Unit |

## Details

The Details dashboard page provides detailed information about the billed usage at account level.

### Billed Usage Detail

| Property           | Details   |
|--------------------|---|
| Description        | This analysis shows the account level details of the top 100 customers based on the billed usage. The data is shown for the selected month.   |
| Purpose            | The accounts at the top of the list are the ones for which the highest amount of usage has been billed. Business users can drill back to the source application and analyze the data further. |
| Representation     | The table displays the customer information details based on the billed usage in the selected month.  |
| Drill Back         | The <b>Account</b> column link drills back to the <b>Account Maintenance</b> page in the Oracle Utilities Customer Care and Billing system.   |
| Source Object      | Billed Usage Fact   |
| OBIEE Subject Area | CCB - Billed Usage  |
| Metrics            | Billed Usage  |

## Revenue

The Revenue dashboard provides insight into the revenue details of customers.

To access this dashboard:

1. Go to the **Home** page.
2. Select **Dashboards > Revenue Analytics > Revenue**.

The dashboard provides the following dashboard pages. The data for current year and month is displayed by default. You may modify the criteria per requirement.

- **Revenue**
- **Region**
- **Trend**
- **Bills and Payments**
- **Analysis**
- **Details**



## Revenue

The Revenue dashboard page provides a snapshot of the total revenue, payments, bills, and adjustments in the selected period.

### Revenue Distribution

| Property           | Details  |
|--------------------|--|
| Description        | <p>This analysis compares the revenue for the current month with the average of previous last three months, broken down into various customer segments.</p> <p>Revenue % = Revenue for current month / Average revenue for previous three months</p>   |
| Purpose            | Business users can analyze how the revenue is distributed across specific customer segments in the selected period.  |
| Representation     | <p>The <b>View By</b> drop down slices the data by customer class, jurisdiction, premise type, rate, or service type.</p> <p>The table shows the distribution of revenue for different customer classes in the selected period, along with the average revenue of the last three months and a calculated result.</p> |
| Drill Down         | The <i>Current Month</i> column link drills down to the <b>Region</b> and <b>Trend</b> dashboard pages for specific metrics related to the selection.  |
| Source Object      | Financial Fact   |
| OBIEE Subject Area | CCB - Financial  |
| Metrics            | Current Month / Average Revenue Last Three Periods   |

### Payments as a Percentage of Bills and Adjustments

| Property       | Details  |
|----------------|--|
| Description    | <p>This analysis provides a snapshot of payments as a percentage of bills and adjustments across various segments in the selected month.</p> <p>The payments percentage is calculated as the payments received in the current month divided by the bills and adjustments for that month in the respective customer segments.</p> |
| Purpose        | Business users can analyze how well payments are being made by the customers.  |
| Representation | <p>The <b>View By</b> drop down slices the data by customer class, jurisdiction, premise type, or service type.</p> <p>The table shows the percentage and actual amount of adjustment compared to the payments received from the customers. The data is displayed for the current month.</p>                                     |
| Drill Down     | The <b>Payments</b> column link drills down to the <b>Bills and Payments</b> dashboard page for specific details about bills and payments for the selected record.   |

| Property           | Details   |
|--------------------|---|
| Source Object      | Financial Fact  |
| OBIEE Subject Area | CCB - Financial   |
| Metrics            | Payments as % of Bills and Adjustments, Payments, Bills and Adjustments |

## Region

The Region dashboard page provides a snapshot of how different cities postal codes contribute to the total revenue.

### Revenue by Region

| Property           | Details  |
|--------------------|--|
| Description        | This analysis provides a spatial representation of the contribution each region/city (postal code) makes to the total revenue in the selected month.   |
| Purpose            | Business users can identify the areas with most, least, or moderate revenue generation for the selected month.   |
| Representation     | <p>The color-coded region on the map shows the total revenue amount in that area for the selected month, along with its postal code.</p> <p>The postal code link broadcasts the postal code value to the <b>Revenue by Customer Class</b> and <b>Revenue by Month</b> analyses on the same page.</p> |
| Drill Down         | No drill down  |
| Source Object      | Financial Fact   |
| OBIEE Subject Area | CCB - Financial  |
| Metrics            | Revenue Amount   |

### Revenue by Customer Class

| Property    | Details   |
|-------------|---|
| Description | <p>This analysis shows the revenue amount generated in a region (postal code) across various customer classes (commercial, industrial, or residential).</p> <p>The postal code for which the data is shown on this analysis can also be broadcast from the <b>Revenue by Region</b> map on the same dashboard page.</p> |
| Purpose     | Business users can analyze how the revenue is generated in an area (postal code) for various customer classes.  |

| Property           | Details   |
|--------------------|---|
| Representation     | <p>The <b>Postal Code</b> drop down slices the data for the area with the respective postal code.</p> <p>The pie chart shows the distribution of revenue for different customer classes in the selected area (postal code).</p> |
| Drill Down         | The pie chart drills down to the <b>Trend</b> dashboard page to display the trend in revenue generation in that region.   |
| Source Object      | Financial Fact  |
| OBIEE Subject Area | CCB - Financial   |
| Metrics            | Revenue Amount  |

### Revenue by Month

| Property           | Details   |
|--------------------|---|
| Description        | <p>This analysis shows a 15-month trend in the revenue generation in a region (postal code).</p> <p>The postal code for which the data is shown on this analysis can also be broadcast from the <b>Revenue by Region</b> map on the same dashboard page.</p>  |
| Purpose            | Business users can identify the geographical areas with minimum and maximum revenue generation in the previous 15 months.   |
| Representation     | <p>The <b>Postal Code</b> drop down slices the data for the area with the respective postal code.</p> <p>The graph displays the actual revenue generated for the respective months in the selected geographical area. Hover over the bars for specific details. The graph also shows the yearly average revenue in the selected region.</p> |
| Drill Down         | The bar drills down to the <b>Trend</b> dashboard page for the trend in revenue generation in the selected region.  |
| Source Object      | Financial Fact  |
| OBIEE Subject Area | CCB - Financial   |
| Metrics            | Revenue Amount  |

### Trend

The Trend dashboard page provides a snapshot of the trend in revenue generation in the selected time period.

## Revenue Trend

| Property           | Details   |
|--------------------|---|
| Description        | This analysis shows the revenue generation broken down into various customer segments per month, for the previous 15 months.  |
| Purpose            | From this snapshot the business users can determine the trend in which revenue amounts are generated across various segments in the selected time period.   |
| Representation     | <p>The <b>View By</b> drop down slices the data by customer class, jurisdiction, premise type, rate, or service type.</p> <p>Revenue includes only billed amount. Both the graph and the table show the monthly revenue amount that is generated against the selected customer segment, for the previous 15 months. Hover over the graph bars to view specific details.</p> |
| Drill Down         | The <b>Revenue Amount</b> column link drills down to the <b>Analysis</b> and <b>Details</b> dashboard pages for detailed information about the revenue generation and also account level details of each customer.  |
| Source Object      | Financial Fact  |
| OBIEE Subject Area | CCB - Financial   |
| Metrics            | Revenue Amount  |

## Year To Date Revenue

| Property           | Details  |
|--------------------|--|
| Description        | This analysis displays a 15-month plot for the revenue amount of each month and year to date revenue before that month.  |
| Purpose            | This analysis provides a snapshot of the trend in revenue generation in the selected time period. Business users can identify any lapses in the revenue generation for a fiscal period.  |
| Representation     | <p>The graph shows the revenue amount generated until each month of the selected year. Hover over the bars for specific values.</p> <p>The table shows the total revenue and year to date revenue amounts for specific fiscal periods in the selected fiscal year. It also displays a calculated result.</p> |
| Drill Down         | No drill down  |
| Source Object      | Financial Fact   |
| OBIEE Subject Area | CCB - Financial  |
| Metrics            | Revenue Amount, Fiscal YTD Revenue, YTD Revenue  |

## Bills and Payments

The Bills and Payments dashboard page provides a snapshot of payments, bills, and adjustments.

### Bills & Adjustments vs Payments

| Property           | Details   |
|--------------------|---|
| Description        | This analysis shows how effectively customers are making their payments in a month; 100% payments compared to the total bills and adjustments is the target.  |
| Purpose            | Business users can analyze whether or not customers are paying their bills on time, and if revenue generation is as per the set target.   |
| Representation     | <p>The graph shows the payments and bills and adjustments for the selected period. It also shows payments as the percentage of bills and adjustments amount, as well the set target for payments collection. Hover over the graph to view the specific details for the selected period.</p> <p>The table displays specific details about payments, bills, and adjustments for previous 15 months.</p> |
| Drill Down         | No drill down   |
| Source Object      | Financial Fact  |
| OBIEE Subject Area | CCB - Financial   |
| Metrics            | Payments, Bills and Adjustments, Payments / Bills and Adjustments   |

## Analysis

The Analysis dashboard page provides a snapshot of the monthly revenue generation.

### Revenue Analysis

| Property           | Details   |
|--------------------|---|
| Description        | This analysis provides information on how different customer segments contribute to the total revenue in the selected month.  |
| Purpose            | This analysis provides a snapshot of the monthly revenue generation across various customer segments. Business users can determine how different customer segments contribute to the total revenue.   |
| Representation     | <p>The <b>View By</b> drop down slices the data by postal code, with a combination of city, customer class, jurisdiction, premise type, rate, service type, or state.</p> <p>The table shows how various customer segments contribute to the total revenue for the selected period.</p> |
| Drill Down         | No drill down   |
| Source Object      | Financial Fact  |
| OBIEE Subject Area | CCB - Financial   |

| Property | Details        |
|----------|----------------|
| Metrics  | Revenue Amount |

## Details

The Details dashboard page provides detailed information about the revenues at account level.

### Revenue Detail

| Property           | Details   |
|--------------------|---|
| Description        | This analysis shows the account level details of the top 100 customers based on their contribution to the revenue generation. The data is shown for the selected month. |
| Purpose            | The accounts at the top of the list are the ones with highest revenue generation. Business users can drill back to the source application and analyze the data further. |
| Representation     | The table displays the customer information details based on the revenue generation in the selected month.  |
| Drill Back         | The <b>Account</b> column link drills back to the <b>Account Maintenance</b> page in the Oracle Utilities Customer Care and Billing system.                             |
| Source Object      | Financial Fact  |
| OBIEE Subject Area | CCB - Financial   |
| Metrics            | Revenue Amount  |

## Billing

The Billing dashboard provides insight into the key metrics related to the billing system, such as bill cycle effectiveness, first day billing efficiency, and estimated and canceled bill segments.

To access this dashboard:

1. Go to the **Home** page.
2. Select **Dashboards > Revenue Analytics > Billing**.

The dashboard provides the following dashboard pages. The data for the last completed calendar month is displayed by default. You may modify the criteria as per requirement.

- **Bill Cycle Effectiveness**
- **First Day Billing Efficiency**
- **Estimated Bill Segments**
- **Canceled Bill Segments**
- **Estimated Bill Segment Details**
- **Canceled Bill Segment Details**

## Bill Cycle Effectiveness

The Bill Cycle Effectiveness dashboard page provides details on how effective bill cycles were historically, and also the details within a single month and also the bill cycle revenue amount trend.

### Bill Cycle Effectiveness History

| Property           | Details  |
|--------------------|--|
| Description        | This analysis shows the monthly trend in bill cycle effectiveness for the previous 15 months. It also shows a monthly comparison between the number of bill segments frozen within the billing window against the monthly target.  |
| Purpose            | Business users can analyze the trends in bill cycle effectiveness for the previous 15 months. Depending on the increase or decrease, analysts can take appropriate measures.   |
| Representation     | <p>The bar graph shows the number of bill segments frozen within the billing window and the target for that month. The X-axis represents the month and year. The Y1-axis represents the number of bill segments, while the Y2-axis represents the bill cycle effectiveness. The line on the graph shows the trend in bill cycle effectiveness. Hover over the bars for specific values.</p> <p>The <b>View By</b> drop down slices the data by various dimensional attributes, such as premise type, customer class, measurement type, service type, or jurisdiction.</p> <p>The <b>Month Year</b> drop down filters the data for the specific month.</p> <p>The table shows the target bill segments, bill segments frozen in window, bill segments frozen outside the window, and the bill cycle effectiveness for the selected dimensional attribute.</p> $\text{Bill Cycle Effectiveness} = (\text{Bill Segments Frozen in Window} * 100) / \text{Target Bill Segments}$ |
| Drill Down         | <p>The labels on the X-axis of the bar graph have the master-detail interaction with the tabular report and <b>Bill Cycle Effectiveness</b> analysis on the same dashboard page.</p> <p>Clicking on a specific <b>Month Year</b> label refreshes the tabular report and <b>Bill Cycle Effectiveness</b> analysis to show the data for the specific month and year.</p>   |
| Source Object      | Service Agreement Billing Fact   |
| OBIEE Subject Area | CCB - Service Agreement Billing  |
| Metrics            | Target Bill Segments, Bill Segments Frozen in Window, Bill Cycle Effectiveness, Bill Segments Frozen Outside Window  |

## Bill Cycle Effectiveness

| Property           | Details   |
|--------------------|---|
| Description        | <p>This analysis shows the trend in bill cycle effectiveness for the selected month between the various bill cycles.</p> <p><b>Note:</b> The <i>Month Year</i> value for which the data is shown in this analysis can also be broadcast from the <b>Bill Cycle Effectiveness History</b> analysis on the same dashboard page.</p>   |
| Purpose            | Business users can analyze the bill cycle effectiveness for the current month. They can compare the effectiveness of the bill cycles within a month and determine which bill cycles perform better across months.   |
| Representation     | <p>The <b>Month Year</b> drop down filters the data for the specific month.</p> <p>The bar graph shows the number of bill segments in each bill cycle. The X-axis represents the bill cycle. The Y1-axis represents the number of bill segments, while the Y2-axis represents the bill cycle effectiveness. The line on the graph shows the trend in bill cycle effectiveness. Hover over the bars for specific values.</p> |
| Drill Down         | No drill down   |
| Source Object      | Service Agreement Billing Fact  |
| OBIEE Subject Area | CCB - Service Agreement Billing   |
| Metrics            | Target Bill Segments, Bill Segments Frozen in Window, Bill Cycle Effectiveness  |

## Bill Cycle Trend

| Property           | Details   |
|--------------------|---|
| Description        | This analysis shows the revenue amount generated in various bill cycles in the selected month, and then compares it with the values in the previous month and same month in the previous year.  |
| Purpose            | Business users can analyze the trends in revenue generation across various bill cycles.   |
| Representation     | <p>The table shows the revenue amount generated in the selected month and previous month, and also compares it with the revenue generated in the same month in the previous year.</p> <p>The revenue generation is shown against various bill cycles.</p> |
| Drill Down         | No drill down   |
| Source Object      | Service Agreement Billing Fact  |
| OBIEE Subject Area | CCB - Service Agreement Billing   |
| Metrics            | Revenue Amount, Trend Compared to Last Month, Trend Compared to Same Month Last Year  |



## First Day Billing Efficiency

The First Day Billing Efficiency dashboard page covers key metrics related to the efficiency of billing in the first day of the billing window.

### First Day Billing Efficiency

| Property           | Details   |
|--------------------|---|
| Description        | This analysis shows the billing efficiency on the first day of the billing window for the previous 15 months.   |
| Purpose            | Business users can gauge the rate at which bill segments are frozen on the first day of the billing window. They can also observe any trends over the 15-month period.  |
| Representation     | <p>The bar graph shows the number of bill segments frozen and targeted in each month. The X-axis represents the month and year. The Y1-axis represents the number of bill segments, while the Y2-axis represents the first day billing efficiency. The line on the graph shows the trend in the first day billing efficiency. Hover over the bars for specific values.</p> <p>The <b>View By</b> drop down slices the data by various dimension attributes, such as premise type, customer class, measurement type, service type, or jurisdiction. The selection is applicable for table representation.</p> <p>The <b>Month Year</b> drop down filters the data for the specific month.</p> <p>The table shows the target bill segments, bill segments frozen on the first day of the bill cycle, and the bill cycle effectiveness on the first day for the selected dimension attribute.</p> <p>First Day Billing Efficiency = (Frozen Bill Segments on First Day * 100) / Target Bill Segments</p> |
| Drill Down         | <p>The labels on the X-axis of the bar graph have the master-detail interaction with the tabular report in the same analysis.</p> <p>Clicking on a specific <b>Month Year</b> label refreshes the tabular report to show the data for the specific <b>Month Year</b>.</p>   |
| Source Object      | Service Agreement Billing Fact  |
| OBIEE Subject Area | CCB - Service Agreement Billing   |
| Metrics            | Target Bill Segments, Frozen Bill Segments on First Day, First Day Billing Efficiency   |

### Worst 5 Bill Cycles By First Day Billing Efficiency <selected month>

| Property    | Details   |
|-------------|---|
| Description | This analysis shows the top five bill cycles that have the least efficiency in first day billing. The data is shown for the selected month. |

| Property           | Details  |
|--------------------|--|
| Purpose            | Business users can identify the bill cycles that had a high number of bill segments not getting frozen on the first day of the billing window. They can compare the performance of these bill cycles with that of the previous month.  |
| Representation     | <p>The bar graph shows the percentage of bill segments frozen on the first day of the billing window across various bill cycles. The X-axis represents the bill cycle. The Y-axis represents the average efficiency percentage on the first day. The lines on the graph represent the average of all bill cycles and the highest efficiency percentage of the month in a specific bill cycle bucket. Hover over the bars for specific details.</p> <p>The table displays the target bill segments and the bill segments frozen on the first day of the bill cycle. It compares the billing efficiency on the first day with that of the efficiency in the previous month, and also shows the trend in billing efficiency.</p> <p>First Day Billing Efficiency = (Frozen Bill Segments on First Day * 100) / Target Bill Segments</p> <p>Trend = Last Month Efficiency - First Day Billing Efficiency</p> |
| Drill Down         | <p>The labels on the X-axis of the bar graph and the <b>Bill Cycle</b> column have the master-detail interaction with the <b>Cumulative Percentage Of Frozen Bill Segments By Day</b> analysis of the same dashboard page.</p> <p>Clicking on a specific Bill Cycle label will refresh the <b>Cumulative Percentage Of Frozen Bill Segments By Day</b> analysis to show the data for the specific <b>Bill Cycle</b>.</p>   |
| Source Object      | SA Billing Fact  |
| OBIEE Subject Area | CCB - SA Billing   |
| Metrics            | Target Bill Segments, Frozen Bill Segments on First Day, First Day Billing Efficiency, Last Month's Efficiency, Highest % of the Month, Average of all Bill Cycles, Trend  |

### Worst 5 Bill Cycles By First Day Billing Efficiency <rolling 12 months>

| Property    | Details  |
|-------------|--|
| Description | This analysis shows the top five bill cycles that have the least efficiency in first day billing. The data is shown for the rolling 12 months.                         |
| Purpose     | Business users can identify the bill cycles that had a high number of bill segments not getting frozen on the first day of the billing window over the last 12 months. |

| Property           | Details  |
|--------------------|--|
| Representation     | <p>The bar graph shows the percentage of bill segments frozen on the first day of the billing window across various bill cycles. The X-axis represents the bill cycles. The Y-axis represents the efficiency percentage on the first day. The lines on the graph represent the average efficiency of all bill cycles and the highest efficiency of the previous 12 months in a specific bill cycle bucket. Hover over the bars for specific details.</p> <p>The table displays the target bill segments and the bill segments frozen on the first day of the bill cycle. It compares the billing efficiency on the first day with that of the efficiency in the previous month, and also shows the trend in billing efficiency.</p> <p>First Day Billing Efficiency = (Frozen Bill Segments on First Day * 100) / Target Bill Segments</p> <p>Trend = Last Month Efficiency - First Day Billing Efficiency</p> |
| Drill Down         | <p>The labels on the X-axis of the bar graph and the <b>Bill Cycle</b> column have the master-detail interaction with the <b>Cumulative Percentage Of Frozen Bill Segments By Day</b> analysis of the same dashboard page.</p> <p>Clicking on a specific Bill Cycle label will refresh the <b>Cumulative Percentage Of Frozen Bill Segments By Day</b> analysis to show the data for the specific <b>Bill Cycle</b>.</p>   |
| Source Object      | Service Agreement Billing Fact   |
| OBIEE Subject Area | CCB - Service Agreement Billing  |
| Metrics            | Target Bill Segments, Frozen Bill Segments on First Day, First Day Billing Efficiency, Last Month's Efficiency, Highest % of the Month, Average of all Bill Cycles, Trend  |

### Cumulative Percentage Of Frozen Bill Segments By Day

| Property    | Details   |
|-------------|---|
| Description | <p>This analysis shows the cumulative percentage of bill segments that were frozen in the various days of the billing window. The data is shown for the selected month.</p> <p><b>Note:</b> The bill cycle for which data is shown on this analysis can also be broadcast from the <b>Worst 5 Bill Cycles By First Day Billing Efficiency &lt;selected month&gt;</b> analysis on the same dashboard page.</p> |
| Purpose     | Business users can analyze the percentage of bills frozen in various days of the billing window. (day 1, 2-5 days, etc).  |

| Property           | Details  |
|--------------------|--|
| Representation     | <p>The first <b>Bill Cycle</b> drop down filters the data to show the frozen bill segment percentages for the selected bill cycle. This selection is applicable only to the graph.</p> <p>The bar graph shows the cumulative percentage of frozen bill segments in the selected month, along with the 12-month average. The X-axis represents the days in bill window. The Y-axis represents the cumulative percentage. Hover over the bars for specific values.</p> <p>The second <b>Bill Cycle</b> drop down filters the data to show the frozen bill segment percentages for the selected bill cycle. This selection is applicable only to the table.</p> <p>The table shows the bill segments frozen and their cumulative percentage for the selected month, and also the respective averages for the previous 12 months. The data is shown against various day buckets in the bill window.</p> <p>Cumulative % Frozen (12 Months) = (Bill Segments Frozen Till the Particular Day in Window (12 Months) * 100.0) / Bill Segments Frozen (12 Months)</p> <p>Cumulative % Frozen (Selected Month) = (Bill Segments Frozen Till the Particular Day in Window (Selected Month)* 100.0)/ Bill Segments Frozen (Selected Month)</p> |
| Drill Down         | No drill down  |
| Source Object      | Service Agreement Billing Fact   |
| OBIEE Subject Area | CCB - Service Agreement Billing  |
| Metrics            | Bill Segments Frozen, Cumulative % Frozen (For selected month and the 12 month average)  |

## Estimated Bill Segments

The Estimated Bill Segments dashboard page focuses on the estimated bill segment trend, along with the high bill complaints raised against them.

### Estimated Bill Segment Trend

| Property    | Details  |
|-------------|--|
| Description | This analysis provides a snapshot of the estimated bill segment trend in the previous 15 months.   |
| Purpose     | Business users can analyze trends in the volumes of estimated bill segments and any sub-trends within it based on the various dimensional attributes that be used for slicing. |

| Property           | Details  |
|--------------------|--|
| Representation     | <p>The <b>View By</b> drop down slices the data into various dimensional attributes, such as customer class, bill cycle, service type, rate, measurement type, premise type, or jurisdiction.</p> <p>The stacked bar graph shows the estimated bill segments sliced by the selected dimensional attribute for each month. The X-axis represents the month and year. The Y-axis represents the number of estimated bill segments. Hover over the bars for specific values.</p> <p>The table shows the estimated bill segments, frozen bill segments, percentage of estimated bill segments, estimated amount, total amount, and the percentage of estimated amount. The percentage of estimated bill segments with high bill complaints metric is derived from the <b>% of Estimated Bill Segments With High Bill Complaints</b> analysis on the same dashboard page.</p> |
| Drill Down         | The graph bars drill down to the <b>Estimated Bill Segment Details</b> dashboard page to show specific billing information.  |
| Source Object      | Service Agreement Billing Fact   |
| OBIEE Subject Area | CCB - Service Agreement Billing  |
| Metrics            | Estimated Bill Segments, Frozen Bill Segments, % of Estimated Bill Segments, Estimated Amount, % of Estimated Amount, Total Amount, % of Estimated Bill Segments with High Bill Complaints   |

### % of Estimated Bill Segments With High Bill Complaints

| Property           | Details  |
|--------------------|--|
| Description        | This analysis provides the details of the percentage of estimated bill segments with high bill complaints. The data is shown for the previous 15 months.   |
| Purpose            | Business users can analyze trends in the percentage of estimated bill segments resulting in high bill complaints from customers. They can help the utility to identify reasons for the same and analyze the effectiveness of their estimation tools. |
| Representation     | The line graph shows the percentage of estimated bill segments with high bill complaints for each month. The X-axis represents the month and year. The Y-axis represents the percentage. Hover over the markers in the line for specific values.     |
| Drill Down         | The graph bars drill down to the <b>Estimated Bill Segment Details</b> dashboard page to show specific monthly billing information.  |
| Source Object      | Service Agreement Billing Fact   |
| OBIEE Subject Area | CCB - Service Agreement Billing  |
| Metrics            | Estimated Bill Segments, Frozen Bill Segments, % of Estimated Bill Segments, Estimated Amount, % of Estimated Amount, Total Amount, % of Estimated Bill Segments with High Bill Complaints   |

## Canceled Bill Segments

The Canceled Bill Segments dashboard page focuses on the canceled bill segments and the cancellation reasons.

### Canceled Bill Segments Trend

| Property           | Details   |
|--------------------|---|
| Description        | This analysis provides a snapshot of the bill segments that were canceled in the previous 15 months.  |
| Purpose            | Business users can identify trends in the volumes of bill segments that get canceled and any sub-trends within it based on the various dimensional attributes that be used for slicing.   |
| Representation     | <p>The <b>View By</b> drop down slices the data into various dimensional attributes, such as customer class, service type, measurement type, premise type, or jurisdiction.</p> <p>The stacked bar graph shows the canceled bill segments against each selected dimensional attribute, and in each month. The X-axis represents the month and year. The Y-axis represents the number of canceled bill segments. Hover over the bars for specific values.</p> <p>The table shows the number of bill segments in specific customer segments that were canceled in each month, for the previous 12 months.</p> |
| Drill Down         | <p>The labels on the X-axis of the bar graph and the <b>Month Year</b> column have the master-detail interaction with the <b>Top 5 Reasons for Bill Segment Cancellation</b> analysis of the same dashboard page.</p> <p>Clicking on a specific Month Year label will refresh the <b>Top 5 Reasons for Bill Segment Cancellation</b> analysis to show the data for the specific <b>Month Year</b>.</p>  |
| Source Object      | Service Agreement Billing Fact  |
| OBIEE Subject Area | CCB - Service Agreement Billing   |
| Metrics            | Count of Canceled Bill Segments in each Dimensional Attribute Classification  |

### Top 5 Reasons for Bill Segment Cancellation

| Property    | Details  |
|-------------|--|
| Description | <p>This analysis provides the top five reasons for a bill segment to mark as canceled. The data is shown for the previous 12 months.</p> <p><b>Note:</b> The month year for which the data is shown on this analysis can also be broadcast from the <b>Canceled Bill Segments Trend</b> analysis on the same dashboard page.</p> |
| Purpose     | Business users can identify the top reasons why bill segments result in cancellations.   |

| Property           | Details   |
|--------------------|---|
| Representation     | <p>Use the slider to view the canceled bill segments' details for a specific month.</p> <p>The bar graph shows the number of cancelled bill segments against each bill cancellation reason. The X-axis represents the reason for bill cancellation. The Y-axis represents the number of cancelled bill segments. Hover over the bars for specific values.</p> <p>The <b>Month Year</b> drop down filters the data in the table for the selected month.</p> <p>The table shows the number of cancelled bill segments, percentage of total canceled, average canceled amount, canceled amount, average billed amount, rebilled segments, and rebilled amount. The data is shown for the selected month.</p> |
| Drill Down         | The <b>Canceled Bill Segments</b> column link drills down to the <b>Canceled Bill Segment Details</b> dashboard page for granular details.  |
| Source Object      | Service Agreement Billing Fact  |
| OBIEE Subject Area | CCB - Service Agreement Billing   |
| Metrics            | Canceled Bill Segments, % of Total Canceled, Total Canceled Amount, Average Canceled Amount, Rebilled Segments, Rebilled Amount, Average Rebilled Amount  |

## Estimated Bill Segment Details

The Estimated Bill Segment Details dashboard page provides detailed information about the estimated bill segments at account level.

### Details

| Property           | Details  |
|--------------------|--|
| Description        | This analysis shows the account level details of the top 100 customers who have the highest billed amounts based on estimated bill segments. The data is shown for the selected month. |
| Purpose            | The accounts at the top of the list are the ones with highest estimated amount. Business users can drill back to the source application and analyze the data further.                  |
| Representation     | The table displays the customer details based on the estimated bill segments and estimated amount in the selected month.   |
| Drill Back         | The <b>Account</b> column link drills back to the <b>Control Central</b> page in the Oracle Utilities Customer Care and Billing system.  |
| Source Object      | Service Agreement Billing Fact   |
| OBIEE Subject Area | CCB - Service Agreement Billing  |
| Metrics            | Estimated Amount, Number of Estimated Bill Segments  |

## Canceled Bill Segment Details

The Canceled Bill Segment Details dashboard page provides detailed information about the canceled bill segments at account level.

### Details

| Property           | Details  |
|--------------------|--|
| Description        | This analysis shows the account level details of the top 100 customers who have the highest amounts based on canceled bill segments. The data is shown for the selected month. |
| Purpose            | The accounts at the top of the list are the ones with highest canceled amount. Business users can drill back to the source application and analyze the data further.           |
| Representation     | The table displays the customer details based on the canceled bill segments and canceled amount in the selected month.   |
| Drill Back         | The <b>Account</b> column link drills back to the <b>Control Central</b> page in the Oracle Utilities Customer Care and Billing system.  |
| Source Object      | Service Agreement Billing Fact   |
| OBIEE Subject Area | CCB - Service Agreement Billing  |
| Metrics            | Canceled Amount, Number of Canceled Bill Segments  |

## Unbilled SAs

The Unbilled SAs dashboard provides insight into the service agreement details of customers who have been unbilled for certain period.

To access this dashboard:

1. Go to the **Home** page.
2. Select **Dashboards > Revenue Analytics > Unbilled SAs**.

The dashboard provides the following dashboard pages. The data for the last completed calendar year month is displayed by default. You may modify the criteria as per requirement.

- **Overview**
- **Bill Segment Errors**
- **Bill Segment Errors Details**
- **Unbilled SAs Details**

### Overview

The Overview dashboard page provides an overview of the unbilled service agreements for the selected period.

### Service Agreements by Days Of Unbilled Usage

| Property    | Details  |
|-------------|--|
| Description | This analysis shows the number of service agreements that are unbilled, grouped by the various age buckets for the unbilled period. It shows the monthly trend for the previous 15 months. |



| Property           | Details  |
|--------------------|--|
| Purpose            | Business users can analyze the quantity of agreements that have been unbilled over the last 15-month period.   |
| Representation     | <p>The stacked bar graph shows the number of service agreements in each unbilled usage days bucket, for the previous 15 months. The X-axis represents the month and year. The Y-axis represents the number of service agreements. Hover over the bars for specific values.</p> <p>The table shows the number of days for which service agreements were unbilled against each unbilled usage bucket (such as &gt; 30, 20-30, and more).</p> |
| Drill Down         | The <b>Month</b> column link drills down to the <b>Unbilled SAs Details</b> dashboard page for granular details.   |
| Source Object      | SA Snapshot Fact   |
| OBIEE Subject Area | CCB - SA Snapshot  |
| Metrics            | Service Agreements, Counts Based on Age Buckets  |

## Bill Segment Errors

The Bill Segment Errors dashboard page provides insight into the errors in bill segments for the selected period.

## Bill Segment Error Trend

| Property       | Details   |
|----------------|---|
| Description    | This analysis compares the bill segments in errors in each month, for the previous 15 months.   |
| Purpose        | Business users can analyze any trends in the volume on bill segments going into error and also any patterns based on the selected dimensional attribute.  |
| Representation | <p>The <b>View By</b> drop down slices the data by customer class, premise type, rate, measurement type, or service type.</p> <p>The stacked bar graph shows the number of bill segments with errors sliced by the selected dimensional attribute. The X-axis represents the month and year. The Y-axis represents the number of bill segments with errors. Hover over the bars for specific values.</p> <p>The table shows the number of bill segments that had errors, bill segments still in error, target number of bill segments, and the percentage of bill segments still in error. The data is displayed for each month, for the previous 15 months.</p> <p><math>\% \text{ Still in Error} = (\text{Total Bill Segments Still in Error} * 100.0) / \text{Total Bill Segments}</math></p> |

| Property           | Details  |
|--------------------|--|
| Drill Down         | <p>The <b>Bill Segments That Had Errors</b> column links drill down to the <b>Bill Segment Errors Details</b> dashboard page for granular details.</p> <p>The labels on the X-axis of the bar graph have the master-detail interaction with the <b>Analysis of Bill Segment Errors</b> analysis on the same dashboard page.</p> <p>Clicking on a specific Month Year label will refresh the <b>Analysis of Bill Segment Errors</b> analysis to show the data for the specific <b>Month Year</b>.</p> |
| Source Object      | Service Agreement Billing Fact   |
| OBIEE Subject Area | CCB - Service Agreement Billing  |
| Metrics            | Bill Segments Still in Error, Bill Segments that Had Errors, Target Bill Segments, % Still in Error  |

### Analysis of Bill Segment Errors

| Property           | Details   |
|--------------------|---|
| Description        | This analysis shows the bill segments that had errors and those still in error, along with the respective error messages. The data is displayed for the selected month.   |
| Purpose            | Business users can analyze the errors that are associated with more number of bill segments. Corrective actions can then be focused upon the identified top errors.   |
| Representation     | <p>The <b>Month Year</b> drop down filters the data for respective month.</p> <p>The table shows the number of bill segments that had errors, those still in error, the respective error message, and the customer class.</p> |
| Drill Down         | The <b>Bill Segments That Had Errors</b> and <b>Bill Segments Still in Error</b> column links drill down to the <b>Bill Segment Errors Details</b> dashboard page for granular details.                                       |
| Source Object      | Service Agreement Billing Fact  |
| OBIEE Subject Area | CCB - Service Agreement Billing   |
| Metrics            | Bill Segments Still in Error, Bill Segments that Had Errors   |

### Bill Segment Errors Details

The Bill Segment Errors Details dashboard page provides detailed information about the bill segments with errors, at account level.

## Details

| Property           | Details  |
|--------------------|--|
| Description        | This analysis shows the account level details of the top 100 customers based on the bill segments that are still in error. The data is shown for the selected month.                                     |
| Purpose            | The accounts at the top of the list are the ones with the highest number of bill segments that are still in error. Business users can drill back to the source application and analyze the data further. |
| Representation     | The table displays the customer details based on the bill segments still in error and those that had errors.   |
| Drill Back         | The <b>Account</b> column link drills back to the <b>Control Central</b> page in the Oracle Utilities Customer Care and Billing system.  |
| Source Object      | Service Agreement Billing Fact   |
| OBIEE Subject Area | CCB - Service Agreement Billing  |
| Metrics            | Bill Segments Still in Error, Bill Segments that Had Errors  |

## Unbilled SAs Details

The Unbilled SAs Details dashboard page provides detailed information about the unbilled service agreements at account level.

## Details

| Property           | Details  |
|--------------------|--|
| Description        | This analysis shows the account level details of the top 100 customers based on the average unbilled days on a single service agreement. The data is shown for the selected month.   |
| Purpose            | The accounts at the top of the list are the ones with highest average unbilled days on a single service agreement. Business users can drill back to the source application and analyze the data further.                       |
| Representation     | The table displays the account details based on the average unbilled days on a single service agreement. It also displays the number of days of unbilled usage in age buckets (such as 10-20 days, 20-30 days, >30 days, etc). |
| Drill Back         | The <b>Account</b> column link drills back to the <b>Control Central</b> page in the Oracle Utilities Customer Care and Billing system.  |
| Source Object      | Service Agreement Snapshot Fact  |
| OBIEE Subject Area | CCB - Service Agreement Snapshot   |
| Metrics            | Service Agreement Counts Based on Age Buckets, Average Unbilled Days on a Single SA  |