

Oracle Utilities Transaction Management

User's Guide

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Chapter 1

Overview

This chapter provides an overview of Oracle Utilities Transaction Management user interface, including:

- **What is Oracle Utilities Transaction Management?**
- **What is this book?**
- **International and Multiple Currency Support**

What is Oracle Utilities Transaction Management?

Oracle Utilities Transaction Management is a web-enabled user interface that provides access to process and transaction data used by Oracle Utilities Transaction Management. Because all Oracle Utilities web applications share a common framework, users can switch between different Oracle Utilities web applications (such as Oracle Utilities Billing Component) without having to open multiple applications.

Important Note

Before you can use Oracle Utilities Transaction Management, you must ensure that appropriate process and transaction data and records have been created in the Oracle Utilities Data Repository. The instructions in this user guide assume that these records exist. For more information about creating, updating, or editing records, see the *Oracle Utilities Transaction Management Installation and Configuration Guide*.

What is this book?

The *Oracle Utilities Transaction Management Web User's Guide* describes the Oracle Utilities Transaction Management functionality, including the following:

- **Chapter 1: Overview** provides an overview of the Oracle Utilities Transaction Management web application.
- **Chapter 2: Working with the Oracle Utilities Energy Information Platform** describes how users work with the Oracle Utilities Energy Information Platform web interface, including information about general navigation and common controls. Also this chapter describes how to run and view the results of a number of Oracle Utilities Transaction Management reports.
- **Chapter 3: Searching and Viewing Oracle Utilities Transaction Management Data** describes how to search and view different types of Oracle Utilities Transaction Management data, including documents, processes and transactions, and requests and responses.
- **Chapter 4: Searching and Viewing Exceptions** describes how to search and view exceptions.
- **Chapter 5: Oracle Utilities Transaction Management Setup** describes the reports provided with Oracle Utilities Transaction Management.

International and Multiple Currency Support

This section outlines international and multiple currency support in the Oracle Utilities Energy Information Platform, including:

- **Locales and Languages**
- **Date and Numeric Presentation**
- **Currency Presentation**
- **Multiple Currency Support**
- **File Formats**
- **Database Support**

Locales and Languages

Two fundamental concepts underlying international support in Oracle Utilities applications are **languages and locales**. Languages determine the specific language in which text labels and controls of an application appear. Locales determine the specific region or country in which the user is working. Specifically, locales are used to specify display and input formatting for:

- Date/time and numeric presentation, and
- Currency presentation

How a user selects a language and/or locale is determined by the type of application being used.

Web-enabled Products

For web-enabled products, a user's locale and language are selected from the **Locales** tab of the **Set Preferences** screen. The selected locale and language are stored in the user's security properties. The available locales on this screen are specified in the LOCALES.CFG.XML configuration file (see **Chapter 2: Configuration Files** in the *Oracle Utilities Energy Information Platform Configuration Guide* for more information). Locales included in the LOCALES.CFG.XML file must also be installed on the web server and be accessible from the Regional Settings Control Panel. If a selected locale is not installed on the web server, currency formatting and presentation may be incorrect.

If a user does not select a locale (or selects a locale of "None"), the default locale is the Server System Locale (defined by the operating system installed on the web server). Oracle Utilities recommends that all users specify a locale before using internationalized applications.

Client/Server Products

For client/server products, the user's locale is determined by the Regional Settings of the client and/or application server machine.

Languages

The language for client/server products is specified using a command line switch and/or a parameter in the LODESTAR.CFG file. See **Oracle Utilities Application Command Line Parameters** on page 4-9 in the *Oracle Utilities Energy Information Platform Installation Guide* for more information about command line parameters. See **LODESTAR.CFG** on page 2-2 in the *Oracle Utilities Energy Information Platform Configuration Guide* for more information about the LODESTAR.CFG file. At this time, available languages include English, French, German, and Italian.

Reports

For client/server applications, the locale for reports is determined by the Regional Settings of the machine on which the report is run.

For web-enabled applications, the locale for reports is based on the Server System Locale (defined by the operating system installed on the web server)

Languages

For client/server applications, the language that appears on reports is determined by the language of the application that generated the report, specified either by a command line parameter or a configuration file parameter.

For web-enabled applications, the language is specified by the Regional Settings of the machine on which the report is run, unless overridden by the LANGUAGE parameter in the LODESTAR.CFG file.

Date and Numeric Presentation

The display and input of dates and numbers is based on the selected locale.

Web-enabled products

Display formatting of both numbers and date/times is based on the user's selected locale.

Copy, cut, and paste operations are supported for all input controls. Required fields are identified by asterisks. Null values are represented by blank (empty) controls. Moving the mouse pointer over an input area displays sample formatting for that field.

Number input controls only accept formatting based on the user's selected locale. The only allowable characters include digits, decimal separator, and minus sign. Any other characters are filtered from input.

Date input controls only accept formatting based on the user's selected locale. Dates can either be keyed in or selected from a pop-up calendar control. All times are keyed in and based on 24 hour format (no AM or PM indicator).

Input validation occurs upon data entry.

Client/Server Products

Formatting for numbers and date/times is based on the locale determined by the regional settings of the client and/or application server machine. Date/time formatting can be overridden from the General Options tab of the Default Options dialog.

Reports

Display formatting of both numbers and date/times for reports is based on the Server System Locale on the machine on which the reports are run.

Currency Presentation

Currency information is stored in the LSCurrency table in the Oracle Utilities Data Repository. This table contains one or more currencies, each defined by a currency code, currency symbol, and formatting rules (such as the number of decimal places). Currency codes in this table use ISO-4217 codes. The LSCurrency table also indicates the Default currency for the database. See **LSCurrency** on page 3-3 in the *Oracle Utilities Energy Information Platform Configuration Guide* for more information about setting up the LSCurrency table.

Note: Although records in the LSCurrency table are not required, Oracle Utilities strongly recommends that at least one record with all properties specified be created and set as "Default". This will ensure consistent display of currency information.

Currency Presentation in Oracle Utilities Receivables Component and Oracle Utilities Quotations Management

Currency input and display is identical to that for numbers with two exceptions:

- A currency indicator is also displayed next to currency input controls and currency displays. The specific currency symbol displayed and the manner in which currency is formatted are determined in the following order:
 - a. The currency associated with the account being viewed (from the LSCurrency field in the Account table).
 - b. The default currency in the LSCurrency table. If there is no default currency, the first record in the LSCurrency table (sorted alpha-numerically by Currency Code).
 - b. If the LSCurrency table is not present or does not contain any records, the currency and formatting of the Server System Locale (defined by the operating system installed on the web server), specified in the **HKEY_USERS\DEFAULT\Control Panel\International** key in the Windows Registry on the web server.
- Currency formatting rules for the user's selected locale are overridden if specific formatting rules for the currency are stored in the LSCurrency table. Typically, the only formatting rules that would be overridden at the currency level would be the ISO code, symbol, and number of decimal places. This applies to Oracle Utilities Receivables Component reports as well, except that the initial locale formatting rules come from the regional settings of the machine on which the report is run.

Currency Presentation in Other Web-enabled Products

Currently, other web-enabled products do not require input of currency values.

Display of currencies is based on the formatting of the selected locale and of the default currency in the database (currency specific formatting always overrides locale specific formatting).

Enabling Display of International Currency Symbols

Display of international currency symbols requires the appropriate Encoding option is selected on Internet Explorer.

How to select encoding options:

1. Select **View->Encoding** from the Internet Explorer menu bar.
2. Select the appropriate option from the list. For example, to enable displaying of the Euro symbol and other Western European currency symbols, select the **Western European (Windows)** option.

Currency Presentation in Client/Server Products

Client/server products do not require input of currency values.

Display of currencies is based on the formatting of the client machine's regional settings and of the default currency in the database. Currency specific formatting always overrides locale specific formatting. If the default currency in the database does not specify any formatting, the currency symbol is used for formatting. If the currency table does not exist or does not contain any records then the default currency is determined by the Regional Settings on the client/server machine. This applies to reports as well.

Multiple Currency Support

Multiple Currency Support allows for accounts with different associated currencies. This is accomplished through the presence of the Currency Code column on the Account, Journal Account, and Checking Account tables in the Oracle Utilities Data Repository. This column references records in the LSCurrency table

Multiple Currency and Oracle Utilities Receivables Component

All input screens which have amount fields on them indicate what currency type is expected as input.

All elements that represent a currency in Oracle Utilities Receivables Component XML structures have a CURRENCY attribute that indicates the corresponding currency type for the amount. The string values used for this attribute are the same as the Currency Code values in the LSCurrency table. On output, the CURRENCY attribute is set for the account as specified in the database. If the account's currency type is not specified in the database, the default currency is used.

A CURRENCY attribute (using the standard stem.tail notation) is supported for Oracle Utilities Receivables Component transaction identifiers to specify the currency type for the account.

On input, the CURRENCY attribute of all Oracle Utilities Receivables Component transactions is checked against the currency value of the account against which the transaction is being posted using the following rules:

1. If a currency type is specified for the account in the database, the transaction must indicate the same currency type or it is an error.
2. If a currency type is not specified for the account in the database, the transaction must indicate either no specific currency type or the default currency type for the database or it is an error.

All transactions that involve two or more accounts (such as Payment and Balance Transfers) validate that the currency types are the same for each account (no currency translation will occur). The credit/debit account pairs for each journal translation record are validated to ensure that they both have the same currency type. Only journal translation records that have credit/debit accounts with the same currency type as the account against which the transaction is being posted are used. Additional currency validations occur for payment files and refund checks.

Multiple Currency and Oracle Utilities Receivables Component Reports

Where applicable, Oracle Utilities Receivables Component reports are grouped by Currency Code.

Multiple Currency and Other Oracle Utilities Products

Oracle Utilities Billing Component, Oracle Utilities Rate Management and Data Manager reports display the Currency Code associated with each account where applicable. Reports that contain multiple currency types do not include the Summary Results page.

In Oracle Utilities Rate Management - Revenue Forecasting, the default currency type is used for all presentation of currency amounts, regardless of whether or not a specific currency has been indicated in the database for any accounts.

File Formats

Input/Output File Formats

Numbers and date/times in input and output files (such as files used with the PLIMPORT program) are independent from locale settings.

Non-English characters are supported in input/output files.

XML Formats

All dates, times, and numbers contained in XML files are represented using the standard formatting rules as defined by the W3C XML Schema Recommendation. For backward compatibility, previously accepted formats for dates and times will continue to be accepted on input, however, all output will use the XML Schema representation.

Note: XML files created by the SAVE TO XML Rules Language statement are an exception. The date, time, and number formats in Rules Language generated XML files are based on the Rules Language configuration used to create them.

Non-English characters are supported in XML files

Database Support

In addition to the LSCurrency table and related columns in the Account, Journal Account, and Checking Account tables, database support for internationalization includes the addition of the COUNTRY column in the Address table and the change from ZIP Code to Postal Code on user interfaces.

Chapter 2

Working with the Oracle Utilities Energy Information Platform

This chapter describes how you work with the Oracle Utilities applications. This includes:

- **Starting the Application and Logging In**
- **Navigating The Oracle Utilities Energy Information Platform**
- **Searching, Viewing, and Entering Data in the Oracle Utilities Energy Information Platform**
- **Run Reports**
- **View Reports**

Starting the Application and Logging In

You log on to Energy Information Platform using Microsoft Internet Explorer.

How to log in:

1. Start the application by double-clicking the shortcut icon, or entering the URL for the Oracle Utilities Energy Information Platform in the **Address** field on the Internet Explorer window.

Note: Contact your system administrator for the URL for the Oracle Utilities Energy Information Platform.

2. The Login screen appears.
3. Enter your user ID in the **User ID** field, enter your password in the **Password** field, and click **Login**. The Energy Information Platform home dashboard screen appears in the browser.

Navigating The Oracle Utilities Energy Information Platform

This section describes the framework of the Oracle Utilities Energy Information Platform and how to use the menus and icons to navigate between functions including:

- **Framework**
- **Menus**
- **Navigation**

Framework

The Energy Information Platform is a web-based framework, consisting of the Top menu, the Left menu, and the Main Workspace.







Top Menu

The Top menu displays a number of menu items, including:

- **Home:** Returns the user to the home dashboard screen.
- **Help:** Expands to display the following:
 - **Content and Index:** Opens **Online Help** window for the current option or function (if applicable).
 - **Online Support:** Opens the Oracle Utilities website in the Main Workspace.
 - **About:** Opens the About dialog, which displays the user's current preferences and the software version installed.
- **Logout:** Logs the user out of the Energy Information Platform, ends the current session, and returns the user to the Login screen.

Left Menu

The Left menu displays menu options available to the user. This menu can be set to one of two modes: the Main menu or the Data menu. The bottom of the Left menu displays a number of icons. The meanings of these icons are as follows:

Icon	Description
	Default Menu: Changes the Left menu from the Main Menu to the Data Menu .
	Default Menu: Changes the Left menu from the Data Menu to the Main Menu .
	Current Data Base: Opens the Set Preferences screen. When you hover the mouse over this icon, a tool tip opens, displaying currently selected data source.
	Security Administration: Opens the Security Administration screen.
	Home: Returns the user to the home dashboard screen.
	Change Theme: Opens the Change Theme dialog.

Main Menu

The Main menu opens by default, and lists the functions available from the Energy Information Platform. Clicking on a menu item displays the corresponding screen in the Main Workspace on the right. A down-pointing arrow at the left of a menu choice indicates that the choice has associated submenu items below it. To open the submenu list, click on the arrow. The arrow becomes a right-pointing arrow, and the submenu options are displayed below the menu item.

Note: The options that appear on the Main menu are dependent on the specific set of products licensed and installed.

Data Menu

The Data menu lists database tables accessible via the Data Navigator, which allows users to search, add, view, and edit database records and tables in the Oracle Utilities Data Repository. See **Chapter 8: Searching and Viewing Data in the Oracle Utilities Data Repository** in the *Oracle Utilities Energy Information Platform User's Guide* for more information about Data Navigator.

Main Workspace

The center of the window is occupied by the Main Workspace, which holds the screen corresponding to the selected function.

Menus

As noted above, the Main menu includes a number of submenus, each relating to a specific activity or product. Oracle Utilities Transaction Management uses the following menus:

Transaction Management Menu

The Transaction Management menu includes the following options:

- **Search:** Expands to display the Oracle Utilities Transaction Management Search menu, which includes the following options:
 - **Inbound/Outbound:** Opens the **Search Inbound and Outbound Documents** screen.
 - **Processes:** Opens the **Search Processes** screen.
 - **Transaction:** Opens the **Search Transaction** screen.
 - **Request/Response:** Opens the **Search Requests/Responses** screen.
 - **Exceptions:** Opens the **Search Exceptions** screen.
 - **System/Token:** Opens the **System Exceptions** screen.
 - **Document Download:** Opens the **Document Download** screen.
- **Set Up:** Expands to display the Oracle Utilities Transaction Management Set Up menu, which includes the following options.
 - **Business Rule:** Opens the Business Rule screen.
 - **Rule Description Language:** Opens the Rule Description Language screen.
 - **Global Functions:** Opens the Global Functions screen.
 - **LTMH/Adapter Servers:** Opens the LTMH/Adapter Servers screen.
 - **JMS Servers:** Opens the JMS Servers screen.
 - **JMS Queues:** Opens the JMS Queues screen.
 - **Payload Types:** Opens the Payload Types screen.
 - **Exception Types:** Opens the Exception Types screen.

-
- **Origination Systems:** Opens the Origination Systems screen.
 - **System Properties:** Opens the System Properties screen.
 - **Runtime Services:** Opens the Runtime Services screen.
 - **Service Activation:** Opens the Service Activation screen.
 - **Map Names:** Opens the Map Names screen.
 - **Map Versions:** Opens the Map Versions screen.
 - **Maps:** Opens the Maps screen.
 - **Trading Partners:** Opens the Trading Partners screen.
 - **External Transaction Types:** Opens the External Transaction Types screen.
 - **External Hubs:** Opens the External Hubs screen.
 - **External Hub Activation:** Opens the External Hub Activation screen.
 - **Run Reports:** Opens the **Run Reports** screen, displaying reports associated with Transaction Management (Product code “LTMH”).
 - **View Reports:** Opens the **View Reports** screen, listing previously run reports associated with Transaction Management (Product code “LTMH”).

Navigation

Oracle Utilities recommends using links and menu options when moving between screens in the Energy Information Platform. Use of the Internet Explorer **Forward** and **Back** buttons can produce unexpected results.

Searching, Viewing, and Entering Data in the Oracle Utilities Energy Information Platform

This section describes how users search, view, and enter data in the Energy Information Platform, and includes:

- **Searching and Viewing Data**
- **Entering Data**

Searching and Viewing Data





This section provides specific information about searching and viewing data in the Energy Information Platform, including:


Searching

When searching records, users enter data in each of the fields they wish to use in their search. See **Entering Data** below for more information about how to enter specific types of data. If a search returns only one record, the record itself is displayed instead of the list screen.


Specifying How Results are Sorted

To specify how search results are sorted, click the **Sort by** plus (“+”) sign. This opens a pop-up window that lists the fields that can be used to sort the search results.

To sort by a specific field(s), check the corresponding checkbox(s). By default, records are sorted in ascending order (denoted by the  arrow). To sort records in descending order, click the  arrow. The  arrow will be replaced by the  arrow.

To change the order by which the search results are sorted, click on the  area and move the field to the appropriate position in the list.

After specifying how the results are to be sorted, click the **Sort by** minus (“-”) sign to close the list.

For example, if a user were searching accounts and wanted to sort the results first by Customer ID in ascending order, and then by Start Time in descending order, the user would first check the Customer ID checkbox, then check the Start Time checkbox and click the  arrow.

Note that sorting settings are reset each time you perform a search.

Viewing Search Results

Search results appear on a list screen that displays the records that match the search criteria. Each item on the list contains the entire record. Use the horizontal scroll bar to view columns that appear to the right of the list screen.

Sorting Search Results

Search results are sorted as specified by the user (see **Specifying How Results are Sorted** above). The direction (ascending or descending) in which each column is sorted is displayed at the top of each column.

Columns sorted in ascending order display a blue arrow pointing up.



Columns sorted in descending order display a red arrow pointing down.



To change the direction in which the results are sorted, click the up (ascending) or down (descending) arrow at the top of the appropriate column on the list screen.

To continue the above example, if a user had searched accounts and sorted the results first by Customer ID in ascending order, and then by Start Time in descending order, the Customer ID column would display a blue arrow pointing up (▲) and the Start Time column would display a red arrow pointing down (▼).

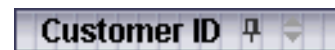
Locking Columns

Some columns on search results list screens can be locked, or “pinned” in place, keeping the identity of the search results visible at all times. As the user scrolls to the right using the horizontal scroll bar, locked columns remain in place, while non locked columns scroll “beneath” the locked column(s).

Columns that can be locked have a pin button (📌) on them.



To lock a column, click the pin button (📌). This rotates the pin button, indicating that the column is locked.



To unlock a column, click the pin button (📌) again.

Entering Data

This section provides specific information about entering data in the Energy Information Platform screens, including:

- **Entering Date and Date/Time Values**
- **Entering Lookup Values**
- **Selecting Values from Drop-Down Lists**
- **Specific Data Formats**

Entering Date and Date/Time Values

Date and Date/Time fields store dates and/or datetimes, such as Start Date, Start Time, and Bill Month values. To enter date/time values, either type the date and time manually, or click the arrow button (▼) to the right of the field and select the date using the calendar control.

The calendar control displays the current month when opened. Click the appropriate day to select it. To change the month, click the arrows on either side of the month displayed. To change the year, click the arrows on either side of the year displayed. To select the current date, click **Today**. To clear the date value, click **Clear**.

Note: When entering dates manually, use the four digit format (i.e. “2004”).

Note: When you select a date using the calendar control, the time defaults to 00:00:00.

Entering Lookup Values

Lookup values are references to records in other tables in the Oracle Utilities Data Repository, including both lookup records such as Operating Company and Jurisdiction records, and parent records such as Customer or Account records. When populated, lookup fields display the identity of the referenced record. To select a lookup, click the **Browse** button (...). This opens a dialog window that lists all the records in the corresponding table in the Oracle Utilities Data Repository.

If there is more than one page of records, you can move between pages using the ◀ and ▶ buttons. Use the ⏮ button to return the first page, and the ⏭ button to navigate to the last

page. To change the number of results that appears on each page, enter the number in the **Rows** field and press the **Enter** key.

To search for a specific record, click **Search**. The dialog displays a search screen.

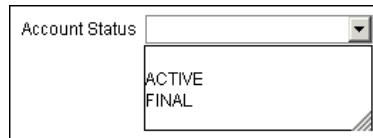
Enter the appropriate parameters for your search and click **Search**. The dialog will display a list of records that match the search criteria.

Click the [...] link to select the appropriate record. The lookup field is automatically populated.

Selecting Values from Drop-Down Lists

Drop-down lists allow users to select a value from a pre-populated list, and can contain either pre-set values or values from tables in the Oracle Utilities Data Repository.

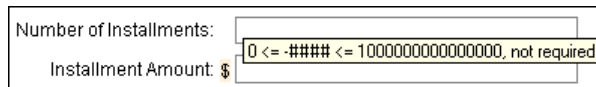
To select a value from a drop-down list, click the arrow next to the field. This opens a list that includes all the values available.



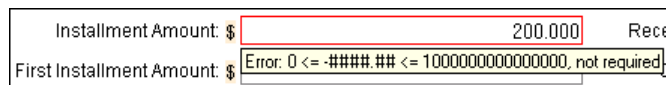
If one or more of the values is longer than the default size of the list, click the lower right corner of the list and resize the list as necessary.

Specific Data Formats

Some fields on some screens of the Energy Information Platform require that data be entered in a specific format. This most often applies to currency and date fields, but can also apply to other number fields and other types of data. Moving the mouse pointer over the icon displays a tooltip that contains the correct format for the field.



If data is entered in an incorrect format, the border of the field turns red indicating that there is an error in the data in the field. Moving the mouse pointer over the field displays a tooltip that describes the correct format for the field.



Required Fields

Fields that are required are indicated by an asterisk (*).

Currency Fields

Currency fields are indicated by a currency symbol to the left of the field.

Run Reports

The **Run Reports** option displays reports available through the Energy Information Platform Reporting Framework. From this screen, users can select and run reports. Each product has its own **Run Reports** option that displays reports associated with that product. For example, the Oracle Utilities Billing Component list displays billing reports, while the Oracle Utilities Receivables Component reports list displays its reports.

How to run reports:

1. Select the **Run Reports** option from the appropriate menu (Tools and Utilities, Work Queues, Billing, Financials, etc.). The Run Reports screen opens.

The Run Reports screen displays the following information for each report:

- **Report Name:** The name of the report.
- **Description:** A description of the report.
- **Priority:** The priority of the report (High, Medium, or Low).
- **Type:** The type of report (PLBX, LSRate (Oracle Utilities Rules Language), Active, BIPublisher, or Crystal).
- **Output Format:** The output format for the report (applies to reports of type “BIPublisher” and “Crystal” only).
- **Creation Date:** The date the report template was created.
- **User:** The User ID who created the report template.
- **Generate ASP:** A flag that indicates if the report framework generates an ASP parameters page for the report.

2. Select the report you wish to run by clicking the **Report Name** link from the list.

The **Enter Report Parameters** screen opens displaying the report parameters for the selected report.

3. Enter the parameters for the report as appropriate.

The **Report Title** field is the title that appears on the **View Reports** screen when the report is run.

4. Select the **Priority** for the report. This determines the priority (High, Medium, or Low) in which the report will be generated.
5. Uncheck the **Shared Report** checkbox if you wish to make the results of the report private. If you leave this checkbox checked, the report results will be available to all users.
6. Click **Run** to run the report. Click **Schedule Report** to schedule the report using the Schedule Process screen (see **Scheduling Reports** below, for more information). When the report is complete, the report opens in the appropriate viewer (Active, Crystal, etc.). In addition, the report is also listed on the **View Reports** screen.

How to search reports:

1. Click **New Search** on the Run Reports screen. The Run Reports search screen appears.

You can search based on the Report Name, Report Type, User ID (who created the report or who last updated the report), Output Format, Creation Date, Priority, Report Category, Product, or the report Description.

You can search for reports whose creation dates are Less Than (<), Greater Than (>), Less Than or Equal To (<=), or Greater Than or Equal To (>=) the supplied date by selecting the appropriate operand from the drop-down list.

You can use the percent sign (“%”) as a wildcard character when entering values in any of the text fields. For instance, if you want to search for all reports whose name begins with the letter G, you could enter “G%” in the Name field. You can use this wildcard before or after specified letters or numbers (i.e. you would use %t to search for all reports whose names end with the letter t, etc.).

Note that account Report Names, User IDs, and Descriptions are **case-insensitive**. For example, there is no difference between the “WQAging” and “wqaging” report names.

2. Specify how the search results are displayed.
 - Select the manner in which the results are sorted from the **Sort By:** drop-down list. You can sort the results by Creation Date, Description, Report Name, Report Type, or User ID.
 - Specify how many results should appear on each page in the **Page Length** field.
3. Click **Search** to perform the search. To clear all the search fields, click **Reset**.
4. The search results appear on the Run Reports screen.

Scheduling Reports

The Schedule Process screen allows users to define a schedule for running processes unattended.

How to schedule a process:

1. Click **Schedule** (or **Schedule Report**). The Schedule Process screen opens.
2. Enter the **Start Time** for the scheduled process by entering the date and time manually or clicking the arrow and select the date using the calendar control and typing the time manually. See **Entering Date and Date/Time Values** on page 2-8 for more information about using the calendar control.

Note: The **Server Time** displayed above the Start Time field is the current time of the web server running the scheduler, including both the location and Time Zone where the server is located. Scheduled processes run based on the server time, not the time on the client machine.

3. Select a **Recurrence Pattern** for the scheduled process. You can select one of the following:

None: The scheduled process runs only once at the specified start time. **Note:** Scheduled processes with a recurrence pattern of None ignore Business Calendars and will run on non-business days.

Intra Daily: The scheduled process runs multiple times, from as frequent as once every 15 minutes to once every several hours. To base the recurrence on a number of minutes, select the **Every x minutes** radio button and select the number from the **Minutes** drop-down list. To base the recurrence on a number of hours, select the **Every x hours** radio button and enter the number of hours in the text box. Intra Daily processes may run throughout a single day or may span multiple days.


Daily: The scheduled process runs once per day or once per number of days. To base the recurrence on a number of days, select the **Every x days** radio button and enter the number of days in the text box. To set the scheduled process to run every weekday, check the **Every weekday** radio button.

Weekly: The scheduled process runs once or more per week (or number of weeks) on specified days. Enter the number of weeks in the **Recur every x week(s) on** text box, and check the specific days of the week on which the process should run. For example, to schedule a process to run on Monday and Wednesday every two weeks, you would enter 2 in the **Recur every x week(s) on** text box and check the Monday and Wednesday checkboxes.

Monthly: The scheduled process runs once per month or once per number of months. A monthly recurrence can be based on either a specific day of the month (such as the 10th

day of the month), or a specific type of day (such as the 2nd Friday of the month). To base the recurrence on a specific day, select the **Day x of every x month(s)** radio button and enter the specific day and number of months in the text boxes. To base the recurrence on a specific type of day, select the **The x x of every x month(s)** radio button and select the appropriate number (First, Second, Third, Fourth, or Last) and day (Sunday through Saturday) from the drop-down lists and enter the number of months in the text box.

Important Note: Each execution of a recurring scheduled process uses the original parameters entered for the process.

4. Set the **Range of Recurrence** for the scheduled process. This specifies how many times the scheduled process will run (based on the specified recurrence pattern). There are three options:
 - **No end date:** To specify no ending date for the recurrence, select the **No end date** radio button.
 - **End after occurrence:** To specify that the recurrence ends after a predetermined number, select the **End after occurrence** radio button and enter the number of recurrences in the text box.
 - **End by:** To specify a date on which to end the recurrences, select the **End by** radio button and enter the date and time by which the recurrence should end. Enter the date and time manually or click the arrow and select the date using the calendar control and type the time manually. See **Entering Date and Date/Time Values** on page 2-8 for more information about using the calendar control.
5. Set any applicable **Recurrence Exceptions** for the scheduled process. Recurrence exceptions define which business calendar, if any, is used in scheduling and how to handle processes scheduled to run on non-business days. There are two options:
 - **Business Calendar:** To schedule the process using a business calendar, click the Browse button (). This opens a dialog window that lists all the available Business Calendars. Click the [...] link to select the appropriate calendar. The field is automatically populated.
 - **Roll to next business day:** Check this checkbox to specify that a process scheduled to run on a non-business day is rolled forward to the next business day. If the process is already scheduled to run on the next business day, a new process is NOT scheduled.

Note: When using a Business Calendar, if the Start Time entered for a process is later than the last date in the Business Calendar, an error will be returned. Also, for scheduled processes with the No End Date option selected, occurrences that would have occurred on dates later than the last date in the Business Calendar will not occur, and do not appear on the View Reports screen.

View Reports

The **View Reports** option displays previously run reports available through the Energy Information Platform Reporting Framework, including other processes such as uploading data via the Upload Usage option. From this screen, users can view and delete reports. Each product has its own **View Reports** option that displays reports associated with that product. For example, the Oracle Utilities Billing Component View Reports screen displays billing reports, while the Oracle Utilities Receivables Component View Reports screen displays its reports.

How to view reports:

1. Select the **View Reports** option from the appropriate product menu (Tools and Utilities, Work Queues, Billing, Financials, etc.) The View Reports screen opens.

The View Reports screen displays the following information for each report:

- **Status Icon:** An icon that displays the status of the report. If an output format was specified for the report, the icon indicates the output format. See **Report Icons** for more information.
 - **Run/Schedule Time:** The time the report was run or is scheduled to run.
 - **Report Title:** The title of the report, specified when the report was run. For LSRate (Oracle Utilities Rules Language) reports, this column will display the name of the Report Template used to generate the report, unless specified using the SETREPORTTITLE Rules Language function.
 - **Priority:** The priority of the report (High, Medium, or Low).
 - **Type:** The type of report (PLBX (Oracle Utilities Billing Component), LSRate (Oracle Utilities Rules Language), Active, BIPublisher, or Crystal).
 - **User:** The user ID of the user who ran the report.
 - **Progress:** The current percentage of the report instance that has been generated, from 0 to 100 percent.
 - **Shared:** A flag that indicates if the report is shared by all users or is accessible only by the user who ran the report.
 - **Base:** A flag that indicates if the report is provided by Oracle Utilities or is a custom report.
 - **Process:** The (machine) name of the server on which the report was executed.
 - **Account Name:** The name of the account associated with the report, if applicable.
 - **Account ID:** The ID of the account associated with the report, if applicable.
2. To view a specific report, click the **Report Title** link for the report. The selected report opens in the appropriate viewer.
 3. To refresh the contents of the screen, click **Refresh Periodically**. To have the screen continually refresh its contents, check the **Refresh Periodically** checkbox.

Note: The current state of the Refresh Periodically checkbox (selected or not) is stored in the user's settings, and is used as the default setting when subsequently opening this screen.

How to delete reports:

1. Check the checkbox next to the report(s) to delete. To select all reports, check the top check box.
2. Click **Delete**.

How to search reports:

1. Click **New Search** on the View Reports screen. The View Reports search screen appears.

You can search based on the Report Title, Report Type, User ID (who created the report), Output Format, Creation Date, Report Category, or Product.

You can search for reports whose creation dates are Less Than (<), Greater Than (>), Less Than or Equal To (<=), or Greater Than or Equal To (>=) the supplied date by selecting the appropriate operand from the drop-down list.









You can use the percent sign (“%”) as a wildcard character when entering values in any of the text fields. For instance, if you want to search for all reports whose name begins with the letter G, you could enter “G%” in the Name field. You can use this wildcard before or after specified letters or numbers (i.e. you would use %t to search for all reports whose names end with the letter t, etc.).






Note that account Report Titles, User IDs, and Descriptions are **case-insensitive**.

2. Specify how the search results are displayed.
 - Select the manner in which the results are sorted by clicking the **Sort by** plus (“+”) sign. See **Specifying How Results are Sorted** on page 2-7 for more information.
 - Specify how many results should appear on each page in the **Page Length** field.
3. Click **Search** to perform the search. To clear all the search fields, click **Reset**.
4. The search results appear on the View Reports screen.

Report Icons

The icon listed next to each report indicates the status of the report. The meanings of these icons are as follows:

Icon	Description
	Report Starting: Report processing is starting.
	Report in Process: Report processing
	Report Complete: Report processing is complete.
	Report Complete (unspecified format): Report processing is complete. The user can select the output format by hovering the cursor over the icon, and selecting the desired output formats. <div data-bbox="989 1386 1297 1606"></div>
This feature applies to Crystal reports only.	
	Report Complete (Adobe Acrobat format): Report processing is complete.
	Report Complete (Microsoft Excel format): Report processing is complete.
	Report Complete (Microsoft Word format): Report processing is complete.

Icon	Description
	Report Complete (Rich Text format): Report processing is complete.
	Report Complete (Comma Separated Values format): Report processing is complete.
	Report Scheduled: Report is scheduled to run at a future time. To view scheduling details, click the ► arrow in the far right column. To edit the schedule, click Edit .
	Report Reminder: Indicates that a scheduled report is due to run in 15 minutes or less.
	Report Error: One or more errors or warnings associated with the report. To view the error, click the Error icon.

Viewing Oracle BI Publisher Reports

When you select an Oracle BI Publisher Report, the report opens in a viewer based on the output format defined for the report. For the default output formats, this includes:

- Adobe Acrobat
- Microsoft Excel
- Microsoft Word (for MS Word and Rich Text Format reports. If Microsoft Word is not installed, Rich Text Format reports open in the installed application (if any) associated with the *.rtf file extension).

Viewing Oracle Utilities Rules Language Reports

When you select a Oracle Utilities Rules Language Report (one with a Type of LSRate), the report opens in the Report view screen.

The **State** section above the top left corner of the report displays the state of the report, including the number of Errors, the number of Pages expected and ready, and the elapsed time (in seconds) it took for the report to run.

State: Errors: 0 Pages: 32 expected, 32 ready, 15 elapsed

The **From:** and **To:** fields above the top right corner of the report show the current pages displayed. The **From:** field displays the current page. The ◀ and ▶ buttons and the field between them are used to navigate the report. The field between the buttons defines how many pages display in the report window at a time. The default is 1. To display more than one page at a time, enter the number of pages you wish to view in the field.

Viewing Crystal Reports

When you select a Crystal Report, the report opens in a viewer based on the output format. For the default output formats, this includes:

- Adobe Acrobat
- Microsoft Excel
- Microsoft Word (for MS Word and Rich Text Format reports. If Microsoft Word is not installed, Rich Text Format reports open in the installed application (if any) associated with the *.rtf file extension).

Emailing Reports

You can also email reports from the View Reports screen. This allows users to distribute reports to other parties via email.

Note: The Send Email function requires the presence of the LSRELAY.CFG.XML file in the C:\LODESTAR\CFG directory on the web server computer. Contact your system administrator for more information about this file.

How to email a report:

1. Select the report (or reports) you wish to send via email and click **Send Email** on the View Reports screen.

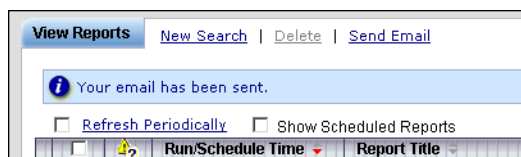
The Send Email screen opens.

2. Select a **From** address from the drop-down list. This list is based on available records in the From Addresses table. If there are no available records in the From Addresses table, the current user's email address is populated (if provided on the User Overview screen on the Security Administration user interface).
3. Enter an email address in the **To** field, or click Address Book (or the "+" sign) to add a contact or group name. See **Using the Address Book** on page 2-15 for more information about using the Address Book.
4. *Optional.* Enter an email address in the **CC** field, or click Address Book (or the "+" sign) to add a contact or group name. See **Using the Address Book** on page 2-15 for more information about using the Address Book.

To remove the CC field, click **Remove CC**.

5. *Optional.* To add the BCC field, click **Add BCC**, and enter an email address in the **BCC** field, or click Address Book (or the "+" sign). See **Using the Address Book** on page 2-15 for more information about using the Address Book.
6. Enter a subject for the email in the **Subject** field.
7. Enter the email message in the **Message** field.
8. To send the email, click **Send**. To clear all the fields, click **Reset**.

A message will appear at the top of the View Reports screen after your email has been sent.



Using the Address Book

In addition to entering email addresses manually, you can use the Address Book feature to select email recipients from those defined in the Oracle Utilities Data Repository. The Address Book contains listings of:

- **Contacts**
- **Groups**

Contacts

Contacts are specific individuals related to parties (such as Service Points or Market Participants) defined in the Oracle Utilities Data Repository.

How to select an existing contact from the Address Book:

1. Click **Address Book** (or the "+" sign) on the Send Email screen.

The Address Book dialog opens on the Contacts tab.

2. Enter the search criteria for the contacts you wish to send email to. You can search by Last Name, First Name, Middle Name, or Company.
3. Specify how the search criteria are to be combined by selecting the appropriate **Combine with** option (**AND** or **OR**), located in the upper right corner of the search screen. The default combine option is **AND**.
4. Specify whether or not the search is Case-sensitive by checking or unchecking the **Case-sensitive** checkbox, located in the upper right corner of the search screen. The default setting is case-sensitive.
5. Specify how the search results are displayed.
 - Select the manner in which the results are sorted by clicking the **Sort by** plus (“+”) sign. See **Specifying How Results are Sorted** on page 2-7 for more information.
 - Specify how many results should appear on each page in the **Page Length** field.
6. Click **Search** to perform the search. To reset the search fields to their previous values, click **Reset**. To clear all the search fields, click **Clear**. To add a new contact to the Address Book, click **Add**.
7. The search results appear on the Address Book dialog.
8. Select the contact(s) you wish to send the email to and click **To**. The selected contact(s) will appear in the To field on the Send Email screen.

To remove a contact from the To, CC, or BCC field, select the contact and click the Delete Key, or click the right mouse, and select **Remove**.
9. *Optional.* To add a contact to the CC (or BCC) field, select the contact(s) you wish to send the email to and click **CC** (or **BCC** as appropriate). The selected contact(s) will appear in the CC (or BCC) field on the Send Email screen.

How to add a contact using the Address Book:

1. Click **Add** on the Contacts tab of the Address Book dialog.

The Edit Contact screen opens.
2. Enter personal information for the contact (First, Middle, and Last Names, Title, etc.) in the **Personal Information** pane.
3. Enter contact methods (phone numbers, email addresses, etc.) for the contact in the **Contact Method** pane.
4. Enter optional address(es) for the contact in the **Address Information** pane.
5. Click **Save** to save the contact.
6. Click **Return to Email** to return to the Send Email screen and Address Book dialog.
7. Select the new contact and click **To**, **CC**, or **BCC** to add the contact to the appropriate field.

See **Contacts** on page 7-2 in the *Oracle Utilities Energy Information Platform User's Guide* for more information about creating contacts.

Groups

Groups are groupings of contacts in the Oracle Utilities Data Repository.

How to select an existing group from the Address Book:

1. Click **Address Book** (or the “+” sign) on the Send Email screen.

The Address Book dialog opens on the Contacts tab. Click the **Groups** tab.
2. Enter the search criteria for the contacts you wish to send email to. You can search by Group Name or Description.

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3. Specify how the search criteria are to be combined by selecting the appropriate **Combine with** option (**AND** or **OR**), located in the upper right corner of the search screen. The default combine option is **AND**.
 4. Specify whether or not the search is Case-sensitive by checking or unchecking the **Case-sensitive** checkbox, located in the upper right corner of the search screen. The default setting is case-sensitive.
 5. Specify how the search results are displayed.
 - Select the manner in which the results are sorted by clicking the **Sort by** plus (“+”) sign. See **Specifying How Results are Sorted** on page 2-7 for more information.
 - Specify how many results should appear on each page in the **Page Length** field.
 6. Click **Search** to perform the search. To reset the search fields to their previous values, click **Reset**. To clear all the search fields, click **Clear**. To add a new group to the Address Book, click **Add**.
 7. The search results appear on the Address Book dialog.
 8. Select the group(s) you wish to send the email to and click **To**. The selected group(s) will appear in the To field on the Send Email screen.

To remove a group name from the To, CC, or BCC field, select the group name and press the Delete key, or click the right mouse, and select **Remove**.
 9. *Optional.* To add a group to the CC (or BCC) field, select the group(s) you wish to send the email to and click **CC** (or **BCC** as appropriate). The selected group(s) will appear in the CC (or BCC) field on the Send Email screen.

How to add a group using the Address Book:

1. Click **Add** on the Groups tab of the Address Book dialog.

The Edit Group screen opens.
2. Enter a name for the group in the **Group Name** field.
3. Enter a description of the group in the **Description** field.
4. *Optional.* Check the **Is Private** checkbox to indicate that the group is private. Private groups can be only be viewed by the user who created the group. Public groups (Is Private unchecked) can be viewed by all users.
5. To add a contact to the group, click **Add** on the Membership title bar, and select the contact from the **Contact ID** drop-down list. Repeat this step for each contact you wish to add to the group.
6. Click **Save** to save the group.
7. Click **Return to Email** to return to the Send Email screen and Address Book dialog.
8. Select the new group and click **To**, **CC**, or **BCC** to add the group to the appropriate field.

See **Groups** on page 7-5 in the *Oracle Utilities Energy Information Platform User's Guide* for more information about creating contact groups.

Chapter 3

Searching and Viewing Oracle Utilities Transaction Management Data

Oracle Utilities Transaction Management allows users to search for and view information about selected inbound and outbound documents, processes and transactions, and requests and responses. This chapter describes how to search and view this data, including:

- **Search Inbound and Outbound Documents**
- **Viewing Inbound/Outbound Document Data**
- **Search Processes**
- **Viewing Process Data**
- **Search Transactions**
- **Viewing Transaction Data**
- **Search Requests/Responses**
- **Search Document Downloads**

Search Inbound and Outbound Documents

The **Search Inbound/Outbound** option allows users to search for Oracle Utilities Transaction Management inbound and outbound documents in the Oracle Utilities Data Repository based on various search criteria. Inbound and outbound documents contain transactions.

How to search inbound and outbound documents:

1. Select **Transaction Management->Search->Inbound/Outbound**.

The Search Inbound/Outbound window opens.

2. Select whether to search for **Inbound** or **Outbound** documents in the Search box.

To search archived documents, check the **Archive** checkbox.

3. Select or enter the search criteria in the appropriate field.

You can select the Sender, Receiver, Payload Type, Status Code, and FA Status Code associated with the document.

You can also search based on Doc Ref ID and source by entering the appropriate value associated with the document. Note that Doc Ref IDs and Sources are **case-sensitive**. For example, there is a difference between the “USER_1” and “user_1” IDs.


You can also search based on the date the process or transaction was sent/received by entering dates in the **Date Sent/Received** fields.

4. Select the manner in which the results are sorted from the **Order By:** drop-down list. You can sort the results by Sent/Received Date or Status of the document.
5. Specify how many results should appear on each page in the **Page Length** field.
6. Click **Search** to start the search. To reset all fields to their default values, click **Reset**. To clear all the search fields, click **Clear**.
7. The search results appear in the Inbound or Outbound Search Results windows.

The Inbound (or Outbound) **Search Results** window displays the following information for each document:

- Inbound/Outbound Source
- Doc Ref ID
- Payload Type
- Status
- FA Status
- Sender ID
- Receiver ID
- Total Accepted
- Total Rejected
- Received Date
- Inbound File Name

8. To sort the results by one of the columns, click the appropriate column heading. For example, to sort the results by Inbound Source, click the Inbound Source column heading. If there is more than one page of results, you can move between pages using the ◀ and ▶ buttons. To change the number of results that appears on each page, enter the number in the **Rows** field.

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9. To view a document, click on the view icon (). Data for the selected process or transaction will appear in the Inbound (or Outbound) Document window. See **Viewing Inbound/Outbound Document Data** on page 3-4 for more information.
 10. To perform another search, click **New Search**.

Viewing Inbound/Outbound Document Data

Inbound and outbound document data is viewed from the Inbound Document and Outbound Document windows. These window open when you select a document from the Inbound (or Outbound) Search Results windows. The Inbound (or Outbound) Document window includes two tabs:

- **Details Tab**
- **Exceptions Tab**

Details Tab

The Details tab displays basic information about a selected process, including:

- **Source:** The source of the document.
- **Doc Ref ID:** The reference ID for the document.
- **Sender ID:** The ID of the sender.
- **Receiver ID:** The ID of the receiver.
- **Transaction Accepted:** The number of transactions in the document that were accepted.
- **File Name:** The path and file name of the document.
- **Payload Type:** A description of the process.
- **Status:** The status of the document.
- **FA Status:** The FA status of the document.
- **Received:** The date/time on which the document was received
- **Transactions Rejected:** The number of transactions in the document that were rejected.
- **Transactions Accepted List Box:** A list of the transactions from the document that were accepted. Each transaction listed includes the following:
 - Transaction Name
 - Transaction Type
 - External Transaction Type
 - Transaction Ref ID
 - Status
 - Date Sent
 - Start Time
 - Stop Time

Click **Refresh** to refresh the process data displayed.

Click on one of the transactions in the **Transactions Accepted** list box to view data for the selected transaction. See **Viewing Transaction Data** on page 3-11 for more information.

Click **View Payload** to view payload data for the document.

Click **View FA Payload** to view FA payload data for the document (if applicable).

Exceptions Tab

The Exceptions tab displays a list of exceptions associated with the document, including:

- **Exception Date:** The date the exception occurred.
- **Source:** The source of the exception (i.e. where the exception occurred).
- **Message:** The exception message.

Search Processes

The **Search Process** option allows users to search for Oracle Utilities Transaction Management processes in the Oracle Utilities Data Repository based on various search criteria.

How to search processes:

1. Select **Transaction Management->Search->Processes**.

The Search Processes window opens.

2. Select or enter the search criteria in the appropriate field.


You can select the Process Type, Process Name, or Status Code associated with the process.

You can also search based on Sender ID, Receiver ID, Internal Acct#, or External Acct# by entering the appropriate value associated with the process. Note that Sender IDs, Receiver IDs, Internal Acct#, and External Acct#s are **case-sensitive**. For example, there is a difference between the “USER_1” and “user_1” Sender IDs.

You can also search based on dates associated with the process. To search based on the date the process was sent, enter the dates in the **Date Sent** fields. To search based on the date the process was Started or Stopped in Oracle Utilities Transaction Management, enter the dates in the **Date Started/Stopped in Oracle Utilities Transaction Management** fields.

3. Select the manner in which the results are sorted from the **Order By:** drop-down list. You can sort the results by Start Time, Stop Time, or Status of the process.
4. Specify how many results should appear on each page in the **Page Length** field.
5. Click **Search** to begin the search. To reset all the fields to their default values, click **Reset**. To clear all the search fields, click **Clear**.
6. The search results appear in the Process Search Results windows.

The **Process Search Results** window displays the following information for each process:

- Process Name
 - Process Type
 - Location
 - Status
 - Start Time
 - Stop Time
7. To sort the results by one of the columns, click the appropriate column heading. For example, to sort the results by Process Name, click the Process Name column heading. If there is more than one page of results, you can move between pages using the ◀ and ▶ buttons. To change the number of results that appears on each page, enter the number in the **Rows** field.
 8. To view a process, click on the view icon (). Data for the selected process will appear in the Process window. See **Viewing Process Data** on page 3-7 for more information.
 9. To perform another search, click **New Search**. To refresh the contents of the Search Results window, click **Refresh**.

Viewing Process Data

Process data is viewed from the Process window. This window opens when you select a process from the Process Search Results window. The Process window includes three tabs:

- **Details Tab**
- **Transactions Tab**
- **Exceptions Tab**

Note: For processes that have a Status of **ERROR**, you can click the **Terminate** link to terminate the process from any of these tabs.

Details Tab

The Details tab displays basic information about a selected process, including:

- **Name:** The name of the process.
- **Type:** The process type.
- **Status:** The status of the process.
- **Start:** The process start time.
- **Stop:** The process stop time. If the process is currently running, the stop time is Null.
- **Description:** A description of the process.
- **Diagram:** A graphical depiction of the process consisting of a series of color-coded boxes connected by black or red lines. Each box represents a transaction in the process. The color of a particular box indicates the current status of the transaction. Black lines between transactions indicate a successful path between the transactions. Red lines indicate a failure at some point between the transactions.
 - Click **Status Code Legend** to open a window that lists the colors and their corresponding color codes.

Click **Refresh** to refresh the process data displayed.

Click on one of the transaction boxes in the diagram to view data for the selected transaction. See **Viewing Transaction Data** on page 3-11 for more information.

Transactions Tab


The Transactions tab displays a list of transactions associated with the process. This list includes the same information as the Transaction Search Results window.

To view a specific transaction, click on the view icon (). See **Viewing Transaction Data** on page 3-11 for more information.

Exceptions Tab

The Exceptions tab displays a list of exceptions associated with the process, including:

- **Transaction Name:** The name of the transaction associated with the exception.
- **Sent Date:** The date the transaction was sent.
- **Exception Date:** The date the exception occurred.
- **Exception Source:** The source of the exception (i.e. where the exception occurred).
- **ID:** The ID of the exception.
- **Exception Type:** The type of exception.
- **Exception Description:** A description of the exception.
- **Message:** The exception message.

To view the transaction, click on the view icon (). See **Viewing Transaction Data** on page 3-11 for more information.

Search Transactions

The **Search Transactions** option allows users to search for Oracle Utilities Transaction Management processes and transactions in the Oracle Utilities Data Repository based on various search criteria.

How to search transactions:

1. Select **Transaction Management->Search->Transactions**.

The Search Transaction window opens.

2. Select or enter the search criteria in the appropriate field.

You can select the Transaction Type, Transaction Name, Status Code, or Exception associated with the transaction.


You can also search based on Sender ID, Receiver ID, Internal Acct#, External Acct#, or Trans Ref ID by selecting/entering the appropriate value associated with the transaction. Note that Sender IDs, Receiver IDs, Trans Ref IDs, Internal Acct#, and External Acct#s are **case-sensitive**. For example, there is a difference between the “USER_1” and “user_1” Sender IDs.

You can also search based on dates associated with the transaction. To search based on the date the transaction was sent, enter the dates in the **Date Sent** fields. To search based on the date the transaction was Started or Stopped in Oracle Utilities Transaction Management, enter the dates in the **Date Started/Stopped in Oracle Utilities Transaction Management** fields.

3. Select the manner in which the results are sorted from the **Order By:** drop-down list. You can sort the results by Start Time, Stop Time, or Status of the transaction.
4. Specify how many results should appear on each page in the **Page Length** field.
5. Click **Search** to begin the search. To reset all the fields to their default values, click **Reset**. To clear all the search fields, click **Clear**.
6. The search results appear in the Transaction Search Results windows.

The **Transaction Search Results** window displays the following information for each process:

- Transaction Name
- Transaction Type
- Status
- Location
- Date Sent
- External Transaction Type
- Transaction ID
- Jurisdiction
- Receiver ID
- Sender ID
- Clearing House ID
- External Account Number
- Internal Account Number
- From System (the system that sent the transaction)

-
- Start Time
 - Stop Time
7. To sort the results by one of the columns, click the appropriate column heading. For example, to sort the results by Transaction Name, click the Transaction Name column heading. If there is more than one page of results, you can move between pages using the ◀ and ▶ buttons. To change the number of results that appears on each page, enter the number in the **Rows** field.
 8. To view a transaction, click on the view icon (). Data for the selected transaction will appear in the Transaction window. See **Viewing Transaction Data** on page 3-11 for more information.
 9. To perform another search, click **New Search**. To refresh the contents of the Search Results window, click **Refresh**.

Viewing Transaction Data

Transaction data is viewed from the Transaction window. This window opens when you select a transaction from the Transaction Search Results window or the Details or Transactions tabs of the Process window. The Transaction window includes the following tabs:

- **Details Tab**
- **Tasks Tab**
- **Exceptions Tab**
- **Notes Tab**

Note: For transactions that have a Status of **ERROR**, you can click **Resubmit**, **Override**, or **Terminate** to resubmit, override, or terminate the transaction from any of these tabs.

Details Tab

The Details tab displays basic information about a selected transaction, including:

- **Name:** The name of the transaction.
- **Status:** The status of the transaction.
- **Transaction Type:** The transaction type.
- **Jurisdiction:** The jurisdiction associated with the transaction.
- **From System:** The system that sent the transaction.
- **Type:** External transaction type.
- **Transaction ID:** ID of the transaction.
- **Clearing House ID:** ID of
- **Sender ID:** ID of the sender of the transaction.
- **Receiver ID:** ID of the recipient of the transaction.
- **Sent:** The date on which the transaction was sent.
- **Start:** The transaction start time.
- **Stop:** The transaction stop time. If the transaction is currently running, the stop time is Null.
- **Diagram:** A graphical depiction of the transaction consisting of a diamond and a series of color-coded boxes connected by black or red lines. The diamond represents the inbound document that contains the transaction. Each box represents a stage or task in the transaction processing. The color of a particular box indicates the status of the task. Black lines indicate a successful path between tasks. Red lines indicate a failure at some point between tasks.
 - Click **Status Code Legend** to open a window that lists the colors and their corresponding color codes.

Click **Refresh** to refresh the transaction data displayed.

Click the **INBOUND** diamond to view the Inbound document that contains the transaction. See **Viewing Inbound/Outbound Document Data** on page 3-4 for more information.

Click on one of the task boxes in the diagram to view payload data for the stage of the transaction. You can view the payload data as either XML or HTML by selecting the appropriate option.

Tasks Tab

The Tasks tab displays a list of the tasks associated with the transaction, including:

- **Payload:** A link that opens a window displaying the payload of the task in either XML or HTML.
- **Task Name:** The name of the task.
- **Queue Name:** The queue associated with the task.
- **Status:** The current status of the task.
- **Start Time:** Start time for the task.
- **Stop Time:** Stop date for the task. If the transaction is currently running, the stop time is blank.

Click **Refresh** to refresh the transaction data displayed.

Click on one of the task boxes in the diagram to view payload data for the stage of the transaction. You can view the payload data as either XML or HTML by selecting the appropriate option.

Exceptions Tab

The Exceptions tab displays a list of exceptions associated with the transaction, including:

- **Exception Date:** The date the exception occurred.
- **Source:** The source of the exception (i.e. where the exception occurred).
- **ID:** The ID of the exception.
- **Exception Type:** The type of exception.
- **Exception Description:** A description of the exception.
- **Exception Message:** The exception message.

Click **Refresh** to refresh the transaction data displayed.

Notes Tab

The Notes tab displays notes related to the transaction.

To add a note, type the note in the **Notes** field and click **Save**.

To edit an existing note, edit the text in the **Notes** field and click **Save**.

Click **Refresh** to refresh the transaction data displayed.

Search Requests/Responses

The **Search Request/Response** option allows users to search for http requests and responses in the Oracle Utilities Data Repository based on various search criteria.

How to search request and responses:

1. Select **Transaction Management->Search->Request/Response**.

The Search Request/Response window opens.

To search archived requests or responses, check the **Search Archive** checkbox.

2. Select or enter the search criteria in the appropriate field.

You can select the Sender Name, Receiver Name, Payload Type, Status Code, or Request Code associated with the request or response.

You can also search based on the date the request or response was sent by entering the dates in the **Request Date** fields.

3. Select the manner in which the results are sorted from the **Order By:** drop-down list. You can sort the results by Request Date or Status of the request or response.
4. Specify how many results should appear on each page in the **Page Length** field.
5. Click **Search** to begin the search. To reset all the fields to their default values, click **Reset**. To clear all the fields, click **Clear**.
6. The search results appear in the Request/Response Search Results window.

The **Request/Response Search Results** window displays the following information for each request or response:

- Request
- Status
- Sender ID
- Receiver ID
- Document Reference ID
- Payload Type
- Total Transactions
- Document ID
- Document File Name
- Document Received Date
- Request Date

7. To sort the results by one of the columns, click the appropriate column heading. For example, to sort the results by Status, click the Status column heading. If there is more than one page of results, you can move between pages using the ◀ and ▶ buttons. To change the number of results that appears on each page, enter the number in the **Rows** field.
8. To perform another search, click **New Search**. To refresh the contents of the Search Results window, click **Refresh**.

Search Document Downloads

The **Search Document Downloads** option allows users to search for document download records in the Oracle Utilities Data Repository based on various search criteria. You can also use this screen to add new document download records.

How to search document downloads:

1. Select **Transaction Management->Search->Document Download**.

The Search Document Download window opens.

2. Select or enter the search criteria in the appropriate field.

You can select the Sender, Document ID, Document Name, Status Code, or Download Type associated with the document download.

You can also search based on the date the document download was received by entering the dates in the **Receive Date Between** fields.

3. Select the manner in which the results are sorted from the **Order By:** drop-down list. You can sort the results by Request Date, Sender, or Status of the document download.
4. Specify how many results should appear on each page in the **Page Length** field.
5. Click **Search** to begin the search. To reset all the fields to their default values, click **Reset**. To clear all the fields, click **Clear**.
6. The search results appear in the Document Download Search Results window.

The **Document Download Search Results** window displays the following information for each document download:

- Document ID
 - Document Name
 - Received Date
 - Sender
 - Status Code
 - Download Type
 - Exception Message
7. To sort the results by one of the columns, click the appropriate column heading. For example, to sort the results by Status Code, click the Status Code column heading. If there is more than one page of results, you can move between pages using the ◀ and ▶ buttons. To change the number of results that appears on each page, enter the number in the **Rows** field.
 8. To perform another search, click **New Search**. To refresh the contents of the Search Results window, click **Refresh**.
 9. To terminate one or more document downloads, check the checkbox for the document downloads you wish to terminate, and click **Terminate**. The status code for each selected record will be updated to "USER TERMINATED."

How to add document downloads:

1. Select **Transaction Management->Search->Document Download**.

The Search Document Download window opens.

2. Click **Add**.

The Search Document Download window opens.

3. Select the **Sender** for the document download record from the drop-down list.

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4. Enter a **Document ID** for the document download record.
 5. Enter a **Document Name** for the document download record.
 6. Enter a **Receive Date** for the document download record.
 7. Click **Save**.

Chapter 4

Searching and Viewing Exceptions

This chapter describes how to view Oracle Utilities Transaction Management system exceptions, including:

- **Search Exceptions**
- **System Exceptions**

Search Exceptions

The **Search Exceptions** option allows users to search for exceptions in the Oracle Utilities Data Repository based on various search criteria.

How to search exceptions:

1. Select **Transaction Management->Search->Exceptions**.

The Search Exceptions window opens.

2. Select the type of exception to search for by checking/unchecking the Inbound, Outbound, Transaction, and/or Request checkboxes.
3. Select or enter the search criteria in the appropriate field.

You can select the Sender or Receiver associated with the exception.


You can also search based on the Source by entering the appropriate value associated with the process or transaction. Note that Sources are **case-sensitive**. For example, there is a difference between the “USER_1” and “user_1” Sources.

You can also search based on the date associated with the exception. To search based on the date, enter the dates in the **Exception Date** fields.

4. Select the manner in which the results are sorted from the **Order By:** drop-down list. You can sort the results by Exception Date, Exception Type, or Source of the exception.
5. Specify how many results should appear on each page in the **Page Length** field.
6. Click **Search** to begin the search. To reset all the fields to their default values, click **Reset**.
7. The search results appear in the Exceptions Search Results window.

The **Exception Search Results** window displays the following information for each exception:

- Exception Type
- Source
- Sender ID
- Receiver ID
- Exception Date
- Exception Message

8. To sort the results by one of the columns, click the appropriate column heading. For example, to sort the results by Source, click the Source column heading. If there is more than one page of results, you can move between pages using the ◀ and ▶ buttons. To change the number of results that appears on each page, enter the number in the **Rows** field.
9. To view a transaction, click on the view icon (). Data for the selected transaction will appear in the Transaction window. See **Viewing Transaction Data** on page 3-11 for more information.
10. To perform another search, click **New Search**. To refresh the contents of the Search Results window, click **Refresh**.

System Exceptions

The System Exceptions options allows users to view Oracle Utilities Transaction Management system exceptions.

How to view System Exceptions:

1. Select **Transaction Management->Search->System/Token Exceptions**.

The **System Exceptions** window opens.

2. The **System Exceptions** window displays the following information for each exception:
 - **Token:** The transaction or process related to the exception.
 - **Source:** The source of the exception (i.e. where in the process the exception occurred)
 - **Date:** The date of the exception.
 - **Message:** A message that describes the exception.

Chapter 5

Oracle Utilities Transaction Management Setup

This chapter describes the Oracle Utilities Transaction Management Setup menu, including:

- **Transaction Management Business Rules**
- **Transaction Management Components**
- **Transaction Management Services**

Transaction Management Business Rules

This section describes how you configure business rules used by Oracle Utilities Transaction Management, including:

- **Global Functions**
- **Rule Description Language**
- **Business Rules**

Global Functions

Global functions are snippets of application code that can be used with multiple Rule Description Language scripts. Each global function is related to a particular Business Rule Type (Import and Import Interval), and is available during configuration of an RDL of the same Business Rule Type.

See **Global Functions** on page 11-54 in the *Oracle Utilities Energy Information Platform User's Guide* for information on working with global functions.

Rule Description Language

Rule Description Language (RDL) scripts define specific units of work for business rules. RDL scripts describe what actions will be taken with an incoming payload, such as whether or not to insert particular pieces of data into the Oracle Utilities Data Repository based on a set of validations. RDL scripts are used only with Import, ImportInterval, and Interval Business Rule Types.

See **Rule Description Language** on page 11-57 in the *Oracle Utilities Energy Information Platform User's Guide* for information on working with global functions.

Business Rules

Business rules are individual business rules that are available to Oracle Utilities Transaction Management. In specific, they define the business rules that will be applied to data being processed Oracle Utilities Transaction Management.

See **Business Rules** on page 11-62 in the *Oracle Utilities Energy Information Platform User's Guide* for information on working with global functions.

Transaction Management Components

Oracle Utilities Transaction Management utilize several components such as servers, Java Messaging Service (JMS) servers, and other components. This section describes how to set up records that define these components in the Oracle Utilities Data Repository, including:

- **Servers**
- **JMS Servers**
- **JMS Queues**
- **Payload Types**
- **Exception Types**
- **Origination Systems**
- **System Properties**
- **Trading Partners**
- **External Transaction Types**
- **External Hubs**
- **External Hub Activation**

Servers

Servers are the application servers which run the Oracle Utilities Transaction Management application. Only application servers with corresponding Server records can run the Oracle Utilities Transaction Management/Oracle Utilities Adapter software.

See **Servers** on page 11-2 in the *Oracle Utilities Energy Information Platform User's Guide* for information on working with servers.

JMS Servers

JMS Servers are Java Messaging Service (JMS) compliant components used by Oracle Utilities Transaction Management. JMS Servers are linked to Servers in **System Properties** records. Note that even if JMS Servers are not being used, a placeholder record is required.

See **JMS Servers** on page 11-4 in the *Oracle Utilities Energy Information Platform User's Guide* for information on working with JMS servers.

JMS Queues

JMS Queues are message queues used by JMS compliant components used by Oracle Utilities Transaction Management. JMS Queues are associated to services in Runtime Service records.

See **JMS Queues** on page 11-5 in the *Oracle Utilities Energy Information Platform User's Guide* for information on working with JMS queues.

Payload Types

Payload types represent different payloads used by Oracle Utilities Transaction Management transactions. Payload types are used by the Oracle Utilities Transaction Management Database Portal to indicate which payload type to monitor.

See **Payload Types** on page 11-7 in the *Oracle Utilities Energy Information Platform User's Guide* for information on working with payload types.

Exception Types

Exception types represent different types of custom exceptions that can be generated by Oracle Utilities Transaction Management. Exception types (and their corresponding severity types) are used for grouping and reporting purposes.

See **Exception Types** on page 11-9 in the *Oracle Utilities Energy Information Platform User's Guide* for information on working with exception types.

Origination Systems

Origination Systems define the external data sources used by Oracle Utilities Transaction Management, and indicate the system the transaction originated from. Origination Systems are linked to services in Runtime Service records.

See **Origination Systems** on page 11-10 in the *Oracle Utilities Energy Information Platform User's Guide* for information on working with origination systems.

System Properties

System Properties represent specific Oracle Utilities Transaction Management servers at runtime, defining how the Oracle Utilities Transaction Management server will perform. System property records also link **Servers** with **JMS Servers** and provide basic information which the server needs to run properly.

See **System Properties** on page 11-12 in the *Oracle Utilities Energy Information Platform User's Guide* for information on working with system properties records.

Trading Partners

Trading Partners represent any party to whom Oracle Utilities Transaction Management will send and/or receive transactions.

How to search trading partners:

1. Select **Transaction Management**→**SetUp**→**Trading Partners**.

The Trading Partners screen opens.

2. Enter the search criteria in the appropriate field.

You can search based on the UID, ID, Name, Type, Inbound Directory, Inbound Extension, Outbound Directory, Outbound Extension, or Hub (JMS) Queue of the trading partner(s).

See **Searching Database Tables** on page 8-7 for more information about searching records, including the use of operands and wildcards.

3. Click **Search** to perform the search. To reset the search fields to their previous values, click **Reset**. To clear all the search fields, click **Clear**. To add a new record, click **Add**. See **Adding Trading Partners** on page 5-6 for more information about adding new trading partners.
4. The search results appear on the Trading Partners list screen.

The Trading Partners list screen displays the following information for each record:

- UID
- ID
- Name
- Type
- Inbound Directory
- Inbound Extension

-
- Outbound Directory
 - Outbound Extension
 - Hub (JMS) Queue
 - User ID
 - Timestamp

See **Viewing and Editing Trading Partners** on page 5-5 for more information about viewing individual records.

5. To sort the results by one of the columns, click the appropriate column heading. For example, to sort the results by Type, click the Type column heading. If there is more than one page of results, you can move between pages using the ◀ and ▶ buttons. To change the number of results that appears on each page, enter the number in the **Rows** field.
6. To view a record, click on the corresponding [...] link. The selected record will appear in the Trading Partners screen. See **Viewing and Editing Trading Partners** on page 5-5 for more information.
7. To perform another search, click **Search**. To refresh the contents of the list screen, click the refresh icon.
8. *Optional.* To delete one or more records, check the check boxes corresponding to the records to be deleted, and click **Delete**. To clear all the checkboxes, click **Clear**.
9. *Optional.* To add a new record, click **Add**. See **Adding Trading Partners** on page 5-6 for more information about adding new trading partners.

Viewing and Editing Trading Partners

Individual trading partners are viewed on the Trading Partners screen. This screen opens when you select a record from the Trading Partners list screen.

How to view and edit trading partners:

1. Click on the [...] link for the trading partner you wish to view. The selected record opens in the Trading Partners screen.

The Trading Partners screen displays the following information for the selected record:

- **UID:** The unique identifier for the record in the Oracle Utilities Data Repository.
- **ID:** The identifier for the trading partner. This should match the identifier present in transaction documents, and is used to specifically identify the sender or receiver of a transaction.
- **Name:** The internal name for the trading partner.
- **Type:** The type of trading partner. For example, the type of business in which the trading partner primarily engages.
- **Inbound Directory:** The directory in which the Oracle Utilities Transaction Management FileLoader service locates incoming files sent by the trading partner. If the “POLL_DIRECTORY” property is not defined, then the “TPID” (Trading Partner ID) property must be defined. When the “TPID” property is defined, the polling directory is pulled from this column based on the defined “TPID”.
- **Inbound Extension:** The file extension the Oracle Utilities Transaction Management FileLoader service uses to select incoming files within the Inbound Directory. When the “TPID” (Trading Partner ID) property is defined, the default file extension can be replaced with the extension specified in this column.
- **Outbound Directory:** The directory into which the Oracle Utilities Transaction Management Outbound Gateway service will deposit files it produces for sending to the

trading partner. If the service is setup to export data to files (the “EXPORT” property equals “F” or “FQ”) and the “EXPORT_DIRECTORY” is not defined, then exporting directory is pulled from this column based on the defined “TPID” (Trading Partner ID) of the receiver.


- **Outbound Extension:** The extension which the Oracle Utilities Transaction Management Outbound Gateway service will append to files it produces for sending to the trading partner. If the service is setup to export data to files (the “EXPORT” property equals “F” or “FQ”) and the “EXPORT_DIRECTORY” is not defined, then the exporting extension can be replaced from this column based on the defined “TPID” (Trading Partner ID) of the receiver.
 - **Hub (JMS) Queue:** The queue into which the Oracle Utilities Transaction Management Outbound Gateway service will send its output. (from the **JMS Queues** table). If the service is setup to export data to a queue (the “EXPORT” property equals “Q” or “FQ”) and the “EXPORT_QUEUE” property is not defined, then the exporting queue is pulled from this column based on the defined “TPID” (Trading Partner ID) of the receiver.
2. Edit data in the fields as appropriate. See **Working with Data Types** on page 8-4 for more information about editing data values.
 3. To save changes made to the record, click **Save**. To save the edited record as a new record, click **Save As New**.
Note: The **Save As New** option only works if the identity of the record has been changed.
 4. To perform a new search, click **Search**.
 5. To open a list of records, click **List**.
 6. To delete the current record, click **Delete**.
 7. To navigate from the current record to one of its parent or lookup records, click the Name of the parent table on the record. Parent and lookup records appear underlined on the screen. Use the **Back** button to return to the record being viewed.
 8. To view a list of child records, click the name of the child table you wish to view in the Children section of the screen. Use the **Back** button to return to the record being viewed.

Adding Trading Partners

You can also add new trading partners.

How to add trading partners:

1. Click **Add** on either the Trading Partners search or list screens. A blank Trading Partners screen opens.
2. Enter the ID of the trading partner in the **ID** field. This should match the identifier present in transaction documents, and is used to specifically identify the sender or receiver of a transaction.
3. Enter the internal name of the trading partner in the **Name** field.
4. Enter the type of the trading partner in the **Type** field.
5. Enter the directory in which the Oracle Utilities Transaction Management FileLoader service locates incoming files sent by the trading partner in the **Inbound Directory** field.
6. Enter the file extension the Oracle Utilities Transaction Management FileLoader service uses to select incoming files within the Inbound Directory in the **Inbound Extension** field.
7. Enter the directory into which the Oracle Utilities Transaction Management Outbound Gateway service will deposit files it produces for sending to the trading partner in the **Outbound Directory** field.

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8. Enter the extension which the Oracle Utilities Transaction Management Outbound Gateway service will append to files it produces for sending to the trading partner in the **Outbound Extension** field.
 9. Select the **Hub (JMS) Queue** into which the Oracle Utilities Transaction Management Outbound Gateway service will send its output by clicking the **Browse** button (). This opens a dialog window that lists all the available Hub (JMS) Queues.
 10. To save the record, click **Save**. The new trading partner appears on the screen.

External Transaction Types

External Transaction Types represent different transaction types used by Oracle Utilities Transaction Management. External Transaction Types tie to the External transaction type that is associated to each Oracle Utilities Transaction Management transaction. The Transaction Identification service will generate an exception if the External Transaction Type associated with an Oracle Utilities Transaction Management transaction is not defined in this table.

How to search external transaction types:

1. Select **Transaction Management>SetUp>External Transaction Types**.
The External Transaction Types screen opens.
2. Enter the search criteria in the appropriate field.
You can search based on the UID or External Transaction Type of the external transaction type(s).
See **Searching Database Tables** on page 8-7 for more information about searching records, including the use of operands and wildcards.
3. Click **Search** to perform the search. To reset the search fields to their previous values, click **Reset**. To clear all the search fields, click **Clear**. To add a new record, click **Add**. See **Adding External Transaction Types** on page 5-8 for more information about adding new external transaction types.
4. The search results appear on the External Transaction Types list screen.
The External Transaction Types list screen displays the following information for each record:
 - UID
 - External Transaction TypeSee **Viewing and Editing External Transaction Types** on page 5-8 for more information about viewing individual records.
5. To sort the results by one of the columns, click the appropriate column heading. For example, to sort the results by External Transaction Type, click the External Transaction Type column heading. If there is more than one page of results, you can move between pages using the ◀ and ▶ buttons. To change the number of results that appears on each page, enter the number in the **Rows** field.
6. To view a record, click on the corresponding [...] link. The selected record will appear in the External Transaction Types screen. See **Viewing and Editing External Transaction Types** on page 5-8 for more information.
7. To perform another search, click **Search**. To refresh the contents of the list screen, click the refresh icon.
8. *Optional.* To delete one or more records, check the check boxes corresponding to the records to be deleted, and click **Delete**. To clear all the checkboxes, click **Clear**.

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9. *Optional.* To add a new record, click **Add**. See **Adding External Transaction Types** on page 5-8 for more information about adding new external transaction types.

Viewing and Editing External Transaction Types

Individual external transaction types are viewed on the External Transaction Types screen. This screen opens when you select a record from the External Transaction Types list screen.

How to view and edit external transaction types:

1. Click on the [...] link for the external transaction type you wish to view. The selected record opens in the External Transaction Types screen.

The External Transaction Types screen displays the following information for the selected record:

- **UID:** The unique identifier for the record in the Oracle Utilities Data Repository.
- **External Transaction Type:** The name of the external transaction type.

2. Edit data in the fields as appropriate. See **Working with Data Types** on page 8-4 for more information about editing data values.
3. To save changes made to the record, click **Save**. To save the edited record as a new record, click **Save As New**.

Note: The **Save As New** option only works if the identity of the record has been changed.

4. To perform a new search, click **Search**.
5. To open a list of records, click **List**.
6. To delete the current record, click **Delete**.
7. To navigate from the current record to one of its parent or lookup records, click the Name of the parent table on the record. Parent and lookup records appear underlined on the screen. Use the **Back** button to return to the record being viewed.
8. To view a list of child records, click the name of the child table you wish to view in the Children section of the screen. Use the **Back** button to return to the record being viewed.

Adding External Transaction Types

You can also add new external transaction types.

How to add external transaction types:

1. Click **Add** on either the External Transaction Types search or list screens. A blank External Transaction Types screen opens.
2. Enter the name of the external transaction type in the **External Transaction Type** field.
3. To save the record, click **Save**. The new external transaction type appears on the screen.

External Hubs

External Hubs represent external systems to/from which Oracle Utilities Transaction Management sends/receives transactions.

How to search external hubs:

1. Select **Transaction Management->SetUp->External Hubs**.

The External Hubs screen opens.

2. Enter the search criteria in the appropriate field.

You can search based on the External Hub ID, Hub Name, Hub Type, URL, or Authentication method of the external hub(s).

See **Searching Database Tables** on page 8-7 for more information about searching records, including the use of operands and wildcards.

3. Click **Search** to perform the search. To reset the search fields to their previous values, click **Reset**. To clear all the search fields, click **Clear**. To add a new record, click **Add**. See **Adding External Hubs** on page 5-10 for more information about adding new external hubs.

4. The search results appear on the External Hubs list screen.

The External Hub list screen displays the following information for each record:

- External Hub ID
- Hub Name
- Hub Type
- URL
- Authentication Method

See **Viewing and Editing External Hubs** on page 5-9 for more information about viewing individual records.

5. To sort the results by one of the columns, click the appropriate column heading. For example, to sort the results by External Hub ID, click the External Hub ID column heading. If there is more than one page of results, you can move between pages using the ◀ and ▶ buttons. To change the number of results that appears on each page, enter the number in the **Rows** field.
6. To view a record, click on the corresponding [...] link. The selected record will appear in the External Hubs screen. See **Viewing and Editing External Hubs** on page 5-9 for more information.
7. To perform another search, click **Search**. To refresh the contents of the list screen, click the refresh icon.
8. *Optional.* To delete one or more records, check the check boxes corresponding to the records to be deleted, and click **Delete**. To clear all the checkboxes, click **Clear**.
9. *Optional.* To add a new record, click **Add**. See **Adding External Hubs** on page 5-10 for more information about adding new external hubs.

Viewing and Editing External Hubs

Individual external hubs are viewed on the External Hubs screen. This screen opens when you select a record from the External Hubs list screen.

How to view and edit external hubs:

1. Click on the [...] link for the external hub you wish to view. The selected record opens in the External Hubs screen.

The External Hubs screen displays the following information for the selected record:

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- **External Hub ID:** The ID for the external hub
 - **Hub Name:** The name of the external hub
 - **Hub Type:** The type of hub
 - **URL:** The URL of the external hub
 - **Authentication Method:** The authentication method used when accessing the external hub via Oracle Utilities Transaction Management
2. Edit data in the fields as appropriate. See **Working with Data Types** on page 8-4 for more information about editing data values.
 3. To save changes made to the record, click **Save**. To save the edited record as a new record, click **Save As New**.
Note: The **Save As New** option only works if the identity of the record has been changed.
 4. To perform a new search, click **Search**.
 5. To open a list of records, click **List**.
 6. To delete the current record, click **Delete**.
 7. To navigate from the current record to one of its parent or lookup records, click the Name of the parent table on the record. Parent and lookup records appear underlined on the screen. Use the **Back** button to return to the record being viewed.
 8. To view a list of child records, click the name of the child table you wish to view in the Children section of the screen. Use the **Back** button to return to the record being viewed.

Adding External Hubs

You can also add new external hubs.

How to add external hubs:

1. Click **Add** on either the External Hubs search or list screens. A blank External Hubs screen opens.
2. Enter an ID for the external hub in the **External Hub ID** field.
3. Enter the name of the external hub in the **Hub Name** field.
4. Enter the type of hub in the **Hub Type** field.
5. Enter the URL of the external hub in the **URL** field.
6. Enter the authentication method used to connect to the external hub in the **Authentication Method** field.
7. To save the record, click **Save**. The new external hub appears on the screen.

External Hub Activation

External Hub Activation records provide specifics surrounding the activation of external hubs accessed Oracle Utilities Transaction Management.

How to search external hub activation records:

1. Select **Transaction Management->SetUp->External Hub Activation**.

The External Hub Activation screen opens.

2. Enter the search criteria in the appropriate field.

You can search based on the External Hub ID, Trading Partner, Request Interval, UserName, Password, Timezone, or Enabled flag of the record.

See **Searching Database Tables** on page 8-7 for more information about searching records, including the use of operands and wildcards.

3. Click **Search** to perform the search. To reset the search fields to their previous values, click **Reset**. To clear all the search fields, click **Clear**. To add a new record, click **Add**. See **Adding External Hub Activation Records** on page 5-12 for more information about adding new external hub activation records.

4. The search results appear on the External Hub Activation list screen.

The External Hub Activation list screen displays the following information for each record:

- External Hub
- Trading Partner
- Request Interval
- Username
- Password
- Timezone
- Enabled flag

See **Viewing and Editing External Hub Activation Records** on page 5-11 for more information about viewing individual records.

5. To sort the results by one of the columns, click the appropriate column heading. For example, to sort the results by External Hub, click the External Hub column heading. If there is more than one page of results, you can move between pages using the ◀ and ▶ buttons. To change the number of results that appears on each page, enter the number in the **Rows** field.
6. To view a record, click on the corresponding [...] link. The selected record will appear in the External Hub Activation screen. See **Viewing and Editing External Hub Activation Records** on page 5-11 for more information.
7. To perform another search, click **Search**. To refresh the contents of the list screen, click the refresh icon.
8. *Optional.* To delete one or more records, check the check boxes corresponding to the records to be deleted, and click **Delete**. To clear all the checkboxes, click **Clear**.
9. *Optional.* To add a new record, click **Add**. See **Adding External Hub Activation Records** on page 5-12 for more information about adding new external hub activation records.

Viewing and Editing External Hub Activation Records

Individual external hub activation records are viewed on the External Hub Activation screen. This screen opens when you select a record from the External Hub Activation list screen.

How to view and edit external hub activation records:

1. Click on the [...] link for the record you wish to view. The selected record opens in the External Hub Activation screen.

The External Hub Activation screen displays the following information for the selected record:

- **External Hub:** The ID for the external hub
- **Trading Partner:** The trading partner associated with the external hub, from the **Trading Partners** table.
- **Request Interval:** The interval at which requests are sent to the external hub
- **Username:** The user name used to access the external hub

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- **Password:** The password used to access the external hub
 - **Timezone:** The time zone in which the external hub is located
 - **Enabled:** A flag that designates if the external hub is enabled for access via Oracle Utilities Transaction Management
2. Edit data in the fields as appropriate. See **Working with Data Types** on page 8-4 for more information about editing data values.
 3. To save changes made to the record, click **Save**. To save the edited record as a new record, click **Save As New**.
Note: The **Save As New** option only works if the identity of the record has been changed.
 4. To perform a new search, click **Search**.
 5. To open a list of records, click **List**.
 6. To delete the current record, click **Delete**.
 7. To navigate from the current record to one of its parent or lookup records, click the Name of the parent table on the record. Parent and lookup records appear underlined on the screen. Use the **Back** button to return to the record being viewed.
 8. To view a list of child records, click the name of the child table you wish to view in the Children section of the screen. Use the **Back** button to return to the record being viewed.

Adding External Hub Activation Records

You can also add new external hub activation records.

How to add external hub activation records:

1. Click **Add** on either the External Hub Activation search or list screens. A blank External Hub Activation screen opens.
2. Select the external hub in the **External Hub** field.
3. Select the trading partner associated with the external hub in the **Trading Partner** field.
4. Enter the request interval for the external hub in the **Request Interval** field.
5. Enter the user name used to access the external hub in the **Username** field.
6. Enter the password used to access the external hub in the **Password** field.
7. Enter the time zone in which the external hub is located in the **Timezone** field.
8. Indicate if the external hub is enabled (Yes or No) from the **Enabled?** drop-down list.
9. To save the record, click **Save**. The new external hub activation record appears on the screen.

Transaction Management Services

Services are the basic working components of Oracle Utilities Transaction Management. A service does a single unit of work, a series of which can be chained together in processing transactions. This section describes how to set up records that define these services in the Oracle Utilities Data Repository, including:

- **Runtime Services**
- **Service Activation**
- **XSLT Map Names**
- **XSLT Map Versions**
- **XSLT Maps**

Runtime Services

Runtime Services represent individual Oracle Utilities Transaction Management services. When used with JMS, Runtime Services take input from **JMS Queues**.

See **Runtime Services** on page 11-16 in the *Oracle Utilities Energy Information Platform User's Guide* for information on working with runtime services.

Service Activation

Service Activation records define how individual Oracle Utilities Transaction Management services will run on each server. Service Activation records link specific **Servers** to **Runtime Services**.

See **Service Activation** on page 11-19 in the *Oracle Utilities Energy Information Platform User's Guide* for information on working with service activation records.

XSLT Map Names

XSLT Map Names are names and descriptions of XML stylesheets (or maps) used by Oracle Utilities Transaction Management. XSLT Maps Names are used to define **XSLT Map Versions**.

See **XSLT Map Names** on page 11-21 in the *Oracle Utilities Energy Information Platform User's Guide* or **Maps** on page 4-16 in the *Oracle Utilities Transaction Management User's Guide* for information on working with XSLT map names.

XSLT Map Versions

XSLT Map Versions represent specific versions of XML stylesheets (or maps) used by Oracle Utilities Transaction Management. Adapter. XSLT Maps Versions are used to define **XSLT Maps**.

See **XSLT Map Versions** on page 11-23 in the *Oracle Utilities Energy Information Platform User's Guide* or **Maps** on page 4-16 in the *Oracle Utilities Transaction Management User's Guide* for information on working with XSLT map versions.

XSLT Maps

XSLT Maps are records which store the actual XML stylesheets (or maps) used by Oracle Utilities Transaction Management. XSLT Maps are defined by **XSLT Map Versions**.

See **XSLT Maps** on page 11-25 in the *Oracle Utilities Energy Information Platform User's Guide* or **Maps** on page 4-16 in the *Oracle Utilities Transaction Management User's Guide* for information on working with XSLT maps.

Chapter 6

Oracle Utilities Transaction Management Reports

This chapter describes the reports provided with Oracle Utilities Transaction Management, including:

- **Transaction Details Report**
- **Exception Details Report**
- **Transaction Control Report**

Transaction Details Report

The Transaction Details Report lists details related to transactions in the Oracle Utilities Data Repository based on specified criteria.

How to run the Transaction Details Report:

1. Select **Transaction Details** on the **Run Reports** screen. The Transaction Detail screen opens.
2. Select or enter the report criteria in the appropriate field.

The **Report Title** field is the title that appears on the **View Reports** screen when the report is run.

You can select the Process Type, Process Name, Transaction Type, Transaction Name, Status Code, Sender, or Receiver from the drop-down lists.

You can also report based on Internal Acct#, or External Acct#, or Trans Ref ID by entering the appropriate value. Note that Sender IDs, Receiver IDs, REF IDs, Internal Acct#, and External Acct#s are **case-sensitive**. For example, there is a difference between the “USER_1” and “user_1” Sender IDs.

You can also report based on dates by entering dates in the **Date Sent** fields.

You can use an asterisk (“*”) as a wildcard character when entering values in any of the text fields. For instance, if you want a report to include all Account IDs that begin with the letter G, you could enter “G*” in the Account ID field. You can use this wildcard before or after specified letters or numbers (i.e. you would use *t to include all Account IDs that end with the letter t, etc.).

3. Uncheck the **Shared Report** checkbox if you wish to make the results of the report private. If you leave this checkbox checked, the report results will be available to all users.
4. Click **Run** to run the report.
5. The report appears in a report window.

Once run, Transaction Detail reports are also available from the Reports List. See **View Reports** on page 2-12 for more information.

Exception Details Report

The Exception Details Report lists details related to exceptions in the Oracle Utilities Data Repository based on specified criteria.

How to run the Exception Details Report:

1. Select **Exception Details** on the **Run Reports** screen. The Exception Detail screen opens.
2. Select or enter the report criteria in the appropriate field.

The **Report Title** field is the title that appears on the **View Reports** screen when the report is run.

You can select the Process Type, Process Name, Transaction Type, Transaction Name, Status Code, Sender, or Receiver from the drop-down lists.

You can also report based on Internal Acct#, or External Acct#, or Trans Ref ID by entering the appropriate value. Note that Sender IDs, Receiver IDs, REF IDs, Internal Acct#s, and External Acct#s are **case-sensitive**. For example, there is a difference between the “USER_1” and “user_1” Sender IDs.

You can also report based on dates by entering dates in the **Date Sent** fields.

You can use an asterisk (“*”) as a wildcard character when entering values in any of the text fields. For instance, if you want a report to include all Account IDs that begin with the letter G, you could enter “G*” in the Account ID field. You can use this wildcard before or after specified letters or numbers (i.e. you would use *t to include all Account IDs that end with the letter t, etc.).

3. Uncheck the **Shared Report** checkbox if you wish to make the results of the report private. If you leave this checkbox checked, the report results will be available to all users.
4. Click **Run** link to run the report.
5. The report appears in a report window.

Once run, Exception Detail reports are also available from the Reports List. See **View Reports** on page 2-12 for more information.

Transaction Control Report

The Transaction Control Report lists all the transactions processed by Oracle Utilities Transaction Management within a given date range.

How to run the Transaction Control Report:

1. Select **Transaction Control** on the **Run Reports** screen. The Enter Report Parameters screen opens.
2. Enter a **Report Title** for the report. This is the title that appears on the **View Reports** screen when the report is run.
3. Enter the date range for the report.

You can change the dates either by typing the date manually, or by clicking the drop-down arrow to the right of the date field. This opens a calendar dialog that you can use to select the correct dates for the report. You change the time by typing the time manually.
4. Uncheck the **Shared Report** checkbox if you wish to make the results of the report private. If you leave this checkbox checked, the report results will be available to all users.
5. Click **Run** to run the report. Click **Schedule** to schedule the report. See **View Reports** on page 2-12 for more information about scheduling reports.
6. The report appears in a report window.

Once run, Transaction Control reports are also available from the Reports List. See **View Reports** on page 2-12 for more information.

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