

**Oracle Utilities Customer Analytics,  
Oracle Utilities Revenue Analytics, Oracle  
Utilities Credit & Collections Analytics**

Metric Reference Guide

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# Preface

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

## Audience

This guide is intended for all users of Oracle Utilities Customer Care and Billing Business Intelligence.

## Related Documents

For more information, see the following documents:

- *Oracle Utilities Advanced Spatial and Operational Analytics Installation Guide*
- *Oracle Utilities Advanced Spatial and Operational Analytics Quick Install Guide*
- *Oracle Utilities Advanced Spatial and Operational Administration Guide*
- *Oracle Utilities Advanced Spatial and Operational Analytics Release Notes*
- *Oracle Utilities Advanced Spatial and Operational Analytics User's Guide*

**See Also:**

- *Oracle Utilities Business Intelligence V2.4.0 Server Administration Guide*
- Oracle Utilities Customer Care and Billing Documentation Library

## Notational Conventions

The following notational conventions are used in this document:

Notation	Indicates
<b>boldface</b>	Graphical user interface elements associated with an action, terms defined in text, or terms defined in the glossary
<i>italic</i>	Book titles, emphasis, or placeholder variables for which you supply particular values

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Notation	Indicates
monospace	Commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter

# Chapter 1

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## Dashboard Content Reference

Oracle Utilities Advanced Spatial and Operational Analytics, Release 2.4.1, provides analysis of and data from Oracle Utilities Customer Care and Billing using Oracle Business Intelligence Enterprise Edition built-in metrics. Non-spatial analytics, information that is not tied to geography, is represented in a series of dashboards showing tables, bar graphs, pie charts, and gauges. Spatial analytics, or information that is geographically related, use OBIEE integrated Map Viewer technology to represent events, weather data, map data, and other geographical information.

This chapter describes the Oracle Utilities Customer Care and Billing Business Intelligence dashboard content. The dashboards are grouped by the following analytics:

- **Credit & Collection Analytics**
- **Customer Analytics**
- **Revenue Analytics**

### Credit & Collection Analytics

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

Oracle Utilities Customer Care and Billing Business Intelligence provides the Credit & Collections analytics content in the following dashboards:

- **Overview**
- **Arrears**
- **Collectibles**
- **Write Offs**

### Overview

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

To access this dashboard:

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

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

- **Overview - Arrears**
- **Overview - Effectiveness**

## Overview - Arrears

The Overview - Arrears dashboard page compares arrears against revenue.

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

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

## Overview - Effectiveness

The Overview - Effectiveness dashboard page provides an overview of the effectiveness of both collection and write off processes.

### Collection Process Effectiveness

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

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

### Write Off Process Effectiveness

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



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

## Arrears

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

To access this dashboard:

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

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

- Distribution
- Arrears Map
- Trend
- Details

### Distribution

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

### Arrears Compared to Revenue

Property	Details
Description	<p>This analysis shows the comparison between arrears and revenue in the selected month and for each service type, thus facilitating a quick view of the outstanding debt in that month.</p> <p>Comparison % = <math>100 * (\text{Arrears for 31+ days} / \text{Total Revenue})</math></p> <p><b>Note:</b> The arrears buckets can be configured to include values, such as &gt; 60 days, &gt; 90 days, etc.</p>
Purpose	Business users can determine the outstanding debt across various service types in the selected month.
Representation	<p>The <b>View By</b> drop down slices the data by customer class, jurisdiction, premise type, or service type.</p> <p>The table shows the comparison between the arrears for 31+ days and the total revenue for each service type.</p>
Drill Down	The <b>31+Days Arrears</b> column link drills down to the <b>Trend</b> dashboard page to view the respective bill cycle details.
Source Object	SA Snapshot Fact

Property	Details
OBIEE Subject Area	CCB - SA Snapshot
Metrics	31+ Days Arrears / Revenue, 31+ Days Arrears, Revenue

## Arrears Distribution

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

## Arrears Map

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

## Arrears by Region

Property	Details
Description	This analysis provides a geographical view to quickly analyze the outstanding debts in a specific region and in the selected period.

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

## Trend

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

### Arrears as % of Billed Revenue

Property	Details
Description	This analysis provides a snapshot of the customer debt as a percentage of revenue over a 15-month period (earlier to the selected month).
Purpose	Business users can determine how well the bills are being paid by customers.
Representation	<p>The first stacked bar graph shows the percentage of debt against the total revenue. This information provides an indication of how well the bills are being paid.</p> <p>The second stacked bar graph shows the actual amount of debt against the total revenue to analyze how well the bills are being paid.</p> <p>Revenue contains only billed amount. The table displays the debt stored in various buckets based on its age - 31-60 days, 61-90 days, and 91+ days.</p>

Property	Details
Drill Down	The <b>31-60 Days</b> column link drills down to the <b>Details</b> dashboard for more specific details.  The <b>61-90 Days</b> and <b>91+ Days</b> column links also drill down to the <b>Details</b> dashboard page.
Source Object	SA Snapshot Fact
OBIEE Subject Area	CCB - SA Snapshot
Metrics	Revenue Amount, 31-60 Days, 61-90 Days, 91+ Days

## Details

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

### Arrears Detail

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

## Collectibles

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

To access this dashboard:

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

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

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

## Distribution

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

### Collection Process Effectiveness Distribution

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

### Collection Process Volume

Property	Details
Description	This analysis provides a summary of the count of collection processes created (to collect arrears payments from the customers) in the selected month.
Purpose	This analysis compares the volume of the current month against the average of the last three months. Business users can analyze the count of accounts ending up in the collection compared to previous periods.

Property	Details
Representation	<p>The gauge shows the percentage of collection processes in the current month compared to the average of the previous three months. It uses different colors to denote how the users perceive the calculated result.</p> <p>The needle movement in the gauge towards yellow or red indicates a need to pay more attention on payment collection scenarios.</p> <p><b>Note:</b> The ranges for green, yellow, and red can be configured.</p> <p>The table shows the collection processes created in the last three months, their collective average, and a calculated value (collection processes in the current month divided by the average of last three months).</p>
Drill Down	The <b>Current Month / Average of Last 3 Months</b> column link drills down to the <b>Collection Process</b> dashboard page for more specific details.
Source Object	Collectible Process Fact
OBIEE Subject Area	CCB - Collectible Process
Metrics	Current Month / Average of Last 3 Months, Average of Last 3 Months

## Collection Process

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

## Collection Process Effectiveness

Property	Details
Description	<p>This analysis provides a detailed view of how effectively the collection processes are used to collect arrears payments from customers for the previous 15 months.</p> <p><math display="block">\text{Effectiveness \%} = 100 * ((\text{Arrears at Start} - \text{Arrears at End}) / \text{Arrears at Start})</math></p>
Purpose	This analysis shows the effectiveness trend across various segments. Business users can pinpoint the segments which are least successful in collecting debts, and thus analyze the need for additional efforts.
Representation	<p>The <b>View By</b> drop down slices the data by customer class or jurisdiction.</p> <p>The bar graph displays the effectiveness of the collection processes in the selected customer segment for the previous 15 months.</p> <p>The table shows the arrears at the start and end of each month, along with the collection process effectiveness, in the selected customer segment.</p>

Property	Details
Drill Down	The <b>Effectiveness</b> column link drills down to the <b>Analysis</b> and <b>Details</b> dashboard pages for respective details.
Source Object	Collectible Process Fact
OBIEE Subject Area	CCB - Collectible Process
Metrics	Arrears at Start, Arrears at End, Collection Process Effectiveness

### Active Collection Process Volume

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

### Collectible Amount

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

### Collectible Amount

Property	Details
Description	<p>Collectible amount is the amount due from a customer for which an organization initiates collection processes.</p> <p>This analysis displays the maximum, minimum, and average collectible amounts for previous 15 months.</p>
Purpose	Business users can identify any unusual collectible amounts or emerging trends in a particular month.

Property	Details
Representation	Both the graph and the table show the maximum, minimum, and average collectible amounts for each of the previous 15 months.
Drill Down	No drill down
Source Object	Collectible Process Fact
OBIEE Subject Area	CCB - Collectible Process
Metrics	Maximum Amount, Minimum Amount, Average Amount

### Collectible Amount Distribution

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

### Collection Duration

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

### Collection Duration

Property	Details
Description	This analysis displays the maximum, minimum, and average collection durations for the previous 15 months. It provides insight into the time taken by the collection processes to collect the arrears amount for the selected period.



Property	Details
Purpose	This analysis shows how long the collection processes take at a minimum, maximum, and average to close. Business users can thus analyze the lead time in collecting debt.
Representation	Both the graph and the table display the maximum, minimum, and average collection duration for each month, for the previous 15 months. If the organization has data for fewer months, the graph displays values for only those existing months.  Hover over the graph for the month and duration (in hours) details.
Drill Down	The <b>Average Duration (Hours)</b> column link drills down to the <b>Details</b> dashboard page for more specific details.
Source Object	Collectible Process Fact
OBIEE Subject Area	CCB - Collectible Process
Metrics	Maximum Duration (Hours), Minimum Duration (Hours), Average Duration (Hours)

### Collection Duration Distribution

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

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## Analysis

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

### Collection Analysis

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

## Details

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

### Effectiveness Details

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

Property	Details
Drill Down	The <b>Account</b> column link drills back to the <b>Account Maintenance</b> page in the Oracle Utilities Customer Care and Billing system.
Source Object	Collectible Process Fact
OBIEE Subject Area	CCB - Collectible Process
Metrics	Effectiveness

## Write Offs

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

To access this dashboard:

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

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

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

### Distribution

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

### Write Off Process Effectiveness Distribution

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

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

## Write Off Process Volume

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

## Write Off Process

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

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## Write Off Process Effectiveness

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

## Write Off Process Volume

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

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

## Write Off Amount

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

### Write Off Amount

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

### Write Off Amount Distribution

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

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

## Write Off Duration

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

### Write Off Duration

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

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## Analysis

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

### Write Off Analysis

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

## Details

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

### Write Offs Detail

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



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Property	Details
Source Object	Uncollectible Process Fact
OBIEE Subject Area	Uncollectible Process
Metrics	Effectiveness

# Customer Analytics

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

Oracle Utilities Customer Care and Billing Business Intelligence provides the Customer analytics content in the following dashboards:

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

## Overview

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

To access this dashboard:

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

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

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

### Customer Growth

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

## Customer Contact Volume

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

## Cases

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

## Average Case Duration

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

## Customers

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

To access this dashboard:

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

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

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

### Customers Map

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

### Customer Net Gain/Loss

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

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

### Customer Gain/Loss Distribution

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

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

### Customer Net Gain/Loss by Month

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

### Trend

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

### Customer Net Gain/Loss Trend

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

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

## Details

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

### Customer Details

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

## Cases

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

To access this dashboard:

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

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

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

## Case Map

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

### Cases

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

### Cases Distribution

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



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

### Cases by Month

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

### Status and Duration

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

## Case Final Outcomes

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

## Case Duration Statistics

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

## Case Duration Distribution

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

## Details

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

## Case Detail

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

## Customer Contacts

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

To access this dashboard:

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

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

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

### Distribution

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

#### Contacts by Class

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

#### Top 5 Contact Types by Volume

Property	Details
Description	This analysis displays the top five contact types with the highest number of customer contacts created in the selected period.
Purpose	These statistics help the business users to monitor resource allocation to handle the customer contacts for the specific period.

Property	Details
Representation	The table shows the number of customer contacts created against each contact type in the selected month. The contact types are ranked per the highest customer contacts in each contact type.
Drill Down	Click the <b>Contacts</b> column link to navigate to the <b>Details</b> dashboard page. The <b>Details</b> dashboard page provides specific account level details of the selected record.
Source Object	Customer Contact Fact
OBIEE Subject Area	CCB - Customer Contact
Metrics	Contacts

### Top 10 Customers by Volume

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

### Trend

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

### Contacts by Day of Week

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

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

### Contacts by Day of Week Hourly Summary

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

### Details

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

### Contact Detail

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

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

# Revenue Analytics

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

Oracle Utilities Customer Care and Billing Business Intelligence provides the Revenue analytics content in the following dashboards:

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

## Overview

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

To access this dashboard:

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

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

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

### Overview - Revenue

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

### Revenue Comparison

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



## Payments as a Percentage of Bills and Adjustments

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

## Overview - Billed Usage

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

### Billed Usage

Property	Details
Description	This analysis compares the usage that was billed for the selected period with the same period in the previous year.
Purpose	Business users can gauge if the Kilowatt-Hours increased when compared to the same month last year, as well as an average of the last three months.
Representation	<p>The gauge shows the percentage of billed usage using different colors to denote how the users perceive the calculated result. The needle movement in the gauge towards yellow or red indicates a need to pay more attention on the usage scenarios.  <b>Note:</b> The ranges for green, yellow, and red can be configured.</p> <p>The table shows usage that was billed for the current month and the same period last year, along with the average billed usage for the previous three months.</p>

Property	Details
Drill Down	The <b>Billed Usage (Kilowatt-Hours) Current Month</b> column link drills down to the <b>Billed Usage</b> dashboard to show specific usage information about the selected record.
Source Object	Financial Fact
OBIEE Subject Area	CCB - Billed Usage
Metrics	Compared to Last Year, Billed Usage (UOM) Selected Month Selected Year, Billed Usage (UOM) Same Period Last Year, Average Billed Usage for Last Three Periods (UOM)

## Billed Usage

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

To access this dashboard:

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

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

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

### Billed Usage

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

#### Billed Usage by Region

Property	Details
Description	This analysis provides a spatial representation of the actual billed usage in a geographical area (postal code) for the selected month.
Purpose	Business users can identify the areas with very high or low billed usages.
Representation	The color-coded region on the map shows the billed usage in that area and the total calculated amount for the usage, along with its postal code.  The postal code link broadcasts the postal code value to the <b>Billed Usage Distribution</b> and <b>Billed Usage by Month</b> analyses on the same dashboard page.
Drill Down	No drill down
Source Object	Billed Usage Fact

Property	Details
OBIEE Subject Area	CCB - Billed Usage
Metrics	Billed Usage, Calculated Amount

### Billed Usage Distribution

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

### Billed Usage by Month

Property	Details
Description	<p>This analysis shows a 15-month trend in the usage amount that was billed for the customers in the selected region (postal code). The data is based on the postal code selected on the <b>Billed Usage By Region</b> map.</p>
Purpose	Business users can identify the geographical areas with minimum and maximum billed usage in the previous 15 months.
Representation	<p>The <b>Postal Code</b> drop down slices the data for the area with the respective postal code.</p> <p>The graph displays the actual billed usage for the respective months in the selected geographical area. Hover over the bars for specific details.</p>
Drill Down	The bar graph drills down to the <b>Analysis</b> dashboard page for billed usage and billed amount details for the selected customer segment.

Property	Details
Source Object	Billed Usage Fact
OBIEE Subject Area	CCB - Billed Usage
Metrics	Billed Usage

## Analysis

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

### Billed Usage Analysis

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

## Details

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

### Billed Usage Detail

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

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

## Revenue

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

To access this dashboard:

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

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

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

## Revenue

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

### Revenue Distribution

Property	Details
Description	<p>This analysis compares the revenue for the current month with the average of previous last three months, broken down into various customer segments.</p> <p>Revenue % = Revenue for current month / Average revenue for previous three months</p>
Purpose	Business users can analyze how the revenue is distributed across specific customer segments in the selected period.

Property	Details
Representation	<p>The <b>View By</b> drop down slices the data by customer class, jurisdiction, premise type, rate, or service type.</p> <p>The table shows the distribution of revenue for different customer classes in the selected period, along with the average revenue of the last three months and a calculated result.</p>
Drill Down	The <i>Current Month</i> column link drills down to the <b>Region</b> and <b>Trend</b> dashboard pages for specific metrics related to the selection.
Source Object	Financial Fact
OBIEE Subject Area	CCB - Financial
Metrics	Current Month / Average Revenue Last Three Periods

### Payments as a Percentage of Bills and Adjustments

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

### Region

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

## Revenue by Region

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

## Revenue by Customer Class

Property	Details
Description	This analysis shows the revenue amount generated in a region (postal code) across various customer classes (commercial, industrial, or residential). The data is displayed for the selected month and is based on the postal code selected on the <b>Revenue by Region</b> map.
Purpose	Business users can analyze how the revenue is generated in an area (postal code) for various customer classes.
Representation	<p>The <b>Postal Code</b> drop down slices the data for the area with the respective postal code.</p> <p>The pie chart shows the distribution of revenue for different customer classes in the selected area (postal code).</p>
Drill Down	The pie chart drills down to the <b>Trend</b> dashboard page to display the trend in revenue generation in that region.
Source Object	Financial Fact
OBIEE Subject Area	CCB - Financial
Metrics	Revenue Amount

## Revenue by Month

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

## Trend

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

## Revenue Trend

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



Property	Details
Source Object	Financial Fact
OBIEE Subject Area	CCB - Financial
Metrics	Revenue Amount

### Year To Date Revenue

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

### Bills and Payments

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

### Bills & Adjustments vs Payments

Property	Details
Description	This analysis shows how effectively customers are making their payments in a month; 100% payments compared to the total bills and adjustments is the target.
Purpose	Business users can analyze whether or not customers are paying their bills on time, and if revenue generation is as per the set target.

Property	Details
Representation	<p>The graph shows the payments and bills and adjustments for the selected period. It also shows payments as the percentage of bills and adjustments amount, as well the set target for payments collection. Hover over the graph to view the specific details for the selected period.</p> <p>The table displays specific details about payments, bills, and adjustments for previous 15 months.</p>
Drill Down	No drill down
Source Object	Financial Fact
OBIEE Subject Area	CCB - Financial
Metrics	Payments, Bills and Adjustments, Payments / Bills and Adjustments

## Analysis

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

### Revenue Analysis

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

## Details

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

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**Revenue Detail**

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

## Additional Information

The Licensing and Packaging Guide contains valuable information on the features and data structures available in Oracle Utilities Customer Care and Billing Business Intelligence. The guide is provided as an Excel spreadsheet, Oracle Utilities Advanced Spatial and Operational Analytics V2.4.1 Licensing and Packaging Guide.xls. The content includes:

- A list of all of the available Oracle Utilities Business Intelligence products.
- Installer Options - the required extractors and schemas for each product.
- Subject Areas, Facts, and Dimensions.
- Dashboards and Answers - the standard dashboards available and the associated Answers along with the Answer path.