

## **Oracle Utilities Customer Care and Billing Release 2.4.0**

Utility Reference Model

5.6.3.1 Manage Meters

December 2015

Oracle Utilities Customer Care and Billing Utility Reference Model 5.6.3.1, Release 2.4.0

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## 5.6.3.1 Manage Meters

This section provides a description of the “Manage Meters” business process, including:

- ♦ [Brief Description](#)
  - ♦ [Actors/Roles](#)
- ♦ [Business Process Diagrams](#)
  - ♦ [Manage Meters Process Model - Page 1](#)
  - ♦ [Manage Meters Process Model - Page 2](#)
  - ♦ [Manage Meters Process Model - Page 3](#)
- ♦ [Manage Meters Detailed Process Model Description](#)
- ♦ [Related Training](#)

## Brief Description

**Business Process:** 5.6.3.1 Manage Meters

**Process Type:** Sub-Process

**Parent Process:** 5.6.3 Manage Supplies (CCB)

**Sibling Processes:**

- 5.6.3.2 Manage Items
- 5.1.5.1 Manage Metered Site
- 5.1.5.2 Manage Un-Metered Site

When an organization purchases Meters for inventory and installation the Meters are recorded in CC&B. This process describes how Meters are entered in CC&B inventory as well as maintenance of the Meter Record in the system.

Every meter must have at least one configuration in order to measure and store meter reads for the meter. A meter without meter reads cannot be billed (or linked to a service agreement. A meter configuration has one or more registers. The number is dependent on how many things are measured. For example, a meter that measures kilowatt-hours and kilowatt (demand) will have two registers.

Metering devices measure consumption and are classified by service type, such as electric meters, gas meters, and water meters. The Meter record:

- Contains specific information about meters such as meter type, manufacturer, and model.

The Meter Configuration record:

- Contains information about the type of consumption a meter measures. This information can change over time. The system maintains how the meter looks over time so billing reflects historical consumption.
- Every meter configuration contains one or more registers. Each register references the unit measured and how the measured quantity is manipulated before it is billed.

The CSR or Authorized User can add a single Meter record or add multiple Meter records at one time using a replication feature. Once installed, the Meter measures the consumption used at a service point. The Meter's history can be tracked while in service as well as stock location while in inventory.

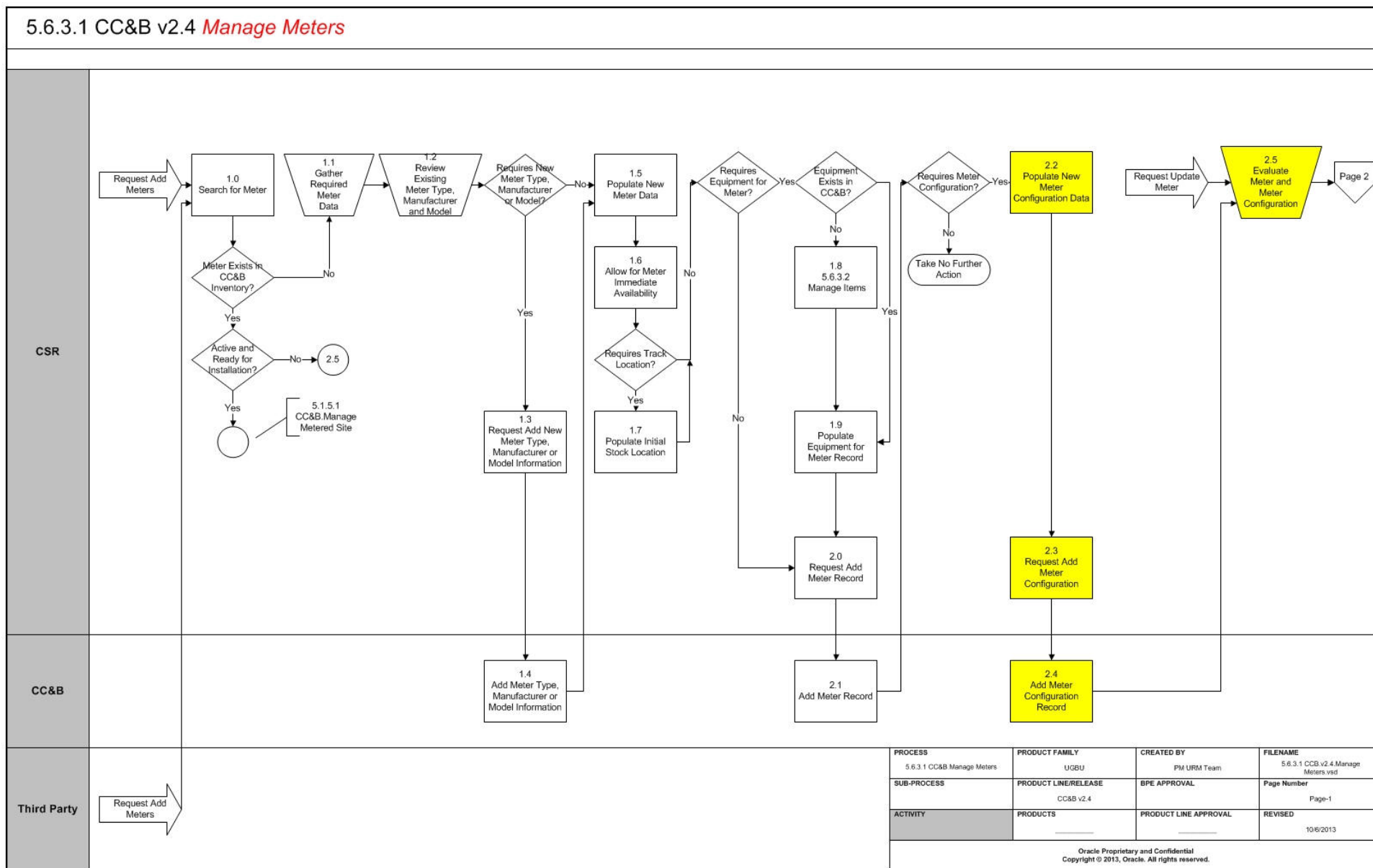
## Actors/Roles

The Manage Items business process involves the following actors and roles:

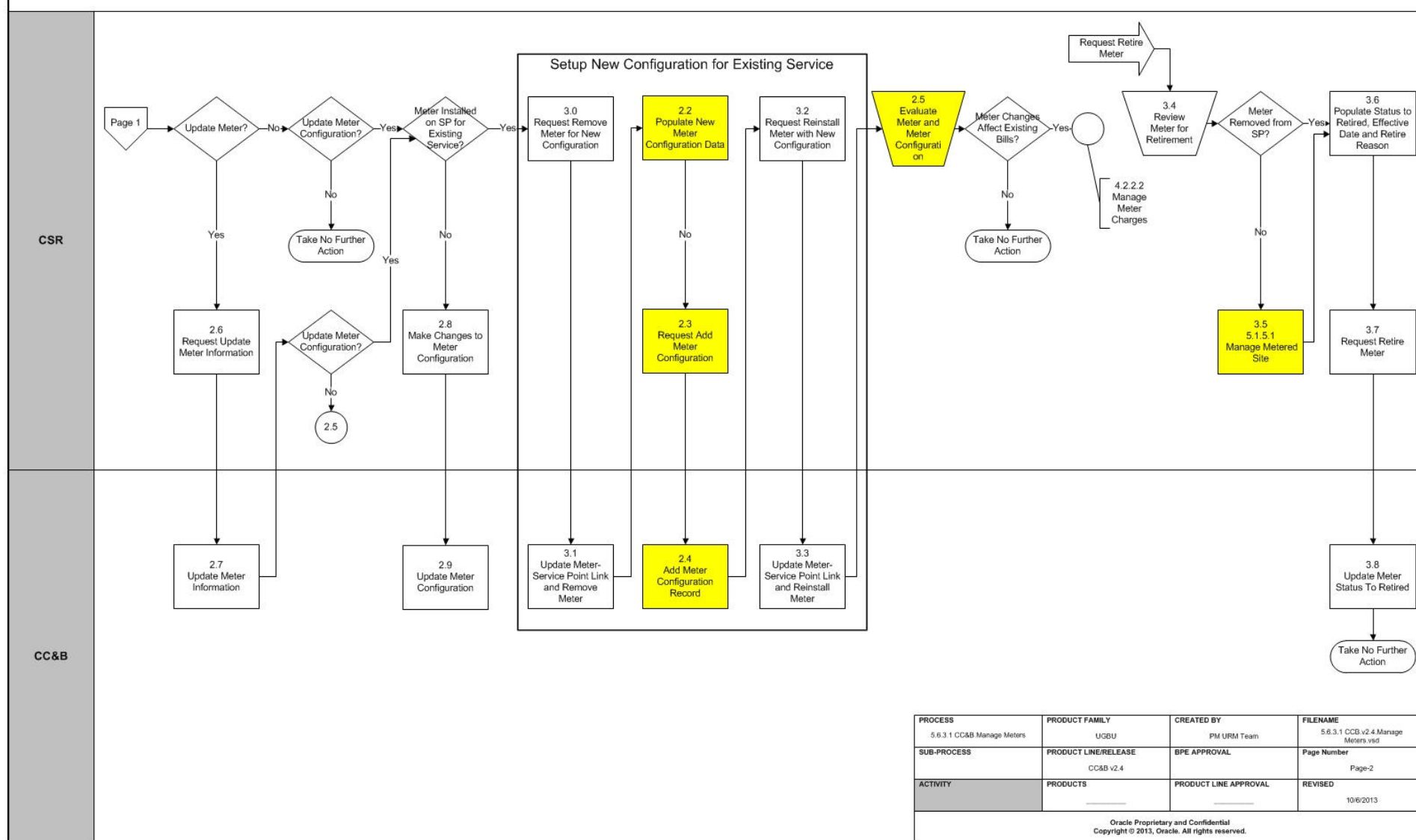
- CSR: CSR or Authorized User of the Customer Care and Billing application.
- CC&B: The Customer Care and Billing application. Steps performed by this actor/role are performed automatically by the application, without the need for user initiation or intervention.
- Third Party: Third Party application or User that can request to add and/or maintain meter or item data.

# Business Process Diagrams

## Manage Meters Process Model - Page 1

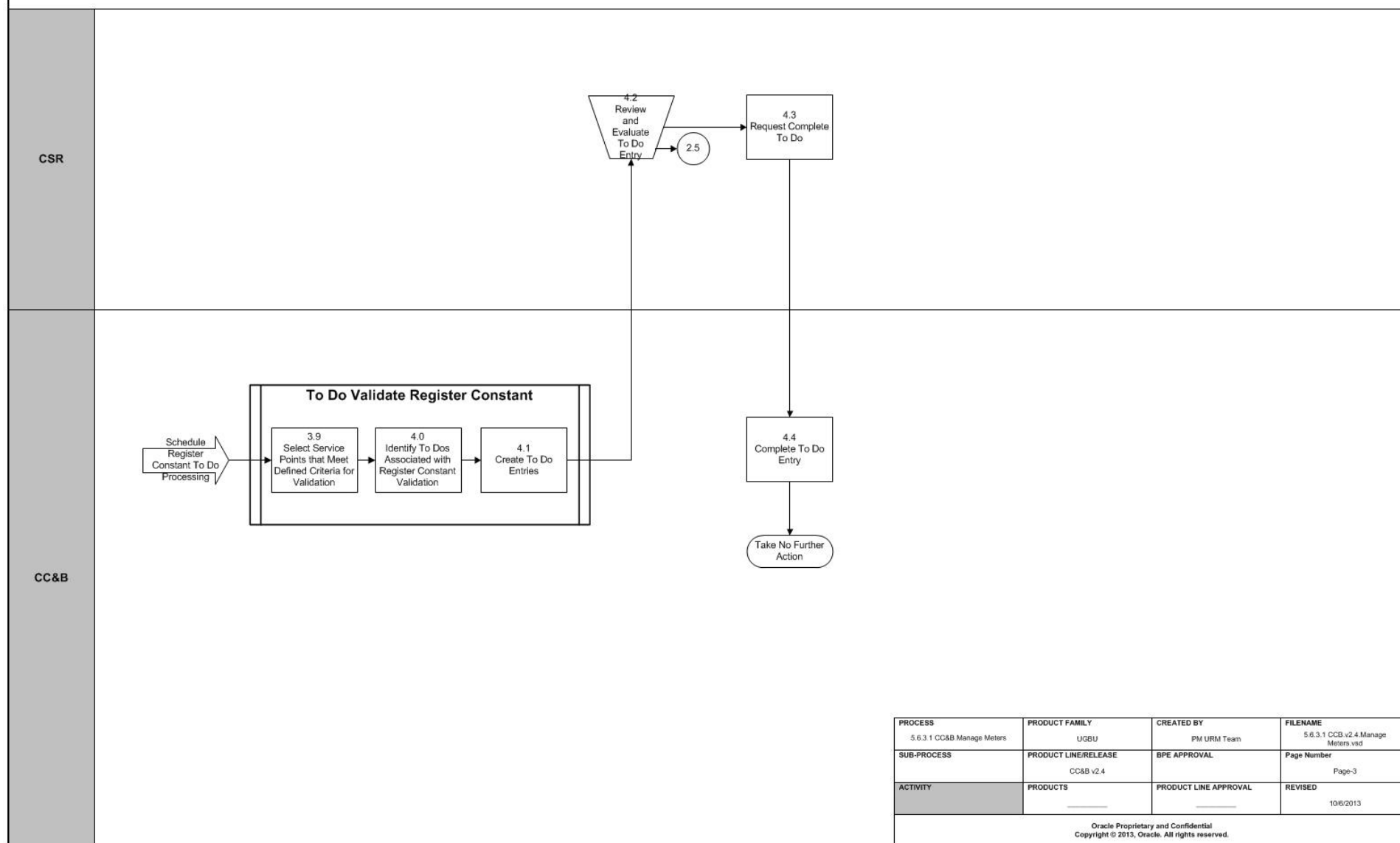


## Manage Meters Process Model - Page 2

5.6.3.1 CC&B v2.4 *Manage Meters*



## Manage Meters Process Model - Page 3

5.6.3.1 CC&B v2.4 *Manage Meters*

# Manage Meters Detailed Process Model Description

This section provides a detailed description of the “Manage Meters” business process, including:

- ♦ 1.0 Search for Meter
- ♦ 1.1 Gather Required Meter Data
- ♦ 1.2 Review Existing Meter Type, Manufacturer and Model
- ♦ 1.3 Request Add New Meter Type, Manufacturer or Model Information
- ♦ 1.4 Add Meter Type, Manufacturer or Model Information
- ♦ 1.5 Populate New Meter Data
- ♦ 1.6 Allow for Immediate Meter Availability
- ♦ 1.7 Populate Initial Stock Location
- ♦ 1.7 Populate Initial Stock Location
- ♦ 1.8 5.6.3.2 Manage Items
- ♦ 1.9 Populate Equipment for Meter Record
- ♦ 2.0 Request Add Meter Record
- ♦ 2.1 Add Meter Record
- ♦ 2.2 Populate New Meter Configuration Data
- ♦ 2.3 Request Add Meter Configuration
- ♦ 2.4 Add Meter Configuration Record
- ♦ 2.5 Evaluate Meter and Meter Configuration
- ♦ 2.6 Request Update Meter Information
- ♦ 2.7 Update Meter Information
- ♦ 2.8 Make Changes for Meter Configuration
- ♦ 2.9 Update Meter Configuration
- ♦ 3.0 Request Removal of Meter for New Meter Configuration
- ♦ 3.1 Update Meter-Service Point Link and Remove Meter
- ♦ 3.2 Request Reinstall of Meter with New Meter Configuration
- ♦ 3.3 Update Meter-Service Point Link and Reinstall Meter
- ♦ 3.4 Review Meter for Retirement
- ♦ 3.5 5.1.5.1 Manage Meter Site
- ♦ 3.6 Populate Status to Retired, Effective Date and Retire Reason
- ♦ 3.7 Request Retire Meter
- ♦ 3.8 Update Meter Status to Retired
- ♦ 3.9 Select Service Points That Meet Defined Criteria for Validation
- ♦ 4.0 Identify To Dos Associated with Register Constant Validation
- ♦ 4.1 Create To Do Entries
- ♦ 4.2 Review and Evaluate To Do Entry
- ♦ 4.3 Request Complete To Do
- ♦ 4.4 Complete To Do Entry

## 1.0 Search for Meter

**Reference:** [Manage Meters Process Model - Page 1 on page 3](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** The CSR or Authorized User searches for the given Meter in CC&B to determine if it is in existing inventory. Searching for the Meter can be accomplished through Meter/Item Search using various search criteria.

### Entities to Configure

- Geo Type
- Installation Options
- Stock Location

### Available Algorithms

- C1-MTRI-DFLT -This Installation Options algorithm formats the Meter Information for display throughout CC&B. This algorithm formats the “Meter Info” that appears throughout the system: Meter Type, Badge Number, Serial Number, Meter Status, Location Information

## 1.1 Gather Required Meter Data

**Reference:** [Manage Meters Process Model - Page 1 on page 3](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** Using a purchase order, packing slip or other meter receipt information, the CSR or Authorized User reviews and collects the needed information for entering meters in CC&B. Information includes Meter type, badge numbers, serial numbers, Manufacturer, Model, and measuring component information.

### Entities to Configure

- Meter Type
- Manufacturer
- Model

## 1.2 Review Existing Meter Type, Manufacturer and Model

**Reference:** [Manage Meters Process Model - Page 1 on page 3](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** The new Meters may be from a new vendor or be a new type of Meter. The CSR or Authorized User determines if the new Meters require any new set up information configured in CC&B. Meter Type defines the type of service associated with this meter. It also defines characteristics common to all meters of a given type and the type of equipment that can be linked to the meter.

### Entities to Configure

- Meter Type
- Manufacturer
- Model

## 1.3 Request Add New Meter Type, Manufacturer or Model Information

**Reference:** [Manage Meters Process Model - Page 1 on page 3](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** If new setup information is required, the CSR or Authorized User enters this information in CC&B.

**Entities to Configure**

- Meter Type
- Manufacturer
- Model

## 1.4 Add Meter Type, Manufacturer or Model Information

**Reference:** [Manage Meters Process Model - Page 1 on page 3](#) for the business process diagram associated with this activity.

**Actor/Role:** CC&B

**Description:** Meter Type, Manufacturer, or Model Information is added in CC&B.

**Entities to Configure**

- Meter Type
- Manufacturer
- Model

**Business Objects**

- C1-MeterTypePhysicalBO - Physical BO for Meter Type

## 1.5 Populate New Meter Data

**Reference:** [Manage Meters Process Model - Page 1 on page 3](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** The CSR or Authorized User enters the new Meter Information for the Meter to be placed in inventory. A Badge Number is assigned. Typically this is the stamped number from the manufacturer. Serial Number, Date Received as well as Meter Type, Manufacturer, and Model are identified

**Entities to Configure**

- Meter Type
- Manufacturer
- Model
- Meter ID Type
- Characteristic Type

## 1.6 Allow for Immediate Meter Availability

**Reference:** [Manage Meters Process Model - Page 1 on page 3](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** The Meter must be considered Active to be installed at a Service Point. Sometimes organizations track meters in inventory prior to receipt of the Meters. In this case the Meters are assigned an Ordered status and changed to Active when received.

## 1.7 Populate Initial Stock Location

**Reference:** [Manage Meters Process Model - Page 1 on page 3](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** If this Meter's location is being tracked, a physical stock location is identified.

**Entities to Configure**

- Stock Location

## 1.8 5.6.3.2 Manage Items

**Reference:** [Manage Meters Process Model - Page 1 on page 3](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** At times additional equipment may be added to the Meter record. The Equipment record must be in CC&B inventory. Refer to 5.6.3.2 Manage Items.

**Entities to Configure**

- Item Type

## 1.9 Populate Equipment for Meter Record

**Reference:** [Manage Meters Process Model - Page 1 on page 3](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** The CSR or Authorized User adds Equipment information to be included with the Meter record.

**Entities to Configure**

- Item Type

## 2.0 Request Add Meter Record

**Reference:** [Manage Meters Process Model - Page 1 on page 3](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** When all information is added for the Meter, the CSR or Authorized User saves the record.

## 2.1 Add Meter Record

**Reference:** [Manage Meters Process Model - Page 1 on page 3](#) for the business process diagram associated with this activity.

**Actor/Role:** CC&B

**Description:** The Meter record is added in CC&B.

**Entities to Configure**

- Meter Type
- Manufacturer
- Model
- Meter ID Type
- Characteristic Type

- Meter Configuration Type

### Business Objects

- DR\_Meter - Data Replicator - Meter
- C1-MeterLocation - Meter Location Description

#### Integration CCB MDM

- C1-MDM2Meter - CC&B-MDM Meter Sync BO

When CC&B environment is integrated with MDM, this Business Object is utilized to synchronize Meter information between CC&B and MDM.

#### Integration CCB MDM

- C1-MDM2MtrSyncRequest - CC&B-MDM Meter Sync Request BO

When CC&B environment is integrated with MDM, this Business Object is used to request to synchronize Meter information between CC&B and MDM.

## 2.2 Populate New Meter Configuration Data

**Reference:** [Manage Meters Process Model - Page 1 on page 3](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** In order to measure consumption and record Meter Reads, the Meter requires a Configuration record. The Meter's configuration defines how the system calculates consumption and how the billing process uses consumption. A Configuration record may change over time. Meter Configurations are effective dated and can impact previous existing Bills. It is recommended to add a new Meter Configuration when the Meter is reconfigured and has an impact on existing bills. The CSR or Authorized User enters the new Meter Configuration including: Effective Date, Configuration Type, Unit of Measure, Time of Use codes, Register Constants, Dial Format, and other information.

### Entities to Configure

- Unit of Measure
- Time Of Use
- Time of Use Group
- Read Out Type
- Characteristic Type
- Characteristic Value
- Meter ID Type
- Protocol Codes

## 2.3 Request Add Meter Configuration

**Reference:** [Manage Meters Process Model - Page 2 on page 4](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** When all information is added for the new Meter Configuration, the CSR or Authorized User saves the record.

## 2.4 Add Meter Configuration Record

**Reference:** [Manage Meters Process Model - Page 1 on page 3](#) for the business process diagram associated with this activity.

**Actor/Role:** CC&B

**Description:** The new Meter Configuration record is added in CC&B.

### Entities to Configure

- Meter Configuration Type
- Unit of Measure
- Time Of Use
- Time of Use Group
- Read Out Type
- Characteristic Type
- Characteristic Value
- Meter ID Type
- Protocol Codes

### Business Objects

- CI\_MeterConfiguration - Meter Configuration
- DR\_MeterConfiguration - Data Replicator - Meter Configuration replicator

Integration CCB MDM

- C1-MDM2MeterConfiguration - CC&B-MDM Meter Configuration Sync BO - When CC&B environment is integrated with MDM, this Business Object is utilized to synchronize Meter Configuration information between CC&B and MDM.

Integration CCB MDM

- C1-MDM2MtrConfigSyncRequest - CC&B-MDM Meter Configuration Sync Request BO - When CC&B environment is integrated with MDM, this Business Object is used to request to synchronize Meter Configuration information between CC&B and MDM.

## 2.5 Evaluate Meter and Meter Configuration

**Reference:** [Manage Meters Process Model - Page 2 on page 4](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** The CSR or Authorized User reviews and verifies the accuracy of the newly entered Meter and Meter Configuration information. The CSR or Authorized User may use the Replication feature to enter a full shipment or group of meters at the same time. The CSR or Authorized User also reviews Meter and Meter Configuration information prior to making any changes for an existing Meter and Meter Configuration. Changes may or may not impact existing Bills. A new configuration is created when the Meter is reconfigured. All existing information was accurate at the time it was entered, but now something about the meter's configuration has changed. The historical information is retained, and the new configuration has its own unique identity in the system.

## 2.6 Request Update Meter Information

**Reference:** [Manage Meters Process Model - Page 2 on page 4](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** At times it may be necessary to update meter information. The CSR or Authorized User enters the required information for the change.

## 2.7 Update Meter Information

**Reference:** [Manage Meters Process Model - Page 2 on page 4](#) for the business process diagram associated with this activity.

**Actor/Role:** CC&B

**Description:** The meter information is updated in CC&B.

### Business Objects

Integration CCB MDM

- C1-MDM2Meter - CC&B-MDM Meter Sync BO  
When CC&B environment is integrated with MDM, this Business Object is utilized to synchronize Meter information between CC&B and MDM.

Integration CCB MDM

- C1-MDM2MtrSyncRequest - CC&B-MDM Meter Sync Request BO  
When CC&B environment is integrated with MDM, this Business Object is used to request to synchronize Meter information between CC&B and MDM.

## 2.8 Make Changes for Meter Configuration

**Reference:** [Manage Meters Process Model - Page 2 on page 4](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** The CSR or Authorized User determines to make changes for the existing Meter Configuration. These changes are required when some information was entered incorrectly prior to the billing process, can be changed without an impact to existing bills, or billing corrections will be made following the meter configuration changes.

## 2.9 Update Meter Configuration

**Reference:** [Manage Meters Process Model - Page 2 on page 4](#) for the business process diagram associated with this activity.

**Actor/Role:** CC&B

**Description:** The Meter Configuration is updated in CC&B.

### Business Objects

- CI\_MeterConfiguration - Meter Configuration Business Object

Integration CCB MDM

- C1-MDM2MeterConfiguration - CC&B-MDM Meter Configuration Sync BO - When CC&B environment is integrated with MDM, this Business Object is utilized to synchronize Meter Configuration information between CC&B and MDM.

Integration CCB MDM

- C1-MDM2MtrConfigSyncRequest - CC&B-MDM Meter Configuration Sync Request BO - When CC&B environment is integrated with MDM, this Business Object is used to request to synchronize Meter Configuration information between CC&B and MDM.



### 3.0 Request Removal of Meter for New Meter Configuration

**Reference:** [Manage Meters Process Model - Page 2 on page 4](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** The effective date of the Meter Configuration cannot overlap with the effective date period for any service point historical installation. This means a new Meter Configuration cannot be added while the Meter is installed and currently measuring consumption. The Meter is removed from the Service Point to add the new effective dated Meter Configuration. CSR or Authorized User installs a removal meter read in order to remove the meter from the Service Point.

### 3.1 Update Meter-Service Point Link and Remove Meter

**Reference:** [Manage Meters Process Model - Page 2 on page 4](#) for the business process diagram associated with this activity.

**Actor/Role:** CC&B

**Description:** CC&B updates the SP-Meter link and removes the meter from the service point.

#### Business Objects

Integration CCB MDM

- C1-MDM2SPMeterHistory - CC&B-MDM SP/Meter History Sync BO - When CC&B environment is integrated with MDM, this Business Object is utilized to synchronize SP/Meter History information between CC&B and MDM.

Integration CCB MDM

- C1-MDM2SpMtrHistSyncRequest - CC&B-MDM SP/Meter History Sync Request BO - When CC&B environment is integrated with MDM, this Business Object is used to request to synchronize SP/Meter History information between CC&B and MDM.

### 3.2 Request Reinstall of Meter with New Meter Configuration

**Reference:** [Manage Meters Process Model - Page 2 on page 4](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** CSR or Authorized User requests to install the meter with the updated configuration and populates a new meter read to the Meter-Service Point Installation Page .

### 3.3 Update Meter-Service Point Link and Reinstall Meter

**Reference:** [Manage Meters Process Model - Page 2 on page 4](#) for the business process diagram associated with this activity.

**Actor/Role:** CC&B

**Description:** CC&B updates the SP-Meter link and installs the meter onto the Service Point. The new effective dated Meter Configuration is now available for the Meter.

#### Business Objects

Integration CCB MDM

- C1-MDM2SPMeterHistory - CC&B-MDM SP/Meter History Sync BO - When CC&B environment is integrated with MDM, this Business Object is utilized to synchronize SP/Meter History information between CC&B and MDM.

Integration CCB MDM

- C1-MDM2SpMtrHistSyncRequest - CC&B-MDM SP/Meter History Sync Request BO - When CC&B environment is integrated with MDM, this Business Object is used to request to synchronize SP/Meter History information between CC&B and MDM.

### 3.4 Review Meter for Retirement

**Reference:** [Manage Meters Process Model - Page 2 on page 4](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** At times it is determined a Meter cannot be repaired or requires removal due to age of the meter. Some organizations' business rules require removal of Meters when they reach a certain age. Once the Meter is removed from the Service Point it is changed to Retired in CC&B.

### 3.5 5.1.5.1 Manage Meter Site

**Reference:** [Manage Meters Process Model - Page 2 on page 4](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** Refer to 5.1.5.1 Manage Meter Site for steps to remove a Meter and/or install a Meter.

### 3.6 Populate Status to Retired, Effective Date and Retire Reason

**Reference:** [Manage Meters Process Model - Page 2 on page 4](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** The CSR or Authorized User updates the Meter Status to Retired. A retire date and retire reason is entered.

**Entities to Configure**

- Retire Reason

### 3.7 Request Retire Meter

**Reference:** [Manage Meters Process Model - Page 2 on page 4](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** The CSR or Authorized User saves the Meter Record with the updated retirement information.

**Entities to Configure**

- Retire Reason

### 3.8 Update Meter Status to Retired

**Reference:** [Manage Meters Process Model - Page 2 on page 4](#) for the business process diagram associated with this activity.

**Actor/Role:** CC&B

**Description:** The Meter is updated to Retired Status in CC&B.

**Business Objects**

Integration CCB MDM

- C1-MDM2Meter - CC&B-MDM Meter Sync BO

When CC&B environment is integrated with MDM, this Business Object is utilized to synchronize Meter information between CC&B and MDM.

#### Integration CCB MDM

- C1-MDM2MtrSyncRequest - CC&B-MDM Meter Sync Request BO

When CC&B environment is integrated with MDM, this Business Object is used to request to synchronize Meter information between CC&B and MDM.

## 3.9 Select Service Points That Meet Defined Criteria for Validation

**Reference:** [Manage Meters Process Model - Page 3 on page 5](#) for the business process diagram associated with this activity.

**Group:** To Do Validate Register Constant

**Actor/Role:** CC&B

**Description:** This background process selects all electric Metered Service Points for a given Service Cycle evaluating all Service Points defined with Current Transformers and Potential Transformers. Ratios are calculated for each. Anomalies are highlighted and To Do Entries created. It then finds the meter currently installed at the service point and extracts its dial constant from an identified meter characteristic. It then calculates a register constant by taking the product of all CT ratios and PT ratios and multiplying this value by the meter's dial constant. It then compares the calculated register constant with the actual register constant of every register linked to the meter. Anomalies are highlighted and To Do entries created

#### Entities to Configure

- To Do Type
- To Do Role
- Characteristic Type
- Characteristic Value
- Meter Type
- Item Type

#### Process

- REGCNST- Register Constant Validation - This background process is used to validate Register Constants for specifically defined Meters

## 4.0 Identify To Dos Associated with Register Constant Validation

**Reference:** [Manage Meters Process Model - Page 3 on page 5](#) for the business process diagram associated with this activity.

**Group:** To Do Validate Register Constant

**Actor/Role:** CC&B

**Description:** To Do's related to Register Constant anomalies are identified.

#### Entities to Configure

- To Do Type
- To Do Role
- Characteristic Type
- Characteristic Value
- Meter Type
- Item Type

**Process**

- REGCNST- Register Constant Validation - This background process is used to validate Register Constants for specifically defined Meters.

## 4.1 Create To Do Entries

**Reference:** [Manage Meters Process Model - Page 3 on page 5](#) for the business process diagram associated with this activity.

**Group:** To Do Validate Register Constant

**Actor/Role:** CC&B

**Description:** To Do Entries are created in CC&B for review by a CSR or Authorized User.

**Entities to Configure**

- To Do Type
- To Do Role
- Characteristic Type
- Characteristic Value
- Meter Type
- Item Type

**Process**

- REGCNST- Register Constant Validation - This background process is used to validate Register Constants for specifically defined Meters.

## 4.2 Review and Evaluate To Do Entry

**Reference:** [Manage Meters Process Model - Page 3 on page 5](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** The CSR or Authorized User reviews the To Do Entry information as well as the Meter and Service Point records. There is investigation and the CSR or Authorized User determines the next steps for resolution for the Register Constant discrepancy.

## 4.3 Request Complete To Do

**Reference:** [Manage Meters Process Model - Page 3 on page 5](#) for the business process diagram associated with this activity.

**Actor/Role:** CSR

**Description:** The CSR or Authorized User marks the To Do Entry as complete and requests completion of the To Do Entry. The CSR or Authorized User may add comments or a log entry for future reference.

## 4.4 Complete To Do Entry

**Reference:** [Manage Meters Process Model - Page 3 on page 5](#) for the business process diagram associated with this activity.

**Actor/Role:** CC&B

**Description:** The To Do Entry is updated to Complete status in CC&B.

## Related Training

The following User Productivity Kit (UPK) modules provide training related to this business process:

- Oracle Utilities UPK for Customer Care and Billing, Administrative Setup
- Oracle Utilities UPK for Customer Care and Billing, User Tasks
- Oracle Utilities UPK for Customer Care and Billing, Credit and Collections
- Oracle Utilities UPK for Customer Care and Billing, Rating and Billing
- Oracle Utilities UPK for Customer Care and Billing, Rating and Billing for Interval Data