

ORACLE

Oracle Energy and Water
Customer Edge
Conference

Past, Present, and Future of Work Management and To Dos

Lynda Elmer

Richard Keeves

David Siska

Oracle Energy and Water



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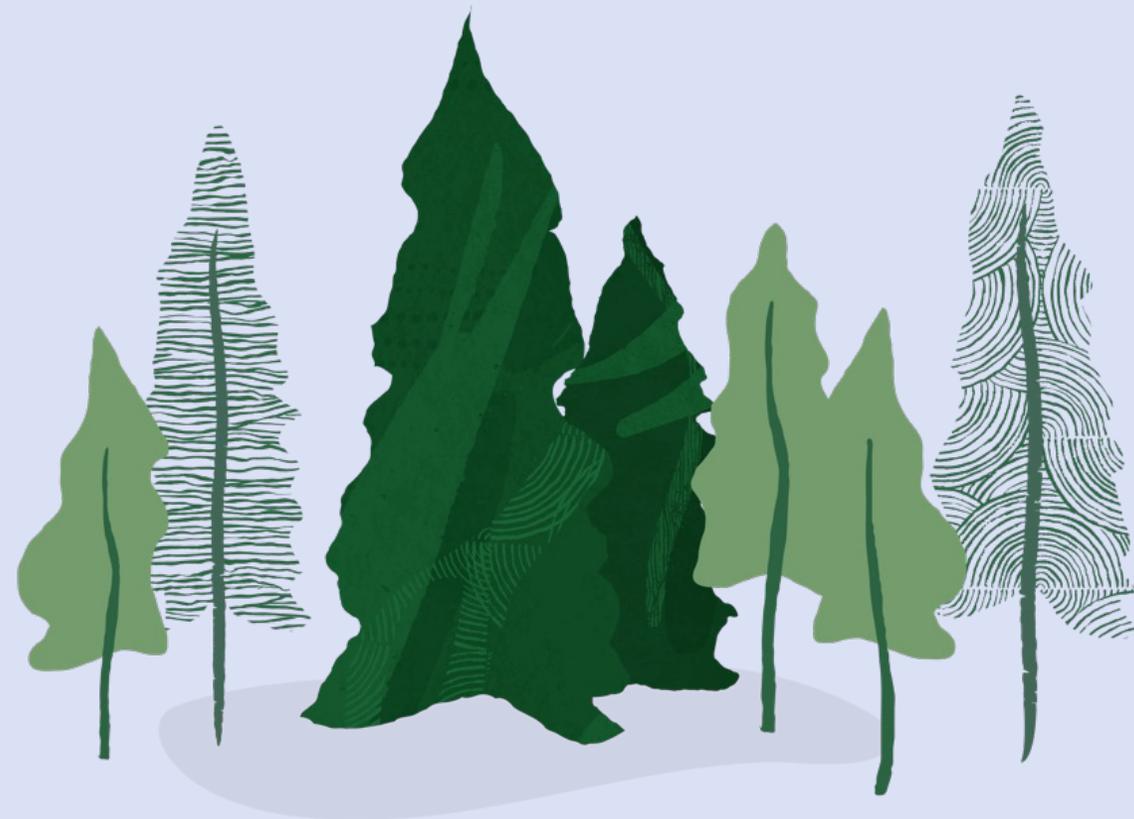


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Speakers



Lynda Elmer
Senior Director
North America Customer
Solutions Delivery



Richard Keeves
Principal Product Designer
UX Design & Research



David Siska
Vice President
Product Design &
Architecture

Safe harbor statement

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, timing, and pricing of any features or functionality described for Oracle's products may change and remains at the sole discretion of Oracle Corporation.

Today's Challenges with To Dos



Vision for To Do Management

Make it easier to **assign**
and **prioritize** To Dos

Make it easier to
resolve To Dos

H1 2024

H2 2024

H2 2023
H1 2024

Reduce the large
volumes of To Dos

Overview

1

Reduction

2

Resolution

3

**Assignment &
Prioritization**

4

Exit Poll

REDUCTION

RESOLUTION

Monitor

- To Do Type - To Do Monitor Algorithms and Batch Process to run the Algorithms
CCB 2.7: August 2018
- Auto-complete C&C-related To Do Entries
CCB 2.8: April 2021
- Complete To Do after X days
CCB 2.8: April 2021

Stop Re-creation

- To Do Entries for Bill Segments in Error
CCB 2.8: April 2021
- To Do Entries during the retry processes of Initial Measurement Data, Usage Transactions, Completion Events, Activities, Settlement Transactions, Device Management
MDM 2.4: April 2021

Maintain

- To Do Type - To Do Pre-Creation System Event
CCB 2.7.0.1: January 2019
- Allow other users to add Comments/User Log entry
CCB 2.7.0.3: September 2019
- To Do Entry Portal
CCB 2.8: April 2021

RESOLUTION

Metrics

- To Do Dashboard Portal
CCB 2.8: April 2021

ASSIGNMENT & PRIORITIZATION

Assignment

- To Do Management Portal
CCB 2.7.0.1: January 2019
- To Do Role assignment based on Access Group
CCB 2.8: April 2021
- Supervisors reopening
CCB 2.8: April 2021
- Improved user search for assigning To Do Entries
CCB 2.9: February 2022
- To Do Role assignment based on Premise CIS Division
CCB 2.9: February 2022

Prioritization

- Recalculate Priority for non-completed To Do Entries and adds a Log entry if the Priority was updated
CCB 2.7: August 2018
- Override To Do Entry Priority based on Bill Cycle Window closing
CCB 2.8: April 2021
- Add Characteristics on To Do Entries for Bill Cycle, Customer Class, and CIS Division
CCB 2.8: April 2021

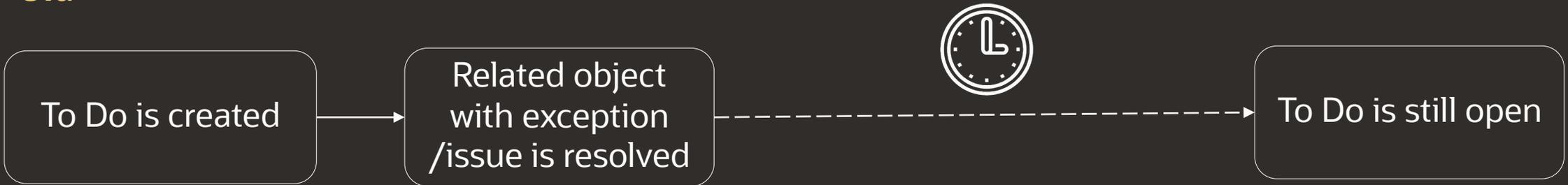
Reduction



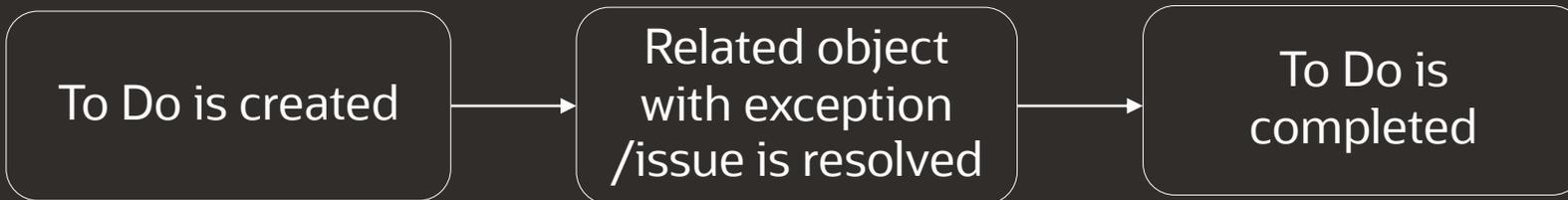
How might we reduce the volume of To Dos?

Monitor

Old



New

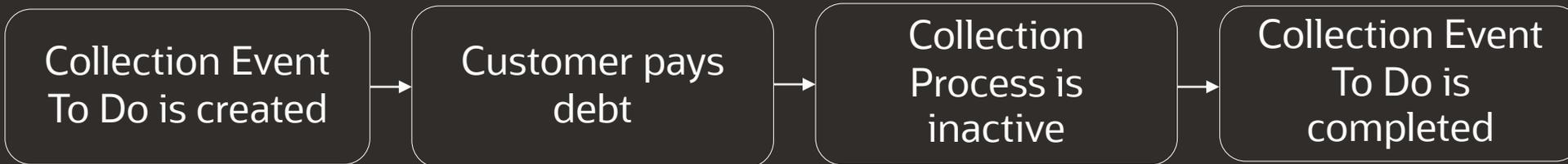


Credit & Collection To Do Monitor

Old

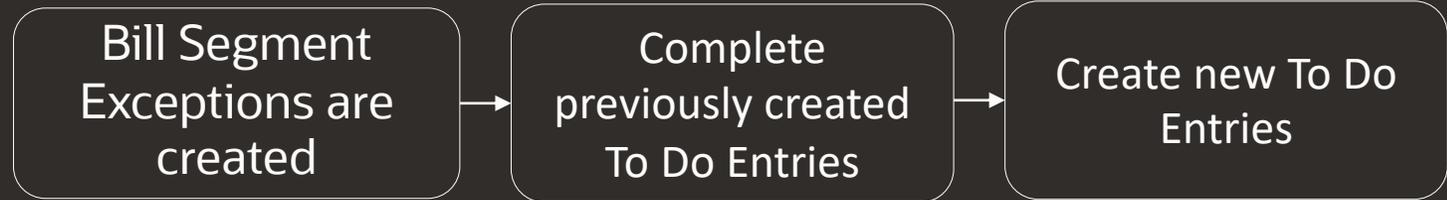


New

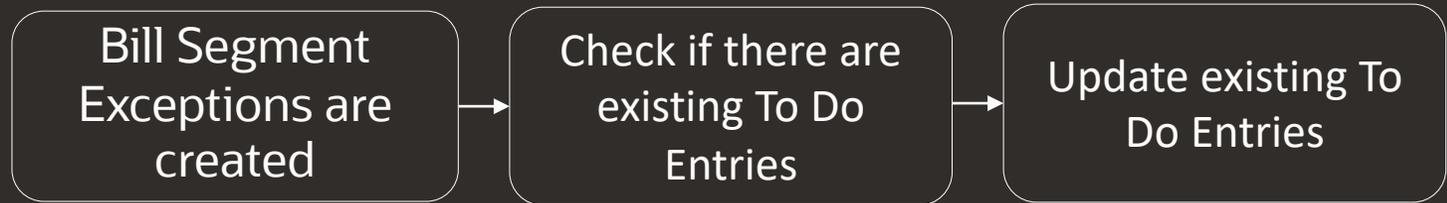


Stop Re-creation of Exceptions

Old



New



Resolution



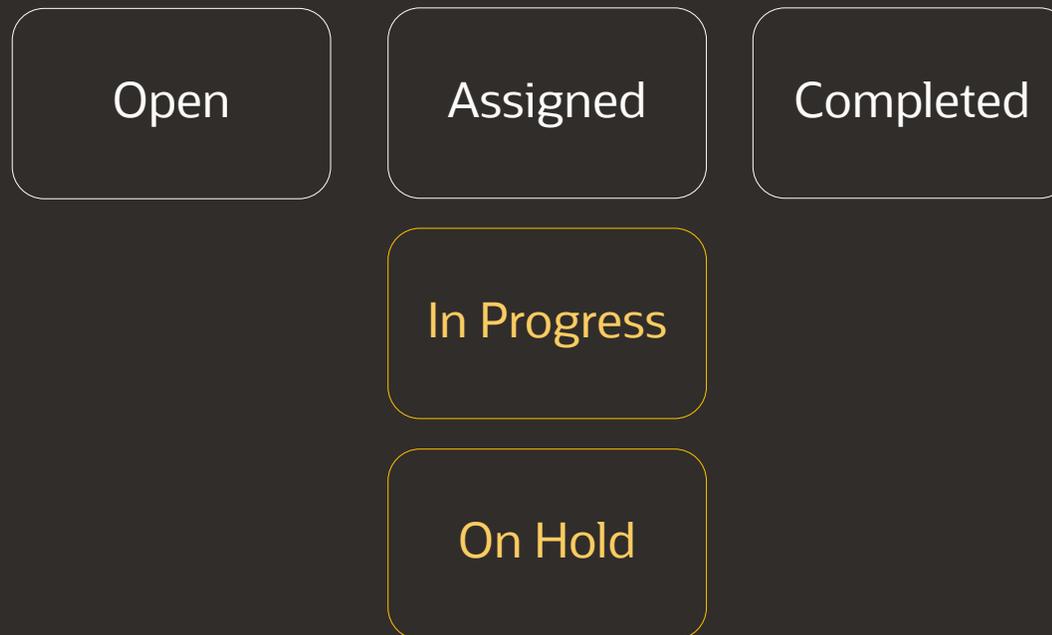
How might we resolve To Dos more efficiently?

To Do Status (Vision for the Future)

Current Statuses



Future Statuses



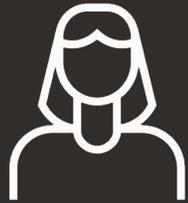
User Research Support

- **We need your help!**
- **Please volunteer to show us how you resolve To Dos**



Assignment and Prioritization

Oracle Redwood Design Process



Discovery

- Goals and Metrics
- User Research
- User Goals
- As-is State



Design & Validation

- Solution Sketching
- Prototyping
- User Testing and validation



Monitor Outcomes

Monitor and assess impact on the desired outcomes



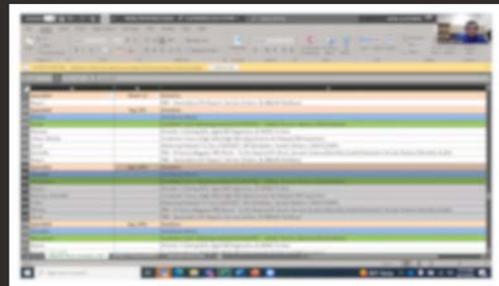
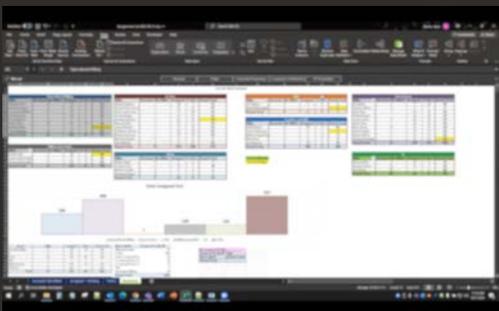
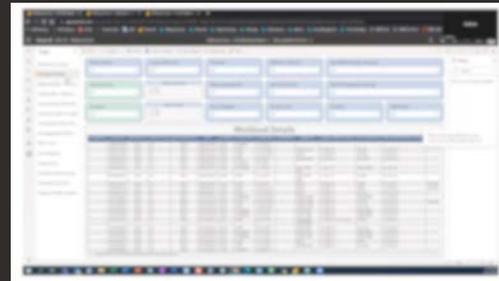
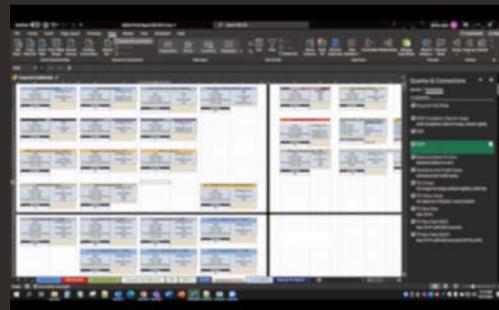
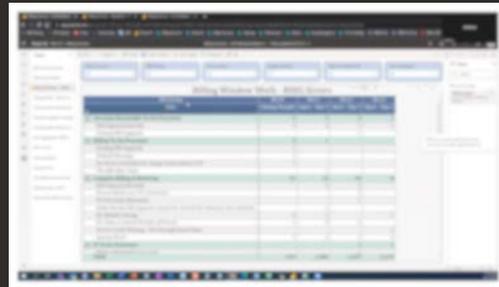
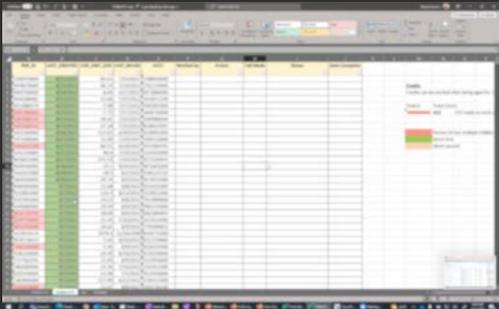
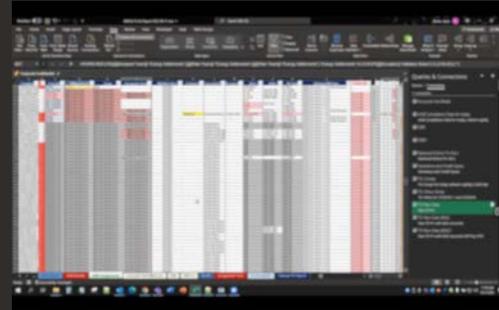
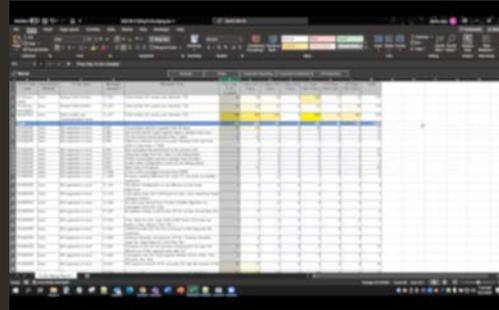
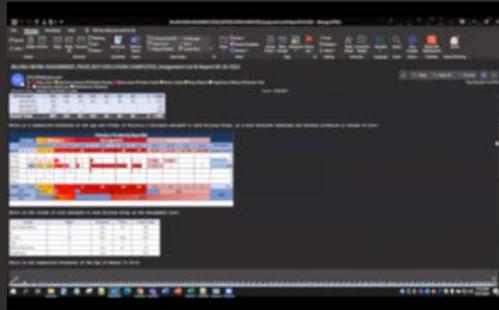
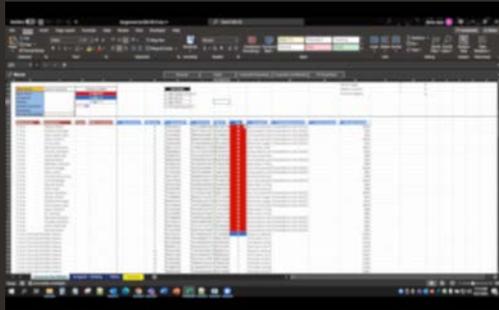


”We did try to assign To Dos in CC&B,
but we were finding it took quite a bit of
time to go in and do the assignment.”

Billing Supervisor

Regarding the existing system

Assigning and Prioritizing Outside of CC&B



How might we make it
faster to assign and
prioritize To Dos?



Work Assignment Screen Prototype

- To Do's are automatically assigned
- Improved Search and Filtering
- Simplified layout

Work Assignment Auto Assign

Search

5 results Assign Status ▾ More Actions ▾ Sort By ▾ Billing Metering Key Accounts Special Billing Customer Operations 🔍 📄

<input type="checkbox"/> Description ↕	Status ↕	Role ↕	Assigned To ↕	Creation Date ↕	Age (days) ↕	Bill Cycle ↕	Closing Date ↕	Edit
<input type="checkbox"/> Zero consumption	On-Hold	Billing	Monica Smith	11/01/2022	35	M01	11/06/2022	✎
<input type="checkbox"/> Measurement not found - Not...	On-Hold	Billing	Monica Smith	11/02/2022	25	M02	11/07/2022	✎
<input type="checkbox"/> Frequent Scalar MC No End...	In Progress	Billing	Monica Smith	11/02/2022	3	M02	11/07/2022	✎
<input type="checkbox"/> Awaiting Bill Determinants	Open	Billing		11/03/2022	3	M03	11/08/2022	✎
<input type="checkbox"/> Account not billed	Assigned	Billing	Monica Smith	11/03/2022	3	M03	11/08/2022	✎

Dashboard Work Assignment Roles Rules



Oracle's New Redwood Design System

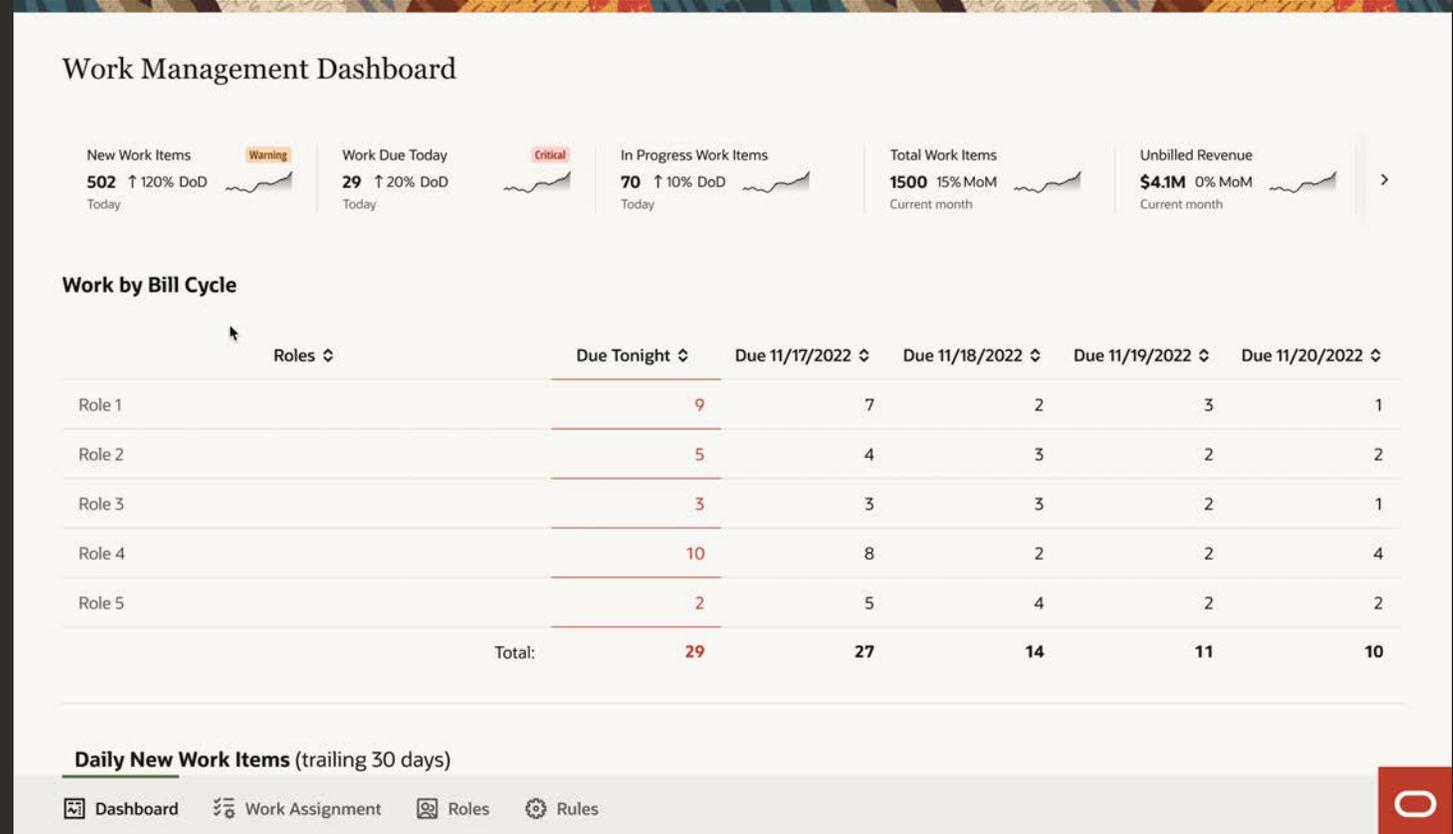
500+
Components

An extensive library of
components and assets



Dashboard Landing Page Prototype

- Designed for the Billing Supervisor
- Prioritizes the work the Billing Supervisor should take action on
- Summarizes key metrics



Rules Builder Prototype

- Easily build rules that drive the auto assignment

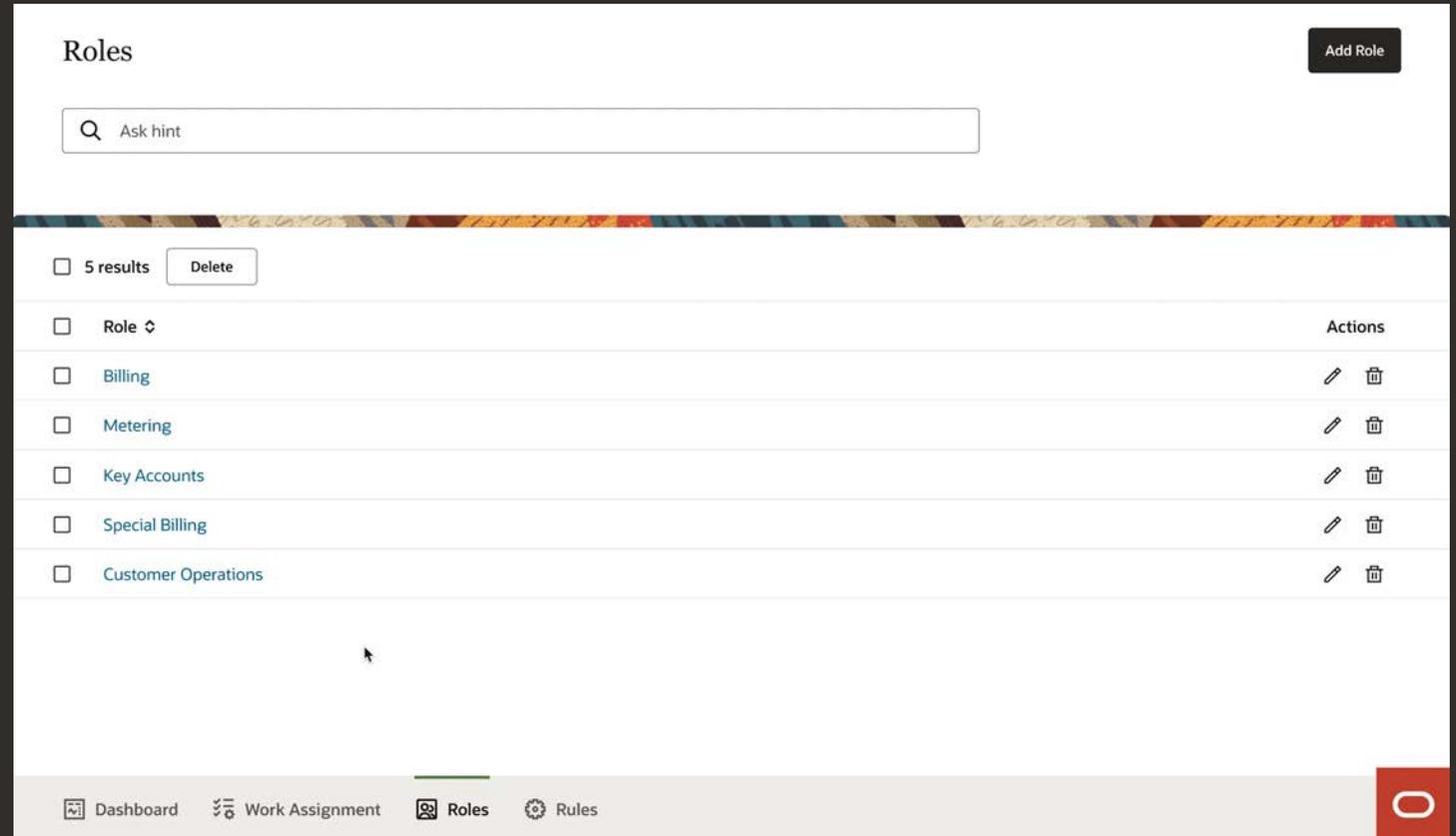
The screenshot displays the 'Rules' management interface. At the top right, there is an 'Add Rule' button. Below the title, a search bar is present. The main content area shows a summary of '5 results' with a 'Delete' button. A table lists five rules, each with a checkbox, a 'Run' button, and an edit icon. The table columns are 'Rule Name', 'Frequency', 'Last Executed', and 'Actions'. The footer contains navigation links for 'Dashboard', 'Work Assignment', 'Roles', and 'Rules', with the 'Rules' link being the active page.

<input type="checkbox"/>	Rule Name ↕	Frequency ↕	Last Executed ↕	Actions
<input type="checkbox"/>	Rule 1	Daily - 0:00	12/05/2022 0:00	<input type="button" value="Run"/>
<input type="checkbox"/>	Rule 2	Daily - 0:00	12/05/2022 0:00	<input type="button" value="Run"/>
<input type="checkbox"/>	Rule 3	Daily - 0:00	12/05/2022 0:00	<input type="button" value="Run"/>
<input type="checkbox"/>	Rule 4	Daily - 0:00	12/05/2022 0:00	<input type="button" value="Run"/>
<input type="checkbox"/>	Rule 5	Daily - 0:00	12/05/2022 0:00	<input type="button" value="Run"/>



Team Member Availability Prototype

- Allows a user to set work availability
- Factors into auto assignment



“Best concept I’ve seen so far to make it work because it is built right into the system”

Billing Supervisor

Regarding new Work Management concept

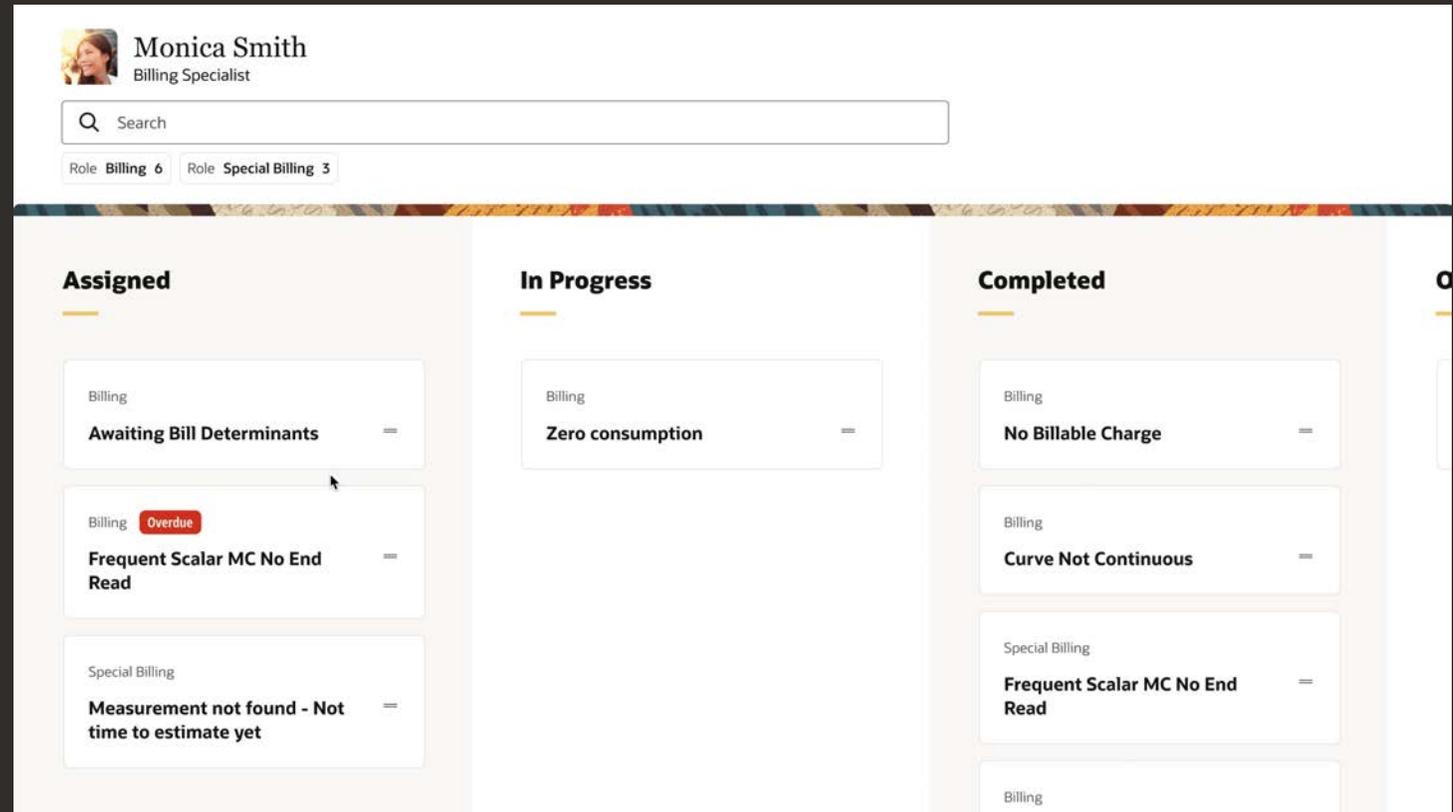
Targeting H1 2024 to launch Next Generation Work Management



Billing Specialist View – Kanban Board

Prototype

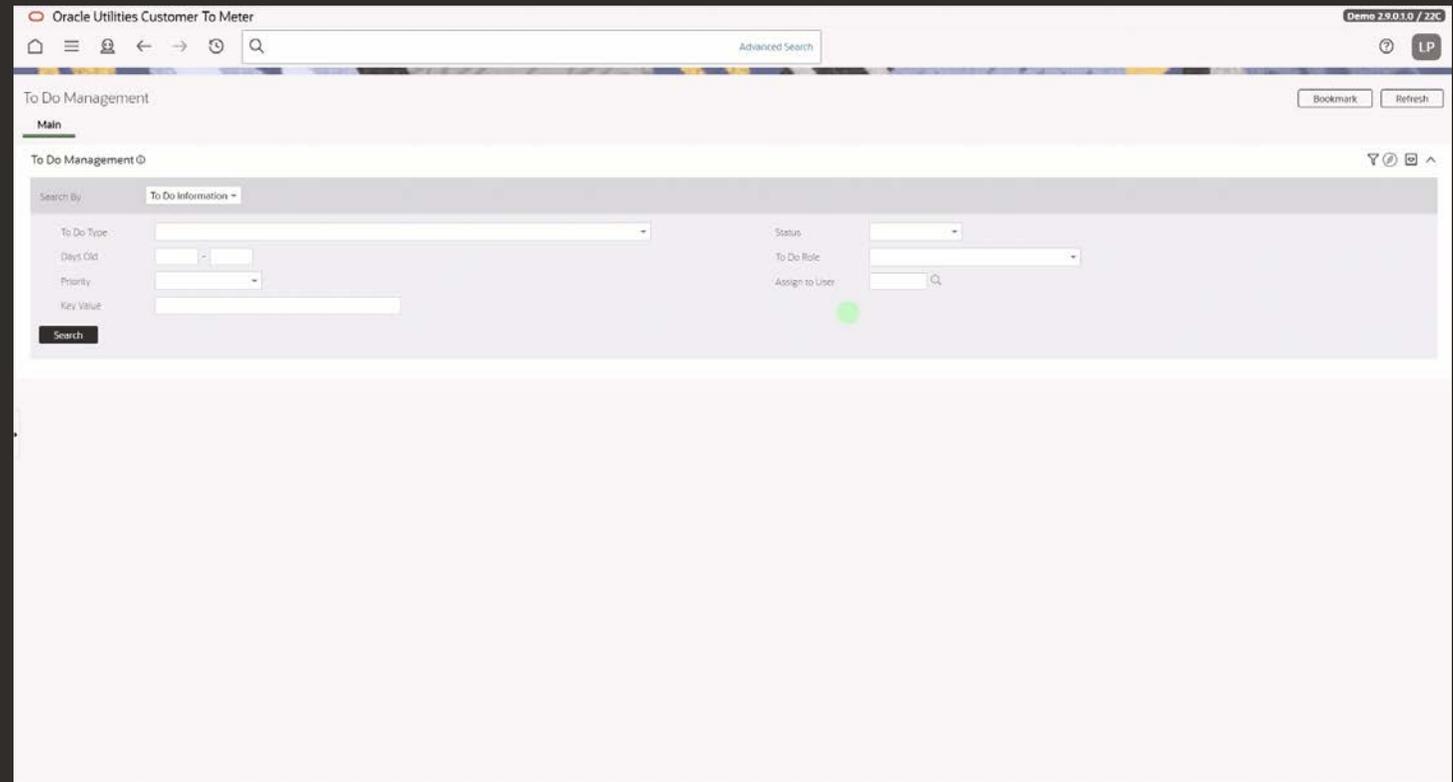
- Super clear what stage the work is in
- Drag and drop interface – Kanban Board



New To Do Management Portal - Available Today

CC&B 2.7.0.1 | C2M 2.7.0.3 | CCS 19A | MDM 2.3.0.2

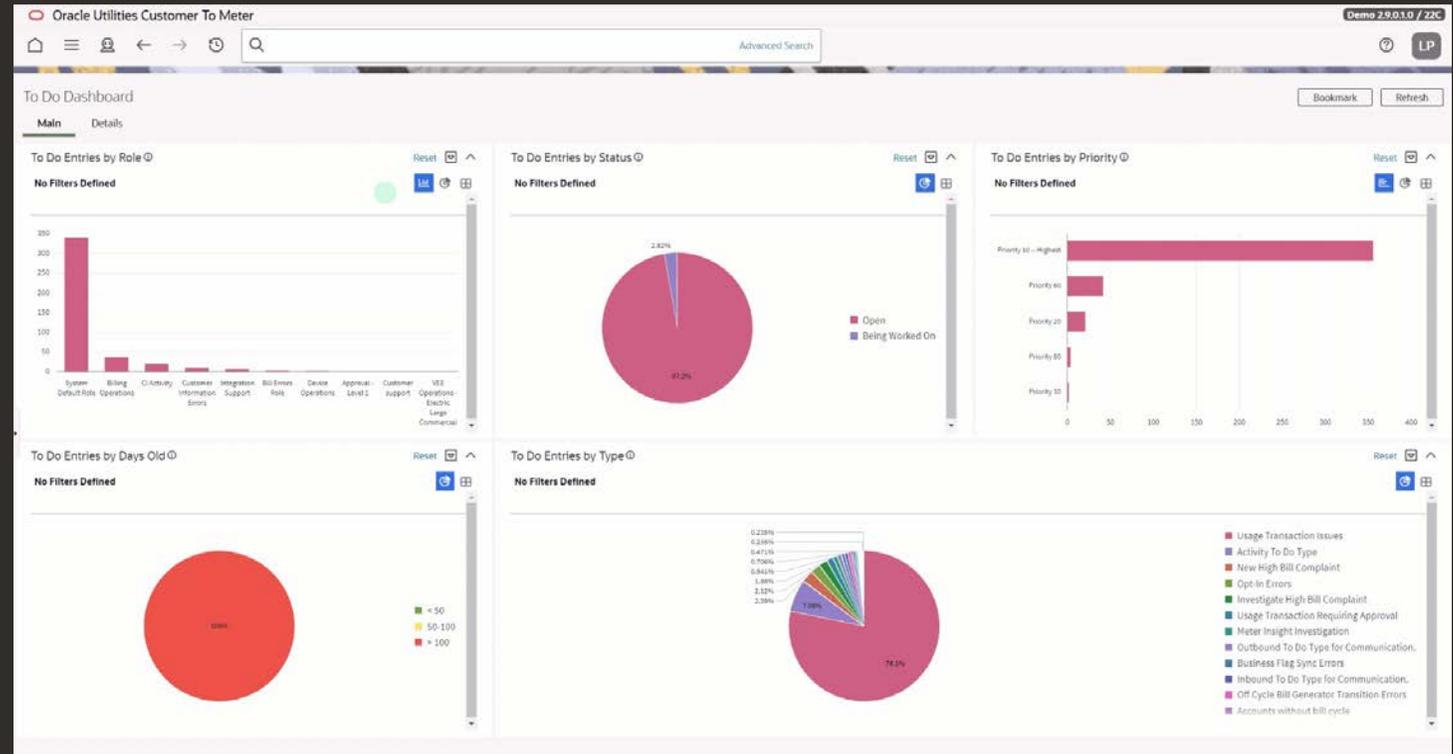
- Find To Dos more quickly
- See context & related To Dos in the same list
- Assign & action in bulk



New To Do Dashboard - Available Today

CC&B 2.8 | C2M 2.8 | CCS 21A | MDM 2.4

- Quick visual overview
- Flip to tabular view
- Drill in for detail



Exit Poll

Which feature are you most excited to see?

Thank you



What's Next?

2:10-3:00

SaaS Transformation Mindset - supporting your journey to the cloud

Join this session to learn more about the breakdown of roles and responsibilities, the guided learning paths available and what you should expect from your system integrators and project teams during implementation and after go-live.

Seaport F

Peer Panel: Innovation in affordability, community programs, and external partnerships

Yesterday's programs for assistance consisted of payment arrangements, budget billing, or perhaps a reduced rate. ...

Seaport GH

Oracle Ignite Kick Off: Demystifying Next Gen Tech

Wondering what our incubator team is up to? Want to talk about what's next on the analytics frontier? Join us for this product exploration session. You'll get the chance to pick 2 poster sessions to hear the latest from our top innovators and ask your questions

Seaport ABC

Play Edge Quiz Game to help us donate more trees!

Customer Transformation



Enterprise Optimization & Execution



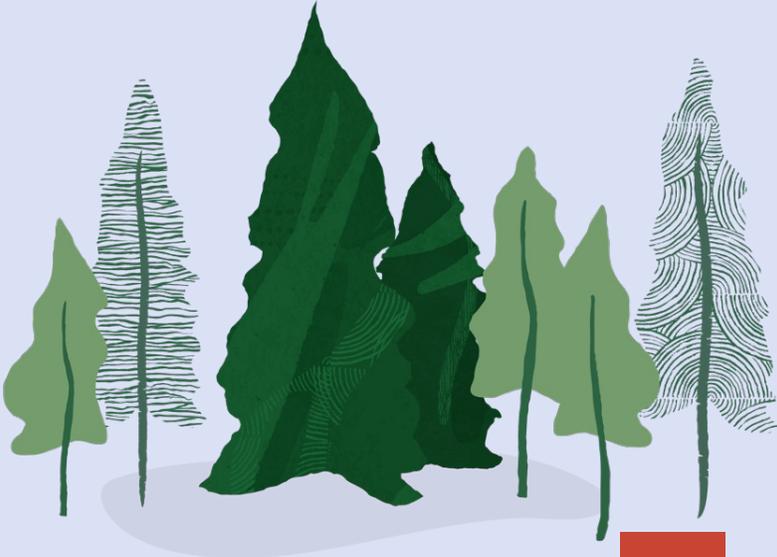
Grid Modernization



Opower Customer Engagement and Decarb



Technology & Cloud Transformation



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