# BDEx - User Guide

Release 4 — Last update: 17 February 2021

Basis Technologies

# Table of Contents

# BDEx Overview

BDEx is a powerful tool for displaying all of the relevant information for a customer in a single view, and providing the tools to quickly and effectively perform actions on these tasks.

This document provides an overview on how to use BDEx.

# Accessing BDEx

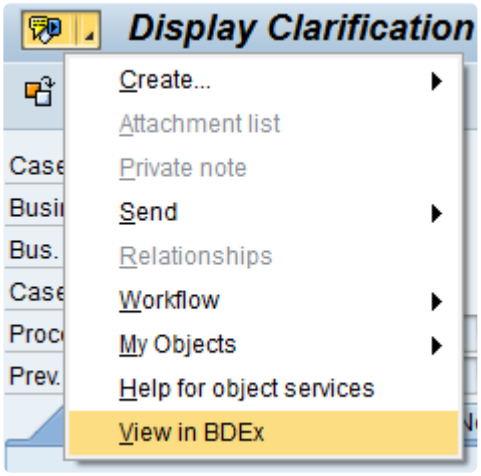
There are currently 4 options enabling access to BDEx.

These will be described in detail within this section.

# Menu Button

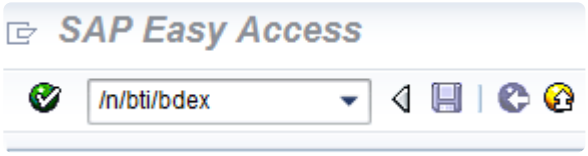
BDEx is designed to be accessible from almost any screen within SAP, using a standard button found towards the top left hand corner of the screen. This button will be present whenever there is customer-specific information being displayed, such as an installation (transaction EL31), a BPEM case (transaction EMMACL) and similar.

When this button is clicked, a menu will appear, including the option “View in BDEx”. Selecting this option will open the BDEx transaction for that customer.



# Transaction Code

BDEx is also accessible via the transaction code /BTI/BDEx.
Note that whenever the BDEx transaction code is used, it should be preceded by /o or /n.




If BDEx is accessed by its transaction code, the first screen that will be visible is the customer identify screen, so that the correct customer can be selected. See section ‘Identify’ for more information on using the identify screen.

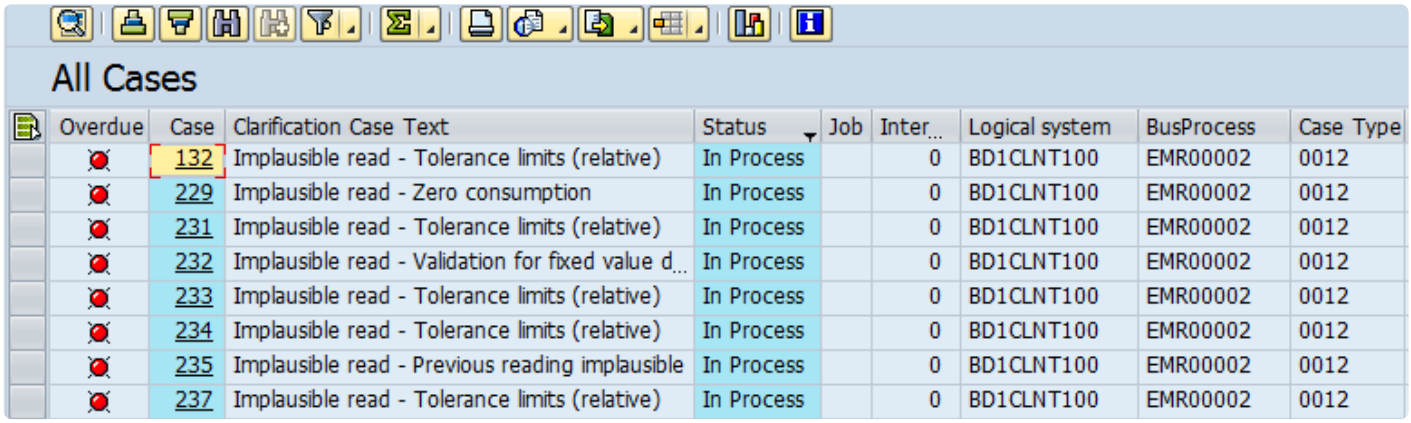
# CRM Interaction Centre Link

BDEx may also be accessible via the CRM web-IC.

# BPEM workbench

The option is available to launch BDEx directly from the BPEM case within the EMMA workbench or EMMACLS view.

If this option is configured BDEx can be loaded by double clicking a BPEM case.

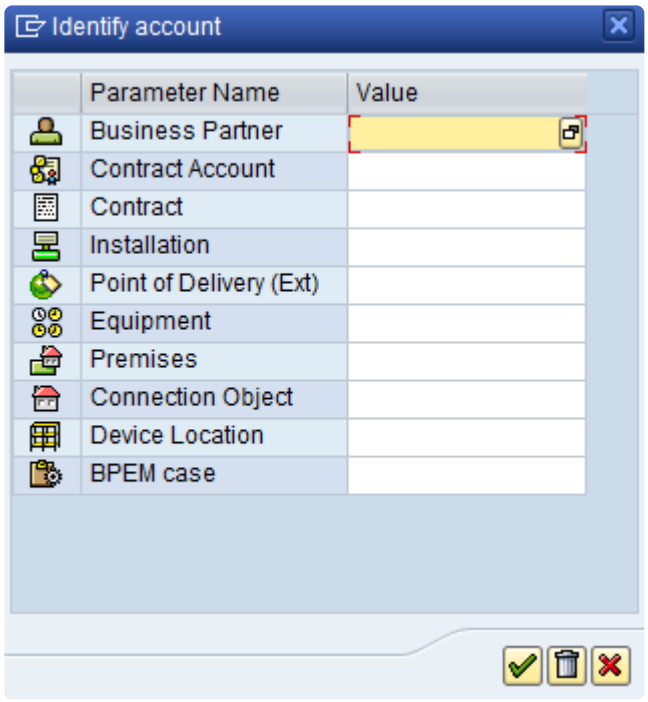


All Cases

| Overdue | Case | Clarification Case Text | Status | Job | Inter... | Logical system | BusProcess | Case Type |
|---|---|---|---|---|---|---|---|---|
| | 132 | Implausible read - Tolerance limits (relative) | In Process | | 0 | BD1CLNT100 | EMR00002 | 0012 |
| | 229 | Implausible read - Zero consumption | In Process | | 0 | BD1CLNT100 | EMR00002 | 0012 |
| | 231 | Implausible read - Tolerance limits (relative) | In Process | | 0 | BD1CLNT100 | EMR00002 | 0012 |
| | 232 | Implausible read - Validation for fixed value d... | In Process | | 0 | BD1CLNT100 | EMR00002 | 0012 |
| | 233 | Implausible read - Tolerance limits (relative) | In Process | | 0 | BD1CLNT100 | EMR00002 | 0012 |
| | 234 | Implausible read - Tolerance limits (relative) | In Process | | 0 | BD1CLNT100 | EMR00002 | 0012 |
| | 235 | Implausible read - Previous reading implausible | In Process | | 0 | BD1CLNT100 | EMR00002 | 0012 |
| | 237 | Implausible read - Tolerance limits (relative) | In Process | | 0 | BD1CLNT100 | EMR00002 | 0012 |

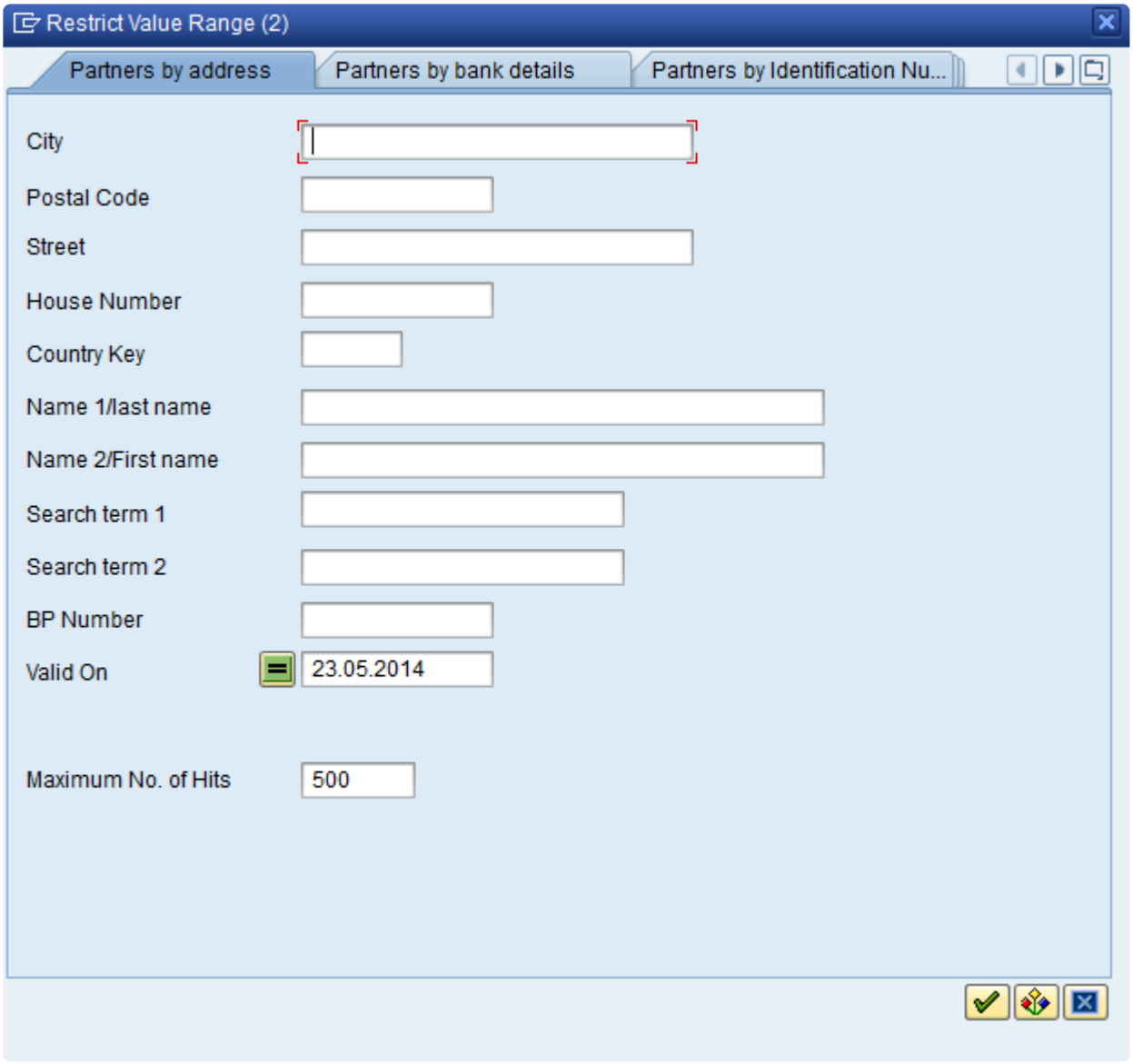
# Identify Customer

When BDEx is run without a customer pre-loaded, or when the search button is pressed ( or CTRL+F), the identify window will be displayed so that a customer can be selected manually.



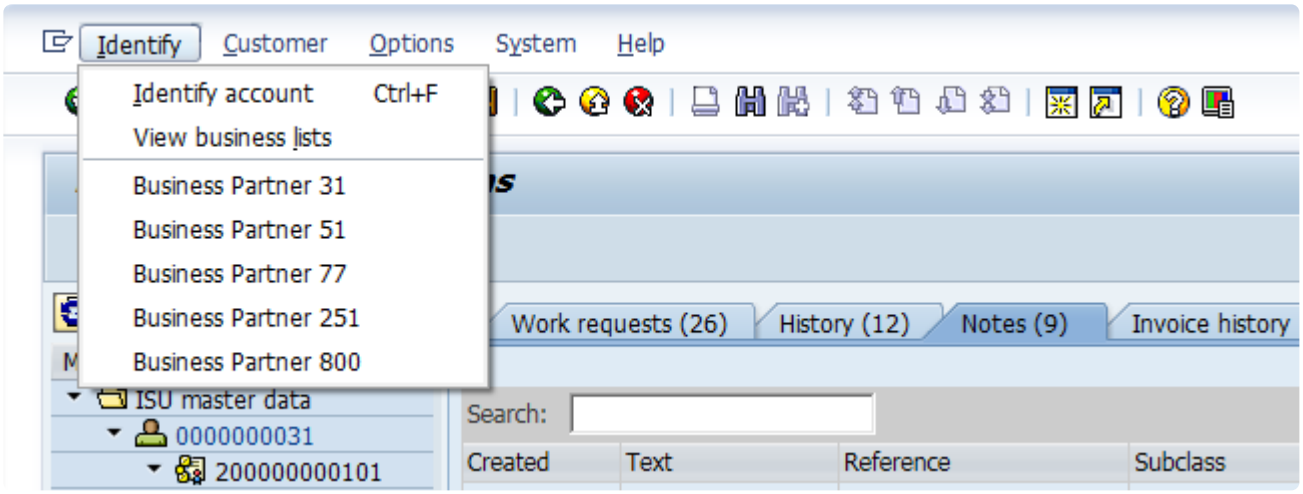

Enter a value in any of the available fields to load BDEx for that parameter. Starting to type in any field will automatically overwrite the existing contents, to save time spent deleting previous values.

F4 help is available for each parameter, e.g. the following screen appears when the F4 help is called for Business Partner:




Whilst in the BDEx screen an option is available to identify the customer from the toolbar menu.

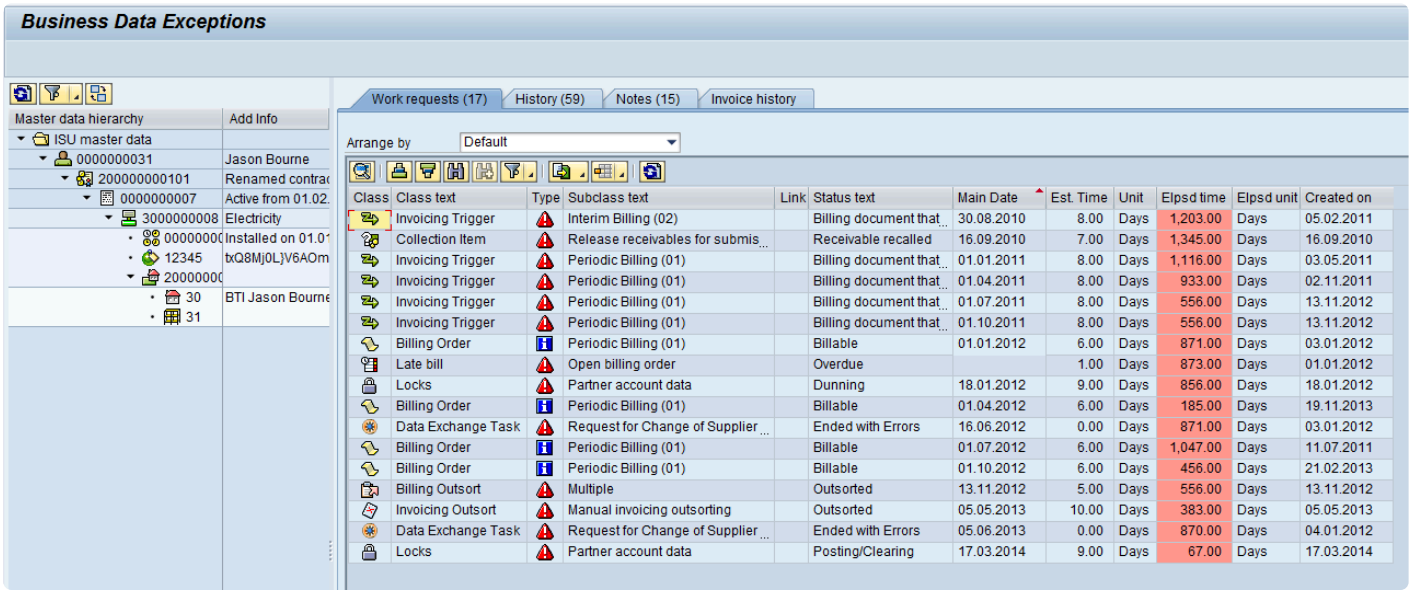
The last five objects viewed will be displayed here to enable quick and simple access to re-load previously viewed data.




From this menu previous accounts can be loaded or the identify window can be displayed by selecting the ‘Identify account’ option.

# BDEx Layout

Here is a screenshot of the main BDEx screen.




| Class | Class text | Type | Subclass text | Link | Status text | Main Date | Est. Time | Unit | Elpsd time | Elpsd unit | Created on |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Invoicing Trigger | | Interim Billing (02) | | Billing document that... | 30.08.2010 | 8.00 | Days | 1,203.00 | Days | 05.02.2011 |
| | Collection Item | | Release receivables for submis... | | Receivable recalled | 16.09.2010 | 7.00 | Days | 1,345.00 | Days | 16.09.2010 |
| | Invoicing Trigger | | Periodic Billing (01) | | Billing document that... | 01.01.2011 | 8.00 | Days | 1,116.00 | Days | 03.05.2011 |
| | Invoicing Trigger | | Periodic Billing (01) | | Billing document that... | 01.04.2011 | 8.00 | Days | 933.00 | Days | 02.11.2011 |
| | Invoicing Trigger | | Periodic Billing (01) | | Billing document that... | 01.07.2011 | 8.00 | Days | 556.00 | Days | 13.11.2012 |
| | Invoicing Trigger | | Periodic Billing (01) | | Billing document that... | 01.10.2011 | 8.00 | Days | 556.00 | Days | 13.11.2012 |
| | Billing Order | | Periodic Billing (01) | | Billable | 01.01.2012 | 6.00 | Days | 871.00 | Days | 03.01.2012 |
| | Late bill | | Open billing order | | Overdue | | 1.00 | Days | 873.00 | Days | 01.01.2012 |
| | Locks | | Partner account data | | Dunning | 18.01.2012 | 9.00 | Days | 856.00 | Days | 18.01.2012 |
| | Billing Order | | Periodic Billing (01) | | Billable | 01.04.2012 | 6.00 | Days | 185.00 | Days | 19.11.2013 |
| | Data Exchange Task | | Request for Change of Supplier ... | | Ended with Errors | 16.06.2012 | 0.00 | Days | 871.00 | Days | 03.01.2012 |
| | Billing Order | | Periodic Billing (01) | | Billable | 01.07.2012 | 6.00 | Days | 1,047.00 | Days | 11.07.2011 |
| | Billing Order | | Periodic Billing (01) | | Billable | 01.10.2012 | 6.00 | Days | 456.00 | Days | 21.02.2013 |
| | Billing Outsort | | Multiple | | Outsorted | 13.11.2012 | 5.00 | Days | 556.00 | Days | 13.11.2012 |
| | Invoicing Outsort | | Manual invoicing outsorting | | Outsorted | 05.05.2013 | 10.00 | Days | 383.00 | Days | 05.05.2013 |
| | Data Exchange Task | | Request for Change of Supplier ... | | Ended with Errors | 05.06.2013 | 0.00 | Days | 870.00 | Days | 04.01.2012 |
| | Locks | | Partner account data | | Posting/Clearing | 17.03.2014 | 9.00 | Days | 67.00 | Days | 17.03.2014 |

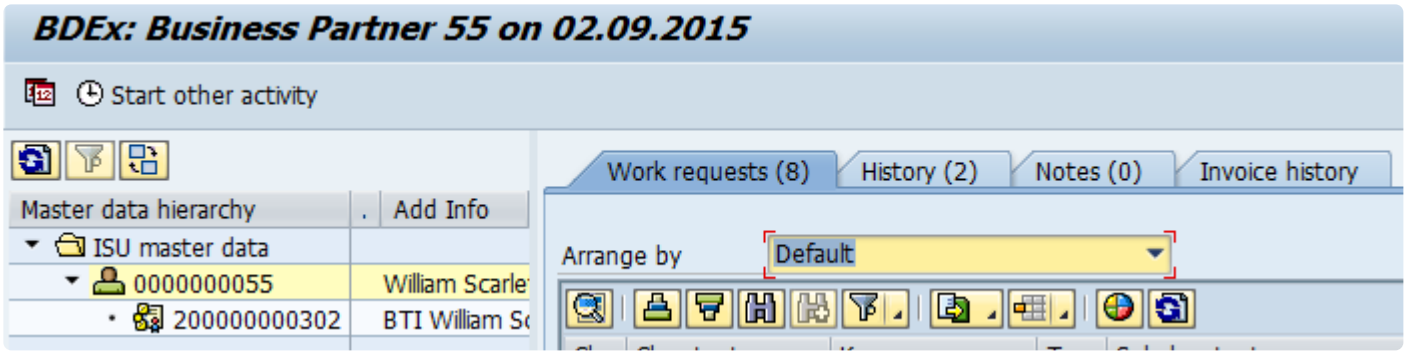
As shown, the screen is split into two overall parts, the customer master data on the left hand side, and the transaction data on the right hand side.

# BDEx Header

BDEx can be launched using various customer data, in some instances the information retrieved maybe different depending upon which context has been used.

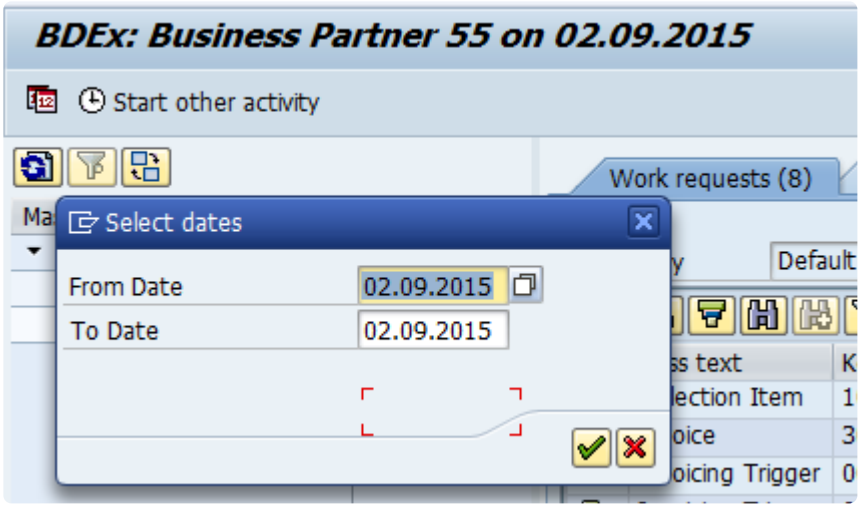
For example loading BDEx using a Business Partner would provide the most comprehensive view of the customer data including the full hierarchy of the master data and all work requests relating to any of the master data items for this Business Partner. However, a contract specific context would filter the results to only display the relevant transactions and work items relating to the contract.

The header title displays the context item used to load the customer data and the date to determine the period to retrieve the master data items and work requests.



# Change date range

The date range can be amended to extend or restrict the transaction data displayed within BDEx.

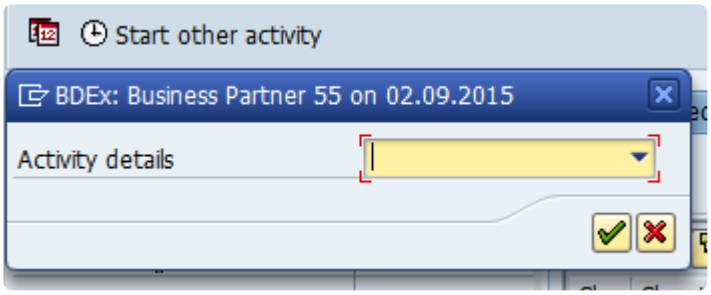



The date range is also determined automatically for some master data objects e.g. Moved-Out contracts or work requests e.g. BPEM cases.

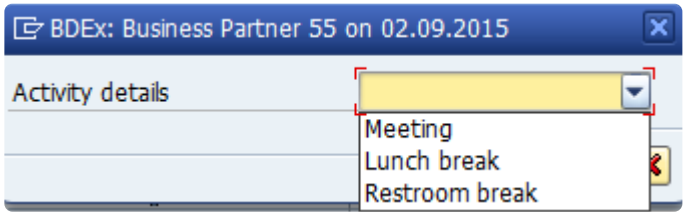
# Start other activity

Logging can be recorded for BDEx activities. This option is controlled by the profile and can be activated or deactivated for different user groups.

Other activities can also be recorded in the activity log by selecting the Start other activity button.



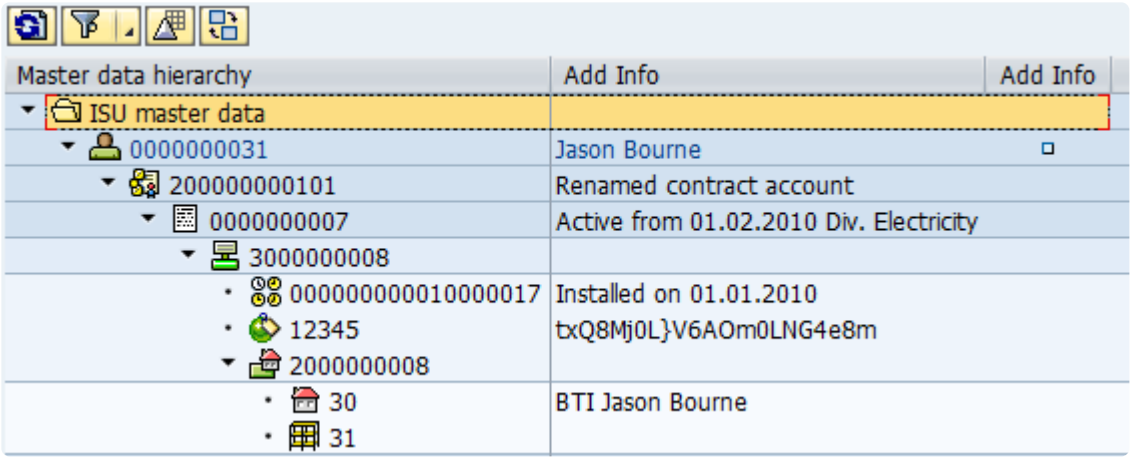

Once the button is pressed the log starts to record time and a drop down list is presented to allow the user to select the activity the time should be recorded against.




Once other activity is started the button changes to End ‘activity name’. The activity can be ended either by clicking the end button or commencing actions against the customer (this ends the other activity automatically).

# Master Data

The master data section of the screen provides a list of the current master data objects for that customer. It shows the dependencies between objects (such as multiple contracts on a single contract account), plus a column on the right shows additional information such as start or end date.

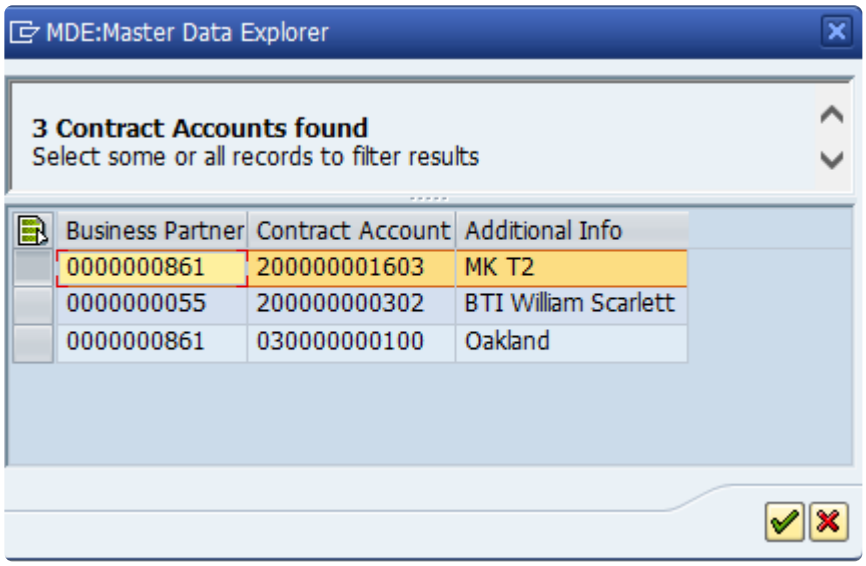



There are also several menu items available in the master data section. Their usage is as follows:

| Button | Name | Usage |
|---|---|---|
| | Refresh | Refreshes all of the data displayed in BDEx |
| | Maintain Filter | When BDEx is loaded for a large customer type and the master data has been filtered according to the preferences selected the maintain filter button will be present. This allows the user to switch between Contract Accounts or remove the filters. It also displays the list of contract accounts for the context used to launch BDEx and which is currently selected. |
| | Switch Context | Select a master data item and press this button to reload BDEx for the selected item. Useful for changing from a customer-centric view to an installation view. |
| | Activate MD Selection | Master data items can be selected or deselected to filter the work requests and transaction data displayed within the Customer Centric Hub dependent upon which data items are selected. |

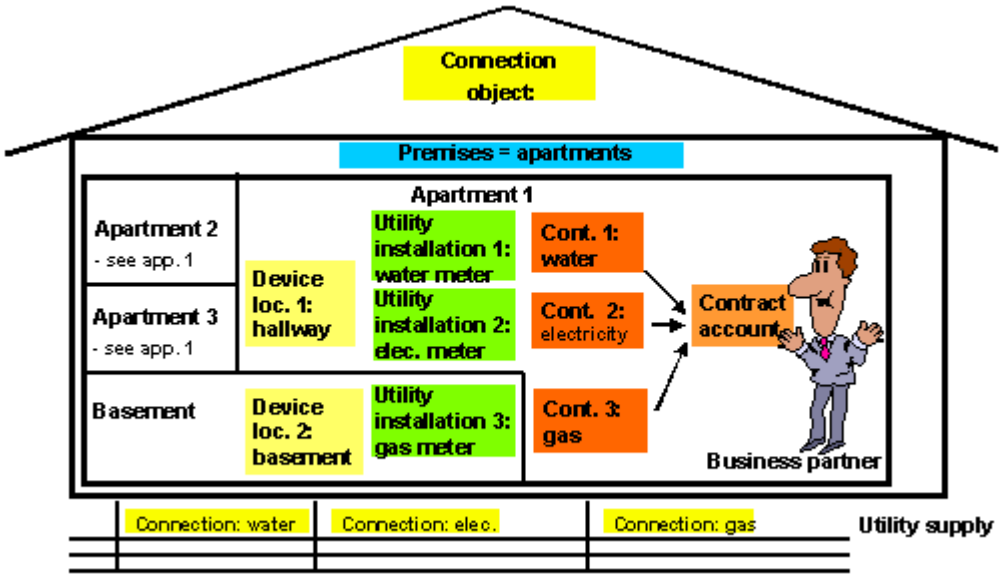
If BDEx is launched for a customer with a large number of contract accounts (the amount is controlled within configuration – defaulted to 3) a pop up box will be displayed providing the option to select which contract

account should be used to launch the customer data.



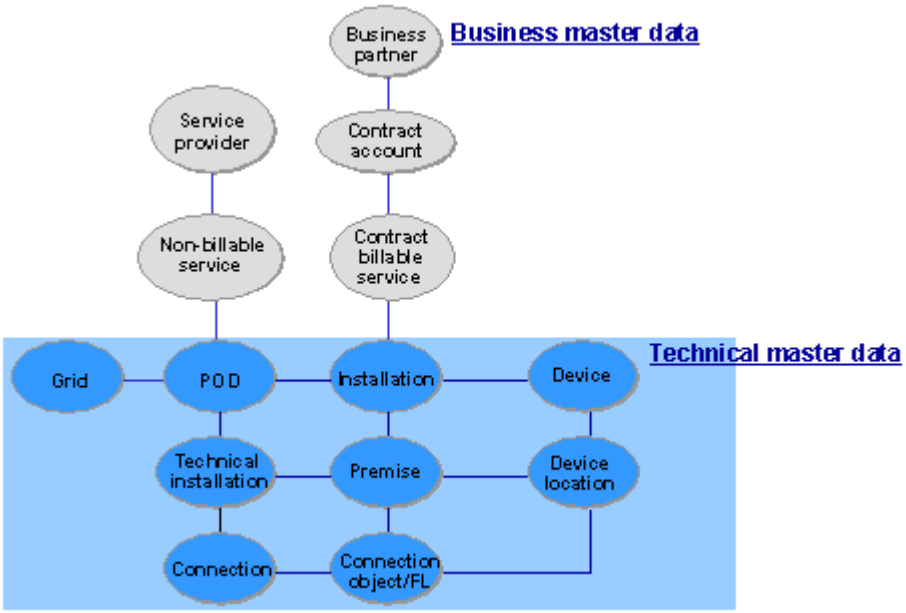

A default contract account will be selected based upon the primary object of the item used to load BDEx i.e. if launching BDEx using a BPEM the contract account directly relating to the primary object from the BPEM case will be used for the default.

# Master Data Overview




The IS-U master data model can be categorized in to two main groups

Business Data: Any master data that is used for billing a customer for the services provided is grouped under Business data. For e.g., a business partner who is a person or an organization.
Technical Data: Any master data that is used for actually providing the services are grouped under Technical Data. For e.g., a device or a meter that is installed in a customer location.




Business Data Defined

**Business Partner:** A business partner could be a person, an organization, a future customer, a contact

person or even an installer who is licensed to provide the utilities services on behalf of the utility company. In most cases, it is easier to correlate the business partner with a human being with whom the utility business can conduct business. In case of an organization, it is imperative that some human is doing business with the utility on behalf of the organization.

**Contract:** A contract is the legal agreement that the business partner has entered with the utility for a particular service. For e.g., a utility may provide electricity, gas and water services. Usually a contract is created in the system for each of these services so that the customer can be billed appropriately.

**Contract Account:** A contract account is a logical way of grouping various contracts. The contract account is used for maintaining the payment, dunning and collection rules that are common to a group of contracts. It is through the contract account, the business partner is linked to the contracts. Multiple contracts can be grouped under a single contract account however, a contract can be linked only to one contract account. Also, multiple contract accounts can be linked to a business partner, however a contract account can only be linked to one business partner. In case of big commercial establishments or utility paid apartment complexes, the contract accounts may be used to group multiple suites or apartments under a single business partner, so that the payment responsibility lies with the business partner.

Technical data Defined

**Device:** This refers to the physical device. It could be an electric meter, gas meter, regulator, sensor etc. Every device has a unique serial number and in SAP a utility device is a nothing but a equipment with a serial number. Every utility device will have a material number created in SAP as well. Usually each service (electric, gas, water) etc will have at the least one device. It is through the device reads that the utility can measure the consumption of the service.

**Device Location:** This refers to the physical location of the device. More than one device can be in a device location or each device can be its own location. For e.g., in a house, the gas meter is outside the house but the water meter is inside the house. So these would be treated as two device locations that have two individual devices installed. Device locations are handy to capture the co-ordinates so that when there is a maintenance activity to be performed on the device, it is easy for the field personnel to locate the device.

**Connection Object:** This refers to the physical location where the various services are provided. It is the service address and usually the address of the house but in case of apartment complex could be different than the address of the apartment that actually consumes the service. Device locations (discussed above) take the address of the connection object with additional qualifiers to pin point their location. For e.g., in one house,= with two device locations, the address of these locations will still be the overall house address but the additional qualifier would be basement, hallway etc. In SAP, the connection object is nothing but a plant maintenance functional location object.

**Premise:** This refers to the spatial unit or the enclosed structure to which the utility services have to be rendered. It is attached to the connection object and takes the address of the connection object but the premise also has other attributes attached to it. For e.g., in case of apartment complexes, you can attach

the owner of the complex to the premise and when the premise is empty and if the services are still consumed, the apartment owner will be billed. The premise can also hold additional information about the spatial unit like if it's rental property, how many occupants etc. Note that this may sound like a duplicate of connection object, but there are some differences, because connection object is all about location data where premise is additional information about the actual structure and space within.

**Installation:** It is at the installation level various billing schema, rate tariffs and billing procedures are attached for the services provided. The installation groups various devices based on registers etc so that specific billing values like rate category can be maintained for the services. Also, every installation is attached to the premise so that actual supply point can be linked with the site where the services are provided. Note: It is a one to one relationship between installation and contract.

**Point of Delivery:** This is a globally identified unique service point where a utility service is provided. In a deregulated market, there are multiple service providers providing a customer different services. For e.g,, a utility company will be providing the actual electricity and any associated infrastructure around it whereas another provider will be able to provide billing, customer service and other related services. So, in a deregulated market, it becomes important to uniquely identify service point and it is done using the point of delivery data object. There is a 1:1 relationship between point of delivery and installation.

**Device Category:** This groups the various devices in to different categories based on the technical characteristics. This enables us to maintain the data that is common for a group of devices, there by grouping them in a logical way. Some examples of device categories are Meter, Transformer, Pressure regulator etc.

This summarizes the key master data objects that make up the IS-U data model. There are other data objects like Technical Installation, Connection, Grid and Services that are used for augmenting these key data objects. More information can be obtained here: SAP Library: Master Data

# Transactional Data

Transaction data is displayed in different tabs on the right hand side of the BDEx screen.

These tabs include Work requests, History, Notes, plus a number of solution specific tabs such as invoicing history for Utilities.

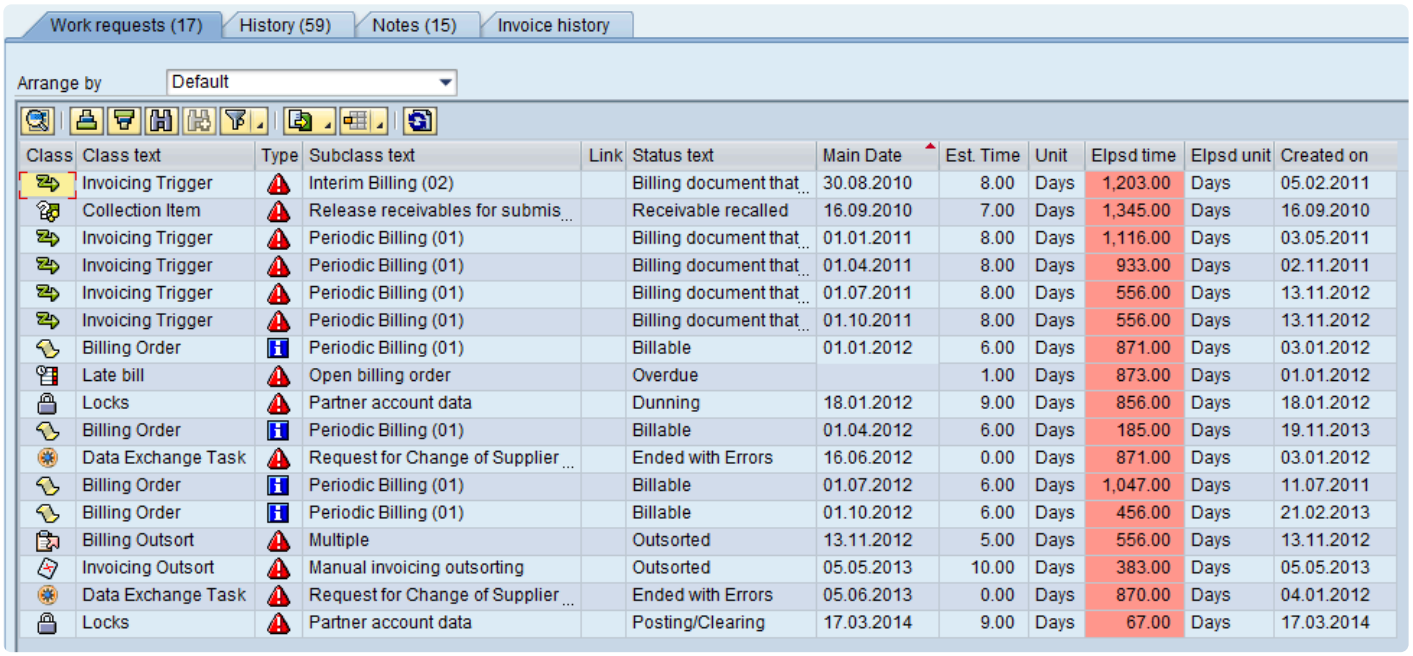
Tabs can be enabled and disabled for different users, so these might not all be visible for everyone.

# Work Requests

This tab displays all active work requests, such as outstanding issues or active business processes for the customer and can be arranged in a number of ways.

The full list of work request types and there descriptions are detailed here:

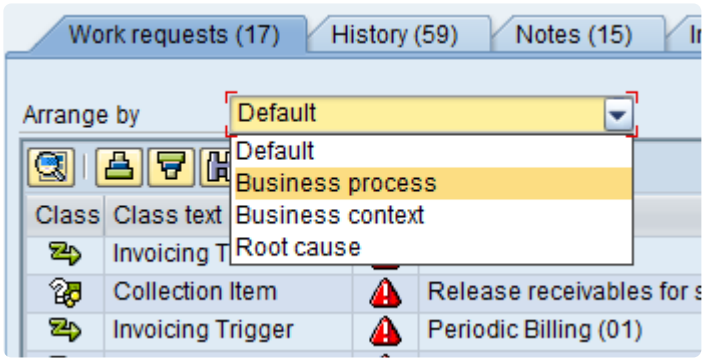
Work Request Types




| Class | Class text | Type | Subclass text | Link | Status text | Main Date | Est. Time | Unit | Elpsd time | Elpsd unit | Created on |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Invoicing Trigger | | Interim Billing (02) | | Billing document that... | 30.08.2010 | 8.00 | Days | 1,203.00 | Days | 05.02.2011 |
| | Collection Item | | Release receivables for submis... | | Receivable recalled | 16.09.2010 | 7.00 | Days | 1,345.00 | Days | 16.09.2010 |
| | Invoicing Trigger | | Periodic Billing (01) | | Billing document that... | 01.01.2011 | 8.00 | Days | 1,116.00 | Days | 03.05.2011 |
| | Invoicing Trigger | | Periodic Billing (01) | | Billing document that... | 01.04.2011 | 8.00 | Days | 933.00 | Days | 02.11.2011 |
| | Invoicing Trigger | | Periodic Billing (01) | | Billing document that... | 01.07.2011 | 8.00 | Days | 556.00 | Days | 13.11.2012 |
| | Invoicing Trigger | | Periodic Billing (01) | | Billing document that... | 01.10.2011 | 8.00 | Days | 556.00 | Days | 13.11.2012 |
| | Billing Order | | Periodic Billing (01) | | Billable | 01.01.2012 | 6.00 | Days | 871.00 | Days | 03.01.2012 |
| | Late bill | | Open billing order | | Overdue | | 1.00 | Days | 873.00 | Days | 01.01.2012 |
| | Locks | | Partner account data | | Dunning | 18.01.2012 | 9.00 | Days | 856.00 | Days | 18.01.2012 |
| | Billing Order | | Periodic Billing (01) | | Billable | 01.04.2012 | 6.00 | Days | 185.00 | Days | 19.11.2013 |
| | Data Exchange Task | | Request for Change of Supplier ... | | Ended with Errors | 16.06.2012 | 0.00 | Days | 871.00 | Days | 03.01.2012 |
| | Billing Order | | Periodic Billing (01) | | Billable | 01.07.2012 | 6.00 | Days | 1,047.00 | Days | 11.07.2011 |
| | Billing Order | | Periodic Billing (01) | | Billable | 01.10.2012 | 6.00 | Days | 456.00 | Days | 21.02.2013 |
| | Billing Outsort | | Multiple | | Outsorted | 13.11.2012 | 5.00 | Days | 556.00 | Days | 13.11.2012 |
| | Invoicing Outsort | | Manual invoicing outsorting | | Outsorted | 05.05.2013 | 10.00 | Days | 383.00 | Days | 05.05.2013 |
| | Data Exchange Task | | Request for Change of Supplier ... | | Ended with Errors | 05.06.2013 | 0.00 | Days | 870.00 | Days | 04.01.2012 |
| | Locks | | Partner account data | | Posting/Clearing | 17.03.2014 | 9.00 | Days | 67.00 | Days | 17.03.2014 |

The ‘Arrange by’ menu is used to determine how the list of work requests should be displayed.

By default, all work requests are displayed in a list, though they can be split by business process (e.g. Plausibility, Meter exchange), business context (e.g. No bill received, High bill complaint), or by root cause, if the root cause can be determined.




There are a number of menu items available in the default view.

Their use is as follows:

| Button | Name | Usage |
|---|---|---|
|  | Details | Shows all details for the selected item including hidden fields in a pop up window. |
|  | Sort ascending/descending | Sorts the selected column(s). |
|  | Find/Find next | Find a value in the list of work requests |
|  | Filter | Filters the list by one or more criteria. Filters can be cleared using the drop-down menu on the right hand side of this button. |
|  | Export | Export the list of work requests to an external file such as an Excel spreadsheet. |
|  | Layout | Sets the display preferences for the list, including displayed/hidden fields and default sort order. Layouts can be saved as a default. Use the drop-down menu on the right hand side of this button to load and maintain saved layouts. |
|  | Root cause analysis | Displays the root cause analysis results for the currently selected line (if any exists) |
|  | Refresh | Refreshes all of the data displayed in BDEx. |

The other work request views are displayed in a hierarchical structure, showing how the work requests are grouped (Business process/Business context), or for root cause, how the items relate to each other.

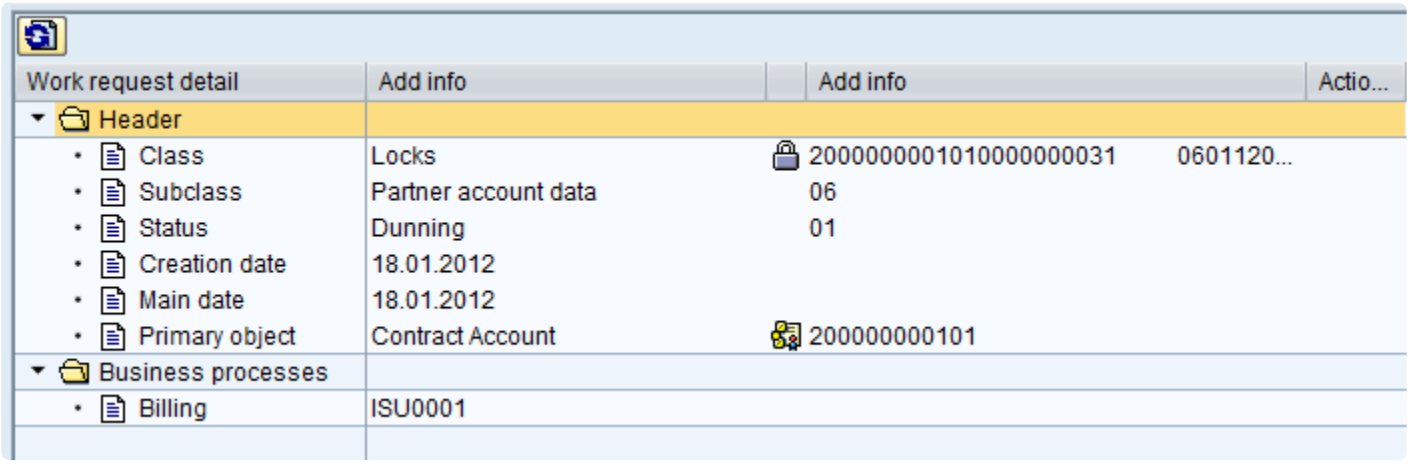
Regardless of how the work requests are arranged, they behave in the same way, and the same actions are available.

For more information on actions, see section ‘Actions’.

# View Work Request Details

Double-clicking a work request will display a screen showing further information about the item.

The types of information will differ between different sorts of work request, but will include relevant information like whether someone is processing this item. An example of work request details is shown below:



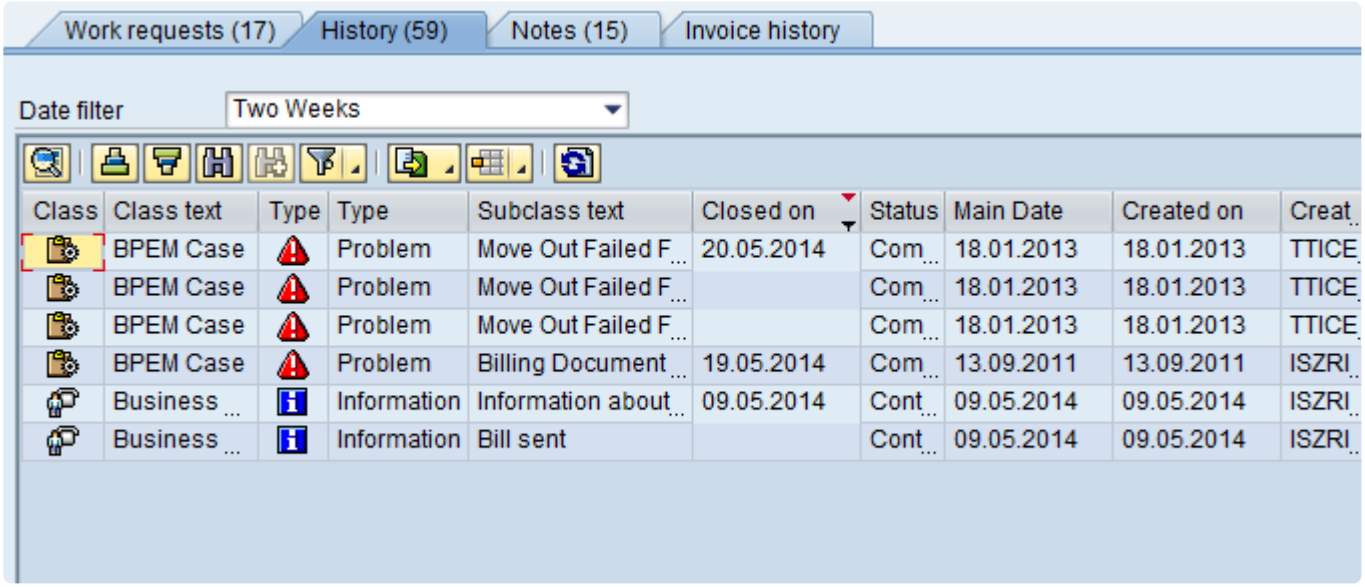

The divider between the work request list and the details screen is draggable, so that the details screen can be enlarged and hidden as required.

# History

Work requests that are no longer considered active are located here.

These may be previous items such as BPEM cases that have been worked by an agent, or they may be previous processes that finished naturally (e.g. work flows).

The date filter drop-down can be used to quickly display and hide older items as required. The data is relevant to the closed date of the work request item.



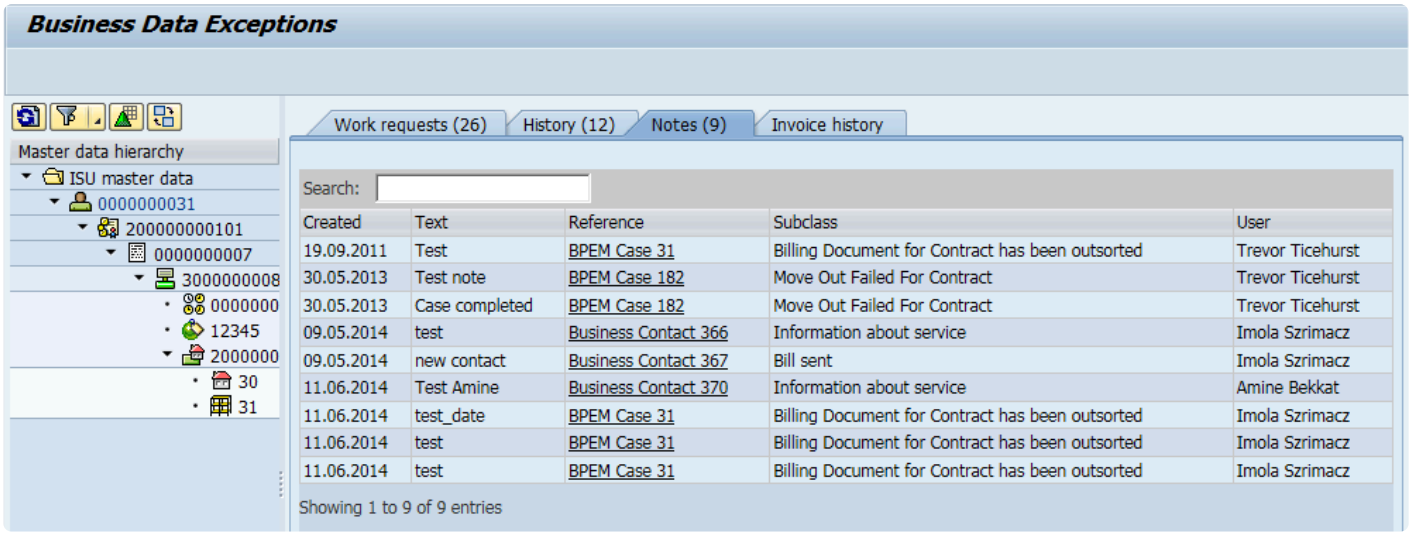

| Class | Class text | Type | Type | Subclass text | Closed on | Status | Main Date | Created on | Creat |
|---|---|---|---|---|---|---|---|---|---|
| | BPEM Case | | Problem | Move Out Failed F... | 20.05.2014 | Com... | 18.01.2013 | 18.01.2013 | TTICE |
| | BPEM Case | | Problem | Move Out Failed F... | | Com... | 18.01.2013 | 18.01.2013 | TTICE |
| | BPEM Case | | Problem | Move Out Failed F... | | Com... | 18.01.2013 | 18.01.2013 | TTICE |
| | BPEM Case | | Problem | Billing Document ... | 19.05.2014 | Com... | 13.09.2011 | 13.09.2011 | ISZRI |
| | Business ... | | Information | Information about... | 09.05.2014 | Cont... | 09.05.2014 | 09.05.2014 | ISZRI |
| | Business ... | | Information | Bill sent | | Cont... | 09.05.2014 | 09.05.2014 | ISZRI |

The history menu bar contains the same items as those found in the ‘Work Requests’ topic.

# Notes

The notes screen contains all text and notes entered in the system relevant to that customer.

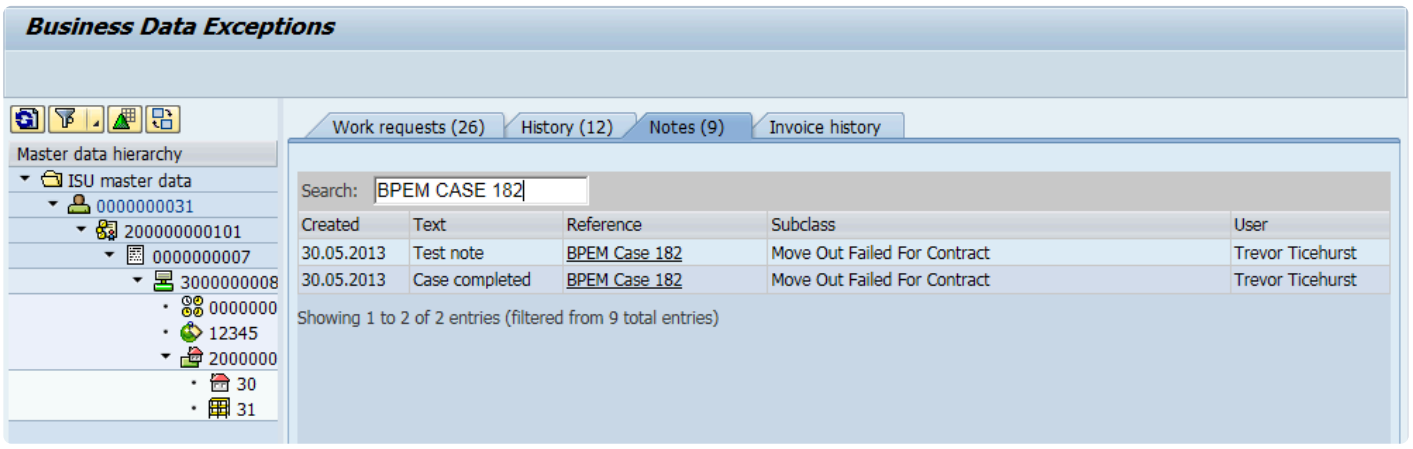
This includes BPEM case notes, interaction record texts, generic object notes, and more.




The list is sorted in ascending order of date created, and the column headings can be clicked to sort accordingly. The item in the reference column can be clicked to display the object directly.

The search function allows you to enter keywords to filter the entries and find the specific records containing these words.

E.g. Enter search item “BPEM Case 182” this will filter all records containing this phase.

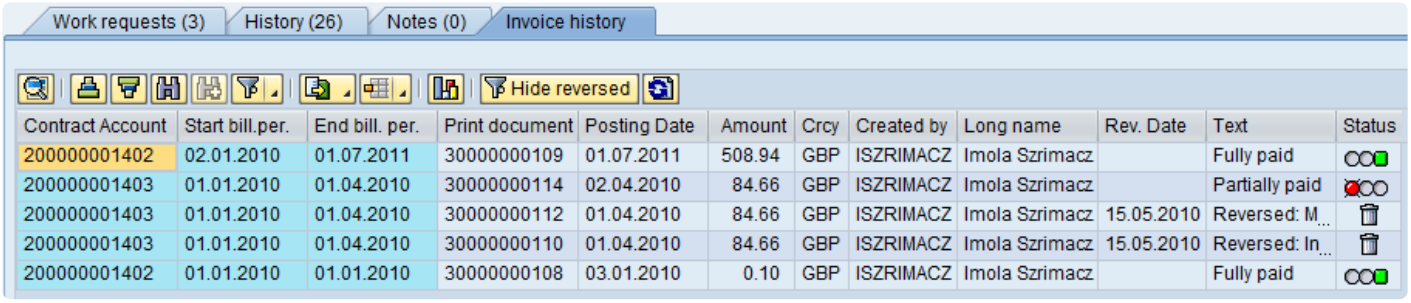



Any text/digits can be entered into the search box and it can be held in any section of the record i.e. Created, Text, Reference, Subclass or User.

# Invoice History

Invoice history is a tab specific to SAP for Utilities (IS-U).

It shows the complete list of invoices generated for a customer and contains information such as the invoicing period, amount, and whether the invoice has been paid or reversed.




| Contract Account | Start bill.per. | End bill. per. | Print document | Posting Date | Amount | Crcy | Created by | Long name | Rev. Date | Text | Status |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 200000001402 | 02.01.2010 | 01.07.2011 | 30000000109 | 01.07.2011 | 508.94 | GBP | ISZRIMACZ | Imola Szrimacz | | Fully paid | |
| 200000001403 | 01.01.2010 | 01.04.2010 | 30000000114 | 02.04.2010 | 84.66 | GBP | ISZRIMACZ | Imola Szrimacz | | Partially paid | |
| 200000001403 | 01.01.2010 | 01.04.2010 | 30000000112 | 01.04.2010 | 84.66 | GBP | ISZRIMACZ | Imola Szrimacz | 15.05.2010 | Reversed: M... | |
| 200000001403 | 01.01.2010 | 01.04.2010 | 30000000110 | 01.04.2010 | 84.66 | GBP | ISZRIMACZ | Imola Szrimacz | 15.05.2010 | Reversed: In... | |
| 200000001402 | 01.01.2010 | 01.01.2010 | 30000000108 | 03.01.2010 | 0.10 | GBP | ISZRIMACZ | Imola Szrimacz | | Fully paid | |

Right click any line to perform actions on the invoices directly, such as displaying or correcting an invoice.

The status column can contain the following values:

| Icon | Description |
|---|---|
| | Invoice has not been fully paid |
| | Invoice has been paid in full |
| | Invoice has been reversed |

In addition to the standard toolbar functions available, which are described in topic ‘Work Requests’, the following buttons are available:

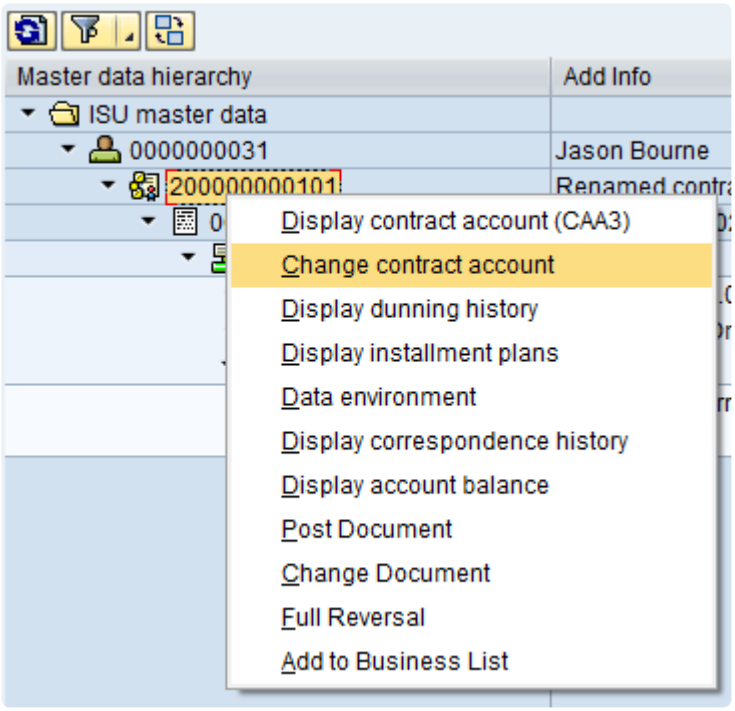
| Button | Name | Usage |
|---|---|---|
| | Display Graphic | Shows the invoicing history as a graph |
| Hide reversed | Hide reversed | Filters out the reversed invoices |
| Show reversed | Show reversed | Removes the filter on reversed invoices |

# Actions

BDEx is designed so that almost all objects such as master data and work requests have context-sensitive functionality available when an item is right-clicked.

# Master Data Actions

Right clicking a master data item will display the list of actions available as a context menu.

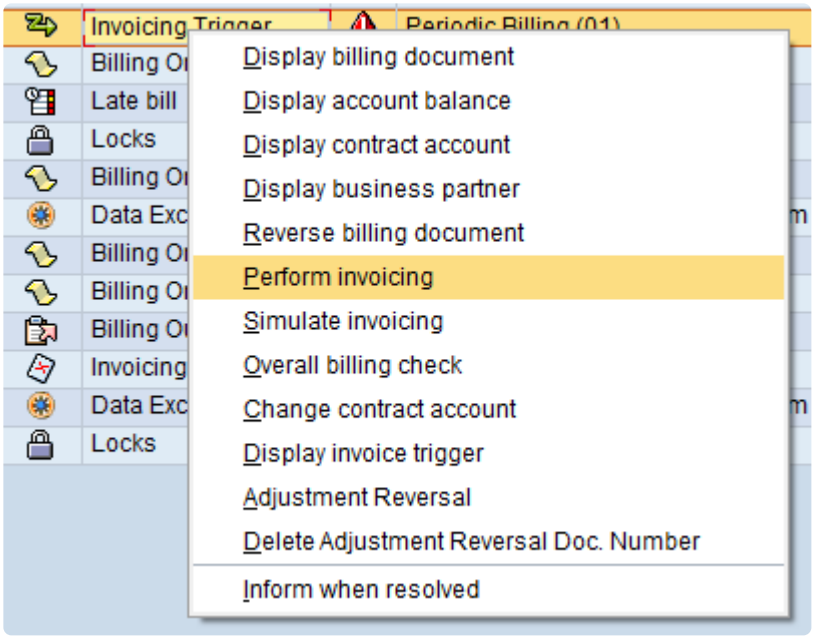



This menu consists of the list of item-specific actions available, plus ‘Add to Business List’ which is available on all master data objects.

See topic ‘Business Lists’ for more information about this.

# Work Request Actions

Right clicking a work request item will display the list of actions available as a context menu.




This menu consists of the list of item-specific actions available, plus ‘Inform When Resolved’ functionality which is explained in the next topic.

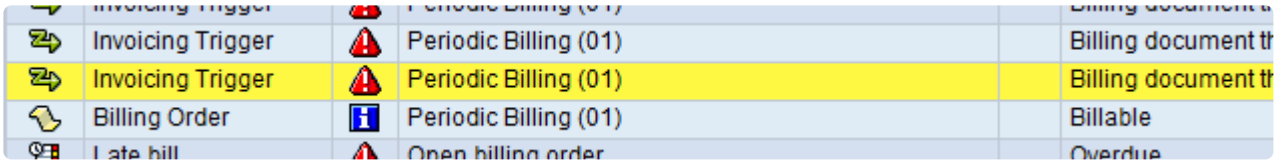
# Inform When Resolved

The menu item ‘Inform when resolved’ adds a work request to a user’s watch list. When the work request has been completed, a notification will be sent to the watching user.

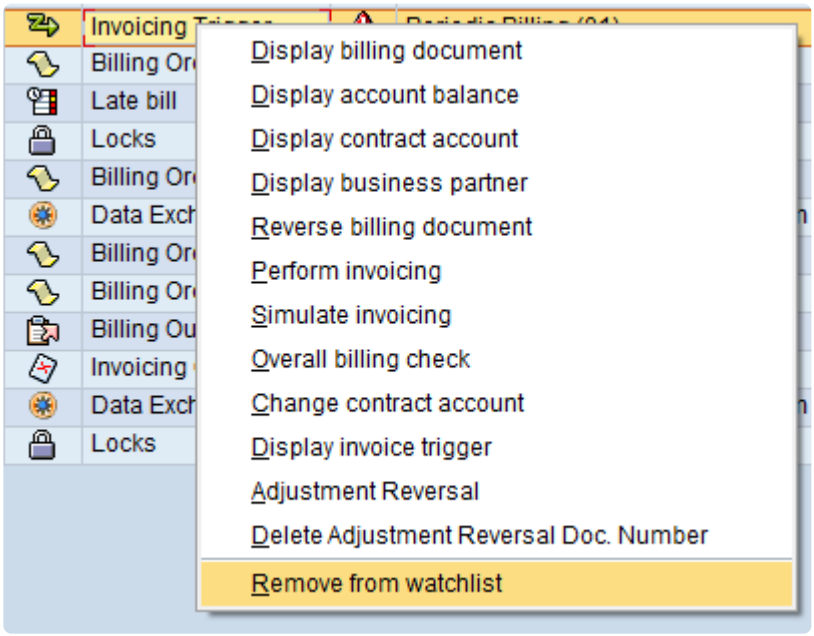
This can be very useful when work is dependent on another person or team, e.g. an implausible read that cannot be resolved until a meter exchange has been completed.

The notification will come as either an email or a work item, depending on system configuration.

Items that have been added to a user’s watch list are highlighted like the following:




To remove an item from the watch list, simply right-click an item and select ‘Remove from watch list’.



# Update status when resolved

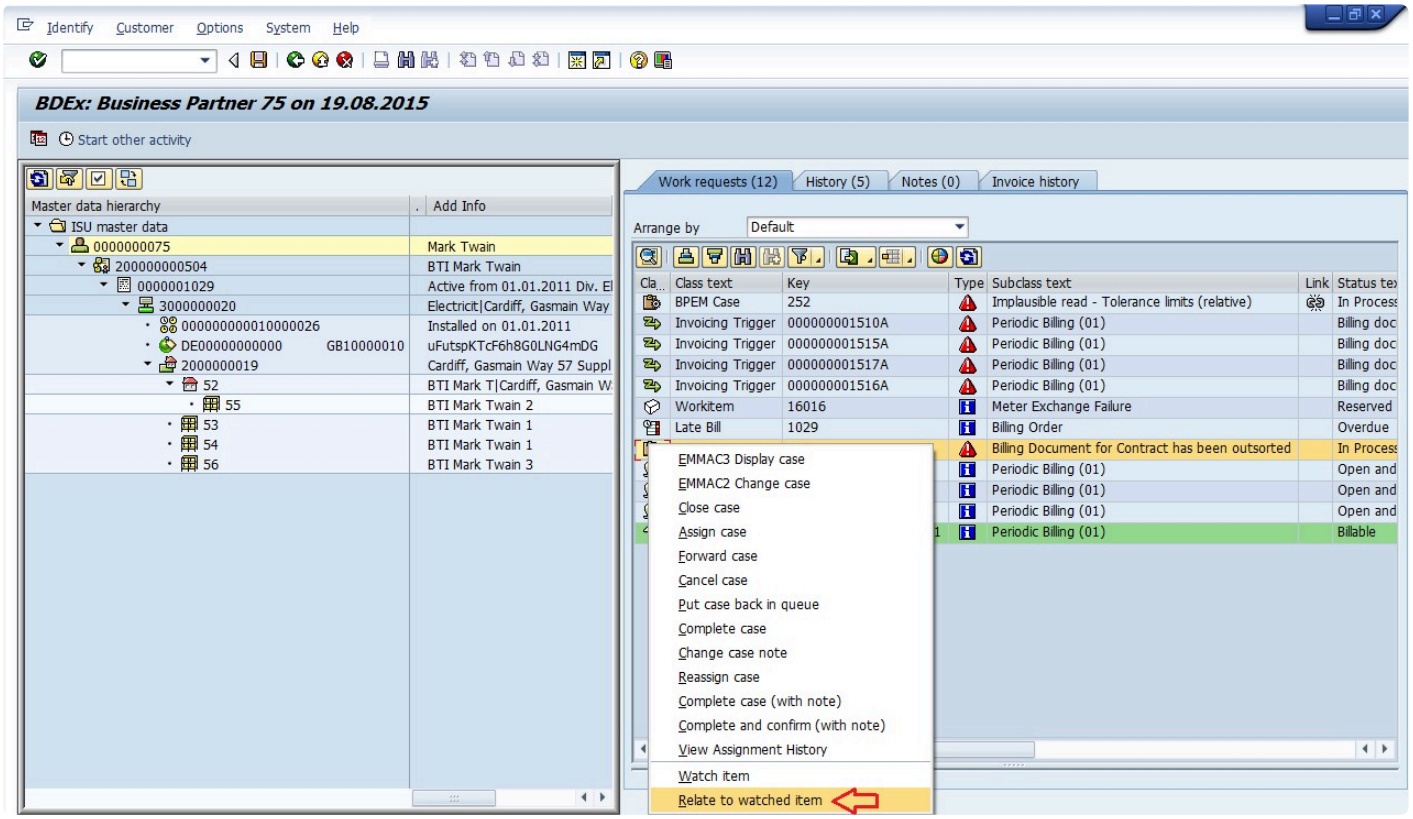
Update status when resolved is a feature of BDEx which offers the Agent an additional choice of actions to execute when a Watched Item is resolved by means of a new Watched Item ‘Relationship’.

This feature has been designed specifically with BPEM Cases in mind however in theory it may also be suitable for other types of Work Request.

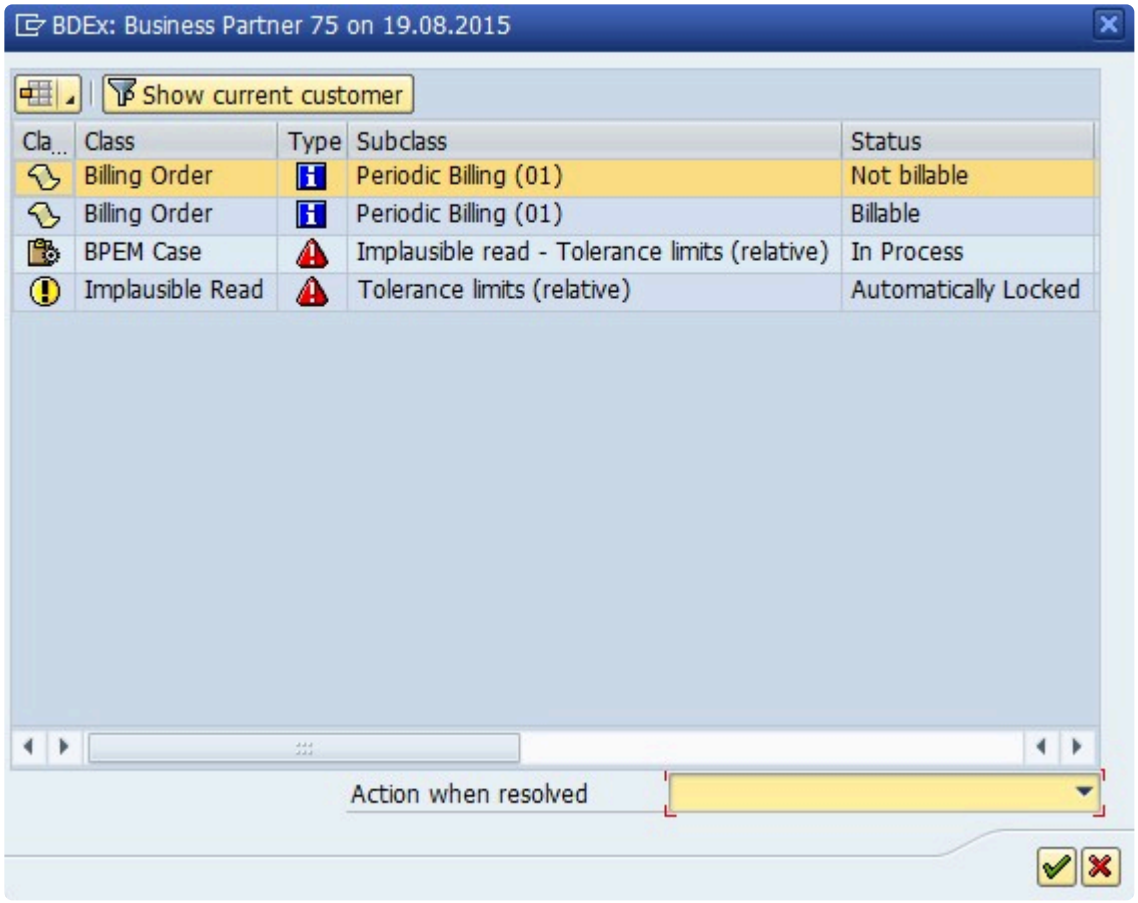
A typical example is illustrated below:

An Agent has already chosen to watch a Billing Order Work Request for a Customer in BDEx and notices that a BPEM Case Work Request can be related to this as well.

The Agent chooses to relate the two Work Requests by executing the ‘Relate to watched item’ right-click action on the second Work Request, i.e. the BPEM Case:

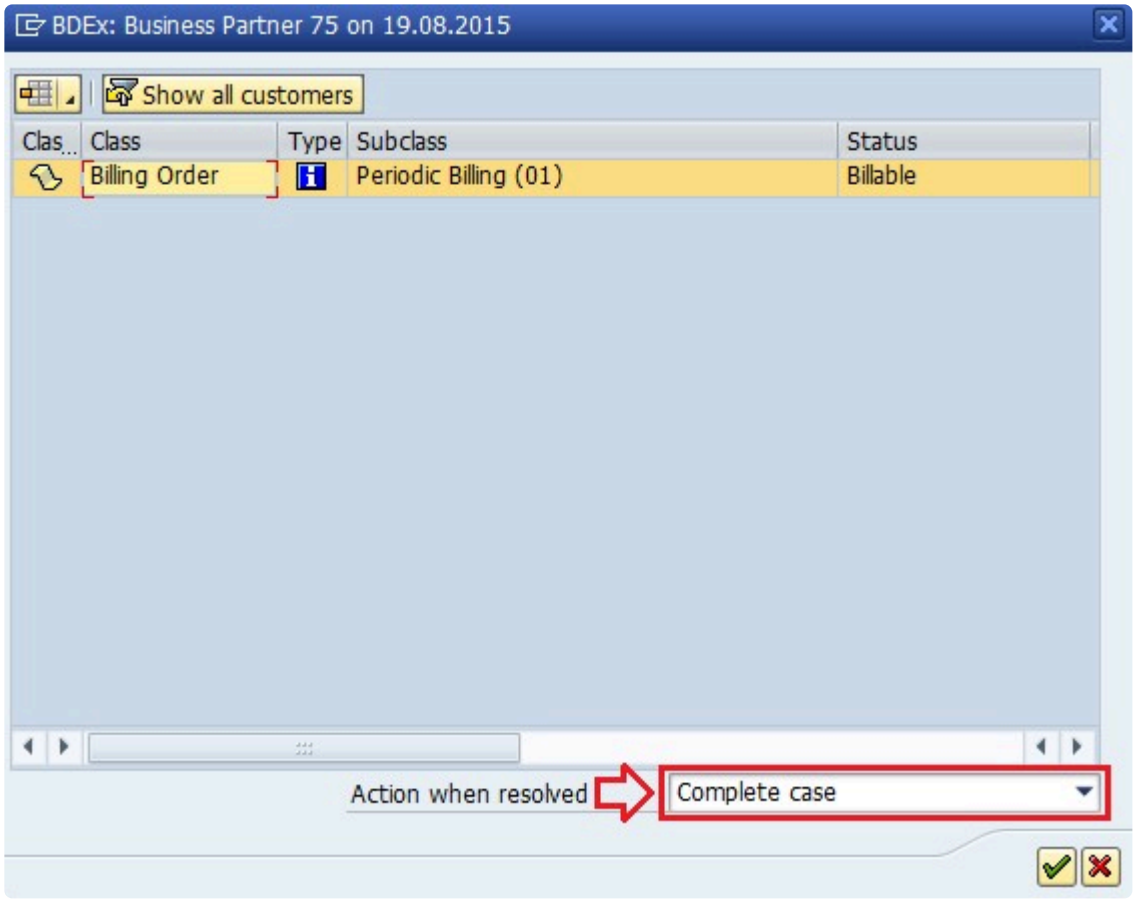



A pop-up is displayed showing all of the Agent’s current Watched Items that could be used to establish a relationship with the selected Work Request:




This can be filtered on the ‘Current Customer’ if necessary using the Toolbar button in the display.

The Agent is then prompted to select a Watched Item from the list and choose an Action from the drop down list displayed:

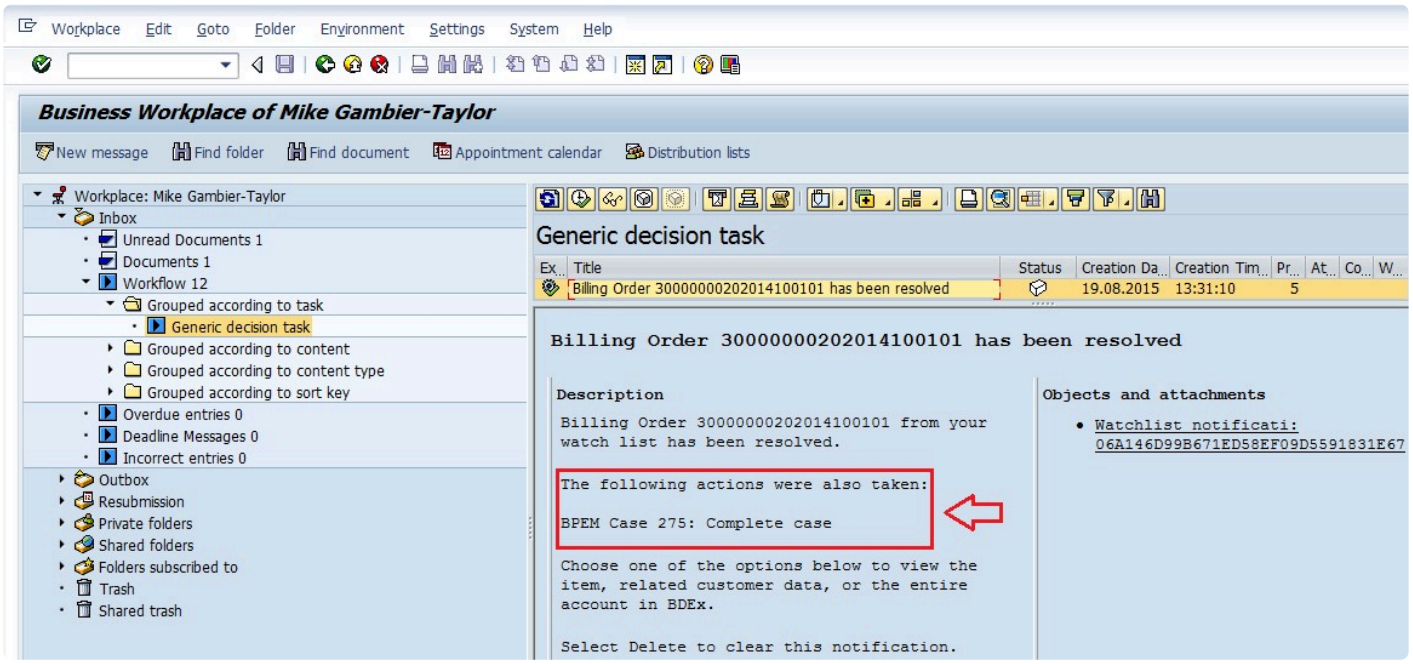



The relationship is then displayed using row highlighting:

| | | | | |
|---|---|---|---|---|
| | BPEM Case | 275 | | Billing Document for Contract has been outsorted |
| | Invoice | 30000000121 | | Periodic Billing (01) |
| | Invoice | 30000000122 | | Periodic Billing (01) |
| | Invoice | 30000000123 | | Periodic Billing (01) |
| | Billing Order | 30000000202014100101 | | Periodic Billing (01) |

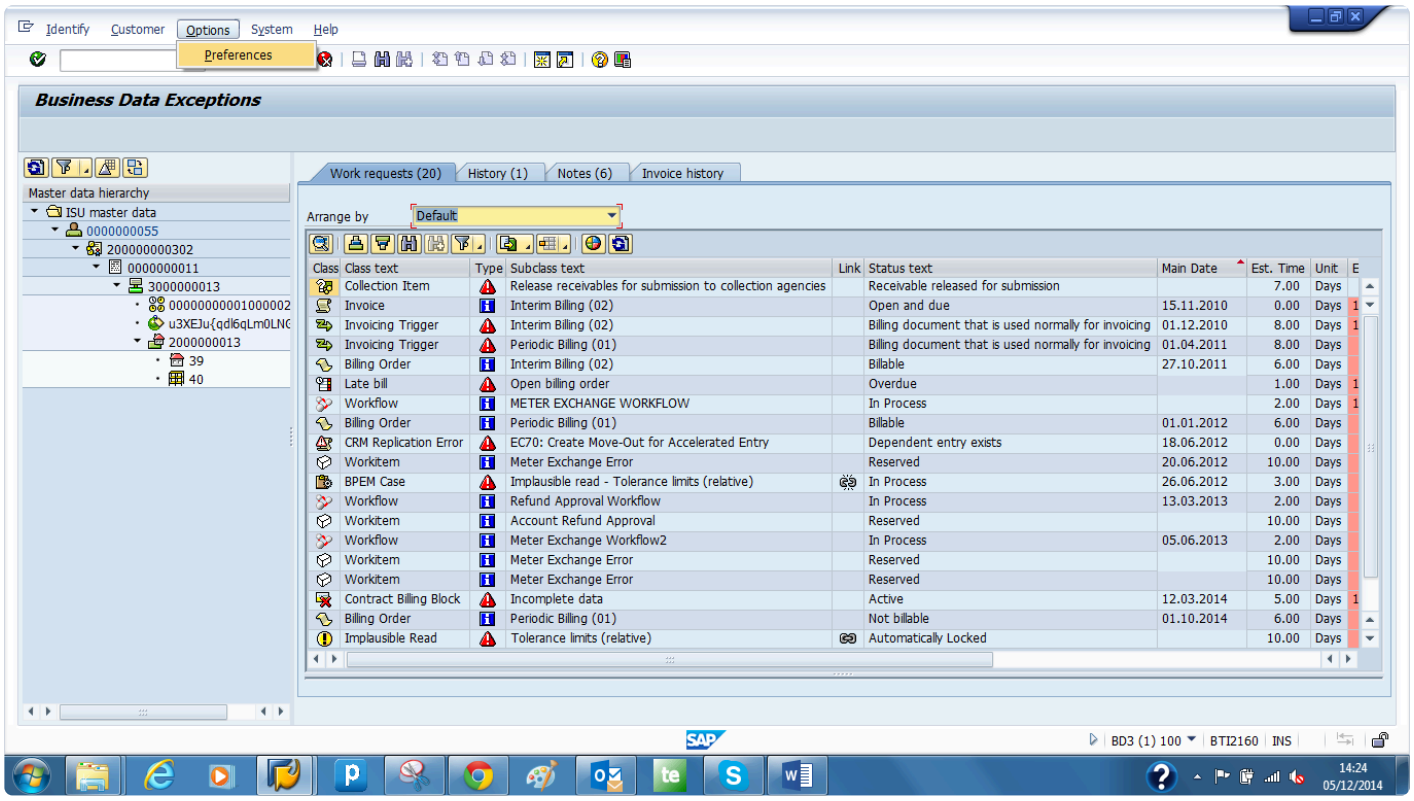
If the Agent successfully resolves the Watched Item, in this example the Billing Order is fulfilled, BDEx will automatically evaluate the relationship and attempt to execute the action using the Agent's credentials.

If the 'Inform when resolved' Notification Workflow has been activated in the system the action details are also mentioned in the Notification Work Item text:


Workplace Edit Goto Folder Environment Settings System Help
Business Workplace of Mike Gambier-Taylor
New message Find folder Find document Appointment calendar Distribution lists
Workplace: Mike Gambier-Taylor
Inbox
Unread Documents 1
Documents 1
Workflow 12
Grouped according to task
Generic decision task
Grouped according to content
Grouped according to content type
Grouped according to sort key
Overdue entries 0
Deadline Messages 0
Incorrect entries 0
Outbox
Resubmission
Private folders
Shared folders
Folders subscribed to
Trash
Shared trash
Generic decision task
Ex... Title Status Creation Da... Creation Tim... Pr... At... Co... W...
Billing Order 30000000202014100101 has been resolved 19.08.2015 13:31:10 5
Billing Order 30000000202014100101 has been resolved
Description
Billing Order 30000000202014100101 from your watch list has been resolved.
The following actions were also taken:
BPEM Case 275: Complete case
Choose one of the options below to view the item, related customer data, or the entire account in BDEx.
Select Delete to clear this notification.
Objects and attachments
Watchlist notificati: 06A146D99B671ED58EF09D5591831E67

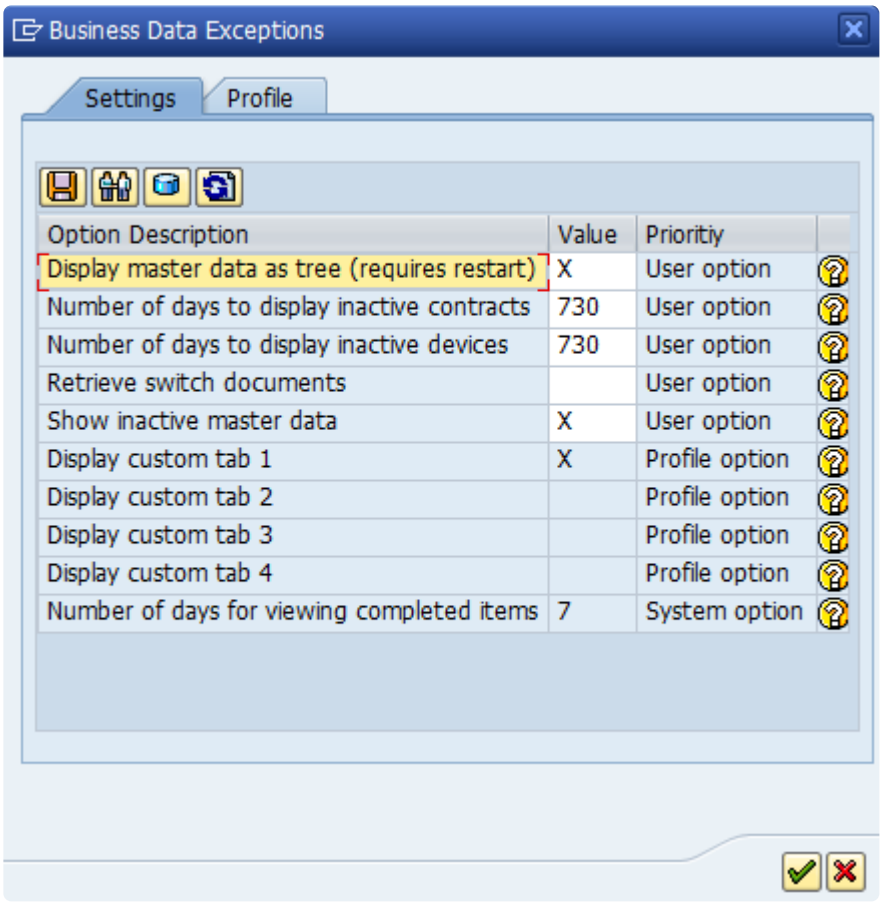
# Preferences

The user settings and the profile selector window is available via the toolbar menu item Options ?Preferences.



# Settings

This screen contains all of the current BDEx settings.




Each item in the list is explained here:

| Option | Value Options | Description |
|---|---|---|
| **Display master data as tree** | X – Yes<br>Blank - No | This enables the master data to be a tree display or as a standard list |
| **No of days to display inactive contracts** | No of days | Inactive contracts can be shown or hidden dependent upon the preference selected. This option enables the history to be restricted to the number of days entered. It is best practice to keep the history days to less than 6 months for the preference and change when required for a specific account. |
| **No of days to display inactive devices** | No of days | Inactive devices enables the history to be restricted to the number of days entered. |
| **Retrieve switch documents** | X – Yes<br>Blank - No | Switch documents can be displayed or not retrieved from this option. |
| **Show inactive master data** | X – Yes<br>Blank - No | This preference can hide/show inactive master data. It is recommended to select no here to this unless you need to view inactive contracts regularly. There is a toggle option on the master data tree menu if this needs to be changed for a specific account. |

User-level options can be changed by the user and are editable but the save button must be clicked to save your preferences.

Profile and system-level options cannot be changed by the user and are not modifiable, though are still visible (greyed out).

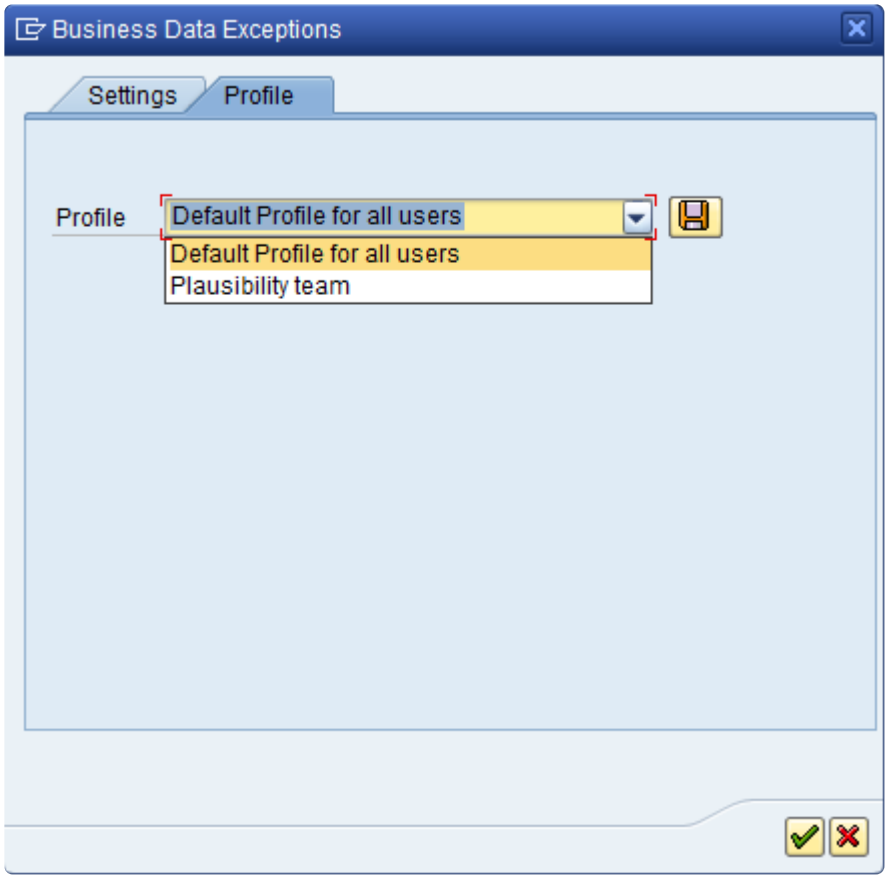
The following toolbar items are available:

| Button | Name | Usage |
|---|---|---|
|  | Save | Saves the current settings as the user default. |
|  | Load Profile Defaults | Loads the default settings for the current profile. |
|  | Load Existing User Settings | Loads the default settings for the current user. |
|  | Refresh | Reloads the current user settings. |

# Profiles

The profiles screen is used to select the active BDEx profile, determining which work request classes are displayed in BDEx, the list of actions that are available when an item is right-clicked, and certain option defaults such as displaying and hiding transaction data tabs, and work request “Arrange by” options.

The profile drop-down selector will contain one or many profiles to choose from, depending on which profiles the user is assigned to.



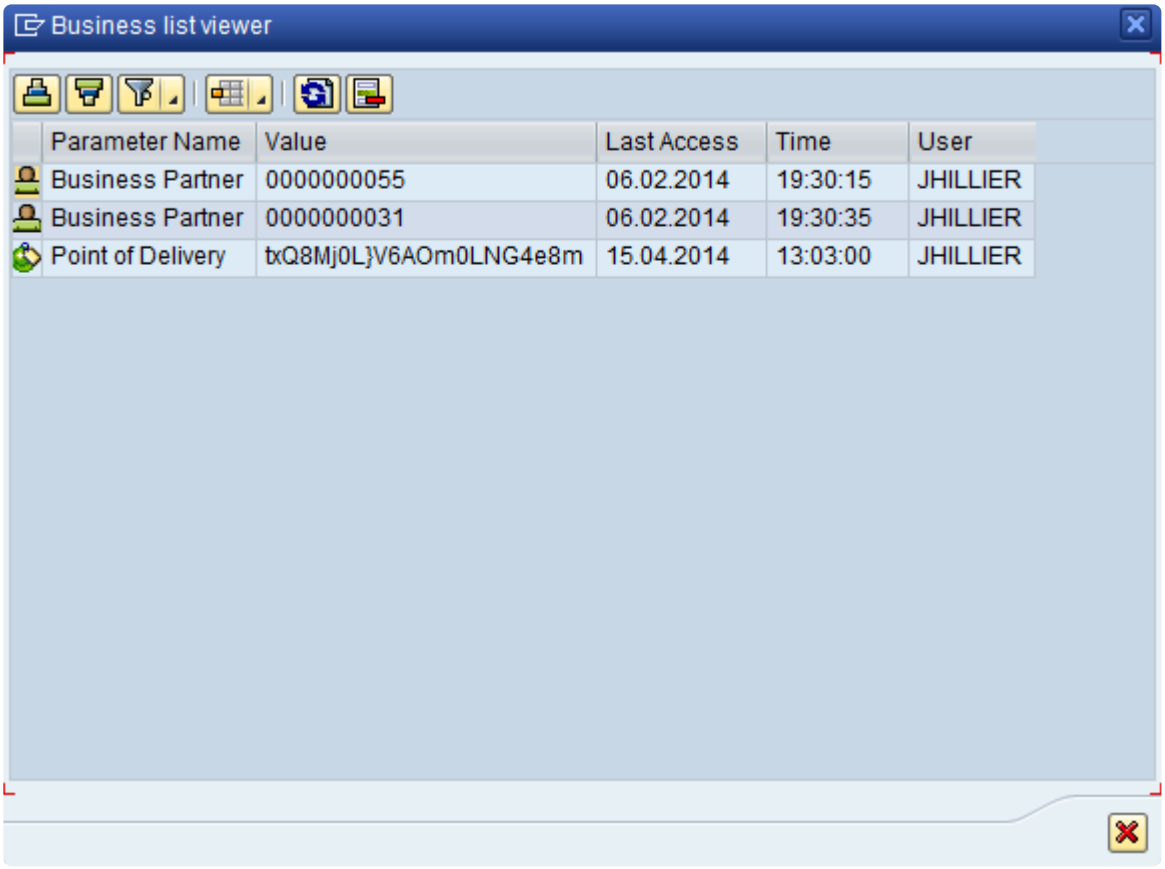

To change profiles, simply select one from the drop-down. The save button is used to set the currently selected profile as the user’s default.

# Business Lists

Business lists are a way of organizing master and transactional data to be worked in the future.

To add an item to a business list, either execute the action described in topic ‘Actions’, or select the menu option ‘Identify’ and then choose from the drop down list – Add to business list.

To view the items in the standard business list, select the menu option Identify and then choose from the drop down list – View business lists. The following window will appear:



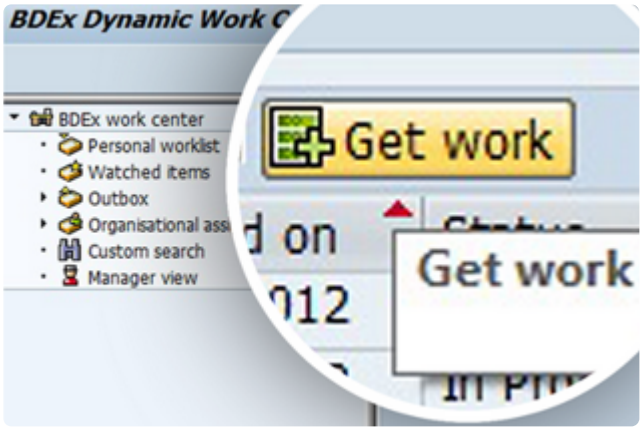

Double-clicking any item in this list will load that parameter into BDEx.

The ‘Delete Entry’ button can be used to remove an item from the list.

Note that all users’ items will be displayed by default in this list. If this becomes unwieldy, consider saving a default variant with other users’ items filtered out.

# Dynamic Work Center

The Dynamic Work Center streamlines the process of allocating back office work in an SAP Utilities environment, enabling greater efficiency, reducing cherry picking of work and enabling back office managers to gain complete visibility and control of their team's workload.



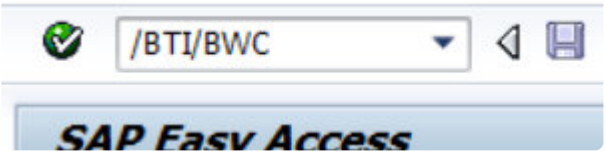

- Provides a unified inbox for each agent – where work can be automatically received and managed
- Single seamless view of BPEM (Business Process Exception Management) cases and work items from IS-U and CRM in a single transaction

- Work is prioritized based on pre-determined rules, and then allocated to the correct agent's single inbox automatically without requiring lots of manual steps.

# Accessing DWC

**DWC – Transaction Code**

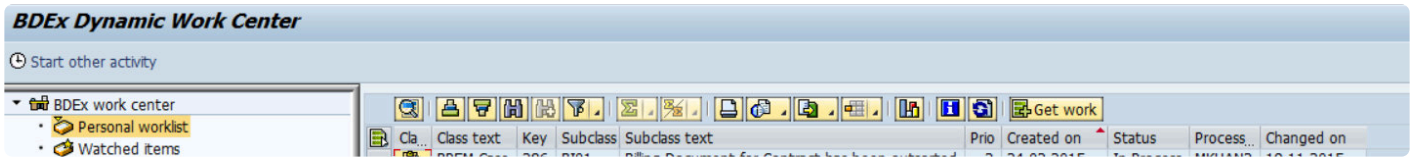
Dynamic work center is accessible via the transaction code /BTI/BWC



# Personal Worklist

Personal Worklist displays all the work ( BPEM cases, WorkItems,..) currently assigned to the user. The list is sorted by preset rules which are unique for each organisation.

The following columns are displayed in the Personal Worklist, additional columns may be present based on your organisation's requirements.

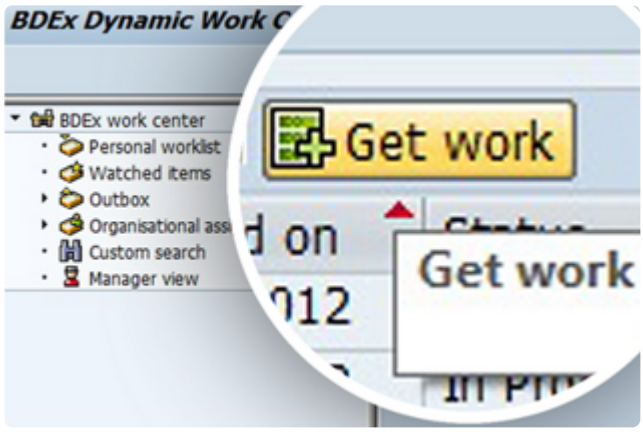



- Class Icon: This represents the type of work request assigned.
- Class Text: Description of the work request type.
- Key: Unique identifier for the work request.
- Sub Class: A work request class can be further categorised into subclasses, for instance BPEM cases are subclassed by case categories.
- Subclass Text: Description of the Subclass.
- Priority: Priority of the work request. This can be defined at the case category level for BPEM cases.
- Created On: Date on which the case was created.
- Status: Current status of the work request. This status is usually changed to "in process" when the case is assigned to an agent.

# Get Work

**Get Work Button**

Unallocated work can be pulled into the personal worklist using the Get Work button.




When an agent clicks the get work button, DWC looks for unallocated work in the queue and moves this to the agents personal worklist.

The amount of work each click of the button pulls in is preconfgured.

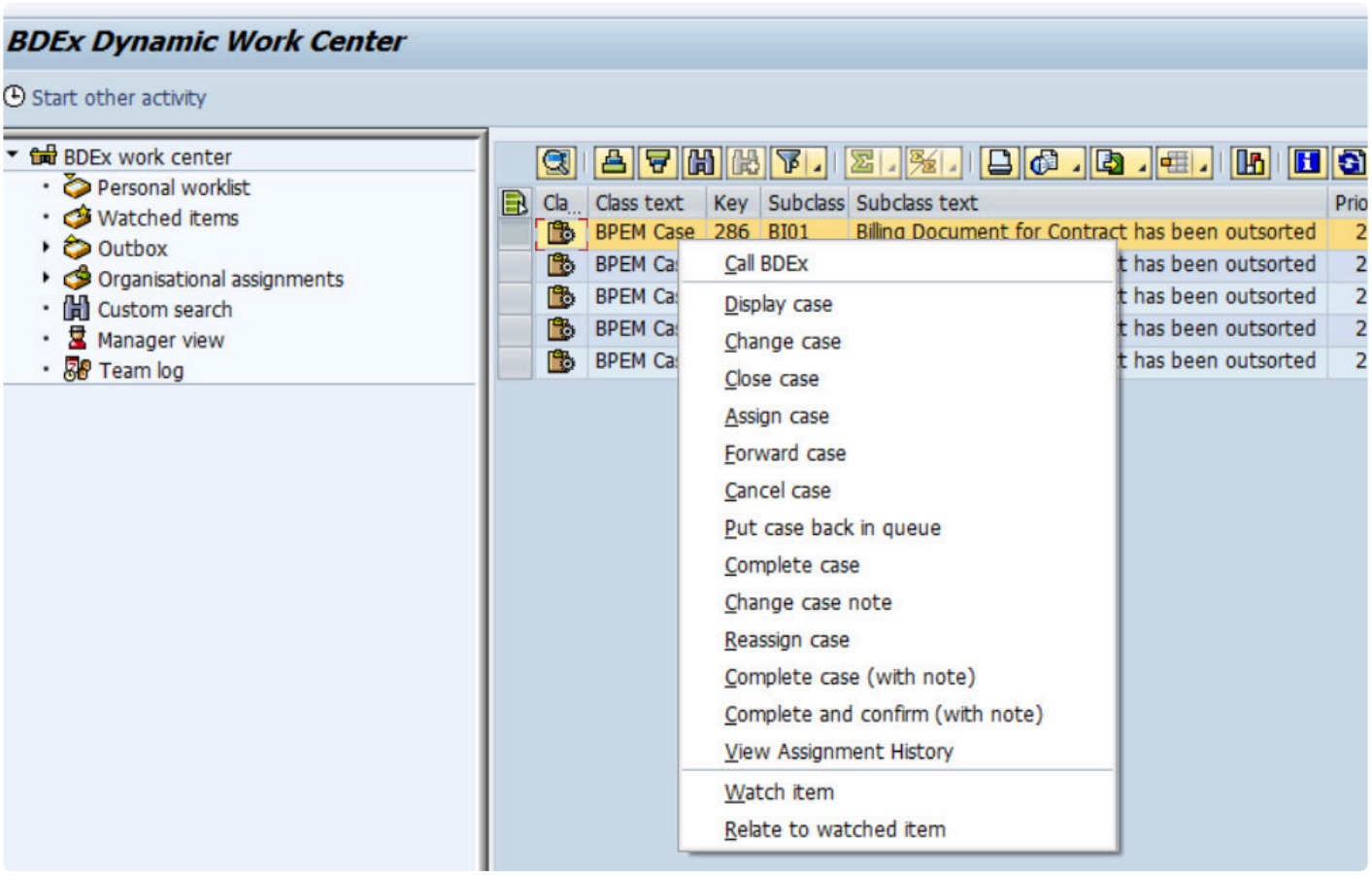
**Automatic work Allocation**

Your system may be set up to push work automatically into an agents worklist. In this setup, the agent will be automatically assigned work based on his current workload and the amount of work remaining in the queue. The get work button will still function and can be used to get additional work from the queue over riding the Auto Work allocation threshold.

# Right Click Actions

Dynamic Work Center provides various right click actions, clicking the right mouse button on any of the items in the personal worklist
will present these actions.

The actions varied based on the type of worklist item and custom settings of your organization. Some of the common default actions are
described below. Please note that your organization may have some of these disabled.




Call BDEx: This opens the case in BDEx directly.

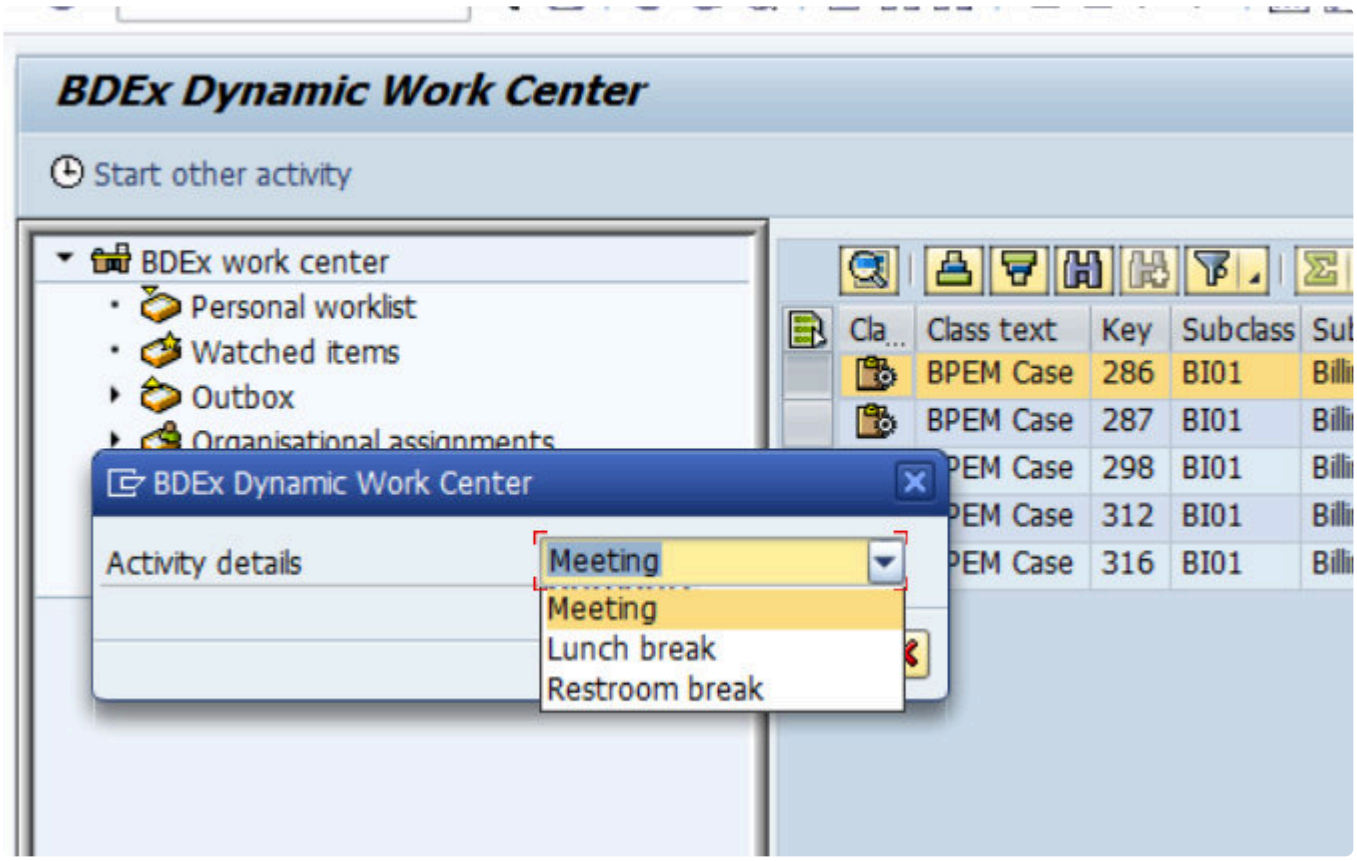
Display Case: Displays the case or any other work request type in its own transaction.
Change Case: Opens the case / work request in its own transaction for editing.
Close Case: Closes the case.
Assign Case: Puts the case in a specific agents work queue. The work is then pulled into the agents inbox based on priority during the next Get Work cycle.
Forward Case: Immediately puts the case in a specific agents personal worklist.
Cancel Case: Cancels the case.
Put Case Back in the queue: The case is put back into the work queue. Dynamic work center will then

assign it to the next available agent based on priority.
Complete Case: Marks the case as complete.
Re-Assign Case:This option can be used by managers to put a work request which is already assigned to an agent into another agents queue.
View Assignment History: Shows the entire assignment history of a work request within Dynamic Work Center. It shows a log of when the case was initial assigned / reassigned / forwarded.
Watch Item: Adds the work request to the watch list ( more details on watch item here ).
Relate To Watch Item: Relates the work request to an existing watched item ( more details on watch item here ).

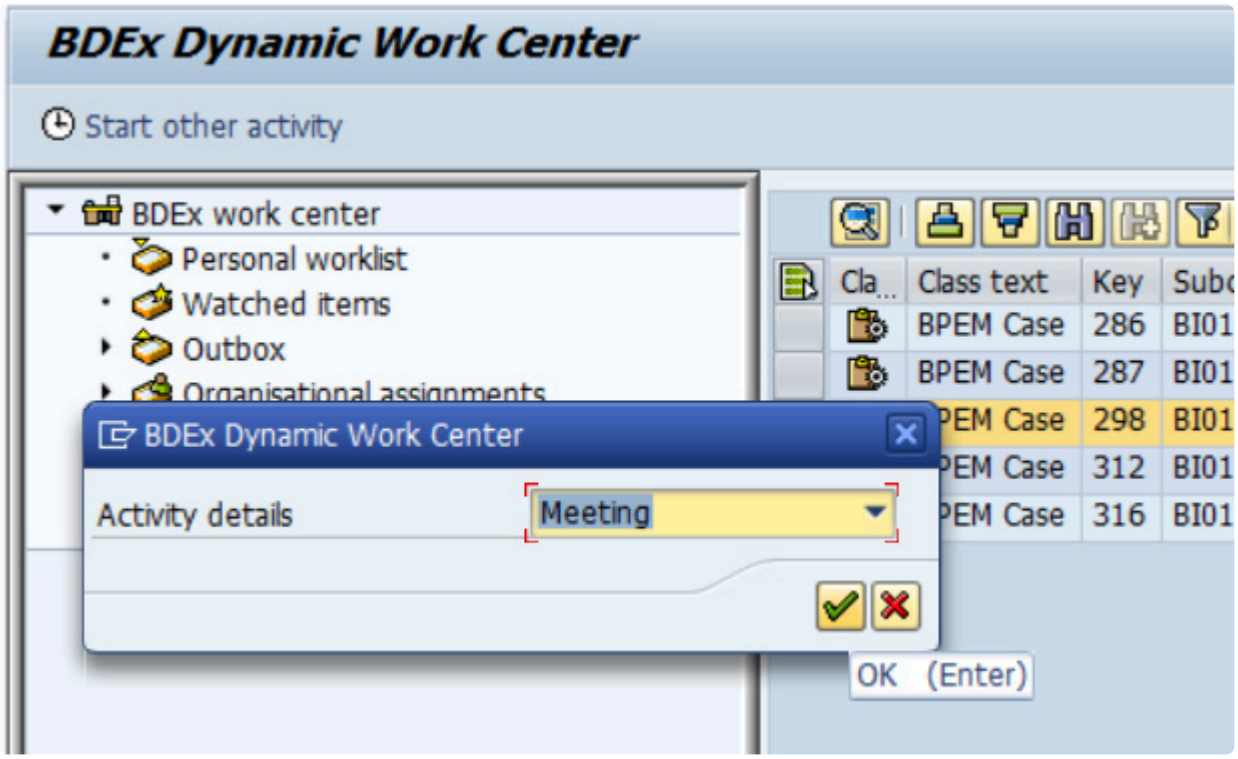
# Activities

Activities are used to log agents time when he/ she is not working on a work request.

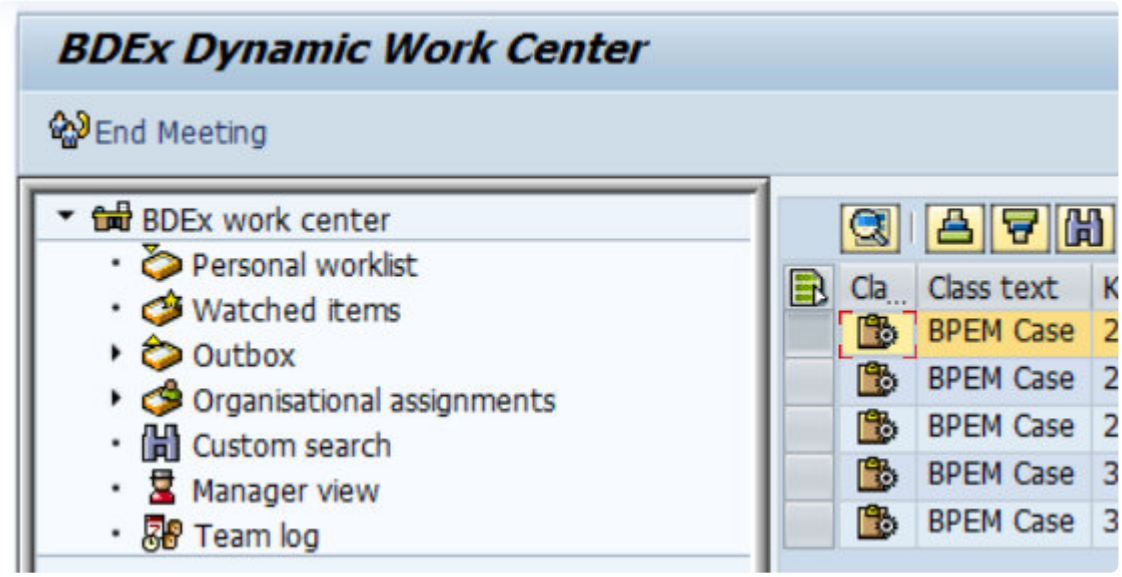
Type of activities are specific to each organization, some common ones may include meetings, lunch breaks, restroom breaks etc.




**Starting a new Activity:** Click on the “Start New Activity” icon, select the appropriate activity using the drop-down and click the okay button.



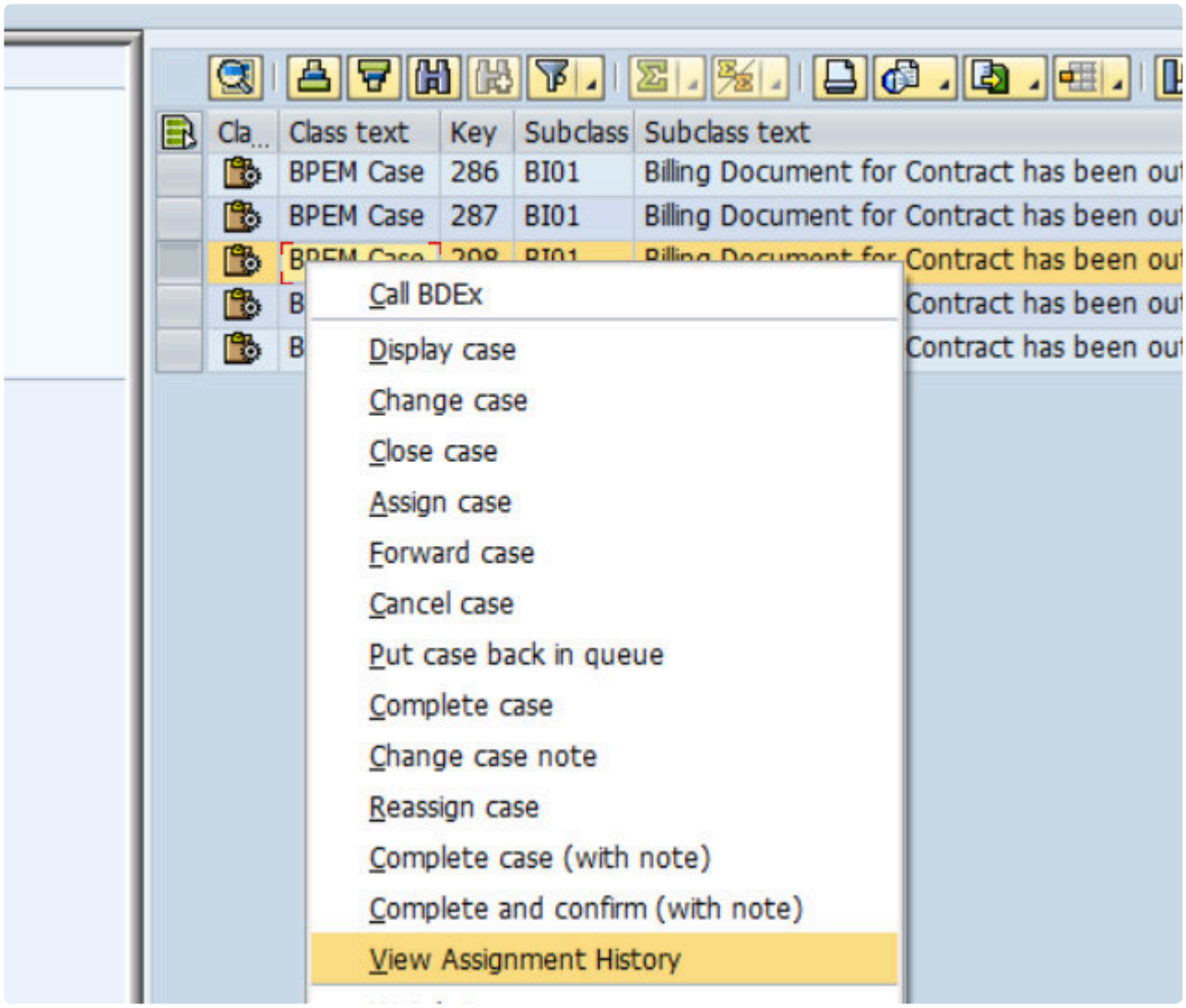

**Ending an Activity:** Press the End Activity button. Performing any action for the same customer account in the DWC will automatically end the activity.



# Assignment History

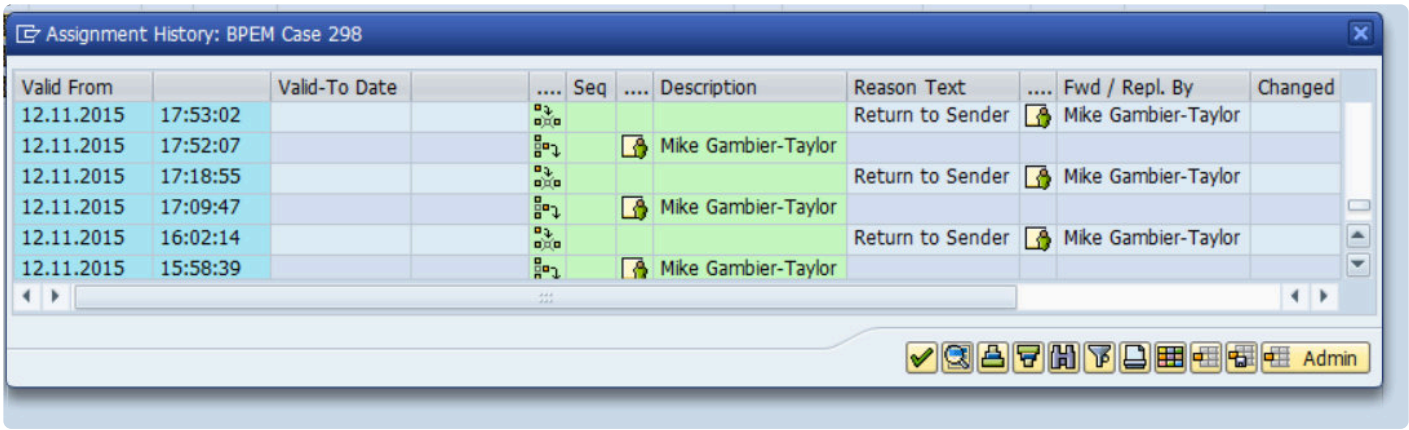
The date/time, reason, previous agent / next agent and who initiated the reassignment are all logged by the Dynamic Work Center and can be
viewed for each work request.

To view the assignment history of a work request, right-click and select the option View Assignment History.




Assignment history provides a detailed view of all the agent assignments associated with a work request.

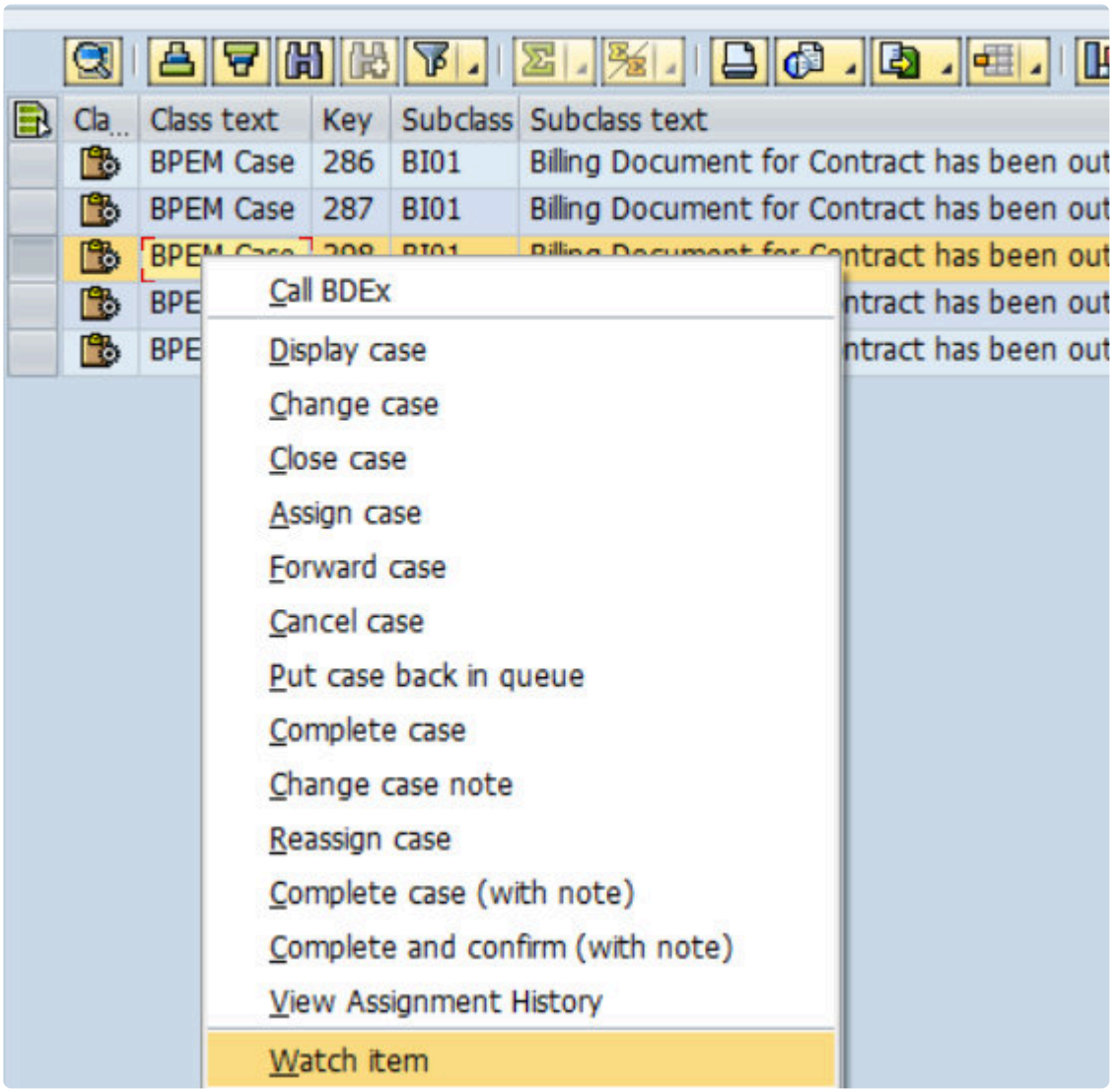
Using the assignment history enables you to track who the work item has been allocated to during its life cycle.


Assignment History: BPEM Case 298
Valid From
Valid-To Date
Seq
Description
Reason Text
Fwd / Repl. By
Changed
12.11.2015 17:53:02 Return to Sender Mike Gambier-Taylor
12.11.2015 17:52:07 Mike Gambier-Taylor
12.11.2015 17:18:55 Return to Sender Mike Gambier-Taylor
12.11.2015 17:09:47 Mike Gambier-Taylor
12.11.2015 16:02:14 Return to Sender Mike Gambier-Taylor
12.11.2015 15:58:39 Mike Gambier-Taylor
Admin

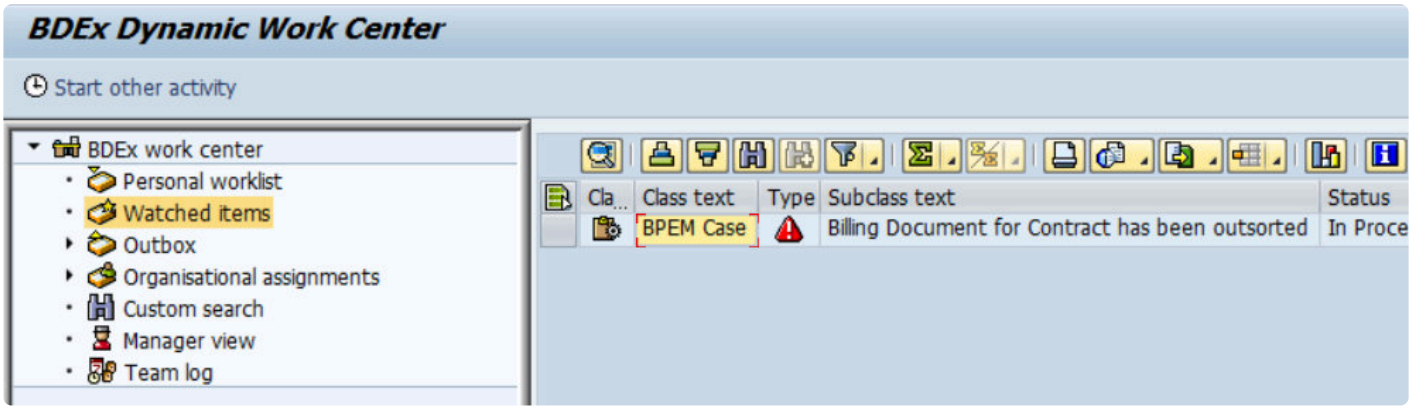
# Watched items

Agents and managers can watch work requests which they are interested in. These work request will be added to their watch items list and they will be sent an email notification
when the work-request is resolved.

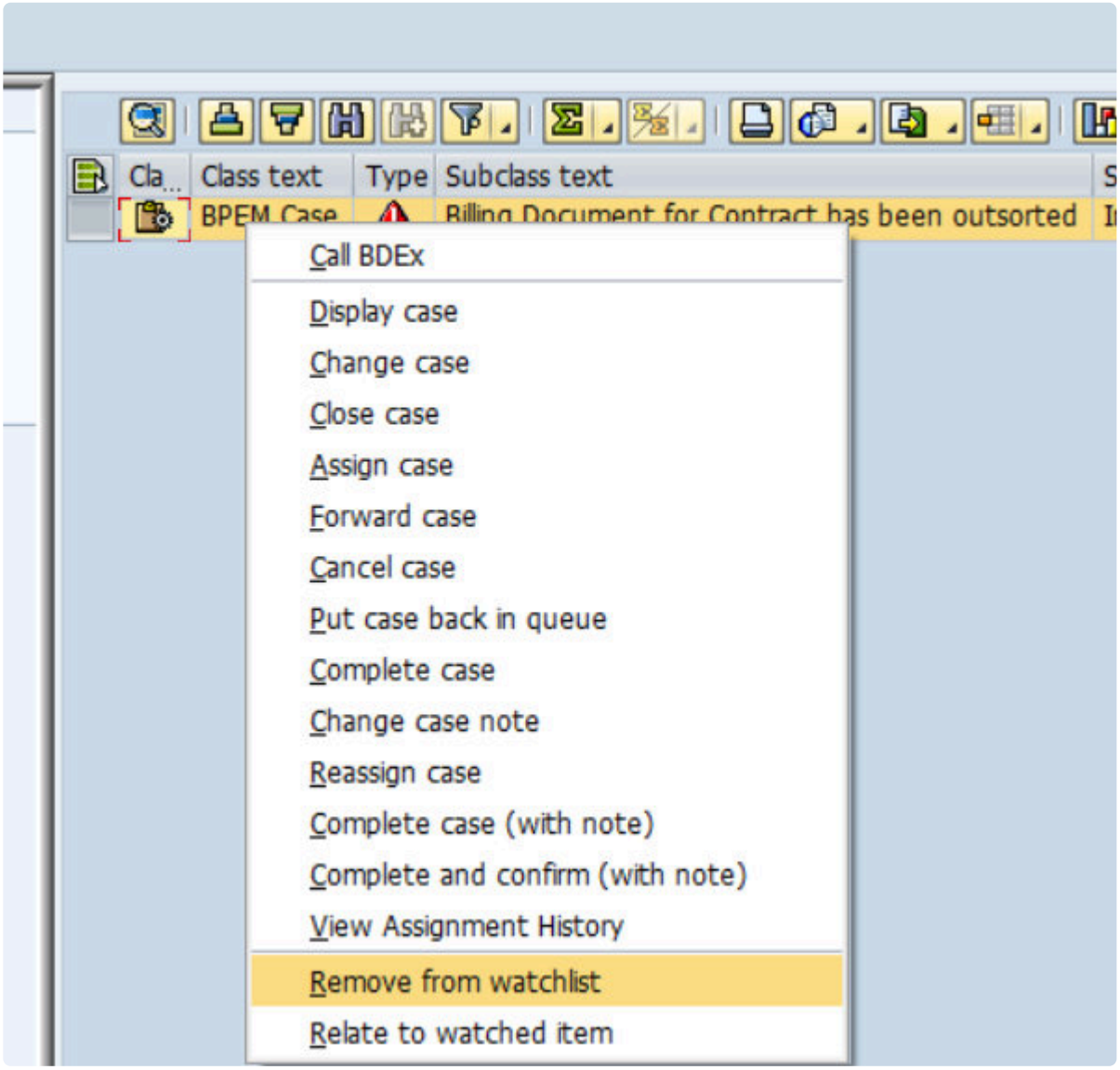
Watch an item: To watch an item right-click on the work-request and click Watch Item.




The watched item will appear in your watched items list.




To remove a watched item, right-click on the item and click on Remove from watchlist.



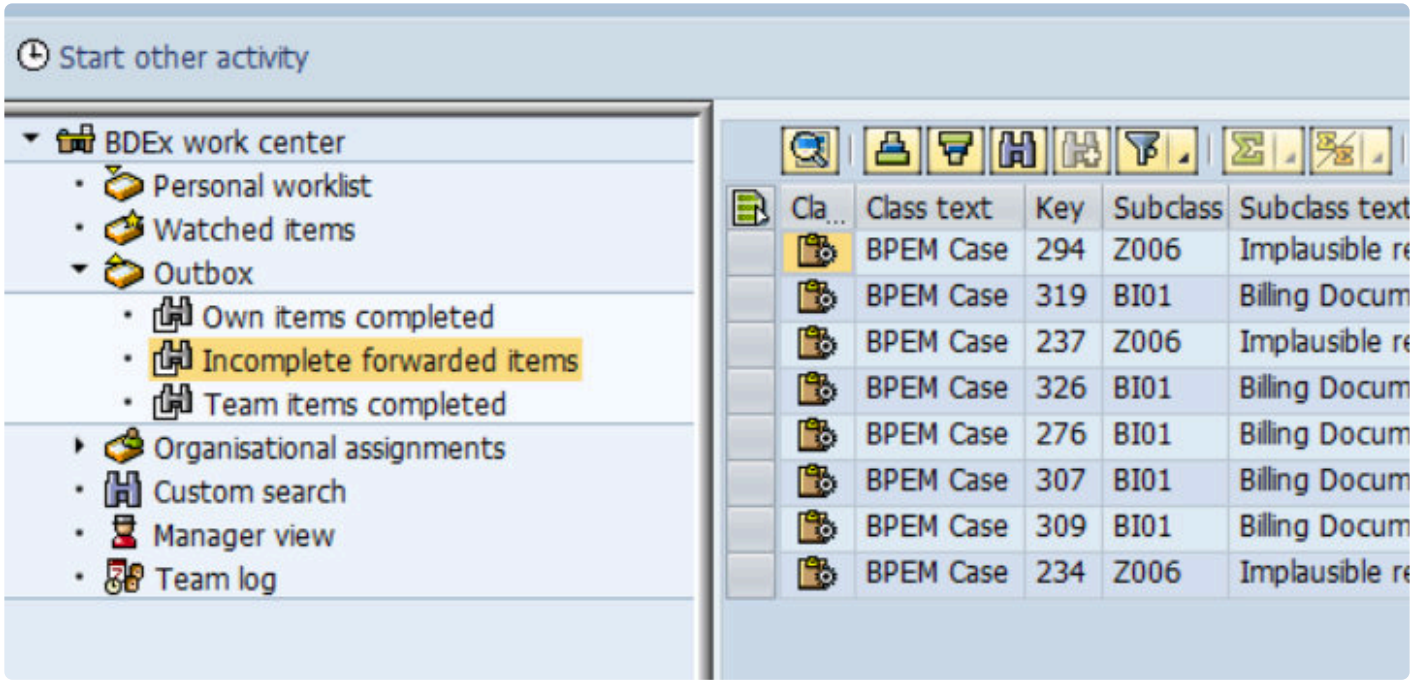
# Outbox

Outbox displays the following items.

- Own Completed Items
- Incomplete or Forwarded Items

For Managers it also shows

- Team's Completed Items.



# Organisational assignments

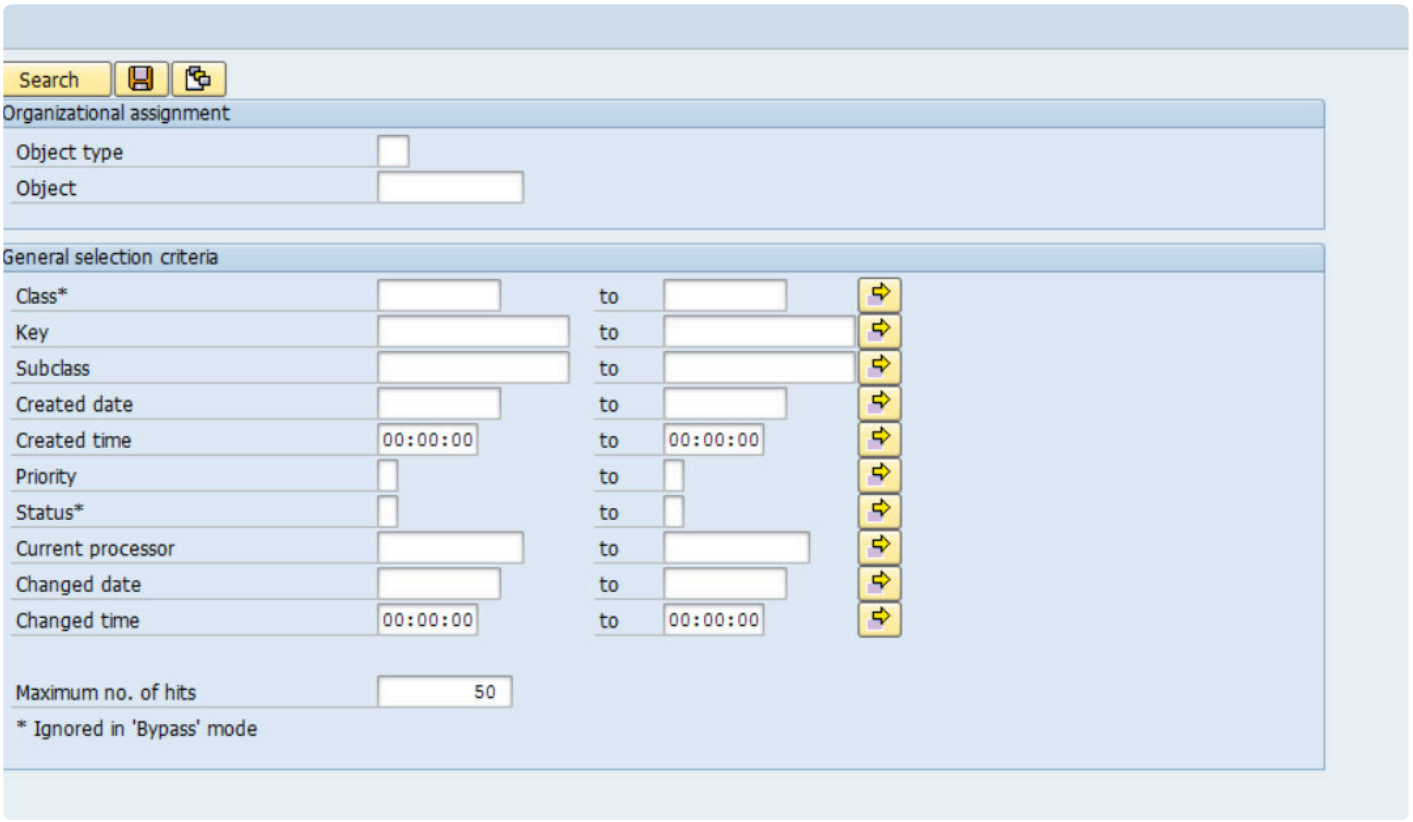
Organisational assignments view displays work allocated or waiting to be allocated under your org structure.

A manager will be able to see work allocated / in queue for his direct reports as well as other agents in the org structure.

# Custom Search

Agents and Managers can search work requests assigned to others ( and themselves ) in the Dynamic Work Center.

The results can be used to forward the items to other agents or assign them to a queue to be allocated to an agents worklist.




**Object Type:** This can be an Organisational unit, position or user. The criteria defines what is to be entered on the next field Object.
**Object:** Based on the entered value in the Object type field an org unit, position or user ID can be entered here.

**Class:** The type of exception you want to search for ( example: BPEM Case, Workitem etc ).
**Key:** The unique number of the exception case.
**Subclass:** Further granularity on the type of exception, for example the case category of a BPEM case.
**Created Date:** Date on which the exception was generated.
**Created Time:** Time at which the exception was generated.
**Priority:** Priority of the exception.
**Status:** Current status of the exception case.
**Current processor:** Agent the case is currently assigned to.
**Changed Date:** Date on which the exception was last changed.

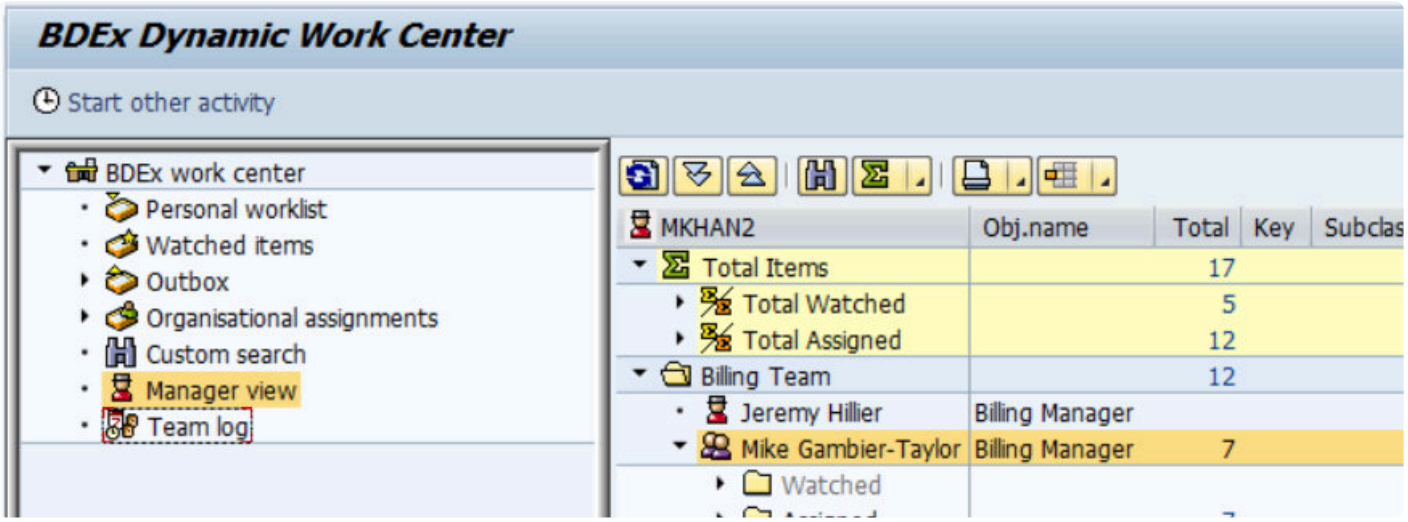
**Changed Time:** Time at which the exception was last changed.
**Maximum no. of hits:** The maximum rows of results to fetch from the system.


All the search options are optional and may or may not be specified. To run the search query, press the Search button.

Search criteria can be saved as variants by pressing the save button after filling up the search parameters, saved variants can be selected by using the variant option.

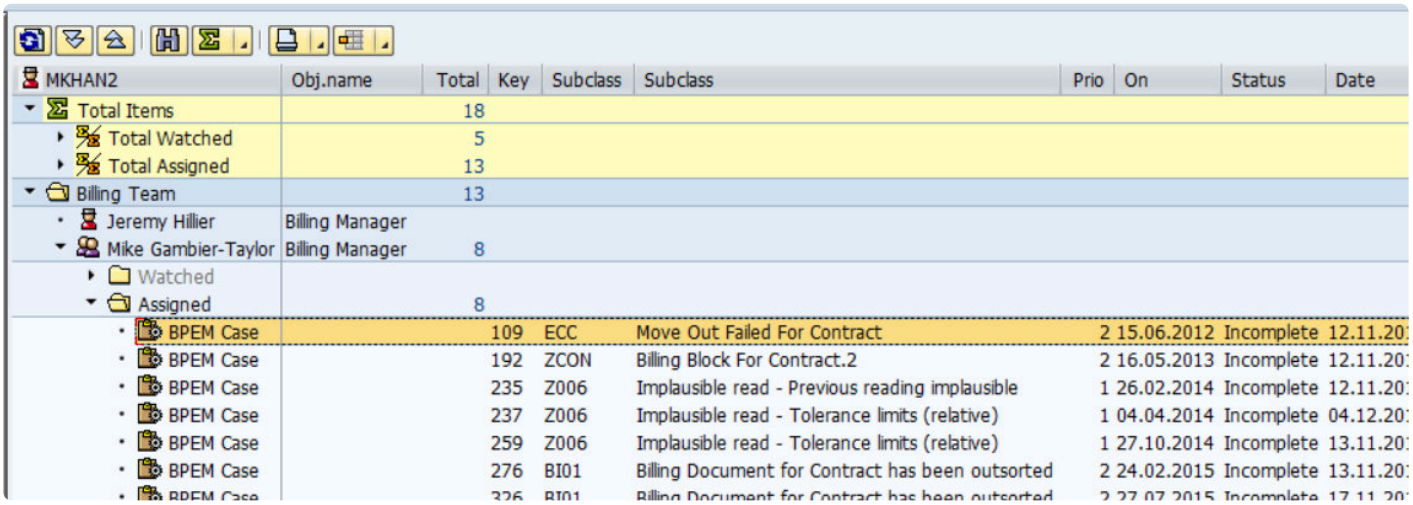
# Managers View

Managers view gives managers the ability to view the workload of their team.



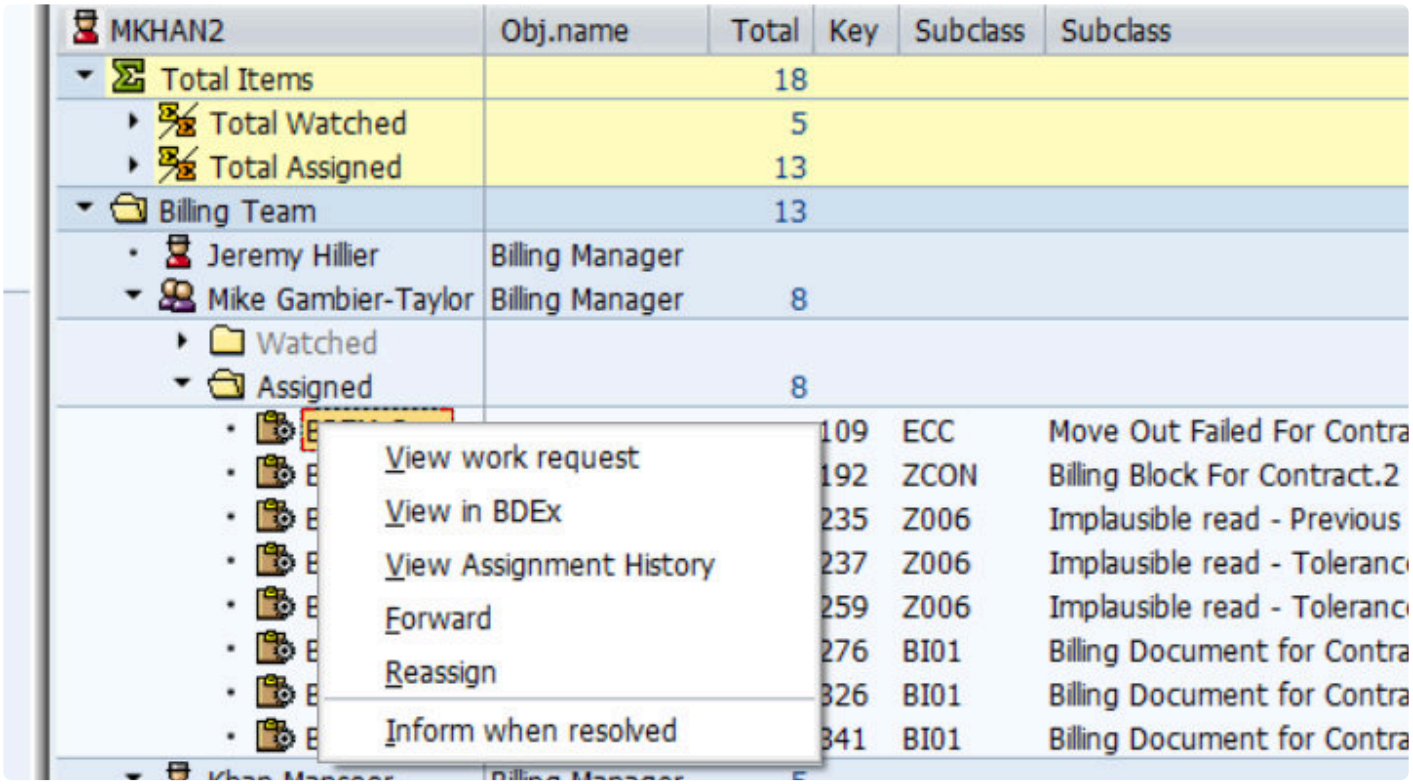

Managers can view work assigned to their team. The status of each work request and the amount of time an agent has spent on the work request.

Work request can be forwarded or reassigned to other agents or put back into the queue .



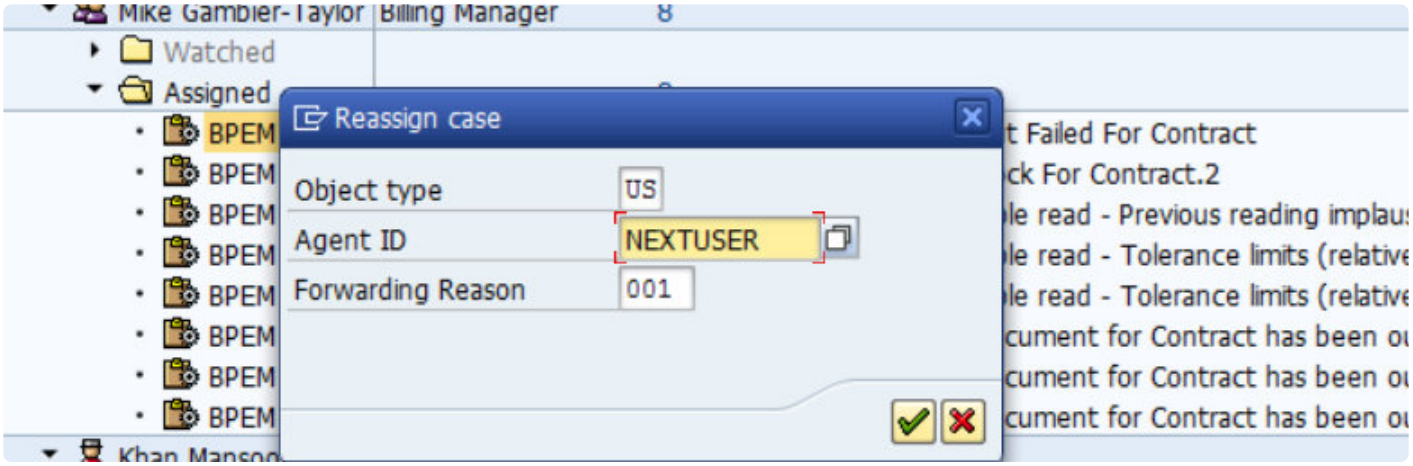

As a manager you can view the total number of work requests assigned to your team and the total work being watched by your team.

You can drill down to each individual team member and view the list of work requests assigned or being watched by a team member.



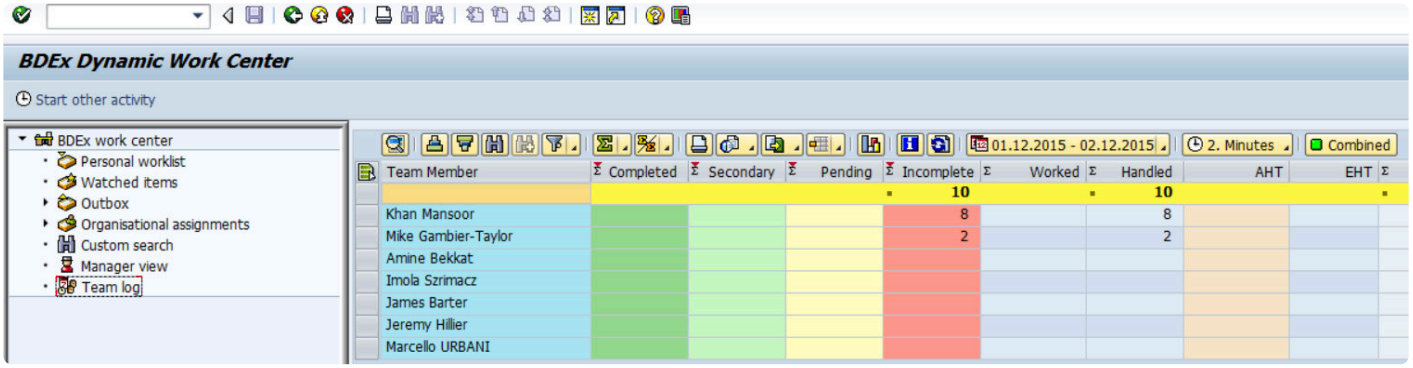

Various right click actions are available for the work requests assigned to team members.

A manager can chose to be informed when the case is resolved , view the case, forward the case and reassign the case to another user.

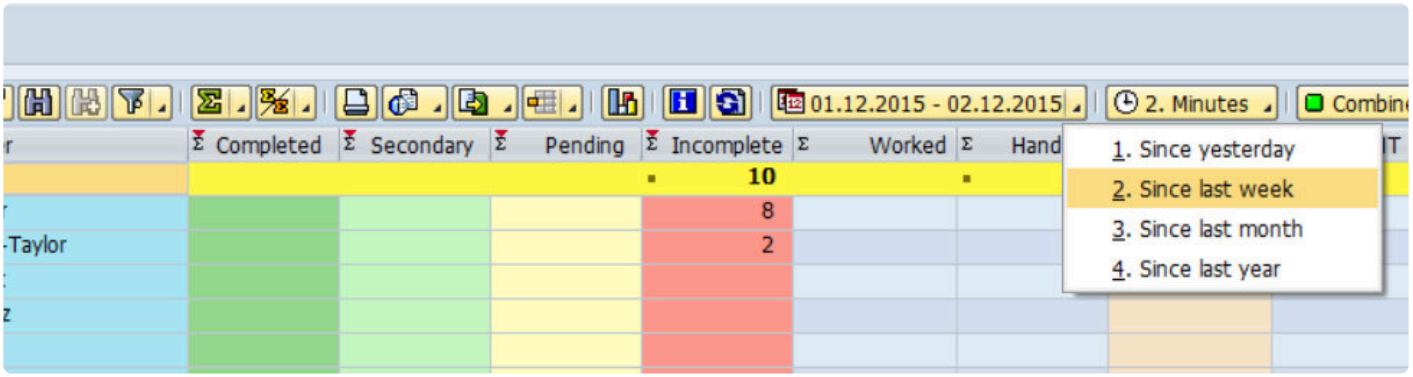


# Team Log

Team log give managers and supervisors an overview of the real time performance of each team member.




Report can be viewed for specific intervals using the quick access drop-box.




Statistics available in the report:

Complete – This is any work item used to load the Customer Centric Hub which has then been set to status completed by the team member in that particular Customer Centric Hub session.

Secondary – This is any other items completed within the session that were not used as the primary work item to launch the Customer Centric Hub.

Pending – the Primary Work Request has been left in a Pending state => Maximum value of 1 per Session

Incomplete – the Primary Work Request has been left open / unresolved => Maximum value of 1 per Session

Worked – count of Primary and/or Secondary Work Requests that have been closed / resolved

Handled – Total BDEx Session count.

Paused Time – Duration of ‘Offline’ Activities recorded for the period

Total Time – All BDEx Sessions accumulated for the period.

Productive Time – Total Time – Paused Time.

Productive %: Percentage of Total Time that the Agent was deemed to be available to work.

AHT (Average Handling Time) – Productive Time divided by the number of Primary Work Requests closed / resolved

EHT (Estimated Handling Time) – based on BDEx Resolution Time settings at the Class & Subclass level

Actions – The number of actions taken by an agent. An action can include any step done withing the DWC like viewing the case in BDEx, watching the case etc.

Top: Case Cat – Case category most work on by the agent.

Top: Count – The count ( number of times ) the top case category was worked by the agent.

BDx St Dat – Date on which DWC user session started.

BDx St Time – Time on which DWC user session started.

# Support from Basis Technologies

## Raising Support Tickets

To request support from Basis Technologies on any issue relating to our product sets (ActiveControl, Transport Expresso, DevOps, Testimony, Diffuser, BDEx Utilities or Transformation), support can be requested from Basis Technologies by submitting a request via our support portal link here.

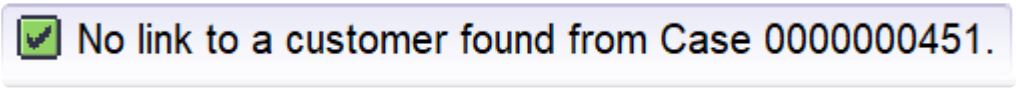
Submitting your request will automatically create a ticket in Zendesk, the ticketing tool used by Basis Technologies.

## Require additional Information or Services?

If additional information or services relating to any of Basis Technologies product sets is required, you can contact us via the support portal link here, or alternatively by contacting your assigned Basis Technologies Account Director.

# No link to customer from &1 &2 found

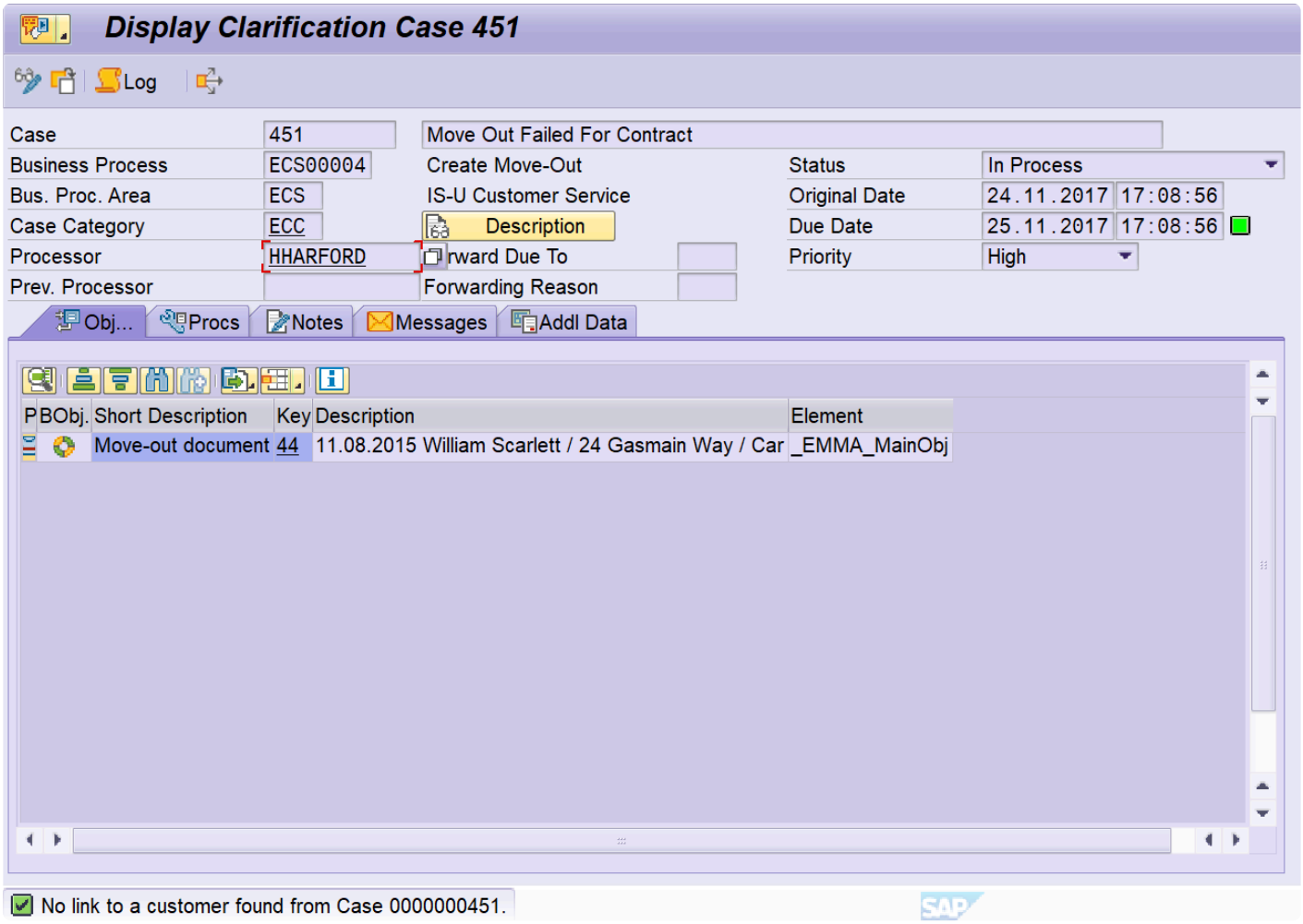
This error is displayed when BDEx is launched from an incorrect object.




To launch BDEx the object must contain a reference to a Master Data Object.

For infomation about Master Data can be viewed here:
Master Data Overview

There are several methods to launch the customer centric hub, however the link to a valid master data object must be present for the launch to occur successfully.
A typical example for this error occurring would happen if you try to launch BDEx from a BPEM case that does not have a Master Data Object associated to it.




In the example the primary object for the case is a move out document (this is not a master data object).

**Resolution Steps**

Check how BDEx was launched and check the master data object is valid.
If the object is invalid BDEx cannot be launched in this way.

See topic User Guide: Accessing BDEx for more information.

If the error is occurring when launching BDEx from a BPEM case ensure in the Case Category object configuration contains a master data object.
For more information about configuring BPEM see Creating Clarification Cases