There’s an App For That!

View Schedule, Sessions, Map, Sponsors, etc.

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Tuesday, February 14, 2017
OUUG REGISTRATION
5:00pm – 8:00pm
Conference Center Anasazi Lobby

VENDOR NIGHT WELCOME RECEPTION
5:00pm – 8:00pm
Palacio Lounge & Veranda
(Located behind Conference Center)
Thanking our wonderful clients as we celebrate our tenth year of service!
Saving energy is a beautiful thing...

Let us help you move towards a better, more optimized future.

Assessment Services
Advisory Services
Implementations
Upgrades
Managed Services
Project Accelerators
Training Services
# Schedule At-A-Glance

<table>
<thead>
<tr>
<th>Time</th>
<th>Tuesday, February 14, 2017</th>
<th>Wednesday, February 15, 2017</th>
<th>Thursday, February 16, 2017</th>
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</thead>
<tbody>
<tr>
<td>7:30am - 8:30am</td>
<td>Full Breakfast</td>
<td>Opening Ceremonies</td>
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<td>Anasazi Courtyard</td>
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<td>Product User Group Agenda</td>
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### EVENING ACTIVITIES
- **Conference Registration in Conference Center Lobby**
  - 5:00pm – 7:30pm
- **Vendor Night Welcome Reception**
  - 5:00pm – 8:00pm
- **Resort Mountainside Palacio Lounge & Veranda**
- **Wrigley Mansion Offsite Social**
  - Presented by Process Solutions Assurance, Origin Consulting & Red Clay Consulting
  - Buses leave at 5:30pm from Conference Center

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# Stay Connected!

Please note this year there is WiFi available throughout the Conference Center; courtesy of Oracle Utilities. Hotel guests also receive free internet in their guest rooms.

Special Thanks To...

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Automating more business processes than any other software

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Join us for an elegant evening & dinner at the historic...

Wrigley Mansion

Wednesday, February 15, 2017
Buses depart at 5:30pm SHARP, Front of Conference Center

Transportation provided to/from event hotel (located only 3 miles from the hotel). Wristband required for entry (guest tickets available for purchase at OUUG Registration Desk). Event hours from 6:00pm - 9:00pm  Casual Attire

This historic landmark constructed in 1932 by William Wrigley Jr., of chewing gum fame, commands breathtaking 360-degree views of the mountains & downtown Phoenix. Guests will enjoy dinner, a hosted bar & the opportunity to roam the treasured grounds & spectacular gardens...and some other fun surprises. All ages welcome; must be 21 years old for alcohol.
Nobody knows Oracle Utilities better

Unparalleled expertise. From the people who pioneered the leading utilities suite.

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What We Do:
Implementation
Support
Consulting
Opening Ceremonies & Keynote All Product Groups

Tuesday, February 14
5:00pm – 7:30pm
Hilton Squaw Peak Conference Center – Anasazi Lobby
Conference Registration Opens

5:00pm – 8:00pm
Vendor Night Expo & Welcome Reception
Palacio Lounge & Veranda

Wednesday, February 15
7:30am – 8:30am
Breakfast – Anasazi Courtyard

8:30am – 9:30am
2017 OUUG Opening Welcome Ceremony & Keynote
Pueblo/Sonora/Kiva
Cathy McCause Fuss, Conference Director
Presentation of OUUG Excellence Awards

Keynote Address:  Dr. Phillip Schnieder
“The Future of Technology for Gas, Wind, Water, Solar & the Grid”

Dr. Phillip Schnieder (MBA, PhD) is not only a business expert, but also a corporate psychologist, who has consulted for numerous Fortune 500 companies and federal agencies on technology issues that include security risk management and cybercrime, as well as how to merge technology with the human element, to maximize individual and organizational productivity. Dr. Schnieder has also worked with a great many energy firms and utilities including Exxon/Mobile and PS&G on strategic planning and futurism. He will discuss some of his “out of the box” methods to creatively use technology to revolutionize energy and the utility industry..

9:30am – 9:45am
BREAK/Networking

9:45am – 10:45am
Breakout Sessions – Attendees proceed to their primary user groups sessions
Not Business As Usual

Fact-based Performance Solutions and Oracle Utilities Professional Services

- Meter to Cash Reporting
- Automated Functional and Performance Testing
- Business Process Analytics
- Bill Accuracy and Revenue Assurance

ORACLE Gold Partner

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3301 Northland Dr. Ste. 214 Austin TX 78731
**Conference Agenda**

**Wednesday, February 15  Hilton Squaw Peak Conference Center**

**9:45am – 10:45am**

**Apache Room**

*Session 1 – Oracle Utilities Customer Care & Billing Address*

*Mike Ballard, Senior Director Utilities Strategy, Oracle Utilities*

**10:45am – 11:00am**

**BREAK/Networking**

**11:00am – 12:00pm**

**Apache Room**

*Breakout Sessions:*

*Session 1 – Roundtable Discussion: CC&B Upgrade to Version 2.5*

Utilities who completed the upgrade to CC&B 2.5.0 and beyond or are in the middle of the process will provide overviews of their efforts. Also includes discussion on the path to freedom from COBOL.

*Rajesh Prasad, SF Water & Other CC&B Customers*

**12:00pm – 1:00pm**

**LUNCH – Anasazi Courtyard**

**1:00pm – 2:00pm**

**Pueblo/Sonora/Kiva**

*Breakout Sessions:*

*Session 1 – Improving Utility Operational Efficiency Through Enhanced Customer Engagement*

The Los Angeles Department of Water and Power, the largest municipal water and power utility in the nation, was established more than 100 years ago to deliver reliable, safe water and electricity to 3.8 million residents and businesses in Los Angeles. LADWP utilizes Oracle’s CC&B to dynamically manage customer and financial data. In this session, SUS will address the intent to provide customer facing solution to LADWP customers. LADWP customers can proactively communicate with their utility, monitor consumption, view and pay their bills anytime via digital channels.

*Lance Brown and Aras Akbarim Los Angeles Department of Water and Power; and Komal Puri, Smart Utility Solutions*

**Apache**

*Session 2 – Leverage Your Bill Print Partner to Minimize Your Exceptions*

Sometimes the most difficult part of a CIS transition is ensuring your customers are not negatively impacted. How can you keep them insulated while making the necessary changes your utility needs? Working with the right partners can keep you on track during your transition while ensuring your customers get the most out of the new information available while minimizing the exceptions that come with every CIS implementation. Learn how Greenville Utilities successfully implemented CC&B into their utility and how their partnership with Utilitec helped in that transition.

*Scott Mullis, Assistant Director of Customer Relations, Greenville Utilities; and Erin Romo, Utilitec*
Wednesday, February 15  Continued

1:00pm – 2:00pm  
**Breakout Sessions:**

**Yucca/Palo Verde**

**Session 3 – Conversion, Technical Challenges, Business Realignment & Bill Redesign**
Discussion regarding conversion, technical challenges business, realignment and bill redesign.

*Shirley Stibb, Alliant Energy*

2:00pm – 2:15pm  
**BREAK/Networking**

2:15pm – 3:15pm  
**Breakout Sessions:**

**Apache**

**Session 1 – Driving Down Storage Costs & Improve Test Data Quality**
Learn how Baltimore Gas & Electric (BGE) was able to drive down storage costs and improve test data quality with Meridian Integration’s Enterprise Data Management Suite (EDMS).

*Jean Kuhn, Baltimore Gas and Electric Company & Zendrick Cunningham, Meridian Integration*

**Yucca/Palo Verde**

**Session 2 – Ensure Reliability, Accuracy & Trouble-Free Billing: Automate Your CC&B System**
Utility companies use sophisticated customer care and billing software systems to ensure a continuous stream of revenue and consistent customer service. These systems are invaluable to the business, but implementation times can be lengthy and integrating business processes and other application software can be labor intensive and require extensive custom scripting. Louisville Water Company has used the Automic Platform to not only streamline batch processing but to also reduce human effort. Processes in the business have become more data driven which has reduced workload throughout multiple departments allowing more focus on business needs than preparing for nightly billing.

*Blake Steenbergen, Louisville Water Company & Matt Busch, Automic Software*

3:15pm – 3:30pm  
**BREAK – Lobby Foyer**
Wednesday, February 15  Continued

3:30pm – 4:30pm  Breakout Sessions:
Apache

Session 1 – Leveraging Benefits from a New Business Requirement to Address Long-Standing Credit and Collections Issues

TEP has been using CC&B for around a decade. Throughout that period, there have been many improvements made to the Credit and Collections functionality. There have also been issues and improvements that were identified that would have required exhaustive analysis to resolve. For those types of fixes/enhancements, the cost of the effort to implement and test outweighed the benefits and they were shelled for future consideration. This presentation explains how significant benefits from a new business requirement were leveraged to address these long-standing C&C issues accumulated for over a decade.

Brian Bub, TEP, Call Center Credit Group Manager; Ramon Vazquez, TEP, IT Manager; and Roberto Tan, Origin Consulting

Yucca/Palo Verde

Session 2 – Analytics and Quality Assurance Tools for CC&B Upgrades and Operations

Want to measure 100% of your CC&B business processes with one click? Or Know which CIS application users are performing the best? How are the new trainees doing? And who is complying with internal or regulatory procedures? Is the application performance consistent day to day and screen to screen? Put away your stop watch and learn how a utility uses an automated solution to measure, analyze, improve, and predict business process performance for Oracle CC&B.

Alan Marshall, Enterprise Systems Manager, San Francisco Public Utilities Commission; Karen Sasic, Director of Billing & Regulatory Relations, Utilities, Inc.; and Maryann Walsh Wolff, Intoollect

5:30pm Buses Depart
6:00pm – 9:00pm  Buses leave directly from the front of the Hilton Conference Center to the spectacular Wrigley Mansion (www.WrigleyMansion.com), located only 3 miles from the hotel. Please note that a wristband is required for entry. All ages welcome; must be 21 years old for alcohol. If you are bringing a guest/spouse, please purchase a guest ticket at www.OUUG.org. Casual Attire.

Hosted by Origin Consulting, Process Solutions Assurance (PSA) & Red Clay Consulting
#1 GLOBAL ENERGY & WATER CLOUD PLATFORM

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- #1 Customer Engagement Web & Mobile Platform
- Enhanced Utility-Customer Relationship
- Increased Customer Satisfaction
- Reduced Call Volume
- Reduced Customer Care Expenses
- Increased Customer Adoption
- Improved Customer Experience

**SMART iQ** (SIQ)

- #1 Cloud Analytics Platform
- Improved Energy & Water Use Efficiency
- Increased Operational Efficiency
- Reduced Customer Service Costs
- Achieve Conservation Targets
- Maximize ROI

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Utilities recognize the need for new distribution network technologies to accommodate sustainable growth and customers’ growing interest in grid or delivery network connected, customer-owned energy technologies such as home/building energy management systems, solar rooftops, and smart appliances. As policies that concern these technologies—customer choice, conservation mandates, emissions reductions, weather-related disruption—begin to unfold around the world, a fundamentally different approach to energy and water delivery infrastructure is needed. A platform that supports customers as active participants of energy and water operations in a sharing economy along the lines of what Uber and Airbnb has done for the transportation and hospitality industries. This session outlines a vision and platform to support the utility of the future.

*Brad Williams, Vice President, Industry Strategy, Oracle Utilities*

**Under the Hood with Oracle Utilities Analytics (OUA) – What changed from OWB to ODI?**

The new version of Oracle Utilities Analytics uses Oracle Data Integrator (ODI) in place of Oracle Warehouse Builder (OWB). This will have a big impact on existing OUA implementations with OWB. During this session we will compare ODI and OWB architectures and also discuss the benefits of using ODI as the ELT tool for more dynamic and efficient implementation approach. We will also discuss the Oracle-provided extractors and schemas for OUA and built in dashboards for utilities modules including CC&B, MDM, MWM, NMS, WAM and ODM.

*Arun Kota, Emtec*
Put the Best of Both Worlds to Work For You

Whether you are currently using or looking to transition to Oracle’s Customer Care and Billing Application (CC&B), Utilitec can help you quickly integrate and optimize your billing process.

As a leading provider of print and electronic billing solutions for utilities, Utilitec supports a number of CC&B clients and is accustomed to working with Oracle’s industry-leading system.

Our solutions were developed to accommodate CC&B requiring less unique code and customization, which translates into quick and efficient onboarding and launch for our clients. From billing intercepts to non-premise charges and everything in between, we understand the specific characteristics and help you maximize the tool based on how you run your business.

Choosing Utilitec as your billing partner delivers:

**Utility Industry Knowledge**

As the only billing solutions outsource provider specifically for utilities, we have the knowledge and expertise needed to address the unique demands of the industry, including products and services that enable clients to leverage CC&B to even further improve efficiencies and customer service.

**Value and Cost Savings**

We are focused on optimizing bill processing and implementation resulting in improved delivery, increased value and cost savings for our customers.

**Customizable and Flexible Solutions**

Our customized approach and flexible payment options allow utilities the ability to provide superior billing services to all its customers.

**Quality, Accuracy and Reliability**

Utilitec maintains the highest level of quality, accuracy and reliability through our integrated quality controls giving our customers peace of mind that all billing customer service issues are eliminated.

For more information on Utilitec or to demo their products contact Chris Macres at 800.950.2240.

Chris Macres
Business Development Manager
800.950.2240

1911 Woodslee Drive
Troy, MI 48083-2236

www'utilitec.net
Thursday, February 16

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<th>Time</th>
<th>Breakout Sessions:</th>
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<tr>
<td>9:45am – 10:45 am</td>
<td><strong>Apache</strong></td>
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| **Session 1** – Automating CC&B Regression Testing | Are you finding that every time you do a CC&B release you need to pull significant business SMEs out to test even for the most minor of upgrades? Are you having to add an extra month or more to a release just to regression test the functionality of a new CC&B version to ensure that functionality is not broken? In this session, we walk through the challenges of how to write automated tests for CC&B so that all that remains to system verification is exploratory testing. We identify the complexities of why CC&B automation is so hard and provide solutions based on real world implementations at Avista’s successful deployment of CC&B. Don’t miss this session to reduce your release cycle times, improve your quality, and reduce the personnel pulled out from data to day operations during each release. 
*Michael Mudge, Application Delivery Manager, Avista & James Ferguson, IntelliTect* |
| Yucca/Palo Verde | **Session 2** – Best Practices for a Quick and Easy Implementation: PPL | Paymentus reviews PPL Electric Utilities’ and other Oracle clients’ experiences in implementing a new payment system that drives adoption, alleviates PCI, and integrates in real time to Oracle CC&B.  
This session explores:  
• The ease of implementation and seamless integration experience to the Oracle CC&B Advanced payment features the Utility chose to drive higher adoption  
• The integration of payment pages behind the Utility’s enrolled customer portal to create a better UI and a secure payment process  
• How to meet and exceed you customers’ ever changing expectations with a single-platform solution.  
*PPL Electric Utilities Case Study by Brian Grillo, Paymentus*

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<th>Time</th>
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<td>10:45am – 11:00am</td>
<td><strong>BREAK – Lobby Foyer</strong></td>
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</table>
| 11:00am – 11:45am | **Apache** | **Session 1** – Customer Preferences and Notifications | Discussion of Customer Preferences and Notifications.  
*Gail Allen & Randy Vance, KCP&L* |
Thursday, February 16  Continued

11:00am – 11:45am  Breakout Sessions:

Yucca/Palo Verde  Session 2 – To Implementation and Beyond...

ALLELTE companies, Minnesota Power, and Superior Water Light and Power, implemented Oracle CC&B version 2.4 with a system go-live in May of 2015. The company’s project was highlighted in Oracle Utilities Customer Spotlight and Customer Story, but what’s new more than one year, post go-live? Members from the project team will present some highlights from the implementation, outlining key strategies that helped anchor a new, stable system foundation. We will share critical success factors, post go-live challenges, post go-live enhancements, and staffing/support approaches that contributed to a highly successful implementation and stabilization. We will also share updates on our in-progress and future projects which include a Customer Portal, upgrading to CC&B 2.5 and a Meter Data Management System.

Kelly Ecklind, Minnesota Power

11:45am – 12:00pm  ALL CC&B ATTENDEES: Closing Ceremonies

Apache  Return conference surveys & discuss ongoing 2017 activities & 2018 planning.

12:00pm – 1:00pm  LUNCH – Anasazi Courtyard

CC&B Conference Ends
Wednesday, February 15  Hilton Squaw Peak Conference Center

9:45am – 10:45am  Saguaro/Cholla  Breakout Sessions: (For LPS, Load Research & Load Analysis Attendees)
An update on the progress of LPS V2.0 delivery as well as the roadmap for the delivery of other Lodestar products will be provided. Support for Lodestar products will also be discussed.
Sharon Allen, Ameren

10:45am – 11:00am  BREAK/Networking

11:00am – 12:00pm  Saguaro/Cholla  Breakout Sessions: (For LPS, Load Research & Load Analysis Attendees)
The Oracle Utilities Application Framework (OUAF) and Service and Measurement Data Framework (SMDA) will be the foundation for LPS V2 and other Lodestar products. This session will provide an introduction as to the functionality and capabilities provided by these two functional layers.
Sharon Allen, Ameren

12:00pm – 1:00pm  LUNCH – Anasazi Courtyard

1:00pm – 2:00pm  Saguaro/Cholla  Breakout Sessions: (For LPS & Load Research Attendees)
The proposed functionality for LPS V2 will be discussed and designed presented.
Sharon Allen, Ameren

Mohave  Load Analysis Attendees Convene:
Product Update & Leveraging New Features
Rick Camarata, Oracle Utilities

2:00pm – 2:15pm  BREAK – Lobby Foyer

2:15pm – 3:15pm  Saguaro/Cholla  Breakout Sessions: (For LPS & Load Research Attendees)
The LPS V2 product will be designed to provide flexibility in meeting settlement process requirements. This session will present the settlement process use-cases the LPS V2 product is being designed to meet, and discuss how product can be configured to meet these requirements.
Sharon Allen, Ameren

Mohave  Load Analysis Attendees:
Product Update & Leveraging New Features
Rick Camarata, Oracle Utilities
Wednesday, February 15  Continued

3:15pm – 3:30pm  BREAK – Lobby Foyer

3:30pm – 4:30pm  Breakout Sessions: (For LPS & Load Research Attendees)
Saguaro/Cholla  A discussion about the best practices in moving from V1 to V2, and the how the LPS V2 Cloud solution can be leveraged.
Sharon Allen, Ameren

Mohave  Load Analysis Attendees:
Product Update & Leveraging New Features
Rick Camarata, Oracle Utilities

5:30pm Buses Depart
6:00pm – 9:00pm  Buses leave directly from the front of the Hilton Conference Center to the spectacular Wrigley Mansion (www.WrigleyMansion.com), located only 3 miles from the hotel. Please note that a wristband is required for entry. All ages welcome; must be 21 years old for alcohol. If you are bringing a guest/spouse, please purchase a guest ticket at www.OUUG.org. Casual attire
Hosted by Origin Consulting, Process Solutions Assurance (PSA) & Red Clay Consulting
Thursday, February 16

7:30am – 8:30am  Breakfast – Anasazi Courtyard

8:30am – 9:30am  GENERAL SESSION/ALL PRODUCT GROUPS:
                  Pueblo/Sonora/Kiva
                  A Vision for a Customer-centric Utility Operations Platform
Utilities recognize the need for new distribution network technologies to accommodate sustainable growth and customers’ growing interest in grid or delivery network connected, customer-owned energy technologies such as home/building energy management systems, solar rooftops, and smart appliances. As policies that concern these technologies—customer choice, conservation mandates, emissions reductions, weather-related disruption—begin to unfold around the world, a fundamentally different approach to energy and water delivery infrastructure is needed. A platform that supports customers as active participants of energy and water operations in a sharing economy along the lines of what Uber and Airbnb has done for the transportation and hospitality industries. This session outlines a vision and platform to support the utility of the future.

Brad Williams, Vice President, Industry Strategy, Oracle Utilities

9:30am – 9:45am  BREAK/Networking

9:45am – 10:45 am  Breakout Sessions:
                    Pueblo/Sonora/Kiva
                    GENERAL SESSION/ALL PRODUCT GROUPS:
                    Under the Hood with Oracle Utilities Analytics (OUA) – What changed from OWB to ODI?
                    The new version of Oracle Utilities Analytics uses Oracle Data Integrator (ODI) in place of Oracle Warehouse Builder (OWB). This will have a big impact on existing OUA implementations with OWB. During this session we will compare ODI and OWB architectures and also discuss the benefits of using ODI as the ELT tool for more dynamic and efficient implementation approach. We will also discuss the Oracle-provided extractors and schemas for OUA and built in dashboards for utilities modules including CC&B, MDM, MWM, NMS, WAM and ODM.

Arun Kota, Emtec

Saguaro  A discussion about LPS V2 (LPS & Load Analysis Attendees)
         Sharon Allen, Ameren & Rick Camarata, Oracle Utilities

Cholla  Load Research Attendees:
        A free form discussion about Lodestar products and roadmaps.

10:45am – 11:00am  BREAK/Networking
## Conference Agenda

### LODESTAR (LPS, Load Research & Load Analysis)

#### Thursday, February 16

##### 11:00am – 12:00pm

**Saguaro**

**Breakout Sessions:**

MDM Data for LPS  
*Sharon Allen, Ameren*

**Cholla**

**Load Research Attendees:**

Red Clay Consulting MDM Session

**Mohave**

**Load Analysis Attendees:**

Sample Manager Design Roundtable  
*Rick Camarata, Oracle Utilities*

##### 12:00pm – 1:00pm

**LUNCH** – Anasazi Courtyard

##### 1:00pm – 2:00pm

**Saguaro**

**Breakout Sessions:**

Load Settlement Today  
*Sharon Allen, Ameren*

**Cholla**

**Load Research Attendees:**

PEPCO/Entegrity

**Mohave**

**Load Analysis Attendees:**

Sample Manager Design Roundtable  
*Rick Camarata, Oracle Utilities*

##### 2:00pm – 2:15pm

**BREAK** – Lobby Foyer

##### 2:15pm – 3:15pm

**ALL LODESTAR ATTENDEES: Closing Ceremonies**

Return conference surveys & discuss ongoing 2017 activities & 2018 planning.  
*Sharon Allen, Ameren & Rick Camarata, Oracle Utilities*

##### 3:15pm

**LODESTAR Conference Ends**
Conference Agenda

MDM

Wednesday, February 15  Hilton Squaw Peak Conference Center

9:45am – 10:45am  Breakout Sessions
Hopi  Oracle Utilities Meter Data Management Address
An open discussion between Utilities and Oracle management on the roadmap, performance, and maintenance of the Oracle MDM.
Oracle Utilities MDM Product Management

10:45am – 11:00am  BREAK/Networking

11:00am – 12:00pm  Breakout Sessions:
Hopi  Session 1 – Supporting Multiple Operating Companies in MDM
Discuss lessons learned and technical considerations to maximize capability of MDM application by supporting multiple Operating Companies and Time Zones simultaneously. AEP and Red Clay will discuss experience gleaned from implementation of MDM 2.1.0.3 for five unique Operating Companies throughout two Time Zones for more than 1.5 million meters.
Todd Thompson, AMI/MDM Application Architect, American Electric Power & Frank Meyer, Red Clay

12:00pm – 1:00pm  LUNCH – Anasazi Courtyard

1:00pm – 2:00pm  Breakout Sessions:
Hopi  Session 1 – Implementing Service Order Management in the Real World: Panel Discussion
If you’re implementing SOM now or considering SOM in your 2-3 year roadmap, this presentation will be extremely informative for your organization. SOM is a reasonably new Oracle Utilities product that assumes a few key architecture and system of record changes that must be accounted for in any new, or existing CC&B and/or MDM implementation. This presentation will not simply address the theoretical best practices for adopting the fully integrated Oracle Meter Solution stack, but will speak directly to lessons learned, enhancements requested, and service requests created by some of the early SOM implementations. Regardless of the timeframe of a possible SOM implementation, this presentation will cover several key solution architecture considerations that will significantly decrease post-CC&B SOM implementations complexity and expense and pave the way to fully realize the return on investment that this AMI enabled server order automation product provides!
Founding utilities of the SOM User Group and Early Adopter Program: Lois Stark, KCP&L; Keith Olson, PG&E; Bobbi Jo Pemberton, Avista; and Jason Kriendler, Triniti Consulting
Expert Oracle Utilities Services

Advisory | Delivery Services | Success Assurance

triniti consulting

SOM User Group Founders | Industry Thought Leaders

www.TrinitiConsulting.com

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ORACLE Gold Partner
Wednesday, February 15  Continued

1:00pm – 2:00pm  Breakout Sessions
Sedona 2  Education Pavilion: Understanding MDM’s Functionality in the Meter to Cash Flow. CUSTOMER ATTENDANCE ONLY for this Training Class
Learn about the critical role that MDM plays in the meter to cash process via a series of self-guided modules, with the assistance of an in-class instructor. You'll be able to view interactive videos that provide an in-depth look at the inner workings of MDM: IMD, VEE, Bill Determinants and CIS Sync. Advance Registration Required & Limited to 12 Students per session. Hosted by Red Clay Consulting

2:00pm – 2:15pm  BREAK/Networking

2:15pm – 3:15pm  Breakout Sessions:
Hopi  Session 1 – Implementing VEE for Market Settlement
How to leverage MDM 2.1 to reconcile data for Texas market settlement. Learn how to configure Periodic Estimations and Consumption Sync processes to reconcile scalar and interval data daily and implementation considerations. Red Clay and AEP will speak to configurations and new functionality leveraged to support Texas Operating Company use case. Tamara Hatter, MDM Business Unit Support, American Electric Power & Mark Polston, Red Clay Consulting

Sedona 2  Education Pavilion: Understanding MDM’s Functionality in the Meter to Cash Flow. **ENCORE SESSION** See course description above 1:00pm

3:15pm – 3:30pm  BREAK – Lobby Foyer

3:30pm – 4:30pm  Breakout Sessions:
Hopi  Session 1 – Trellis: A Unique Approach to Change Management
This session will introduce a solution for managing configuration changes, as well as an easier way of migrating these changes between environments. Moving configuration data through environments in a flexible way can be challenging. It is often difficult to manage complex MDM and CC&B configurations across multiple environments. These issues are further compounded when end users need to move atomic changes and bug fixes through environments. Grant Erickson, IntelliTect; Bobbi Jo Pemberton, Avista; Mark Michaelis; and Travis Johnston, Triniti Consulting

Sedona 2  Education Pavilion: Understanding MDM’s Functionality in the Meter to Cash Flow. **ENCORE SESSION** See course description above 1:00pm
Wednesday, February 15  Continued

5:30pm Buses Depart
6:00pm – 9:00pm  Buses leave directly from the front of the Hilton Conference Center to the spectacular Wrigley Mansion (www.WrigleyMansion.com), located only 3 miles from the hotel. Please note that a wristband is required for entry. All ages welcome; must be 21 years old for alcohol.  If you are bringing a guest/spouse, please purchase a guest ticket at www.OUUG.org. Casual Attire

*Hosted by Origin Consulting, Process Solutions Assurance (PSA) & Red Clay Consulting*

Thursday, February 16

7:30am – 8:30am  Breakfast – Anasazi Courtyard

8:30am – 9:30am  **GENERAL SESSION/ALL PRODUCT GROUPS:**

**Pueblo/Sonora/Kiva**

A Vision for a Customer-centric Utility Operations Platform

Utilities recognize the need for new distribution network technologies to accommodate sustainable growth and customers’ growing interest in grid or delivery network connected, customer-owned energy technologies such as home/building energy management systems, solar rooftops, and smart appliances. As policies that concern these technologies—customer choice, conservation mandates, emissions reductions, weather-related disruption—begin to unfold around the world, a fundamentally different approach to energy and water delivery infrastructure is needed. A platform that supports customers as active participants of energy and water operations in a sharing economy along the lines of what Uber and Airbnb has done for the transportation and hospitality industries. This session outlines a vision and platform to support the utility of the future.

*Brad Williams, Vice President, Industry Strategy, Oracle Utilities*

9:30am – 9:45am  BREAK/Networking
Thursday, February 16

9:45am – 10:45 am
Breakout Sessions:

Pueblo/Sonora/Kiva
GENERAL SESSION/ALL PRODUCT GROUPS:
Under the Hood with Oracle Utilities Analytics (OUA) – What changed from OWB to ODI?
The new version of Oracle Utilities Analytics uses Oracle Data Integrator (ODI) in place of Oracle Warehouse Builder (OWB). This will have a big impact on existing OUA implementations with OWB. During this session we will compare ODI and OWB architectures and also discuss the benefits of using ODI as the ELT tool for more dynamic and efficient implementation approach. We will also discuss the Oracle-provided extractors and schemas for OUA and built in dashboards for utilities modules including CC&B, MDM, MWM, NMS, WAM and ODM.
Arun Kota, Emtec

Hopi
Session 1 – Life after Project and When Project Delivery Hits Production
Meter Data Management is the hub to collect all things from the field devices and often times becomes mission critical for billing. However, when the business needs additional information/edits/functions, a project often gets underway. Managing functional expectations, system impacts and new business processes once in production can be an opportunity for continuous improvement.

As utilities mature, the use of the meter data for field operations and also uses the data for billing purposes, the business areas must continue to refine best practices, improve communication and ensure quality measures are in place.

This session will be interactive to ensure that each attendees regardless of role; IT, operations, customer service, will hear about key ideas to consider before embarking on a new functions. The discussion will continue through the system life cycle of the launch of the business feature to ensure smooth business process transition.
Dawn Frye, OUC

10:45am – 11:00am
BREAK/Networking
Thursday, February 16  Continued

11:00am – 12:00pm  Breakout Sessions:
Hopi  Session 1 – Data Migration & Conversion Between MDM 1.6 and 2.x
Learn considerations and high-level approach to mitigate fallout from data conversion from legacy systems to MDM 2.1. This presentation will discuss Red Clay and AEP lessons learned and considerations to ensure data quality and performance when migrating data from MDM v1.6 and CIS to MDM v2.1 using Red Clay’s SmartGridMigration (SGM) product.
*American Electric Power & Hitesh Daya, Red Clay Consulting*

12:00pm – 1:00pm  LUNCH – Anasazi Courtyard

1:00pm – 2:00pm  Breakout Sessions:
Hopi  Session 1 – Alternatives to Complex Calculations
*Juanito de Jesus, ATCO Electric & Patti Costello, Oracle Utilities*

2:00pm – 2:30pm  MDM Closing Ceremonies
Hopi  Return conference surveys & discuss ongoing 2017 activities & 2018 planning.
*Bob Walters, ComEd*

*MDM Conference Ends*
## Conference Agenda

**WAM**

**Wednesday, February 15**  
**Hilton Squaw Peak Conference Center**

<table>
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| 9:45am – 10:45am | Breakout Sessions
Pueblo/Sonora/Kiva  
*Oracle Utilities Work and Asset Management Address*
  *Barry DeMartini & Kimberley Herrala, Oracle Utilities* |

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| 11:00am – 12:00pm | Breakout Sessions:
Navajo  
*Session 1 – Maintenance & Asset Management Functional Workshop Part 1*
  *Moderators: Barry DeMartini & Pat Caldwell, Oracle Utilities* |

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| 12:00pm – 1:00pm | Women in Reliability & Maintenance (WIRAM) Lunch (No Cost)
Arroyo  

**WIRAM**

WIRAM’s mission is to empower women around the world to understand the importance of Asset Management and Reliability and their role in society and how to use this knowledge to apply it for best practices and operational excellence achievement. Learn more about WIRAM at [www.maintenance.org/pages/wiram](http://www.maintenance.org/pages/wiram).

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Navajo  
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  *Moderators: Barry DeMartini & Pat Caldwell, Oracle Utilities* |

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<td>2:00pm – 2:15pm</td>
<td>BREAK – Lobby Foyer</td>
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UPGRADE READINESS
For Oracle Utilities Work & Asset Management v2

In May 2015, Oracle Utilities announced the availability of Oracle Utilities Work and Asset Management v2.1. This new version is now on the same technology framework as Oracle's other utility-specific applications. This upgraded solution offers many opportunities for those companies considering an upgrade. However, with opportunity comes risk that an Upgrade Readiness Assessment from Process Solutions Assurance (PSA) can help you minimize. Tangible assessment results include developing a tailored roadmap for understanding the benefits of upgrading and how to seamlessly achieve it.

PSA brings tremendous technical and functional experience to the Oracle Utilities marketplace over the last 15 years by developing methods, best-practices, and software offerings that help minimize risk and heighten returns for their customers. PSA is now translating their experience into this Upgrade Readiness Assessment service to help existing Oracle Work and Asset Management users measure and plan for upgrading their systems to the latest platform. This assessment will utilize senior resources who are experienced in both platforms and automated tools to measure current and future state scenarios. Deliverables will provide support for the internal business case and planning efforts for any utility considering the move.

Findings are specific to your organization and are supported by deliverables to help your staff understand the opportunities identified. If an upgrade is recommended, an upgrade path will be included to reduce project risk and staff impacts, returning value while a full project is planned and established.

Are you wondering?

- Is an upgrade right for us?
- What can we do better with the current systems?
- Does my data require clean up before a project?
- How will my infrastructure be impacted by an upgrade?
- Do features in the newer version align with our goals?
- How complex would an upgrade be?
- How do we move forward?
- What will happen with my integrations?

ORACLE Gold Partner

www.ConsultPSA.com
Wednesday, February 15  Continued

2:15pm – 3:15pm  Breakout Sessions:

Pueblo/Sonora/Kiva  Session 1 – Implementing WAM V2: The Final Piece of the Puzzle
This session describes the decision process to start a new WAM V2 implementation at Louisville Water Company. This presentation will provide an overview of company objectives for advancing work and asset management processes and key technologies to be connected through the project. We will also address how WAM functionality is addressed in this new (first) V2 implementation.

James Bates & Jeremy Raney, Louisville Water; and Raylene Kwasnicki & Peter Turi, EY

Navajo  Session 2 – Criticality Analysis: Case Study with Metropolitan Council Environmental Services
The Metropolitan Council is the regional agency of government for the Minneapolis-St.Paul metropolitan area. The metro area is home to 2.9 million people (2012) in 7 counties and 188 cities and townships, encompassing nearly 3,000 square miles. MCES Strategic Plan set a goal to establish Asset Management as a priority to address these challenges so that MCES can successfully meet customer expectations while controlling rates for the future. MCES identified criticality analysis as one of the first steps in establishing their Asset Management program and setting it up for sustainable success. In March 2016, Uberlytics was contracted to facilitate two pilot criticality analyses that will identify system/asset structure and provide a criticality ranking for equipment in two facilities and an approach to complete all MCES facilities in the future in order to balance performance, risk and cost through a system of shared accountability.

MCES & Tacoma Zach, Uberlytics

Adobe  Session 3 – Automated WAM Service Request Creation
In February 2016, Seattle City Light implemented a new interface to Oracle WAM to automatically create Service Requests for new or upgraded electric service applications. The Oracle WebCenter Suite (Portal, Content), Business Process Mapping (BPM), and Application Development Framework (ADF), enabled Seattle City Light to establish the online customer portal application and a tool to review, approve and submit the applications to WAMS. An Oracle Service Bus service interface loads the data into WAMS and generates Service Requests with associated service histories. By implementing an online application for our customers, the time required for utility staff to process customer applications was reduced to less than half. Previously, customers submitted hand written forms; the new process insures that information is complete, clear and processed in a timely manner. WAM Service Requests now have complete, standardized information.

Leslie Wilson, Seattle City Light
Wednesday, February 15  Continued

3:15pm – 3:30pm  BREAK – Lobby Foyer

3:30pm – 4:30pm  Breakout Sessions:

Pueblo/Sonora/Kiva  Session 1 – Transforming Maintenance from Cost to Profit Center with Precision Maintenance Strategies - 40 years Post-RCM
Veolia’s Asset Management program has been based on Reliability Centered Maintenance (RCM) as core concept since 2002 with many major Wastewater systems having successfully complete RCM studies around the world and proving the value of the very detailed analysis. However, the cost of an RCM study is a significant manpower drain and investment and so RCM was only been applied strategically on high risk systems. For 2016, Veolia began an RCM analysis project on an energy plant with a goal of completely reviewing every system during 2016. By mid-year it was clear that the plant level personal could not support the classical RCM process, so Veolia did a pilot project with APT’s Preventance package. This presentation will provide a comparison of manpower required to complete a classical RCM and a review leveraging the Preventance package and a discussion of the benefits.
Marc Yarlott, Veolia & Mark Benak, APT

Navajo  Session 2 – Mobilize Your Workforce! Mobile Solutions for Your Field & Inventory Crews
PSA’s InField Mobile™ application suite for Oracle WAM enables clients to maximize their efficiency. InField Mobile applications are accessible from anywhere, putting valuable data into the hands of your field personnel…operating in connected and disconnected modes. It’s completely mobile out of the box, using any iOS, Android, Windows mobile device. From the assets in your facilities, plants, and infrastructure PSA’s InField Mobile applications are flexible, affordable and built to improve your bottom line.

- Work Order Task Completion
- Work Planning (Labor, Material, Other Charges, Procedures)
- Labor & Direct Charge Allocation
- Forms and Spec Completion (Service History)
- Asset Data Collection & History
- Asset History (Work History and Readings History)
- PM Routes & Inspection Routing
- Visualize Work on Maps (streamline work routes)
- Supports Contractor Work

Dee Clawson & John Clow, Process Solutions Assurance (PSA)
Wednesday, February 15  Continued

3:30pm – 4:30pm  Breakout Sessions:  
Adobe  
Session 3 – Condition Assessment in WAM  
MMSD will provide an overview of our approach to implement Condition Assessment module in WAM. This includes configuration that will help us integrate condition assessment tasks in our day-to-day work order and PM activities. The goal is to have condition assessment ratings available for key asset groups for improved decision making and maintenance and replacement.

Prior to implementing the Oracle WAM module the District developed a methodology for condition assessment that divided assets into asset management groups and condition assessment templates for all the groups. This presentation will illustrate the methodology, overall goals and how obstacles were overcome.  
Amy Bublitz & Claudia Haack, Madison Metropolitan Sewerage District

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6:00pm – 9:00pm  Buses leave directly from the front of the Hilton Conference Center to the spectacular Wrigley Mansion (www.WrigleyMansion.com), located only 3 miles from the hotel. Please note that a wristband is required for entry. All ages welcome; must be 21 years old for alcohol. If you are bringing a guest/spouse, please purchase a guest ticket at www.OUUG.org. Casual Attire  
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Thursday, February 16

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A Vision for a Customer-centric Utility Operations Platform
Utilities recognize the need for new distribution network technologies to accommodate sustainable growth and customers’ growing interest in grid or delivery network connected, customer-owned energy technologies such as home/building energy management systems, solar rooftops, and smart appliances. As policies that concern these technologies—customer choice, conservation mandates, emissions reductions, weather-related disruption—begin to unfold around the world, a fundamentally different approach to energy and water delivery infrastructure is needed. A platform that supports customers as active participants of energy and water operations in a sharing economy along the lines of what Uber and Airbnb has done for the transportation and hospitality industries. This session outlines a vision and platform to support the utility of the future.

Brad Williams, Vice President, Industry Strategy, Oracle Utilities

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Arun Kota, Emtec

Navajo

Session 1 – Utility Asset Management: Connecting the Dots to ISO 55000 Part 1
This presentation will show how to roadmap your asset management plan for ISO 55000 compliance using Oracle WAM, DataRaker, OMS (Outage Management System) with the support of Uberlytics and APT applications.

Marc Yarlott, Veolia; Kimberly Herrala, Oracle; Tacoma Zach, Uberlytics; and Mark Benak, APT
Breakout Sessions: Session 2 – Implementing a Mobile Solution to Maximize Efficiency of Work Order Management

After using Oracle Work and Asset Management for many years, Pennichuck Water found that they were missing a few key system components that would help realize the full potential of their business processes. With an outdated paper-based process for recording labor, material, and mileage, as well as their struggle to track assets and their associated work records, Pennichuck began searching for mobile and work order visualization solutions. They found their resolve with GeoWorx Mobile. This session will cover how visualizing assets and asset data on a map and providing mobile Oracle WAM capabilities to their field staff has led to significant time and resource savings at Pennichuck.

_Dawn DeBlois, Pennichuck Water & Sean Graebner, GeoNexus Technologies_

Education Pavilion: WAM Asset Fundamentals Training

_Presented by Process Solutions Assurance (PSA) & Utilicore Consulting_

CUSTOMER ATTENDANCE ONLY for this Hands-on Training Class

Advance Registration Required; limited to 24 students. Two additional encore classes are below.

Learn about:

- Distinction and relationship between assets & components
- Relationship between assets & asset/storage locations
- Specifications & their relationship to assets & asset components
- Types of asset classifications
- Related asset functionality mass disposition, material disposition, BOM, measurements & service history
- Create an Asset Type
- Define valid Location Types
- Define valid Service History Types
- Create an Asset Location
- Create a new Asset

BREAK/Networking
Continued

11:00am – 12:00pm  Breakout Sessions:

Pueblo/Sonora/Kiva  Session 1 – WAM-SPAM! Automatically Generated System Operation Reports
With the scope and complexity of St. Paul’s WAM implementation, a method for monitoring the functioning of all the various “moving parts” was needed. Standard WAM functionality provides a wealth of monitoring information on most internal and interface operations; however system administrators typically have to proactively go looking for it. In addition to basic system functions, many ongoing end user operations needed monitoring for work management, record keeping, and data quality reasons.

The solution to the situation was the creation of an email based monitoring system using WAM “Workflow Group” functionality coupled with a series of custom developed database procedures. This system now provides system admin’s and other interested end users with daily emails containing information on system operation. This session will describe the WAM configuration and technical components of the implemented solution.

*Natilee Squires & Dan Bartholic, City of St. Paul, Public Works*

Navajo  Session 2 – Utility Asset Management: Connecting the Dots to ISO 55000 Part 2  *(Continuation of 9:45am – 10:45 am session)*
This presentation will show how to roadmap your asset management plan for ISO 55000 compliance using Oracle WAM, DataRaker, OMS (Outage Management System) with the support of Uberlytics and APT applications.

*Marc Yarlott, Veolia; Kimberly Herrala, Oracle; Tacoma Zach, Uberlytics; and Mark Benak, APT*

Adobe  Session 3 – Invoicing using WAM to EBS
The City of St Petersburg Water Resources Department is using WAM to send invoices to EBS AP. This has cut down on data entry, time and errors; now it is only being created once and entered into one system. The system also stores the work orders and specifications for the data. Various divisions within the department send invoices for services rendered such as our FOG program, portable meters, and strong waste. The service request module uses the input data which is picked up by EBS AP and an invoice is created using a batch job. The FOG program is billed once a year, whereas the portable meters and strong waste are monthly based on usage.

*Samantha Mooren, City of St Petersburg*
Continued

**Sedona 2**

**Education Pavilion: WAM Asset Fundamentals Training *ENCORE***
*Presented by Process Solutions Assurance (PSA) & Utilicore Consulting*

CUSTOMER ATTENDANCE ONLY for this Hands-on Training Class
Advance Registration Required; limited to 24 students. See full course description above at 9:45am – 10:45am.

**12:00pm – 1:00pm**

**LUNCH – Anasazi Courtyard**

**1:00pm – 2:00pm**

**Breakout Sessions:**

**Session 1 – The Maturation of KPI’s: Driving Value from your Asset Management System**

As the practice of utility asset management is maturing from truck rolls and manual repairs to technologies that allow for automatic data collection and exchange, key performance indicators (KPIs) are going through a significant evolution. How utilities are measuring the effectiveness of their KPIs, and how to evolve KPIs to increase their value, will be a necessary focus in 2017 and beyond because of a potentially significant uptick in ROI.

During this session, presenters will share results of a January 2017 survey conducted by TMG Consulting into current and future key performance indicators. Questions to be answered include:

- What are current KPIs and do they offer enough lead time to conduct repairs before assets fail?
- Do asset managers have a process for gaining top-down support for investments?
- What new and emerging KPIs can be measured through newer technologies?

Attendees will walk away with research-based information and anecdotal feedback from utilities such including Hydro One, Fountain Valley, CA and BC Hydro to benchmark the health of their KPIs against peer utilities and, ultimately, make plan for ever-increasing ROI.

*Pam Glanvill, TMG; Tacoma Zach, Uberlytics; and John Clow, PSA*
Continued

1:00pm – 2:00pm
Navajo

Breakout Sessions:

Session 2 – Adding Custom Forms Modules to the WAM Application, Version 1.9
At Westar we created and integrated several Oracle Forms programs into the WAM application as new modules. These modules enable the users to do data corrections in WAM without Database Access and to do organizational changes, such as changing an account segment within an account. Highlights include:

- The work at Westar (Business Need/Solution)
- The challenge of WAM forms development
- Oracle Forms basics (creating, testing and compiling)
- Building a form
- Adding and securing a form to the WAM application map

Jennifer Brennan, Westar Energy & Mark Wood, EY

Adobe

Session 3 – WAM to EBS Inventory and Timekeeping Solutions
The County Sanitation Districts of Los Angeles County (Districts) are a confederation of 25 separate Districts that serve the wastewater and solid waste management needs of over 5 million residents within Southern California. The Districts’ Energy Recovery Section maintains power plants to economically convert waste into green energy. Third party reporting tools continue to add value to our Oracle WAM by extracting data and building custom reports and dashboards to manage the use WAM. These reporting tools have proven invaluable over the past two years with ongoing integration of WAM with EBS data preparation and housekeeping. This presentation will cover many of the challenges and benefits realized by the Districts through the integration and how the Districts utilized reporting tools in ways to improve efforts by our maintenance staff. We will also provide insight into how the Districts are overcoming these changes within its workforce, highlight the software configuration choices it has made and challenges it continues to face.

Howard Wolfer, County Sanitation Districts Of Los Angeles County

Sedona 2

Education Pavilion: WAM Asset Fundamentals Training *ENCORE*
Presented by Process Solutions Assurance (PSA) & Utilicore Consulting
CUSTOMER ATTENDANCE ONLY for this Hands-on Training Class
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2:15pm – 3:15pm
Pueblo/Sonora/Kiva

WAM Closing Ceremonies
Return conference surveys, discuss ongoing 2017 activities & 2018 planning. Barry DeMartini, Oracle & Cathy McCause Fuss, OUUG
ORACLE UTILITIES USER GROUP CONFERENCE 2017

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