Detailed Design Change Pack

# Communication Detail

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| Comm Reference: | 3069.2 - KL - PO |
| Comm Title: | Contact Management Service (CMS) Rebuild Release 1 and Shipper Meter Number Creation (MNC) |
| Comm Date: | 18/07/2022 |

# Change Representation

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| Action Required: | For Representation |
| Close Out Date: | 01/08/2022 |

# Change Detail

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| Xoserve Reference Number: | Contact Management Service (CMS) Rebuild |
| Change Class: | Functional System |
| \*ChMC Constituency Impacted: | Shipper All Classes  Distribution Networks (DNs) |
| Change Owner: | James Barlow  [James.Barlow@xoserve.com](mailto:James.Barlow@xoserve.com) |
| Background and Context: | **What is the CMS Rebuild?**  The current CMS system provides the ability for DSC Customers to query and update the data within their own portfolio. It is an ageing system that needs to be updated to cater for new ways of working and make it easier for customers to use. An extensive study was carried out with CMS users to understand their current pain points, requirements for a new version of CMS, and where possible business process improvements.  **CMS Rebuild Delivery**  CMS is being re-built using a family of methods and practices for flexible product delivery, called Agile. One of the key principles of this approach is to “satisfy the customer through early and continuous delivery of valuable solutions”.  The project will develop and test small parts of the product every few weeks, which can then be demonstrated to users during the customer focus groups, allowing early and frequent feedback. These small deliveries will be grouped into releases and a change pack will be issued per release.  Customer focus groups will continue the customer engagement and will allow users to feed into the delivery of the new solution and demo the latest developments in the Alpha Trials environment. If you would like to register for future sessions, please use this [link](https://www.eventbrite.co.uk/e/cms-rebuild-focus-groups-registration-302607797067). All minutes from these sessions will be published on the [CMS Rebuild Page](https://www.xoserve.com/products-services/data-products/contact-management-service-cms/cms-rebuild-product/).  To support customers in learning and adopting the system and processes, we are launching ‘Alpha Trials’ in July to customer focus group attendees. This will provide those attendees access to a test environment where they can try out the system and gain familiarity with new functionality and processes. Alpha Trials will also enable the CDSP to obtain real-time feedback from customers on the solution.  Further training on the new CMS solution and processes will be provided prior to go live.  **CMS Rebuild Release 1 Scope**  In consultation with the customer focus group, it is proposed that the following two processes will be delivered in the first release:   1. Shipper raised Meter Number Creation (MNC) – allows Shipper organisations to request that a Supply Meter Point (SMP) is recorded in UK Link. This will be managed within the new version of CMS, instead of the current manual process. For the avoidance of doubt Network raised MNumber creations will continue to be logged in current CMS, this will move over to the new version of CMS in a later release. 2. Supplier Theft of Gas Process (SUT) – This is the new Supplier raised Theft of Gas process introduced by Modification 0734, which will be triggered by receipt of claims from the Retail Energy Code Company (RECCo).   This Change Pack will cover:   1. Administration functionality for the new version of CMS, such as new user accounts 2. Changes for the Shipper Raised Meter Number Creation (MNC) Process   Supplier Theft of Gas Process, although to be delivered as part of Release 1, the design will be defined in a separate change pack (XRN5236) due to DSC change control.  We are targeting Q4 2022 with Release 1; however, this date will be firmed up and confirmed by the end of July 2022. |

# Change Impact Assessment Dashboard (UK Link)

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| Functional: | Shipper Meter Number Creation (MNC) process will functionally remain the same but move from a manual process to an automated process within the new version of CMS. |
| Non-Functional: | The new version of CMS will:   * be available 365 days a year between 7am and 11:59pm daily. * be supported within business hours (9am – 5pm) on working days (every day except weekends and UK bank holidays). * have a user interface that will be accessible to Web Content Accessibility Guidelines (WCAG 2.1). * be available on Chrome (v 99.0.4844.94 or higher) or Microsoft Edge (v100.0.1210.32 or higher) on either a laptop or desktop. |
| Application: | New Contact Management Service (CMS) |
| User(s): | Shipper All Classes  Distribution Networks (DNs)  RECCo |
| Documentation: | None |
| Other: | None |

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| --- | --- | --- | --- | --- |
| Files | | | | |
| File | Parent Record | Record | Data Attribute | Hierarchy or Format  Agreed |
| None | None | None | None | None |

# Change Design Description

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| **CMS System:**  The new version of CMS will be a great improvement to the current CMS and the existing functionality. The new version of CMS will:   * Provide an enhanced, and intuitive, User Interface * Allow users to manage their work queues for MNC and SUT and organisational work queues (where appropriate) * Provide the ability to search for a Contact Reference Number (CRN) * Receive notifications on progress of Contacts * Be available 365 days a year between 7am and 11:59pm daily. * Be supported within business hours (9am – 5pm) on working days (every day except weekends and UK bank holidays). * Have a user interface that will be accessible to Web Content Accessibility Guidelines (WCAG 2.1). * Be available on Chrome (v 99.0.4844.94 or higher) or Microsoft Edge (v100.0.1210.32 or higher) on either a laptop or desktop, initially, future releases may contain additional browsers if required (Safari, Firefox etc).   **Account Management:**  There will be new accounts required for the new CMS system. Local Security Officers (LSOs) will be approached to provide names of users involved with the Shipper MNC or the Supplier Theft of Gas processes. These accounts will then be created for your organisation. Future Releases will follow a similar process.  There will be some changes to the way we manage CMS accounts:   * The first-time you log-in you will need to set-up Multi-Factor Authentication (MFA), which means you will need to provide a mobile phone number or an email address, where a code can be sent, and entered to confirm your identity. * From time to time at log-in you may also be asked for a code to be sent to your email or mobile phone, and you will need to enter this to log-in. * In the new version of CMS, we will be monitoring the accounts, so that if a user isn’t active on the new CMS system for more than 90 days, we may disable their account. Users with a disabled account will then need to request their Local Security Officer (LSO) enables their account before they can successfully log-in.   **Dual Running:**  During Agile delivery of the new CMS there will be a period of dual running. This will mean that you will need to retain your existing account on the current version of CMS (for any processes which have yet to be implemented in the new system) and hold another account for the new version of CMS (for processes which have been released). We will communicate when the period of dual running will end, it is expected to be after Q1 of 2023.  **Shipper Raised Meter Number creation (MNC) Process Overview:**  Currently there is a manual process for Shipper organisations to request to create a Supply Meter Point (SMP) in UK Link, there are circa 3,600 Shipper MNC contacts raised per year.  The current process requires the Shipper to email MNC requests, which are then validated manually by a Central Data Service Provider (CDSP) agent. They are emailed to the Distribution Network (DN), who carry out further validations and in some cases a site visit. The results are then emailed back to the CDSP agent. For valid contacts the MPRN will be created manually, and an email will be sent back to the Shipper with resolutions.  **Reason for Change:**  Resolve pain points identified within the current process, including:   * **Customer Effort** - Currently raising MNC contacts is a lengthy manual process, which requires a lot of effort to see if a contact has been accepted and check the progress of a contact. * **Cycle Time** – Currently there can be delays in creating the MPRN. * **Not Getting it Right First Time** - Currently there are issues with incorrect address information.   **New Process:**  The Shipper MNC process will be managed within the new version of CMS, instead of the current manual process. The fundamental process steps will not change, the process has been reengineered to resolve the pain points.  The new version ofCMS will reduce customer effort, decrease cycle time, and improve right first-time rates for the Shipper MNC process by making improvements to the raise and track processes:   * + Raising a Shipper MNC contact will be done through an easy-to-use web interface, designed to make data entry as efficient as possible, for example the system will allow an address search by typing part, or all, of the postcode or address, if the address is found to be a valid UK address, using data from Royal Mail’s Postcode Address File (PAF), it will then automatically populate the address. As the PAF checks are completed before submission the number of investigations/invalid outcomes will be reduced. * Visibility of a contact status will be improved by quickly providing a response when a contact is submitted (successfully logged with Contact Reference Number (CRN) or rejected). An alert will also be shown in the notification area, if selected the contact history will be displayed.   A training pack will be provided for the new Shipper MNC Process, along with standard help and FAQs that will be published on the CMS Webpage.  A single Shipper MNC contact can be raised via the CMS Replacement user interface. When submitted there will be a pop-up window to show if the contact was logged, displaying the CRN, otherwise it will show the contact was rejected with a reason.  There will be alerts when a contact changes its status, which will be displayed in the notifications area, if selected the contact history will be shown. There will also be an option to search for a contact using the CRN.  This process does not require file upload/downloads. In a future release the ability to upload a file of Shipper MNC Contacts will be included in the new CMS.  **Transition:**  A cut-off date will be communicated where Shipper MNC Contacts should no longer be raised via email, and instead raised in the new CMS.  **High-Level To Be Business Process:**  A high-level to be process flow diagram can be found [here.](https://umbraco.xoserve.com/media/43430/contact-management-service-cms-rebuild-release1-shipper-mnc-high-level-process.pdf)  **Screen Mock-Ups:**  To provide a view as to how the solution for the Shipper MNC process will look, a series of indicative screen mock-ups are available [here*.*](https://umbraco.xoserve.com/media/43429/contact-management-service-cms-rebuild-release-1-screen-mock-ups.pdf)Please note these screens have been shared to provide early sight of what the new CMS user interface may look like and, as such, are currently in development and subject to change. |

# Associated Changes

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| Associated Change(s) and Title(s): | This change will be implemented as part of the CMS Rebuild Release 1 (targeted for Q4 2022), there is one other Change Pack associated with CMS Rebuild Release 1: XRN5236 - Reporting Valid Confirmed Theft of Gas into Central Systems (Modification 0734).[*(link to other Change Pack)*](https://umbraco.xoserve.com/media/43466/30695-kl-po-xrn5236-reporting-valid-confirmed-theft-of-gas-into-central-systems-modification-0734-detailed-design.docx) |

# DSG

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| Target DSG discussion date: | 18/07/2022 |
| Any further information: | None |

# Implementation

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| Target Release: | Q4 2022 (targeting October 2022) |
| Status: | For approval |

Please see the following page for representation comments template; responses to [uklink@xoserve.com](mailto:uklink@xoserve.com)

**Industry Response Detailed Design Review**

**Change Representation**

(To be completed by User and returned for response)

***Please consider any commercial impacts to your organisation that Xoserve need to be aware of when formulating your response***

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| User Contact Details: | Organisation: | Wales & West Utilities | |
| Name: | Tom Stuart | |
| Email: | tom.stuart@wwutilities.co.uk | |
| Telephone: | 07964937739 | |
| Representation Status: | Support | | |
| Representation Publication: | Publish | | |
| Representation Comments: | Wales & West Utilities support this change. Consideration should be given to the impact that implementation might have on parties IT systems following the technical difficulties experienced during the DES migration to the cloud. This should include, as a minimum, testing of any changes to interfaces including testing of URLs against firewalls. | | |
| Confirm Target Release Date? | Yes | | «h1\_userDataAlternative» |

**Xoserve’ s Response**

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| Xoserve Response to Organisations Comments: | Thank you for your response. In terms of technical difficulties experienced across other projects, we always look to review lessons learnt and look to address issues encountered under previous projects to ensure a smooth implementation. Worth noting, the CMS Rebuild project team will be providing specific training and guidance for release 1 which should give the opportunity for any questions and concerns to be discussed and resolved before delivery. |

**Change Management Committee Outcome**

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| Change Status: | Approve | ☐ Reject | | | ☐ Defer |
| Industry Consultation: | 10 Working Days | | ☐ 15 Working Days | | |
| ☐ 20 Working Days | | ☐ Other [Specify Here] | | |
| Date Issued: | 18/07/2022 | | | | |
| Comms Ref(s): | 3069.2 – KL – PO | | | | |
| Number of Responses: | 1 | | | | |
| Solution Voting: | Shipper | | | Approved | |
| ☐ National Grid Transmission | | | Please select. | |
| Distribution Network Operator | | | Approved | |
| ☐ IGT | | | Please select. | |
| Meeting Date: | 10/08/2022 | | | | |
| Release Date: | Release: Adhoc TBC | | | | |