Revised Detailed Design Change Pack

# Communication Detail

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| Comm Reference: | 3098.3 – RT - PO |
| Comm Title: | XRN5556.B - Contact Management Service (CMS) Rebuild Version 1.1 Revised Detailed Design Change Pack |
| Comm Date: | 17/10/2022 |

# Change Representation

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| Action Required: | For Representation  |
| Close Out Date: | 31/10/2022 |

# Change Detail

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| Xoserve Reference Number:  | **XRN5556.B** |
| Change Class: | Functional System |
| \*ChMC Constituency Impacted: | Shipper All ClassesDistribution Networks (DNs)Independent Gas Transporters (IGTs) |
| Change Owner:  | James BarlowJames.Barlow@xoserve.com |
| Background and Context: | **Please note: This Change pack is an update to the approved XRN556.B change pack, issued in September 2022. There are no changes to the submitted content. The proposed update is to add in another Contact type (Set to Extinct) to CMS version 1.1.****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/).To support customers in learning and adopting the system and processes, we have launched ‘Alpha Trials’ in July to customer focus group attendees. This provides the trialists 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 Version 1 is expected to launch in October 2022 with the Shipper Raised Meter Number Creation (MNC) and the Supplier Theft of Gas processes. This change pack will cover the changes for CMS Version 1.1.**CMS Rebuild Version 1.1 Scope****Please note: This Change pack is an update to the approved XRN556.B change pack, issued in September 2022. There are no changes to the submitted content. The proposed update is to add in another Contact type (Set to Extinct) to CMS version 1.1.**In consultation with the customer focus group, it is proposed that the following process will be delivered in version 1.1:1. Duplicate Meter Point Reference Numbers (MPRNs) for one Supply Meter Point (SMP)
2. **Set to Extinct (STE)**

We are targeting to release version 1.1 in December 2022. |

# Change Impact Assessment Dashboard (UK Link)

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| Functional:  | 1. Duplicate (DUP) Meter Point Reference Number process
2. **Set to Extinct Contact introduced to the new version of CMS and updated business process.**
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| Non-Functional:  |  |
| Application:  | New Contact Management Service (CMS) |
| User(s):  | Shipper All ClassesDistribution Networks (DNs)Independent Gas Transporters (IGTs) |
| 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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| **Please Note: This Change pack is an update to the approved XRN556.B change pack, issued in September 2022. The original change description, which has been approved, has been highlighted in grey. The proposed addition of the Set to Extinct (STE) contact type is detailed below for review.****Set To Extinct (STE) Process Overview:**Currently there is a manual process for Shippers, Disruption Network (DN) or Independent Gas Transporter (IGTs) organisations to request to change the status of a Meter Point Reference Number (MPRN) to extinct. There are circa 2,000-3,000 Set to Extinct (STE) requests per year.The current process requires the Shipper, DN or IGT to email STE requests, which are then validated manually by a Central Data Service Provider (CDSP) agent and if they are found valid the meter point status is changed to extinct.**Reason for Change:**Resolve pain points identified within the current process, including:* **Customer Effort** - Currently raising STE contacts is a lengthy manual process, which requires a lot of effort to confirm if a contact has been accepted and check the progress of a STE contact.
* **Cycle Time** – Currently there can be delays in updating the status of an MPRN to extinct.

**High-Level Set to Extinct (STE) Business Process:**A high-level to be process flow diagram can be found [here.](https://umbraco.xoserve.com/media/43720/xrn5556b-contact-management-service-cms-rebuild-version-11-set-meter-point-reference-number-to-extinct-business-process.pdf) **Set To Extinct (STE) Process:**The STE 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 STE process by making improvements to the raise and track processes:* + Raising a STE contact will be done through an easy-to-use web interface, designed to make data entry as efficient as possible.
* 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 single STE contact can be raised via the new CMS system user interface by entering the MPRN and the reason for the request, for example MPRN created in error or cancelled work. 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.When the ability to bulk upload multiple contacts, of multiple contact types, becomes available, the STE process will be part of this functionality. See Change pack XRN5556.C - Contact Management Service (CMS) Rebuild – Bulk Upload of Contacts via File Upload submitted October 2022. 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.As with other contact types a challenge can be made up to 12 days after a STE Contact has been resolved as invalid, and a Previously Submitted Contact (PSC) will be created. A training pack will be provided for the new STE Process, along with standard help and FAQs that will be published on the [CMS Rebuild Webpage](https://www.xoserve.com/products-services/data-products/contact-management-service-cms/cms-rebuild/).We are targeting to deliver dashboard reporting functionality early 2023, all contact types will be included, including STE.**Transition:**A cut-off date will be communicated when Set to Extinct (STE) Contacts should no longer be raised via email, and instead raised in the new version of CMS. The latest updates on the rollout of the new CMS system can be found [here](https://www.xoserve.com/products-services/data-products/contact-management-service-cms/cms-rebuild/).The following section has been approved as part of the September Change Pack and remains unchanged.**Duplicate Meter Point Reference Numbers (MPRNs) for one Supply Meter Point (SMP**) **Process Overview:**Currently a Shipper, Distribution Network (DN) or Independent Gas Transporter (IGT) can raise a contact (using the existing version of CMS) to the Central Data Service Provider (CDSP) to request to remove a Meter Point Reference Number from UK Link as there is another MPRN identifying the same Supply Meter Point. There are circa 1,440 Duplicate MPRN contacts raised per year.**Reason for Change:**Resolve pain points identified within the current process, including:The existing version of CMS doesn’t have functionality to cater for some common scenarios for duplicate contacts, for example:* If the duplicate MPRN (the MPRN to remove) has a live Shipper and was not raised by the live shipper
* If the duplicate MPRN contact is within an IGT portfolio and was raised by a Shipper
* If stakeholder communication is required to resolve a contact.

In these three scenarios the contact can’t be managed within CMS, instead stakeholders need to contact each other outside of CMS (emails/phone calls) and agree the MPRN is a duplicate. This off-line communication can cause long delays to resolving contacts, or in some cases prevent the duplicate from being removed. It also makes it difficult to track the progress of the duplicate contact.**New Process:**The new business process for Duplicate MPRNs can be found [here](https://umbraco.xoserve.com/media/43621/xrn5556b-contact-management-service-cms-rebuild-version-11-duplicate-meter-point-reference-number-business-process.pdf). This process includes some screen mock-ups, 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. See below for a summary of the process:* A single Duplicate MPRN contact can be raised via the CMS Rebuild 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 rejection reason.
* The Duplicate MPRN contact can then be investigated, this may involve:
	+ Data Clarifications (DCs): a question raised by CDSP agent to either the originator or a stakeholder (see below for more information).
	+ Contact Originator (CO): a question raised by CDSP agent, or a stakeholder who did not raise the contact, to the person who raised the contact.
	+ Configuration Change (CC): a request from the CDSP agent to the Shipper (which can either be the contact originator or a stakeholder) to withdraw ownership of the supply point and/or remove the meter, so that the Meter Point can be set to extinct, and any financial adjustments triggered.
* For more information about when CCs and DCs can be raised see the table below:

* When the contact is resolved an alert will be displayed in the notifications area, and if selected the contact history will be displayed. There will also be an option to search for a contact using the CRN. In future releases the alert functionality will be expanded, for example to include an alert when a DC has been sent to you or responded to.

This process does not require file upload/downloads. In a future CMS release the ability to upload a file of Duplicate MPRN Contacts will be included. A training pack will be provided in line with the release for the new Duplicate MPRN Process, along with standard help and FAQs that will be published on the CMS Webpage.The new version of CMS will make system/process improvements to increase transparency, reduce customer effort, increase collaboration, and remove barriers to the investigation and resolution of the contact with the introduction of the following functionality:* **Transparency:** The full history of a contact can be seen within one screen, including Current Status, Configuration Change (CC) requests/responses, Data Clarification (DC) requests/responses, Contact Originator (CO) requests/responses, and update dates and times.
* **Transparency:** The detail (where relevant) of the contact can be viewed by all stakeholders involved in the contact
* **Reduction of customer effort:** Any stakeholder that identifies a duplicate scenario can log the contact.
* **Reduction of customer effort:** Where the duplicate MPRN is within the portfolio of a stakeholder other than the raising stakeholder, the new version of CMS will provide functionality to refer the contact to the relevant stakeholder to review / approve / dispute.
* **Increased systemised collaboration:** Where a stakeholder receives a referral (DC or CC), they can directly communicate with the originator via the Contact Originator (CO) functionality.

**Transition:**A cut-off date will be communicated where Duplicate MPRN Contacts should no longer be raised via the existing version of CMS, and instead raised in the new version of CMS.For the avoidance of doubt there will be no data migration, any contacts in progress before the cut-over date will continue to be progressed to resolution in the existing version of CMS.**Accessing the new Version of CMS:**Please refer to July’s Change pack which provides an overview of the new version of CMS, including account creation, system availability and dual running. |

# Associated Changes

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| Associated Change(s) and Title(s): | XRN5556 - CMS Rebuild parent XRN |

# DSG

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| --- | --- |
| Target DSG discussion date: |   |
| Any further information: | None |

# Implementation

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

Please see the following page for representation comments template; responses to uklink@xoserve.com

Industry Response Detailed Design Review

«RangeStart:HDS»

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: | «h1\_organisation» |
| Name: | «h1\_name» |
| Email: | «h1\_email» |
| Telephone: | «h1\_telephone» |
| Representation Status: | «h1\_userDataStatus» |
| Representation Publication: | «h1\_consultation» |
| Representation Comments: | «h1\_userDataComments» |
| Confirm Target Release Date? | «h1\_targetDate» | «h1\_userDataAlternative» |

# Xoserve’ s Response

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| Xoserve Response to Organisations Comments: | «h1\_xoserveResponse» |

Please send the completed representation response to uklink@xoserve.com

«RangeEnd:HDS»

Change Management Committee Outcome

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| Change Status: | [x]  Approve | [ ]  Reject | [ ]  Defer |
| Industry Consultation: | [x]  10 Working Days | [ ]  15 Working Days |
| [ ]  20 Working Days | [ ]  Other [Specify Here] |
| Date Issued: | 17/10/2022 |
| Comms Ref(s): | 3098.3 - RT - PO |
| Number of Responses: | 2 |
| Solution Voting: | [x]  Shipper | Please select. |
| [x]  National Grid Transmission | Please select. |
| [x]  Distribution Network Operator | Please select. |
| [x]  IGT | Please select. |
| Meeting Date: | 09/11/2022 |
| Release Date: | TBC |

Please send the completed representation response to uklink@xoserve.com

Version Control

# Document

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| --- | --- | --- | --- | --- |
| Version | Status | Date | Author(s) | Remarks |
| Version 1.0 | Issued | 14.10.2022 | Laura Poole  |  |
| Version 2.0 | Approved | 15/11/2022 | Kate Lancaster | Updated following approval at ChMC on 09/11/2022 |