CMS Alpha Trials – Customer Pack

About Contact Management Service (CMS)

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. The new version of CMS will deliver improvements and enhanced functionality. We are currently developing Version 1 of the system, which will go live in October 2022. This will be followed by Version 1.1, which will contain the duplicate (DUP) process and further enhancements.

About Alpha Trials

CMS is being re-built using a flexible product delivery approach, called Agile. One of the key principles of this approach is to "satisfy the customer through early and continuous delivery of valuable solutions".

We are developing and testing small parts of the product (CMS) every few weeks, which are then demonstrated to users during customer focus groups, allowing early and frequent feedback. These small deliveries are being grouped into versions.

As part of this approach and to support customers in learning and adopting the system and processes, we are launching 'Alpha Trials' in July to Customer Focus Group attendees.

What is it?

Alpha Trials will provide Customer Focus Group attendees access to a test environment where you can try out the system, navigate through the business processes supported by the system and gain familiarity with the new functionality and processes.

Why are we doing it?

Alpha Trials will give you the opportunity to familiarise yourself with the system and provide real-time feedback to the CMS development team.

You will have the opportunity to experience the following activities and features:

- Log and submit Shipper raised MNumber creation contacts (MNC)
- See validations in action
- View success/failure messages
- View new statuses
- View contacts and their history

- View and manage work queues:
    - Search and filter organisation and personal queues
    - Assign contacts to self and others
    - Un-assign contacts for self/return to organisation queue
- View and manage common elements/referrals
    - Receive and respond to Site Visit requests
    - Receive and respond to Data Clarification requests
- Log a previously submitted contact (PSC)
- Receive notifications on resolution of a Contact

The following functionality is related to the process, but will not be available in the Alpha trial environment:

- Bulk logging of contacts – either file or form
- Post Office address finder – allows user to look up address and select a PAF valid address before submitting contact
- Audit Trail – Full view of the lifecycle of a contact

Timescales

The Alpha trial environment will be available from 29th July 2022 until early September. We will then re-open trials later in the year for Version 1.1 – keep tuned to the Customer Focus Groups for more information.

Shipper-Raised MNC – An Overview

The Shipper-Raised MNC process will be managed within the new version of CMS, replacing the current manual process. Whilst the fundamental process steps will not change, the process has been reengineered to resolve known pain points that you, our customers, told us about.

Trial steps:

- The Alpha trial version of CMS will allow single contacts to be logged via log contact user interface screen.
- The field validations will be processed at the point of submitting a page and can be amended or rectified immediately.
- Once successfully submitted you'll receive a success message.
- The contact will then be available in the CDSP work queue where either a Data Clarification (DC) will be raised or a Site Visit will be raised (SV)
- Where a DC is raised the contact will be returned to the contact originator's work queue for them to respond. This contact can be moved from the originator's queue to the main organisation queue to be assigned to someone else or responded to by the originator.

- Where a SV is raised the contact will be moved to the Distribution Network (DN) organisation queue where it can be assigned to an agent. The agent may then respond to the SV.
- When the site visit is responded to, the contact will return to the CDSP work queue and a CDSP agent will either re-send the SV or resolve the contact as valid or invalid.
- When the contact is resolved, the originator will see a notification advising them of the outcome. The originator may then select to view the contact to view the full history.
- On viewing a contact resolved as invalid, the contact the originator may decide to submit a PSC. When doing so, a message will appear providing the CRN of the newly generated contact. The newly generated contact will then follow the same process as described above.

Statuses that will be viewed in the trial:

Status code	Status name	Org queue	Description
AACA	Awaiting allocation to CDSP agent	CDSP	Contact is waiting to be assgined so that a CDSP agent can investigate and manually handle or determine the next relevant step in contact lifecycle.
ATCA	Allocated to CDSP agent	CDSP	Contact is being assigned to a CDSP agent who can investigate and manually handle or determine the next relevant step in contact lifecycle.
SVDN	Site visit sent to Distribution Network	DN	Contact has a newly submitted SV request and is waiting to be assigned to a DN agent so that the request can be handled.
SVDA	Site visit allocated to Distribution Network agent	DN	Contact has a newly submitted SV request and is being assigned to a DN agent to handle the request.
DCRS	Data clarification sent to raising stakeholder	Contact raising org	Contact has a newly submitted DC request and is waiting to be assigned to an agent of the raising stakeholder organisation so that the request can be handled.
DCAA	Data clarification allocated to agent	Contact raising org	Contact has a newly submitted DC request and is being assigned to an agent of the raising stakeholder organisation to handle the request.
CCIV	Contact closed as invalid	N/A	A contact has been resolved as invalid
CCVA	Contact closed as valid	N/A	A contact has been resolved as valid

Note to DNs and IGTs: Whilst the MNC functionality will be provided for Shippers to raise contacts in the live system, if you are a DN or IGT, please feel free to raise contacts during the Alpha trials to get a feel for how the system looks and feels – raising contacts and responding to Data Clarifications in other scenarios will feel very similar to this. For example, it will give you a good idea of how it will look and feel when receiving SVs on Dead to Live (DTL) and Isolation (ISO) contacts (though the SV forms on DTL and ISO will be different)

Accounts: The number of accounts that can be utilised in the environment is limited, and so accounts will be shared amongst those organisations taking part in the trial. For the purposes of this trial, while real organisation names are used, the accounts that have been set up do not have any organisation detail related to them in the environment, except whether they are a Shipper or DN. For example, as a Shipper you will log into an account that has a different Shipper's name associated.

Fair usage: As accounts will be shared for the trial you will see in the Shipper organisation queue contacts that you did not raise yourself i.e., where DCs are raised. Where possible, to avoid confusion, only respond to those contacts that you raised yourself or agreed with colleagues (in Agent and Supervisor capacities) to work between yourselves.

Depending on Shipper activities being carried out, contacts reaching the DN work queues may be limited, so if there are not many available in the DN work queue at any point please limit the number that you work on. Where numbers of contacts are limited, we will endeavour to log and make more available.

Things to note: As you go through the activities you may notice that some of the wording used is not quite correct, for example, the message on the landing page says, "What would like to do today?", rather than "What would *you* like to do today?", or that no matter the account logged in as there is a welcome that states, "Welcome back Simon". These instances are known, are just placeholders and will be fixed/amended before the live version is available, but for the purposes of the trial we have concentrated on having the functionality correct – however, we welcome you feeding back to us any potential anomalies, misspellings, or wording that doesn't seem quite right!

As stated, not all functionality planned for version 1 is available in this trial environment so there will be buttons that when clicked do not work (See 'Why are we doing this?' section above for detail on available functionality).   These are contained to the landing page, for example clicking the 'Dashboards' button will not result in an action being triggered. However, again please do feedback to us of anything you have clicked/actioned that hasn't resulted in the expected outcome.

Trial Information

Access & Logging On

Please note the system is supported on Chrome (v 99.0.4844.94 or higher) or Microsoft Edge (v100.0.1210.32 or higher) on either a laptop or desktop. Future versions may contain additional browsers if required (Safari, Firefox etc).

1. Customer Focus Group attendees will be given a user account to access the trial environment. You will receive two emails containing these details. You will need access to a recent version of either the Chrome or Edge web browser on a laptop/desktop.

2. Once you have received your access emails, click on the link in the email to access the test environment

3. Log in using the account name(s) and password(s) given in the emails

4. If you have not received your emails within a day of the trial starting, please check your junk email folder. If you still cannot find it, please contact us via email on cms_rebuild@correla.com
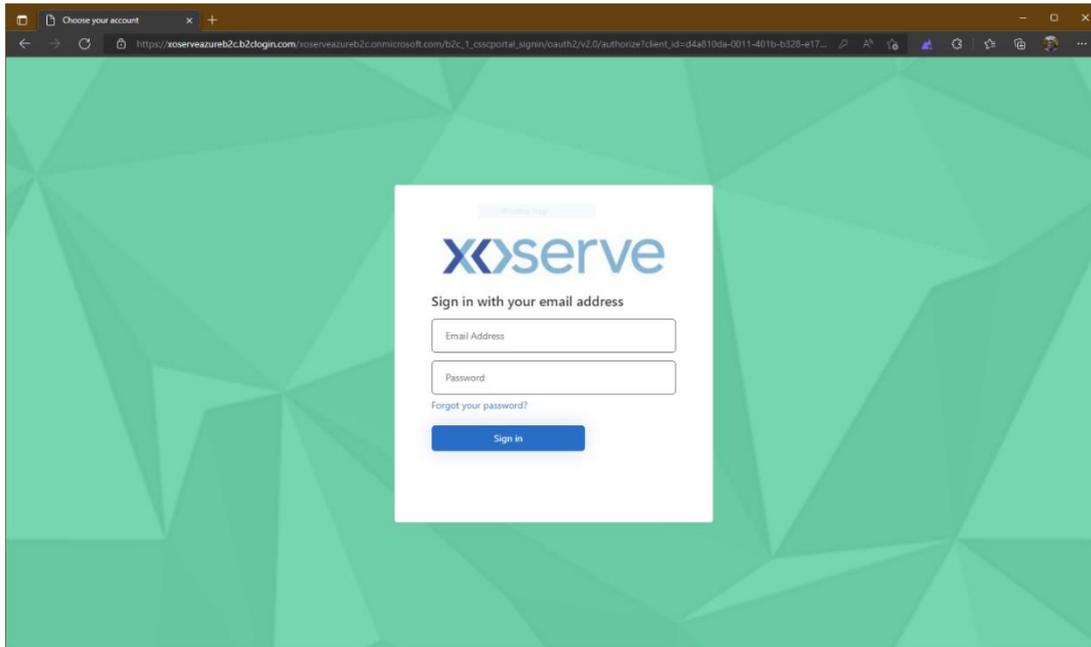
5. Once you have logged in, you will see the Home Page, which shows the various tasks, processes and activities that you can do. Please note, in the trial version, not all of these menu tiles will have functionality behind them or may have limited functionality.
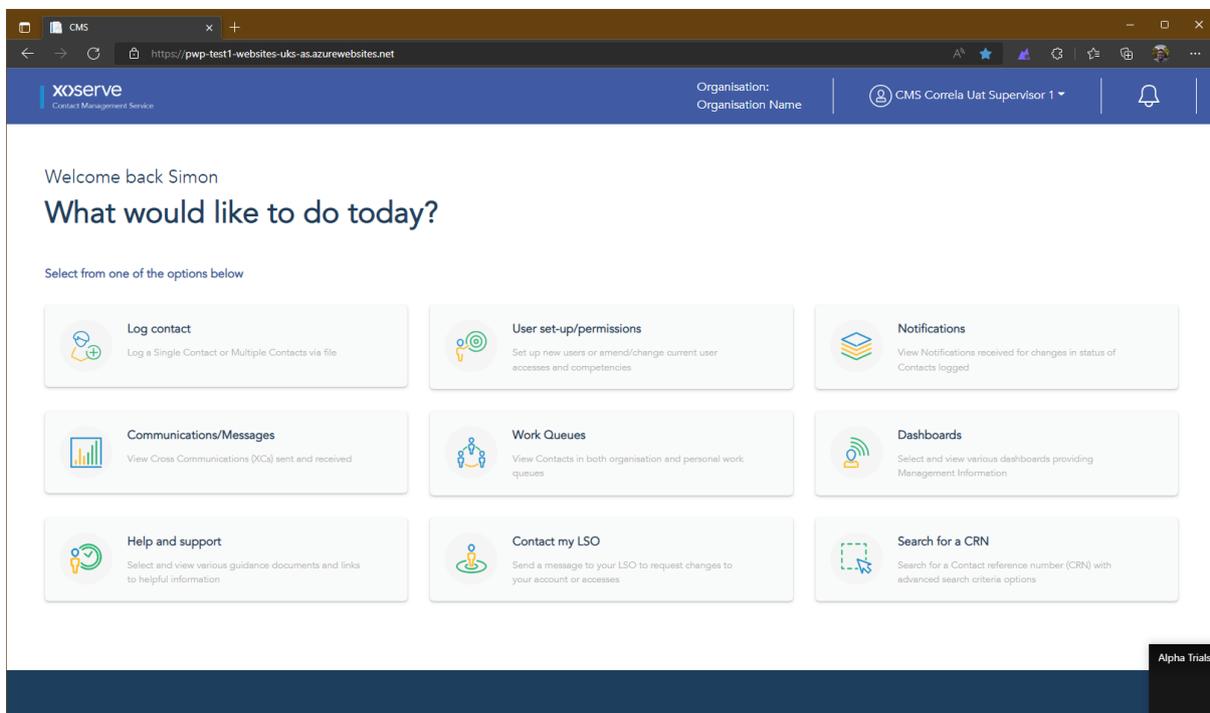
6. If you have any problems logging in, you can ask for help using the dedicated Microsoft Teams chat that has been set up or send us an email. You will receive an email detailing how to access the Alpha Trials Support Teams channel.

Availability Times

The Alpha Trial environment will be available seven days per week for the duration of the trial, however support will only be available Monday to Friday between the hours of 12:00-16:00 (UK time). Please note that we may need to take the system down at times to carry out upgrades and maintenance. We will notify you of this via the dedicated Alpha Trials Support Teams chat and from the CMS Rebuild email address.

Data

When entering data into the system, for GDPR purposes, please do not use real customer names, contact details (email addresses or phone numbers) or MPRNs.

Security

Please note - by using the system, you agree to use the system only for the purposes for which it is intended and to comply with the Information Security policies.

Getting Support and Giving Feedback

In addition to access to the system, you will also be given access to a dedicated Alpha Trials Microsoft Teams Channel. This will enable you to contact the development support team with any questions, queries, problems and feedback you have regarding the trial or the system itself. Simply type your query into the chat and one of our team will get back to you within the published support hours (12:00-16:00). **Please DO NOT contact the Xoserve service desk with queries regarding this trial by phone, email or website.** You will receive an email detailing how to access the Alpha Trials Support Teams channel. If you require any support in using Microsoft Teams, or do not have access to Microsoft Teams please contact us on cms_rebuild@correla.com

We will also review this channel and may open other channels of communication e.g. virtual drop in sessions, if this would be beneficial to customers.