Detailed Design Change Pack

# Communication Detail

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| Comm Reference: | 3256.2 -LO - PO |
| Comm Title: | XRN5556J - Contact Management Service (CMS) Rebuild – Delivery of Must Reads Process (MUR) |
| Comm Date: | 12/02/2024 |

**Change Representation**

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| Action Required: | For information |
| Close Out Date: | 19/02/2024 |

# Change Detail

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| Xoserve Reference Number: | [XRN5556.J](https://www.xoserve.com/change/customer-change-register/xrn-5556j-cms-rebuild-version-delivery-of-must-reads/) |
| Change Class: | Functional System |
| \*ChMC Constituency Impacted: | Shipper All Classes  Distribution Networks (DNs)  Independent Gas Transporters  *\*Assumed impacted parties of the proposed change, all parties are encouraged to review* |
| Change Owner: | [uklinkdelivery@xoserve.com](mailto:uklinkdelivery@xoserve.com) |
| Background and Context: | ***Clarification Request***  *This Change pack contains the relevant clarifications on the file format changes that were requested from the initial Detailed Design Review.*  *Please note to support the launch of Must Reads into the new CMS there will be and enhanced customer framework that will enable the CDSP to provide customised support to DNs, IGTs and MRAs. The changes to the process do not impact the Shipper community.*  **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. 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/).  CMS Rebuild Version 1 was launched in October 2022 with the Shipper Raised Meter Number Creation (MNC) and the Supplier Theft of Gas (SUT) processes.  CMS Rebuild Version 1.1 was launched in December 2022 with the Duplicate (DUP) and Set to Ex (STE) processes.  CMS Rebuild Version 1.2 was deployed in August 2023 alongside V1.4 and this contained the ability to bulk upload contacts via the new Bulk Contact Logging file (BCL)  CMS Rebuild Version 1.3 was launched in April 2023 with the Isolation (ISO) and Dead to Live (DTL) processes.  CMS Rebuild Version 1.4 was launched in August 2023 with the Address Amendments (ADD) and Distribution Network raised MNumber Creation (DMN) processes.  CMS Rebuild Version 1.5 was launched in November 2023 with Request for Financial Adjustment (RFA) and Consumption Dispute Query (CDQ) processes.  CMS Rebuild Version 1.6 Contained Theft of Gas (TOG) and New MPRN Creation (FOM) and this was launched in November 2023  CMS Rebuild Version 1.7 will contain the new processes Known Meter Issue (KMI) and Shipper Agreed Reads (SAR) which are linked to XRN5604 and XRN5605 this is due to be launched on 24 February 2024. Please note change packs for this version can be found under XRN5604 and XRN5605.  **CMS Rebuild Version 1.8 Scope**  In consultation with the customer focus group, it is proposed that the following process will be delivered in version 1.7:   1. Must Reads (MUR)   This change pack will cover the changes for the Must Reads Process. |

# Change Impact Assessment Dashboard

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| Functional: | The existing Must Reads (MUR) processes will be moved to the new version of Contact Management Service (CMS). |
| Non-Functional: | N/A |
| Application: | New Contact Management Service (CMS) |
| User(s): | Distribution Networks (DNs)  Independent Gas Transporters (IGTs)  Shipper All Classes |
| 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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| **Must Read (MUR) Clarification:**  We are recirculating this document to provide the additional clarification on key points to ensure a comprehensive understanding of the enhanced Must Reads process and functionality. This update aims to improve the document’s clarity and address the concerns that have been raised during the Detailed Design Change Pack review. It will also cover the Enhanced Customer Framework that will be available following the launch to provide DNs, IGTs and MRAs customisable levels of support. Shippers are not impacted by the information provided in this clarification.  **Must Read (MUR) Clarification – File Format changes - MJO/ MJI:**  The changes to the MJO/MJI file can be summarised as follows:   |  |  |  |  | | --- | --- | --- | --- | | Field Name | MJO/MJI | New / Amendment | Reason for change | | Contact reference number | MJO | label change | To bring in line with standard field naming | | Meter Serial Number | MJO | label change | To bring in line with standard field naming | | Meter make | MJO | New | Added to assist reader in locating correct meter and/or identify any discrepancies with data held on UKLink | | Meter model | MJO | New | Added to assist reader in locating correct meter and/or identify any discrepancies with data held on UKLink | | KMI Indicator | MJO | New | Added due to MOD5605 requirement to provide meter issue flag information where a flag has been added or removed through KMI process and there is a MUR contact open at that time | | Update/information | MJO | New | Added to provide any detail CDSP may have been aware of that might assist MRA/IGT/DN in investigation or if MUR still required | | Meter serial number read | MJI | New | To allow the reader of the meter to provide detail of the meter that was found and read, which may be different to the Meter Serial Number is currently attached on UKLink | | Comments group | MJI | label change | Was 'Comments' but changed to 'Comments group', and specific comments made available to ensure correct validation | | Comments | MJI | New | Added in case extra information could be provided to assist in resolution of contact |   **Must Read (MUR) Clarification – File Format changes – RJO / RJI:**  The changes to the RJO/RJI file can be summarised as follows:   |  |  |  |  | | --- | --- | --- | --- | | FIELD NAME | RJO/RJI | New / Amendment | Reason for change | | Contact reference number | RJO | label change | To bring in line with standard field naming | | Meter serial number | RJO | label change | To bring in line with standard field naming | | Meter make | RJO | New | Added to assist reader in locating correct meter and/or identify any discrepancies with data held on UKLink | | Meter model | RJO | New | Added to assist reader in locating correct meter and/or identify any discrepancies with data held on UKLink | | KMI Indicator | RJO | New | Added due to MOD5605 requirement to provide meter issue flag information where a flag has been added or removed through KMI process and there is a MUR contact open at that time | | Update/Information | RJO | New | Added to provide any detail CDSP may have been aware of that might assist MRA/IGT/DN in investigation or if MUR still required | | Meter serial number read | RJO | New | To allow the reader of the meter to provide detail of the meter that was found and read, which may be different to the Meter Serial Number is currently attached on UKLink | | Comments group | RJO | label change | Was 'Comments' but changed to 'Comments group', and specific comments made available to ensure correct validation | | Reader comments | RJO | New | Added in case extra information could be provided to assist in resolution of contact | | Rejection reason | RJO | Label change | Label change to highlight this is the reason the original read provided on the MJI was rejected | | Latest comments group | RJI | Label change | Label change to highlight in the Contact detail that this is the comment from the most recent visit | | Comments | RJI | New | Added in case extra information could be provided to assist in resolution of contact |   **Must Read (MUR) Clarification – File Format changes – LTO /LTI**  The changes to the LTO /LTI file can be summarised as follows:   |  |  |  |  | | --- | --- | --- | --- | | Field Name | LTO / LTI | New / Amendment | Reason for change | | Contact reference number | LTO | label change | To bring in line with standard field naming | | Meter serial number | LTO | label change | To bring in line with standard field naming | | Comments group | LTO | label change | Was 'Comments' but changed to 'Comments group', and specific comments made available to ensure correct validation | | Reader comments | LTO | New | Added in case extra information could be provided to assist in resolution of contact | | Access instructions | LTO | New | Added to provide access instructions that were provided in MJO | | Meter location | LTO | New | Added to provide meter location provided in MJO | | Meter make | LTO | New | Added to assist reader in locating correct meter and/or identify any discrepancies with data held on UKLink | | Meter model | LTO | New | Added to assist reader in locating correct meter and/or identify any discrepancies with data held on UKLink | | KMI indicator | LTO | New | Added due to MOD5605 requirement to provide meter issue flag information where a flag has been added or removed through KMI process and there is a MUR contact open at that time | | Update/Information | LTO | New | Added to provide any detail CDSP may have been aware of that might assist MRA/IGT/DN in investigation or if MUR still required | | Level 3 read date | LTI | Label change | Changed to 'Level 3 read date' to differentiate from dates provided in MJO | | Meter serial number read | LTI | Label change | To bring in line with naming of field in MJI | | Level 3 comments group | LTI | label change | Was 'Comments' but changed to 'Level 3 comments group' to differentiate in contact detail from comment groups provided in MJI, and specific comments made available to ensure correct validation | | Comments | LTI | New | Added in case extra information could be provided to assist in resolution of contact |   **The File format documents can be accessed here:**  Each of the documents below provides the file format, including the description and any set values, for each file type in one tab and the second tab provides the file format changes and reasons as displayed above.    **Enhanced Customer Support Framework**  We appreciate that this may not be an ideal situation for some customers and therefore we will be launching an enhanced customer support framework containing three options which will be in place for up to six months following the launch of V1.8. This is to support customers whilst they undertake any system changes required on their set up.  Alongside this there will also be additional Customer virtual sessions where MUR operatives are invited to join one to walk through the improved MUR process, the potential options and provide the opportunity for questions to be asked. To register for a session please use this [link](https://www.eventbrite.co.uk/e/cms-rebuild-mur-must-reads-walk-throughs-tickets-825513903307?aff=oddtdtcreator).  *For options 1 & 2 an extra LWI will be provided for the reformatting, as well as the full Must Read process training guide that will be published for the whole process. For option 3, all the detail will be contained within the full Must Read process training guide*  **Option 1: Customer amends the format of MJO/RJO/LTO and then the CDSP uploads the MJI/RJI/LTI on the customer’s behalf**   * On the download of the files, the customer will follow a quick process using excel to change the format of the file to match that of the legacy file format so it may be uploaded into their systems (see LWI embedded below). * When the Must Read investigations/visits are completed and the customer is ready to provide the outcomes, rather than uploading the file into CMS themselves, they can forward to the CDSP who will amend the format on their behalf, so that it may be accepted in the system. * The CDSP will load the file, within an agreed SLA (to be agreed with customers), and respond to the customer with the outcome i.e. success of the file being loaded, the number of records accepted, and the rejection reason(s) for any records which were not accepted (so that any necessary changes can be made to the file and a new file potentially produced for uploading)   **Option 2: Customer amends the format of MJO/RJO and then uses MUR processing tool to create MJI/RJI and uploads to CMS**   * On the download of the files, the customer will follow a quick process using excel to change the format of the file to match that of the legacy file format so it may be uploaded into their systems (see LWI embedded below). * When the must read investigations/visits are completed and the customer is ready to provide the outcomes, they will use the MUR file processing tool to create the files for upload. * The customer will upload the file into CMS and check the for success of file being accepted, the records accepted, and the rejection reason(s) for any records which were not accepted.   **Option 3: Customer makes no amendments to the MJO/RJO, uses MUR processing tool to manage process and create MJI/RJI, uploads MJI/RJI**   * On the download of the file, the customer will not carry out any re-formatting to load into their systems * When the must read investigations/site visits are completed and the customer is ready to provide the outcomes, they will use the MUR file processing tool (see LWI below) to create the files for upload. * The customer will upload the file into CMS and check the for success of file being accepted, the records accepted, and the rejection reason(s) for any records which were not accepted   **The full LWI for the above options can be found below**  The LWI attached provides the guidance for the reformatting of files to allow their loading into customer systems and on using the MUR file processing tool.    **PREVIOUSLY SUBMITTED DETAILED DESIGN CHANGE PACK BELOW**  **Must Read (MUR) Process Overview:**  Where a Shipper has failed its UNC obligation to provide a cyclic read for Supply Meter Point, The Transporters (Distribution Network/IGT) are obliged to procure a read on behalf of the Shipper at a cost to the Shipper, known as a Must Read. This process notifies relevant parties when a Must Read is triggered, facilitates the procurement of the read by the Transporter and invoices relevant charges to the Shipper (Distribution Networks only)  **Reason for Change:**  Resolve pain points identified within the current process, including:  The existing version of CMS doesn’t have functionality to:   * Allow stakeholders (DN, IGT, or Meter Read Agencies) to download the Must Read reports multiple times * Update the Must Read reports on a daily basis * The contact detail is not updated with UKLink updates e.g. where there has been a change to the meter status or meter point status * Offline reporting has to be issued to stakeholders to provide understanding of outcomes of resolved contacts and to support invoicing activities   In the first scenario, once any of the Must Read reports are downloaded from the legacy CMS UI, the option to download again is not available until either a new generation of contacts the next month (MJO report), following new contacts moving to the rejected (RJO report), or following new contacts moving to the Level 3 process (LTO report). If these downloaded reports are lost or mis-placed the same information is unavailable meaning some contacts may not be investigated or reads procured.  In the second and third scenarios, once any of the reports are downloaded, if there is any change any of the supply meter points this is not made clear to the stakeholder as the information is still relevant only to the date that it is first downloaded. As a result, there may be attempts made to procure reads where the meter has been removed or a read is no longer necessary as it has been loaded via RGMA processes.  In the fourth scenario, stakeholders aren’t notified of the outcomes of any resolved contacts making invoicing of customers (IGTs) or the reviewing of supplier invoices (DNs) challenging.  **New Process:**  The new business process for the Must Read (MUR) process can be found here:     * All reports can be downloaded as many times as required * Reports and the contact detail page will be updated with any recent UKLink activity, such as meter status change or meter status change * Contact detail information is available and visible to all relevant stakeholders for each MUR contact * Each stakeholder has a new individual Must Read page within the CMS UI which displays the lists of contacts, the most recent updates, and the ability to view the contact detail * A new and improved file formatting tool, the tool used to convert must read visit information into the required format, will be available to download at any time from the CMS UI * An individual report is available to download from the CMS UI for each stakeholder detailing the outcomes of all resolved MUR contacts * Where the meter issue flag is added to or removed from an SMP using the Known Meter Issue (KMI) contact, this detail will be updated in the MUR contact detail and visible in the downloaded reports   A training guide will be provided in line with the release for the new MUR 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, latest responses from MRAs, IGTs, or DNs * **Transparency:** The detail (where relevant) of the contact can be viewed by all stakeholders involved in the contact * **Reduction of customer effort:** Any wasted effort will be reduced through the daily updating of supply meter point information * **Reduction of customer effort:** The size of the backlog will be reduced through the improved file tracking functionality making the outcome of any site visit provided immediately visible   **Transition:**  A cut-off date will be communicated in Change Management Committee (ChMC), Contract Management Committee (CoMC) and through email communications where MUR MPRN Contacts should no longer be actioned via the legacy version of CMS, and instead investigated and actioned in the new version of CMS. |

# Associated Changes

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| Associated Change(s) and Title(s): |  |

# DSG

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| Target DSG discussion date: |  |
| Any further information: |  |

# Implementation

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| --- | --- |
| Target Release: |  |
| Status: |  |

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***

|  |  |  |
| --- | --- | --- |
| User Contact Details: | Organisation: | «h1\_organisation» |
| Name: | «h1\_name» |
| Email: | «h1\_email» |
| Telephone: | «h1\_telephone» |
| Customer decision on Change Pack: | «h1\_userDataStatus» | |
| Commercial impacts: | «h1\_commercial\_impacts» | |
| Representation Publication: | «h1\_consultation» | |
| Representation Comments: | «h1\_userDataComments» | |

**Xoserve’ s Response**

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

Please send the completed representation response to [uklink@xoserve.com](mailto:uklink@xoserve.com)

«RangeEnd:HDS»

Change Management Committee Outcome

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Change Status: | Approve | Reject | | | Defer |
| Industry Consultation: | 10 Working Days | | 15 Working Days | | |
| 20 Working Days | | Other [Specify Here] | | |
| Date Issued: | Click here to enter a date. | | | | |
| Comms Ref(s): |  | | | | |
| Number of Responses: |  | | | | |
| Solution Voting: | Shipper | | | Please select. | |
| National Grid Transmission | | | Please select. | |
| Distribution Network Operator | | | Please select. | |
| IGT | | | Please select. | |
| Meeting Date: | Click here to enter a date. | | | | |
| Release Date: | Release: Feb / Jun / Nov XX or Adhoc DD/MM/YYYY or NA | | | | |

Please send the completed representation response to [uklink@xoserve.com](mailto:uklink@xoserve.com)

Version Control

# Document

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| --- | --- | --- | --- | --- |
| Version | Status | Date | Author(s) | Remarks |
|  |  |  |  |  |