xoserve

Contact Management User Guide

Shipper Edition

Version 3.0

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Introduction

This User Guide is designed to provide a clear understanding of The Contact Management Service.

The guide contains:-

⇒ How to log on to the system and accessing the Contact Management Home Page

⇒ Raising Contacts, managing the responses

⇒ How to conduct searches

⇒ File responses

There are a number of symbols throughout the User Guide, the symbols and their meaning are included   below.

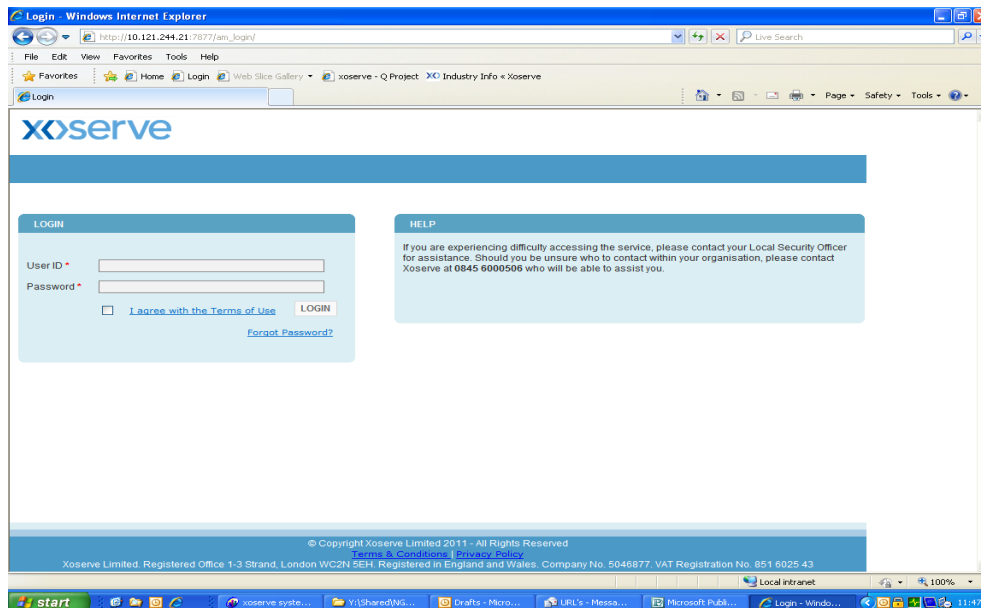Information

Warning

Area of interest

Mouse click required

Keyboard entry required

Section 2

Log onto Contact Management

2.1 Log onto the Contact Management system
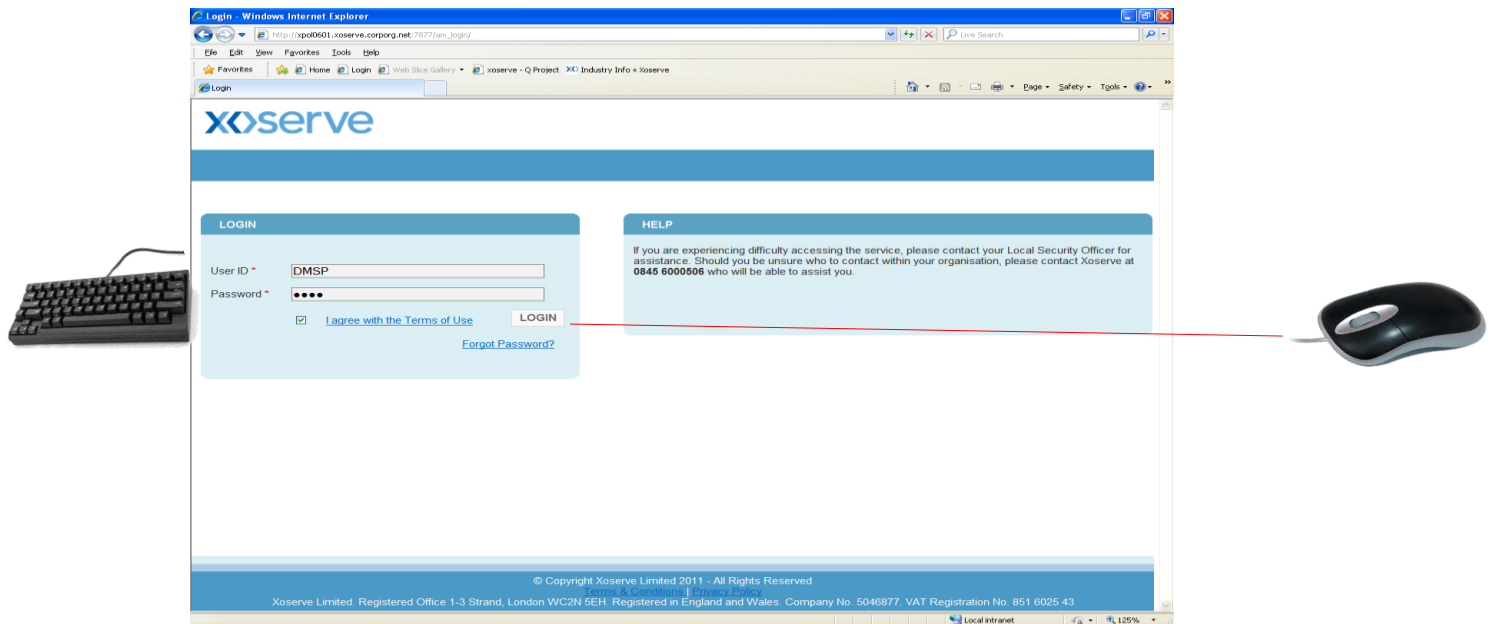
The portal Login Page looks as follows….

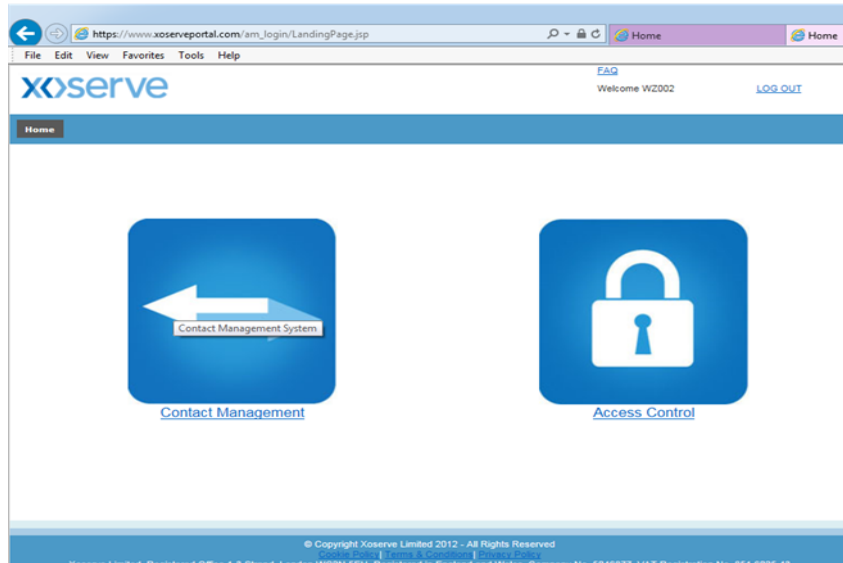

Step 1 – Enter your User ID

Step 2 – Enter your Password

Step 3 – Tick the box to agree to Terms of Use
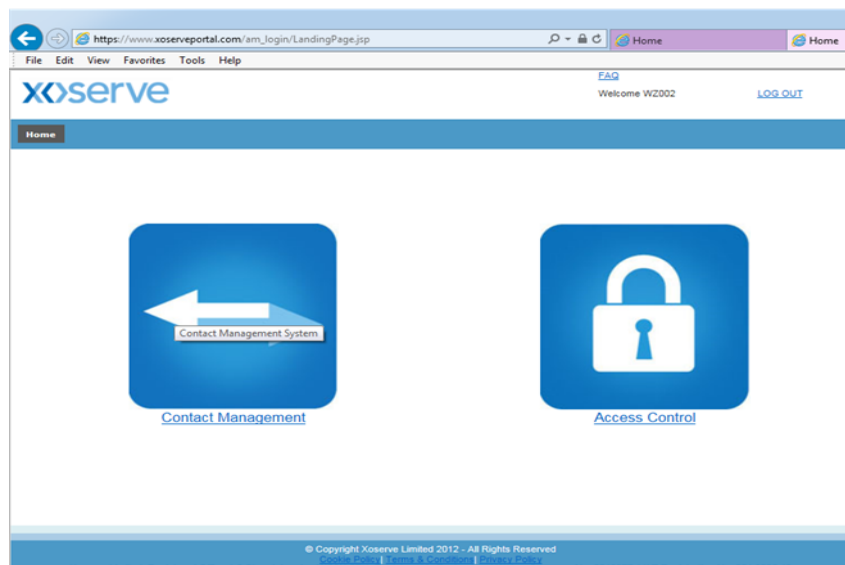
Step 4 – Click Login

The following Service Page will appear….

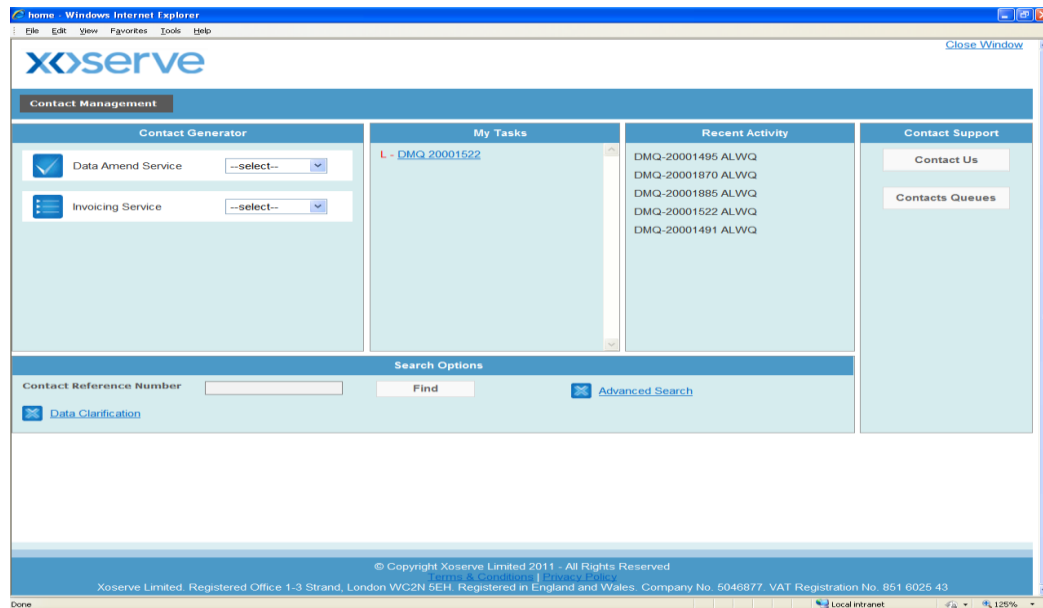There are two services on this page:-

$\Rightarrow$ Contact Management

$\Rightarrow$ Access Controls

Click Contact Management and this will take you to Contact Management home page.

Click Xoserve logo and you are taken to Xoserve.com

2.3 Contact Management Home Page

The Contact Management home page incorporates 5 different areas within the system, these are:

Zone 1

Contact Generator – This section is not applicable to you.

Zone 2

My Tasks – This section includes all tasks you have assigned to yourself

Zone 3

Recent Activity – This section details the last 10 actions you have performed. For example, closing a Contact and responding to a Data Clarification (DC).

Zone 4

Contact Support – This area is made up of 'Contact Us' and 'Contact Queues'. Contact Us details useful contact details for some of the services that Xoserve provide. Contacts Queues takes you to an area that lists outstanding Contacts for your organisation that require investigation.

Zone 5

Search Options – This section includes a variety of search facilities. Contact Reference Number Search and   Advanced Search will find Contacts raised in The Contact Management system. Data Clarification search returns Contacts that are currently at DC stage of the process.
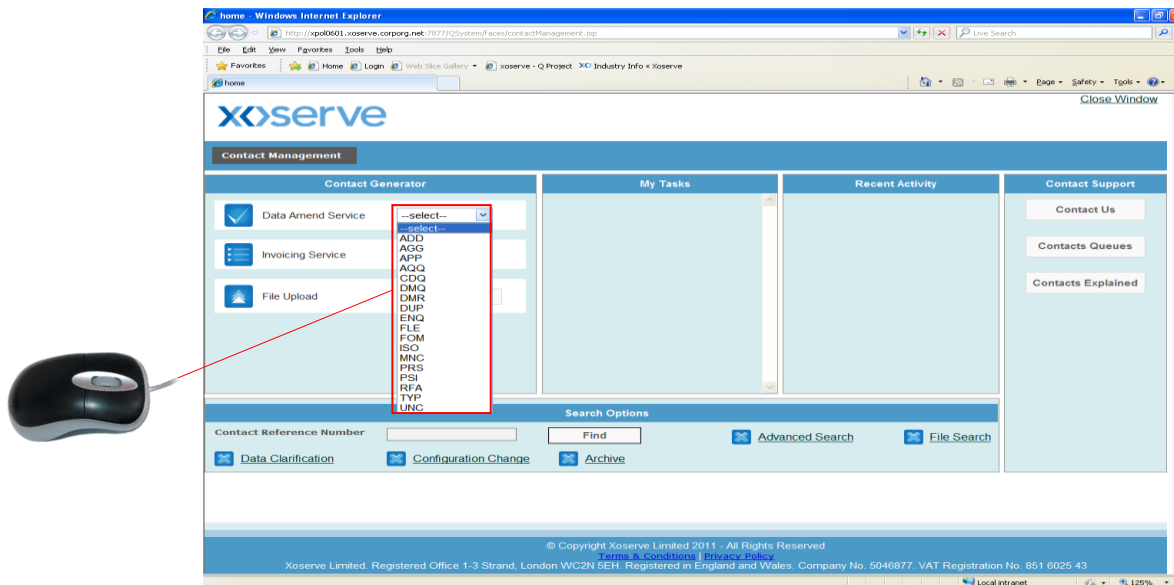
Section 3

Log a Contact

3.1 Log a Contact via Screen

Select the relevant Contact Code from Data Amend Service or Invoicing Service.

The Contact form is presented to you. Enter the mandatory and relevant data. All mandatory data is identified by *.

After entering some information, there may be a slight delay as The Contact Management system will be validating data against our source systems. This will occur across a number of Contact Types.

The system will tell you real time if you have entered incorrect details into the form.

Close Window will take you to the Services Page. If you want to revert back to the Contact Management home page, click Cancel.

3.1 Log a Contact via Screen

Once a Contact has been logged successfully, the following message will appear. It will show….

$\Rightarrow$ A Confirmation that the Contact has been logged successfully

$\Rightarrow$ The Contact Reference Number

$\Rightarrow$ The date and time of your submission

You may want to make a note of the Contact Reference Number, however you will see it appear in 'Recent Activity' on the Contact Management home page.

3.2 File Upload

This is a standard EFT template, the red fields highlight the mandatory data required for the Contact type. You can select multiple Contact types per template. This example is highlighting the ADD process.

Once the EFT template has been completed successfully and all mandatory information has been entered Column A will change from red to green. You can then upload your template to the system using the file upload shown on the Contact Management home page.

3.2 File Upload

The following screen will appear.

The File Type will be showing as QMP, this is the format required to submit your file to Xoserve
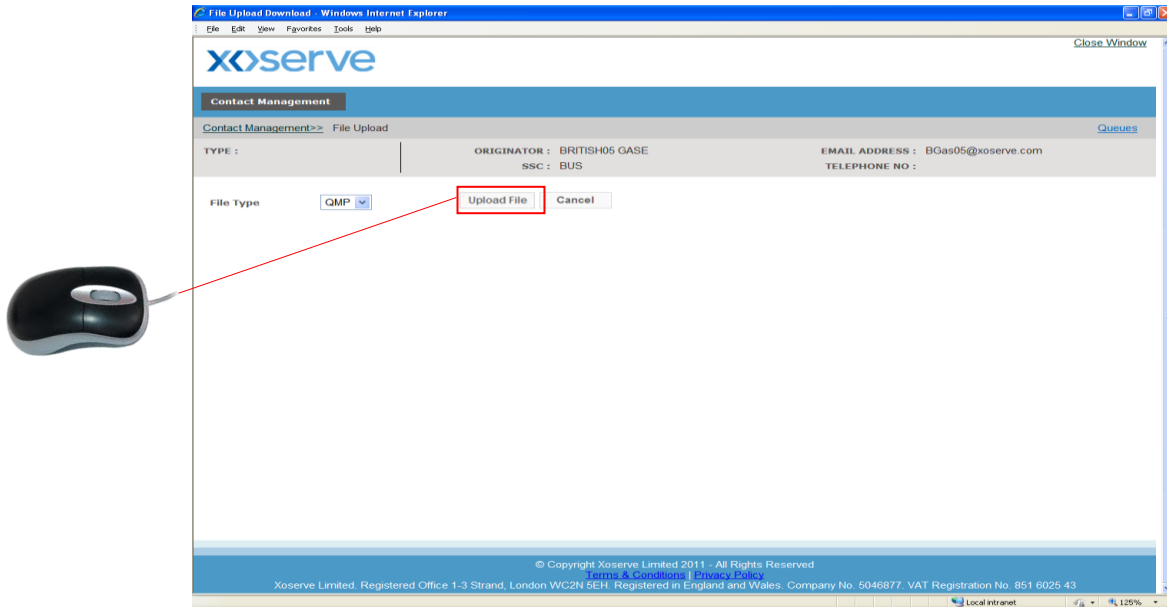
Select file upload and the File Upload screen will appear....
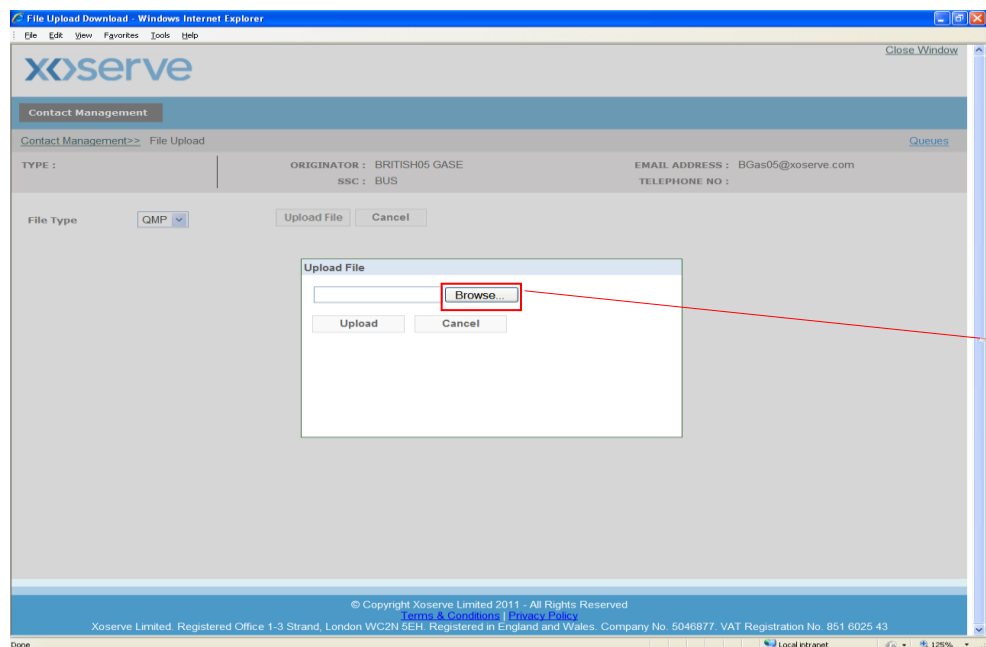
Select Browse and you will be taken to a relevant area where your files are saved. Select the file and Open, this will appear in the box next to Browse.
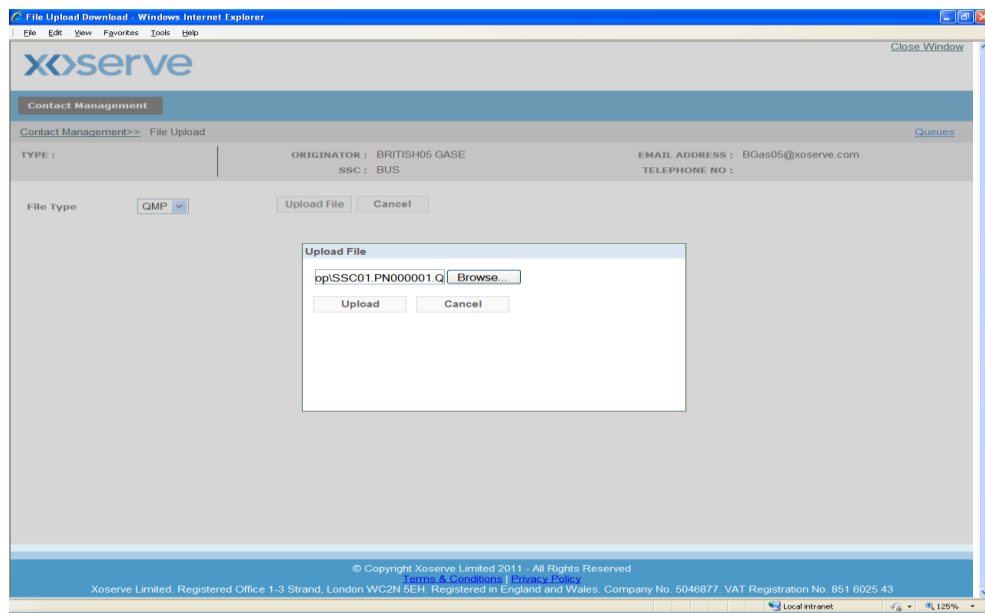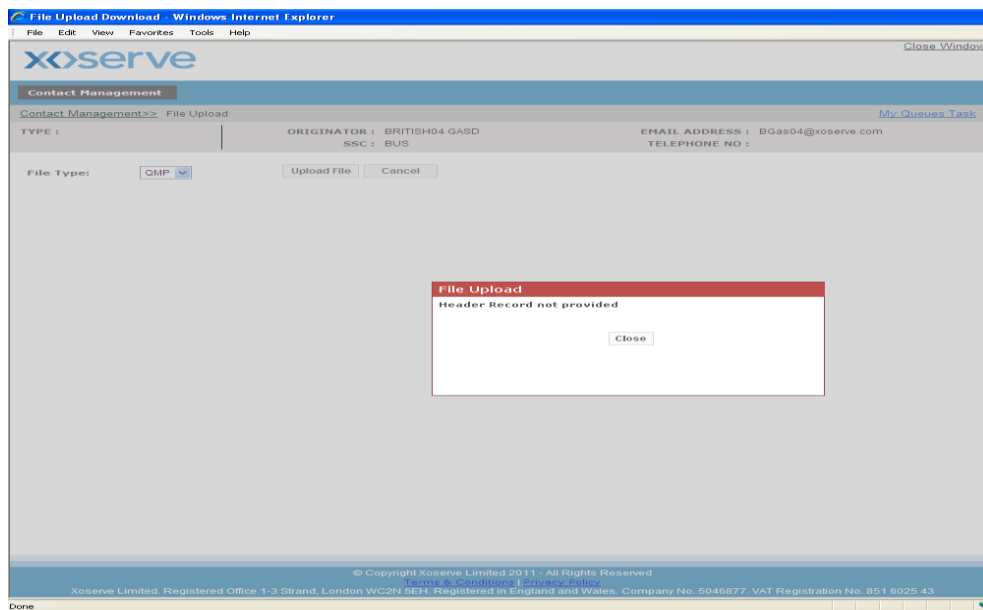
Select Upload, and the file is submitted.

You will receive a message at this point stating whether the submission has successfully loaded or rejected.

A successfully submitted file will show as follows….
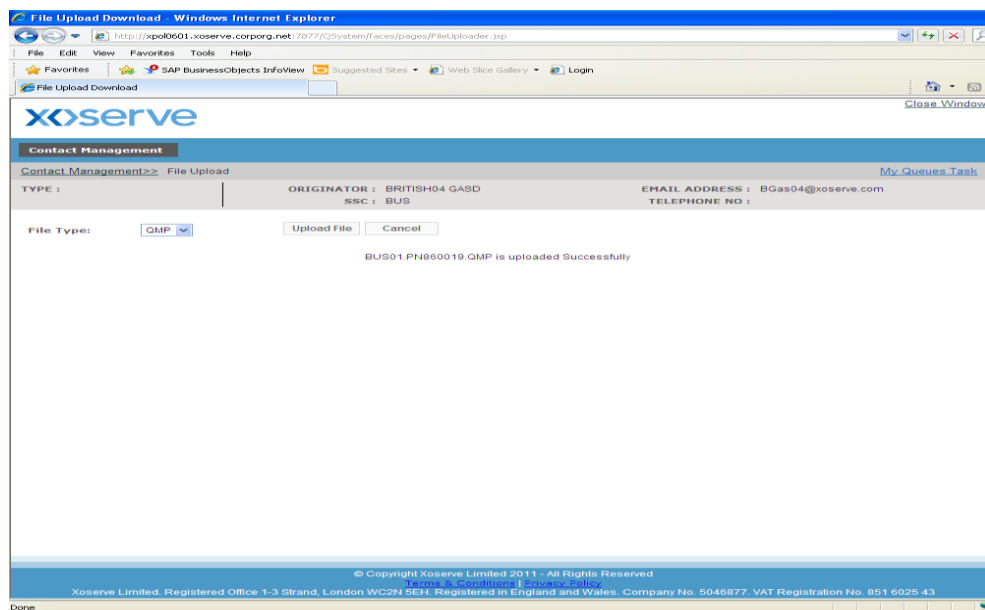
3.2 File Upload

An unsuccessfully submitted file will show as follows….

There are a number of reasons why a file might reject. These are held under the Contacts Explained Guide.

3.3 Top 50 Contact

When raising a Contact to Xoserve, you can select 'Top 50'. This would denote to Xoserve that the Contact raised is one of your priorities for the month.

Each organisation can raise a maximum of 50 'Top 50' Contacts per month. You will see the following message once it is submitted showing that it is a Top 50 Contact and will also show your organisation's remaining balance for the month.

Section 4

Contacts Queue

When selecting Contacts Queue in the Contact Support section on the Contact Management home page, you are taken to the Contact Queues and work outstanding. This will show as follows….

The area is made up of three queues. This view illustrates that you have selected the Action Queue.

My Tasks

This table is linked to the My Tasks zone on the Contact Management home page. It provides additional   information in order to help you prioritise.

Contacts Queue

This is a queue that is visible to all Users. This queue includes all Contacts raised by your organisation.

Action Queue

This is a general queue holding a number of Contacts that have been investigated by Xoserve and require further attention from yourselves. The Contacts within this Queue may be the result of a Contact raised by another Shipper.

If you are seeking a specific Contact, the Actions Queue has filters to help identify this Contact.

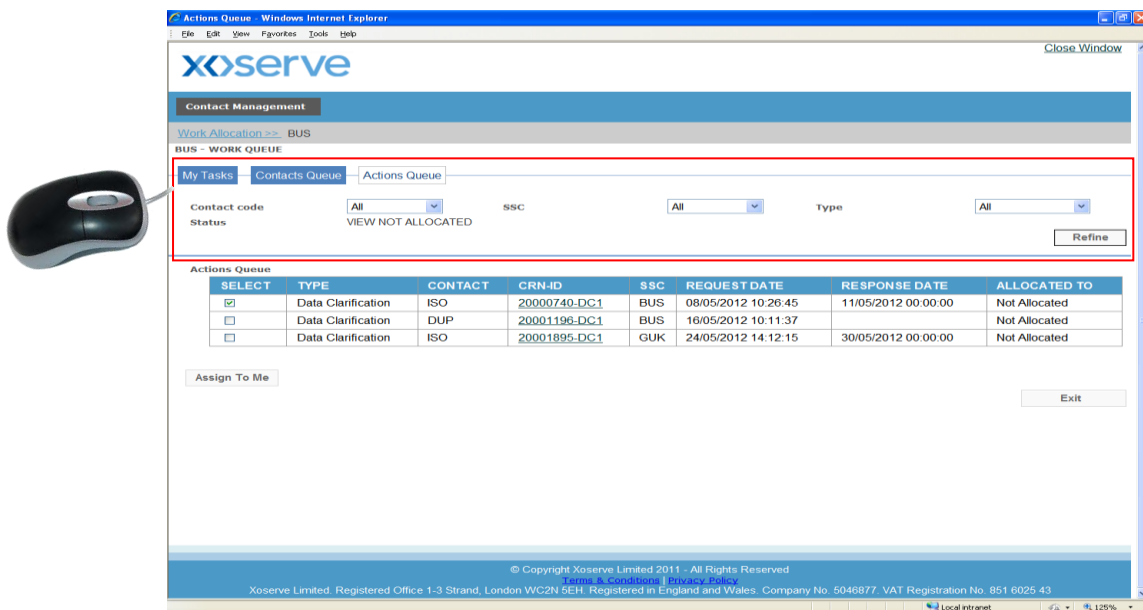## 4.2 Assigning a Contact - User

Actions Queue

The Contacts Queue details the Contacts currently outstanding with your organisation. The Contacts within this Queue may be as a result of a Contact raised by another Shipper, e.g. Data Clarification or Configuration Change request.

Assign a Contact

Step 1 – Find the Contact in the queue

Step 2 – Click the box in the 'SELECT' Column. Once a tick is showing in the box,

Step 3 – Click Assign To Me.

This Contact will then be moved to your 'My Task' queue and can be worked upon.

When assigning a Contact, you can select one or multiple Contacts at a time.

4.3 Transferring Contacts - User

My Tasks

Transfer a Contact to the Action Queue

Step 1 – Find your Contact via the Contacts Queue

Step 2 – Click the box for this contact
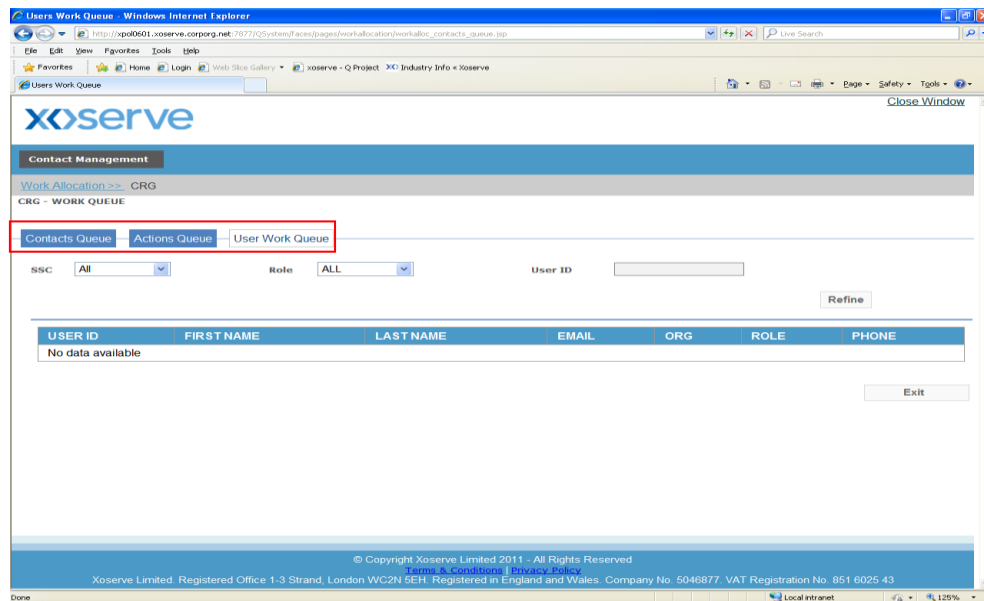
Step 3 – Click Transfer to Queue.

This will then appear in the Action Queue and can be worked upon by another person.

When transferring a Contact, you can select one or multiple Contacts at a time.

When selecting Contacts Queue in the Contact Support section on the Contact Management home page you are taken to the Contacts Queue.

The area is made up of three queues. This view illustrates that you have selected the User Work Queue.

Contacts Queue – This is a queue that is visible to all Users. This queue includes all Contacts raised by your organisation.

Actions Queue – This is a general queue holding a number of Contacts that have been investigated by Xoserve and require further attention from yourselves. The Contacts within this Queue may be the result of a Contact raised by another Shipper

Users Work Queue – This queue lists the Users within the organisation and information relating to the User. Once a team member is selected, the current work they have in their 'My Tasks' becomes visible.

If you are seeking a specific Users Work Queue, enter the User ID into the field and this will bring back the relevant User only.

Actions Queue

A Supervisor can allocate a Contact to themselves or to another colleague within the organisation. Contacts can be allocated from the Actions Queue.

Assigning a Contact

Step 1 – Find the Contact in the queue

Step 2 – Select the box for this Contact. Once a tick is visible in the box

Step 3 – Assign to a user by clicking 'Allocate to User'.

Step 4 – A drop down menu will appear including all users in the organisation. Choose a user

Step 5 – Click Assign to the Above User; this Contact will then be moved into the User's My Task queue and can be worked upon.
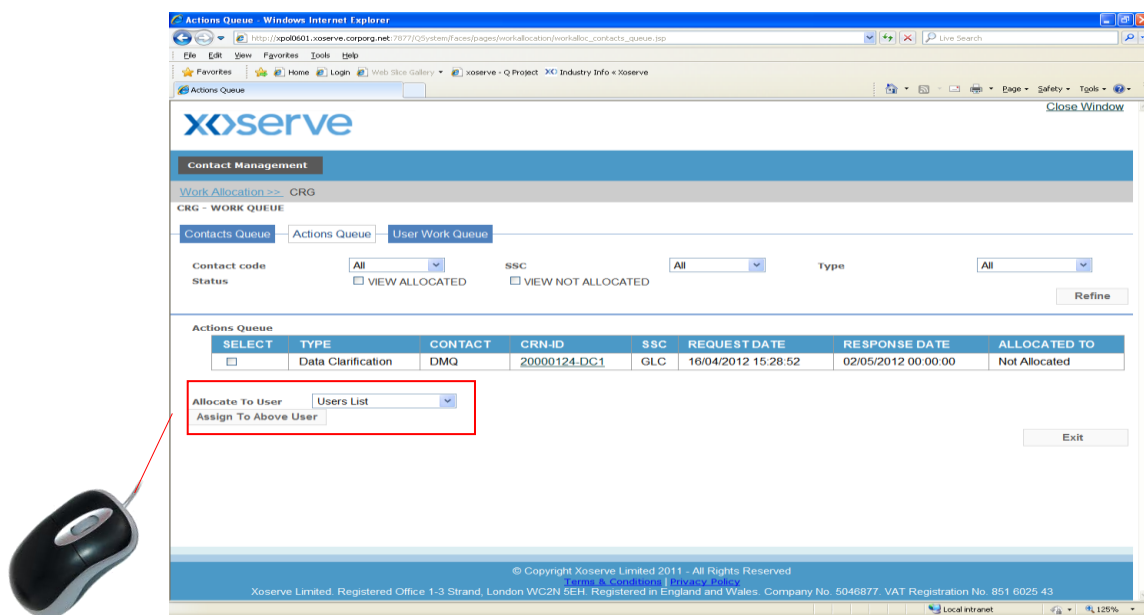
The drop down list will include yourself as a Supervisor. Allocation of a Contact will work exactly the same, select the User ID and then Assign to Above User.

Once a Contact has been assigned the Contact will also update in the chosen person's Work Queue.

As a Supervisor you have the ability to retrieve a Contact from a team member's My Tasks and place into the Action Queue so another team member can work on the Contact.

Step 1 – Select Contacts Queues on the Contact Management home page

Step 2 – Select User's Work Queue

Step 3 – Select the relevant User

Step 4 – Click the box for the Contact you want to transfer

Step 5 – Select Transfer to Queue

This Contact will then appear in the Actions Queue ready for a team member to work on.

When transferring a Contact, you can select one or multiple Contacts at a time.

Section 5

Correspondence

5.1 Receiving a Data Clarification Request

In response to your original Contact or a Contact raised by another Shipper, Xoserve may require further   information and will send a Data Clarification request.

Your Original Contact

The Data Clarification request will become visible in your My Tasks. It relates to the Contact you have previously sent to Xoserve.
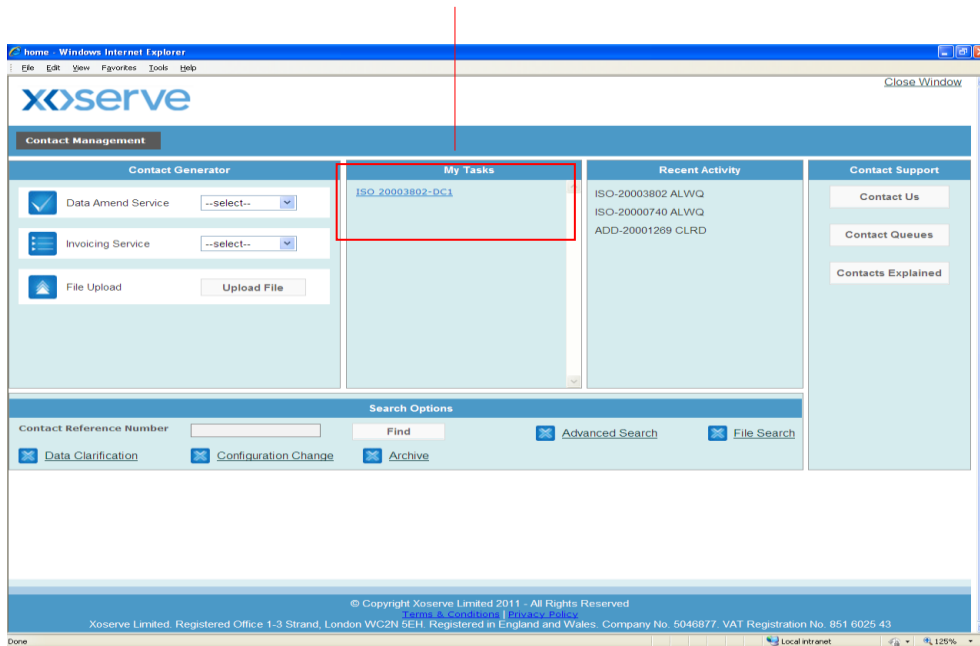
ℹ️ The Data Clarification Request is a point-to-point communication between the Contact Originator and the Contact Handler.

ℹ️ The format of the reference number consists of the Contact Type, the Contact Reference number, the correspondence type (DC) and the count (1 or 2)

Please see page 27-29 for actioning the Data Clarification.

5.1 Receiving a Data Clarification Request

Third Party Data Clarification Request

This will appear in the Contact Queue under the support section on the Contact Management home page.

Select the Action Queue and the following will appear….

You can refine your search by using combinations of search criteria.

Step 1 – Select the box for the relevant Contact

Step 2 – Click Assign to me

The Contact will become visible in your My Tasks.

When the DC is selected the message below will appear stating the DC number and when a response is due by.
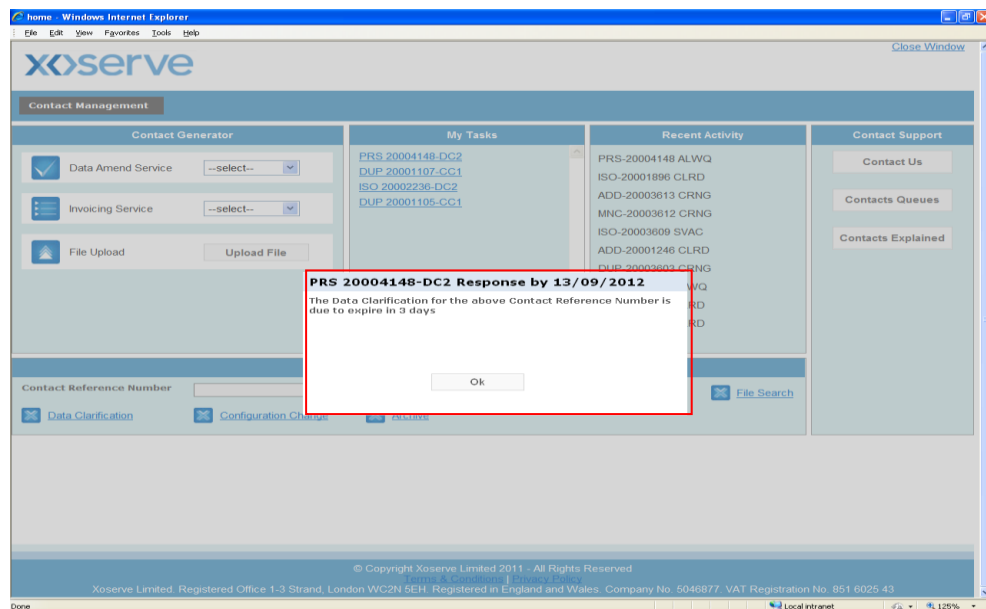
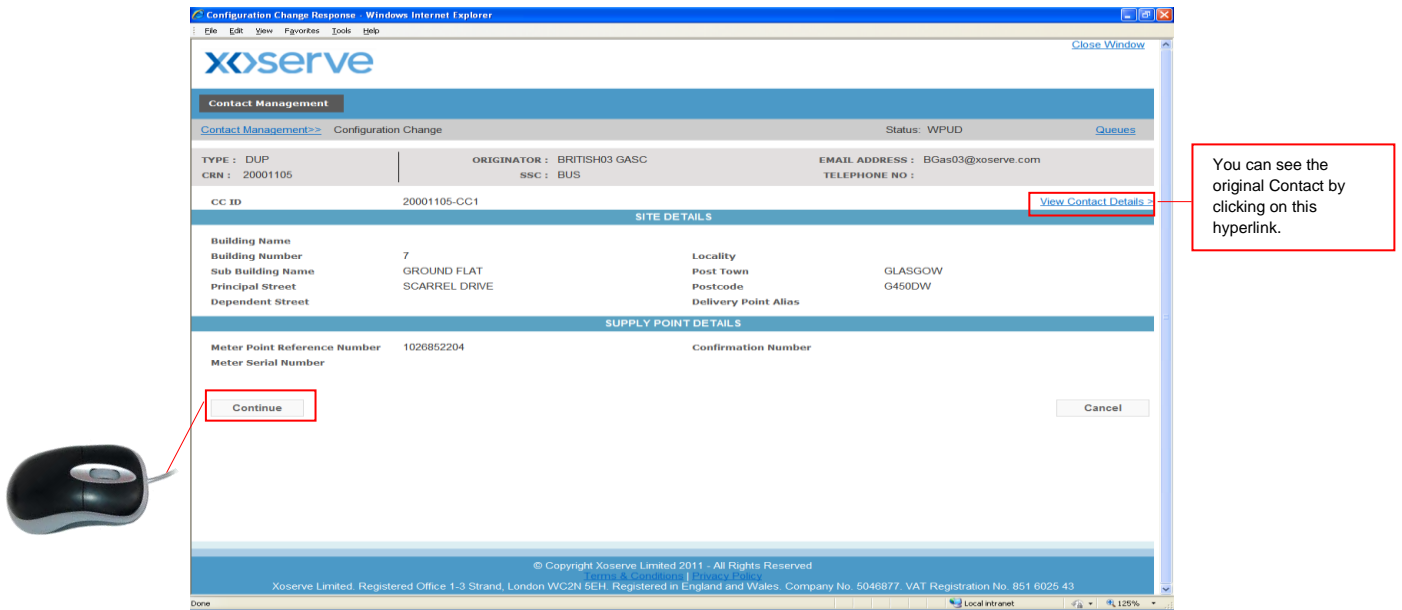

Click Ok and you will be taken into the Data Clarification form.

5.1 Receiving a Data Clarification Request

You can see the original Contact by clicking on this hyperlink.

Click Continue and the details of the DC request will appear.

DC ID is an identifier for the original Contact.

Dispatch Date is the day Xoserve sent it to you.

'Request by' will identify the Xoserve Contact Handler.

This is when the DC needs to be responded by.

Up to two DC's can be sent per Contact. These will show as DC1 and DC2 on the system.

5.2 Responding to a Data Clarification Request

In the response section please provide us with the information we require in the free format comments field and select submit to return to us.

You can write up to 2000 characters in the Comments box.

The DC will be directed back to the Contact Handler at Xoserve.

Your name is populated in the 'Response by' field when you click Submit.

A Data Clarification Request effectively places your original Contact on hold; 'the clock has stopped'. Only when it is returned does the 'clock start' again.

A Data Clarification will remain open for 20 business days. Each time the Contact is opened you are prompted as to how many days are left on the DC before it is due to expire.
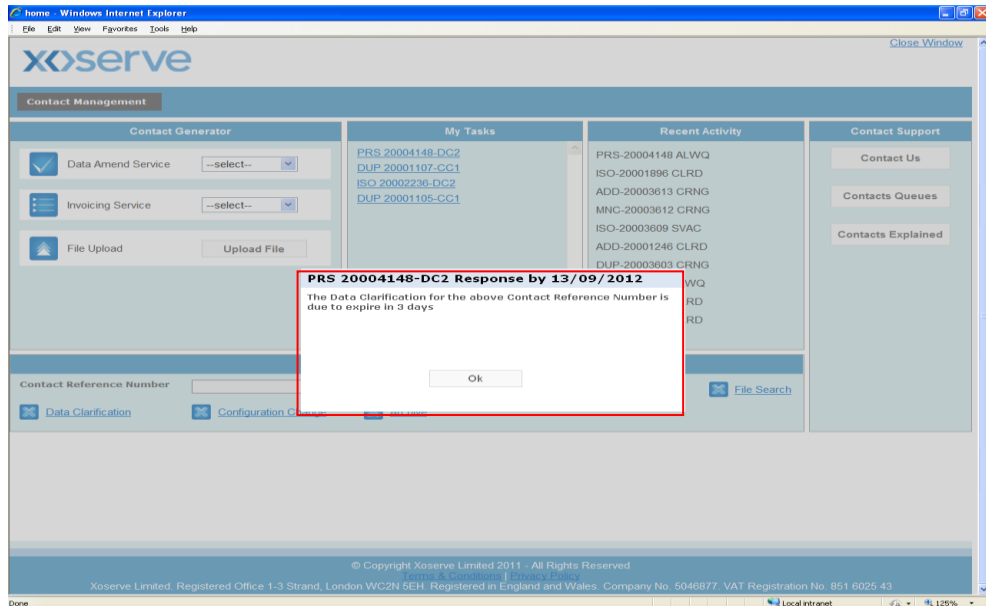
If you do not respond during the 20 days, the Contact will auto close on the system. For the Contact to be resolved a new Contact will need to be raised including the information requested in the DC.

⚠️ The maximum elapsed time for a Data Clarification stage is 20 business days. In this respect if a second Data Clarification is sent at any point within this time then it will remain valid for the remaining portion of the 20 days.

E.g.   DC1 responded after 15 days since it was sent

DC2 sent on day 16 therefore 4 business days will remain

In response to your original Contact or a Contact raised by another Shipper, Xoserve will require prior action by you before proceeding with the processing of the Contact. Xoserve also require an update from yourself to say the action has been completed.

<u>Your Original Contact</u>

The Configuration Change request (CC) will become visible in your My Tasks. It relates to the Contacts you have previously sent to Xoserve.
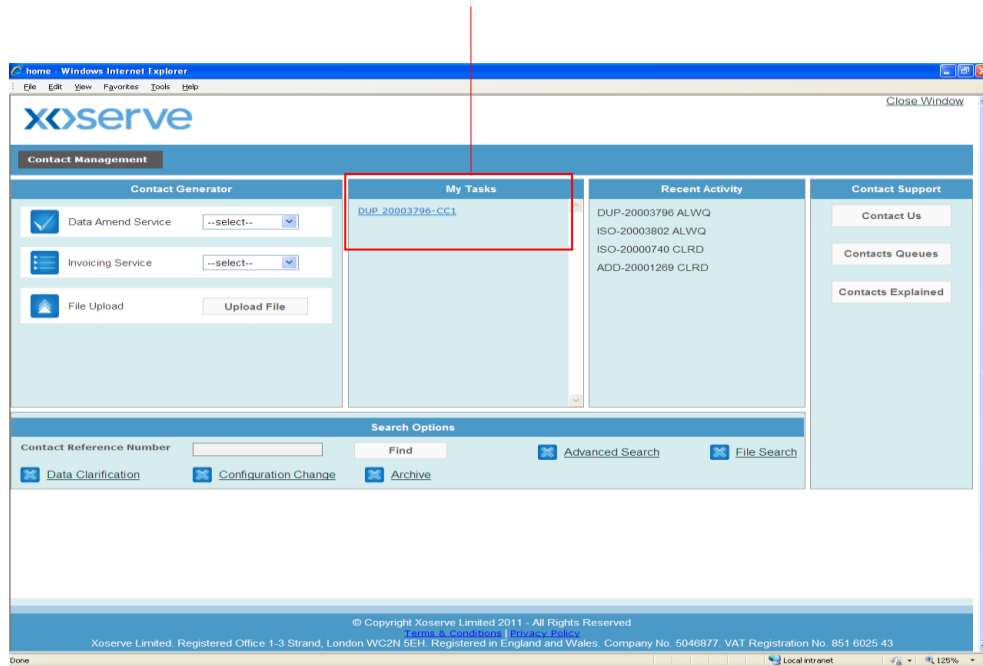
The Configuration Change Request is a point-to-point communication between the Contact Originator and the Contact Handler

Please see page 33-35 for actioning the Configuration Change Request

Third Party Configuration Change Request

This request will appear in the Contact Queue under the support section on the Contact Management home page. Select the Actions Queue and the following will appear….

You can refine your search by using combinations of search criteria.

Step 1 – Select the box for the relevant Contact

Step 2 – Click Assign to me

The Contact will become visible in your my Tasks.

When the CC is selected the message below will appear stating the CC number and when a response is due by.
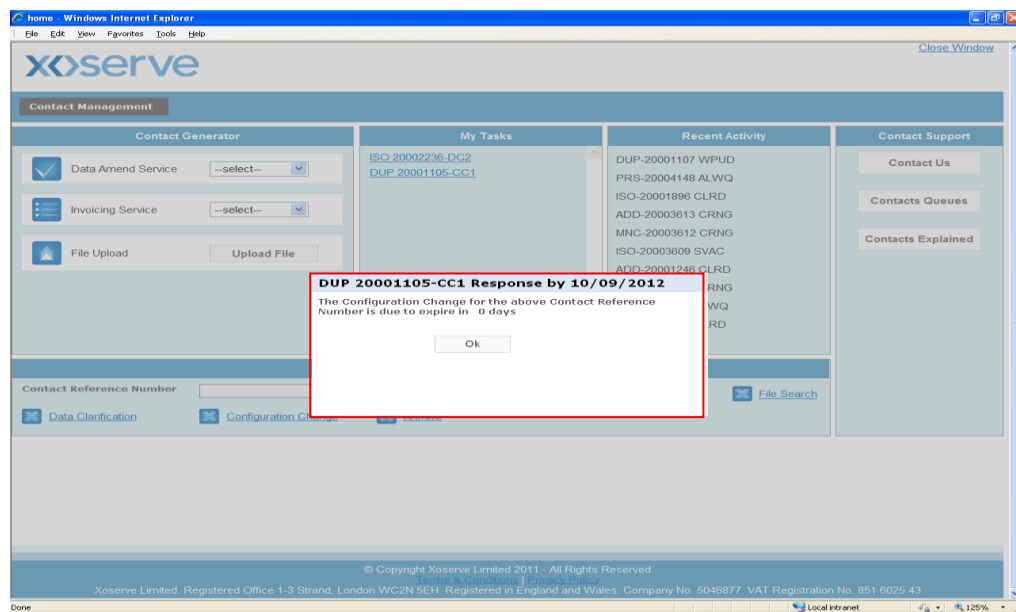
Click Ok and you will be taken into the initial Contact raised.

5.4 Receiving a Configuration Change Request

You can see the original Contact by clicking on this hyperlink.

Click Continue and the details of the CC request will appear….

CC ID is an identifier for the original Contact.

Dispatch Date is the day Xoserve sent it to you.

'Request by' will identify the Xoserve Contact Handler.

This is when the CC needs to be responded by.

Up to two CC's can be sent per Contact, these will show as CC1 and CC2 on the system.

You will notice that you have the opportunity to Object to our request or tell us that you have completed the Action. It is important that you select one of these two options.

Action Completed

Select the Action Completed Radio button. The comments box is available if you have further comments but it is not mandatory. Once completed click Submit.

You can write up to 2000 characters in the Comments box.

Object

Select the Object Radio button. At this time the Comments box becomes mandatory, please update this box with your reasons / comments and click select Submit.

The CC will be directed back to the Contact Handler at Xoserve.

Like a Data Clarification Request, the Configuration Change Request effectively places your original Contact on hold; 'the clock has stopped'. Only when it is returned does the 'clock start' again.

A Configuration Change will remain open for 40 business days. Each time the Contact is opened you are prompted as to how many days are left on the CC before it is due to expire.
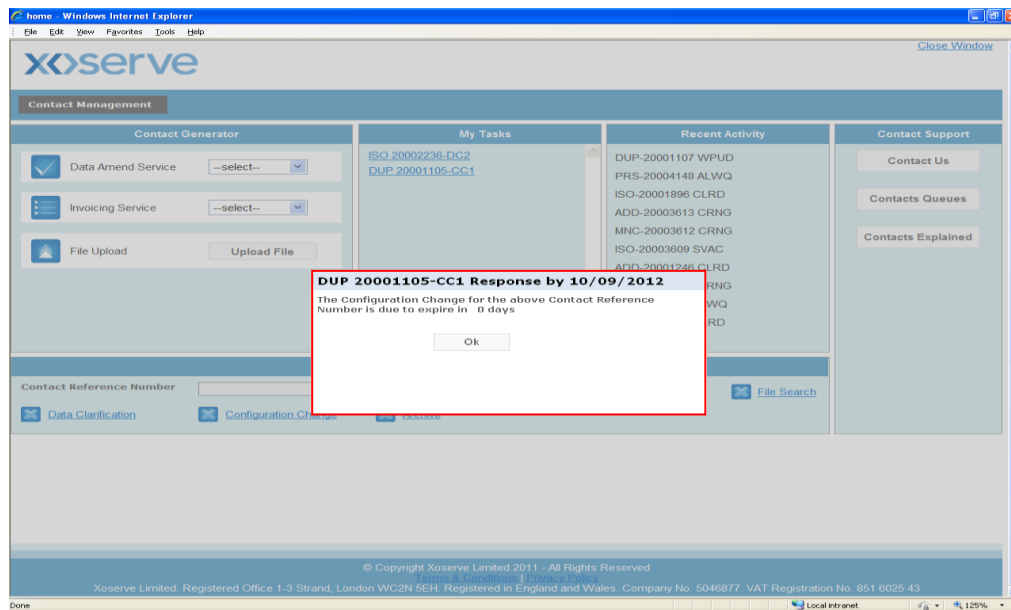
If you do not respond during the 40 days, the Contact will auto close on the system. For the Contact to be resolved a new Contact will need to be raised with the requested action completed from the CC.

The maximum elapsed time for a Configuration Change stage is 40 business days. In this respect if a second Configuration Change is sent at any point within this time then it will remain valid for the remaining portion of the 40 days.

E.g.   CC1 returned to Xoserve after 25 days since dispatch date

         CC2 sent on day 25 therefore 15 business days will remain

5.7 Receiving an RFI request (Theft of Gas only)

In response to your original Contact or a Contact raised by another Shipper or Network, where more information is required regarding a Theft, a Request for Information (RFI) will be sent. These will appear in the Contact queue under the support section on the Contact Management home page. Tick the box next the relevant **ToG** contact, then click 'Assign To Me'
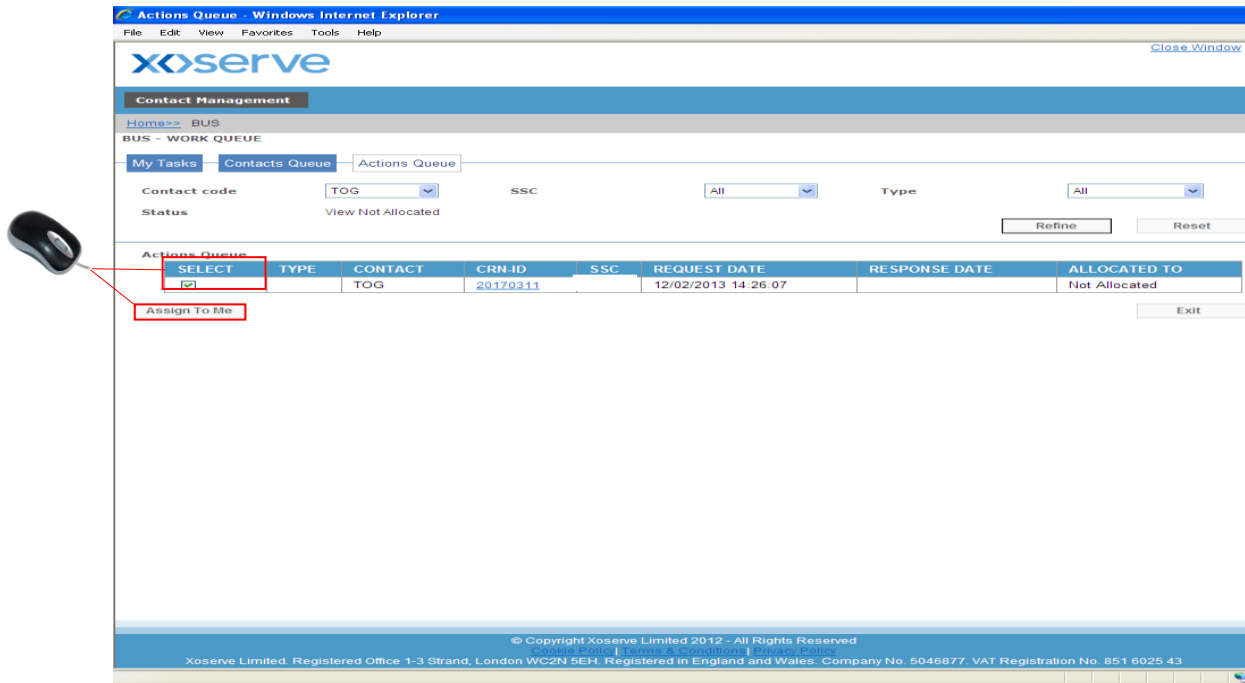
The contact will appear in your 'My Tasks' area. Click on the CRN hyperlink.
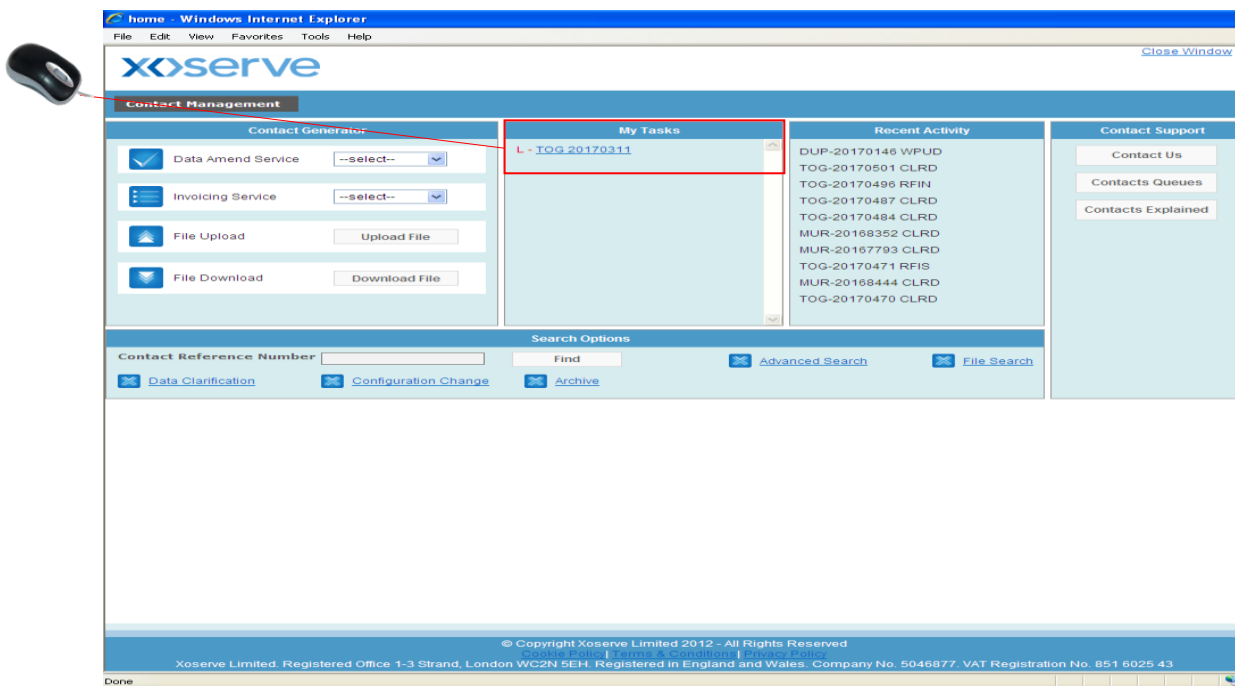
5.7 Receiving an RFI request (Theft of Gas only)

The following screen appears, detailing the RFI that requires your attention. To view the contact itself, you can click 'View Contact Details'.

5.8 Responding to an RFI request (Theft of Gas only)

In response to the Request for Information a TOG Investigation Outcome will need to be provided.
Dependent on the outcome of the investigation the system will require mandatory information before user can submit the contact.

Valid TOG

Where a Theft has been investigated and proven against a Large or Small Supply Point. User will need to record the following:

Type of Theft

Theft Start Date

Theft End Date

Estimated Calculation of Gas [kWh]

If Police have been informed and if they have, Police data provided

Engineers report

NB - Large Supply Points **only** will be Invoiced

Valid TOG-Not Pursuing

Where a Theft has been investigated and proven against a Large or Small Supply Point but is not pursued.

Invalid TOG

Where a Theft has been investigated and determined as Invalid TOG Contact raised.

Once all necessary information has been provided, click 'Submit' to send the RFI back to Xoserve

5.9 Auto closure of an RFI request (Theft of Gas only)

A Request for Information will remain open for 80 business days. If you do not respond within the 80 day period, the Contact will auto close on the system.

For the contact to be resolved a new contact will need to be raised including the information to complete the RFI.

Section 6

Resolution of a Contact

6.1 Contact Resolution

There are two outcomes to a Contact once it has been worked upon by Xoserve; Valid and Invalid.

Valid Resolution is when your Contact has been actioned as requested by Xoserve and Invalid Resolution is when Xoserve have not been able to complete the Contact due to validation failures or missing information.

Valid resolution of a Contact looks as follows including a standard top and tail message and the confirmation as to how your Contact has been processed….

Invalid resolution of a Contact looks as follows including a standard opening paragraph and the reason why the Contact was not upheld.

Section 7

Search Facilities

In order to find a Contact on the system there are a number of searches available.

Search options are located on the Contact Management home page.
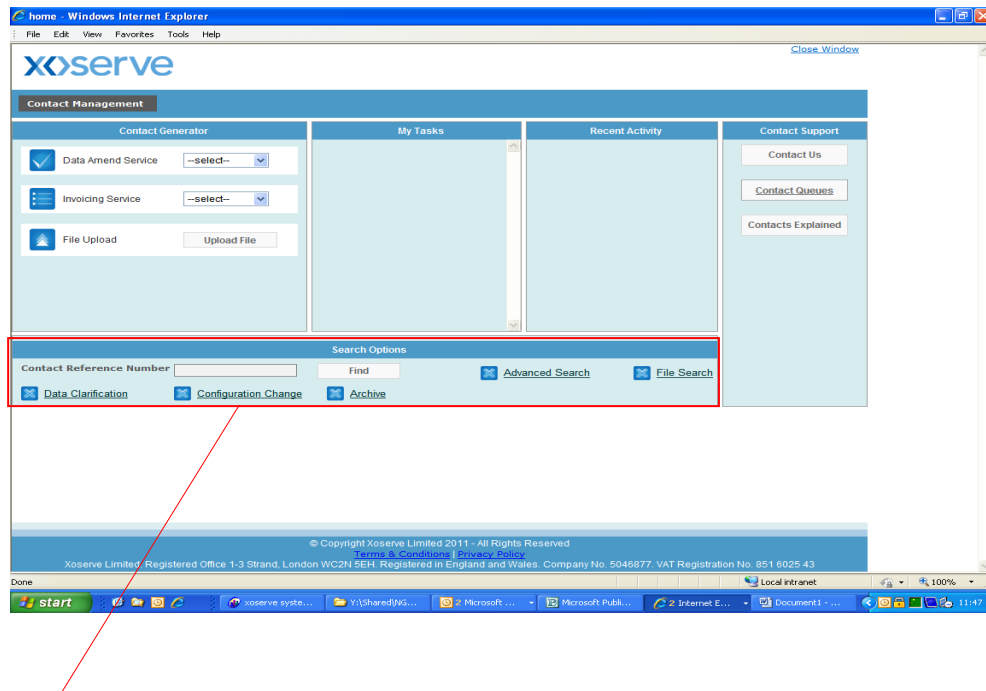
There are six search options, these are:-

Basic Search – Pinpointing a Contact by Contact Reference Number

Advanced Search – Searching for a single or multiple Contacts using a combination of search filters

File Search – Locating a file submitted to Xoserve
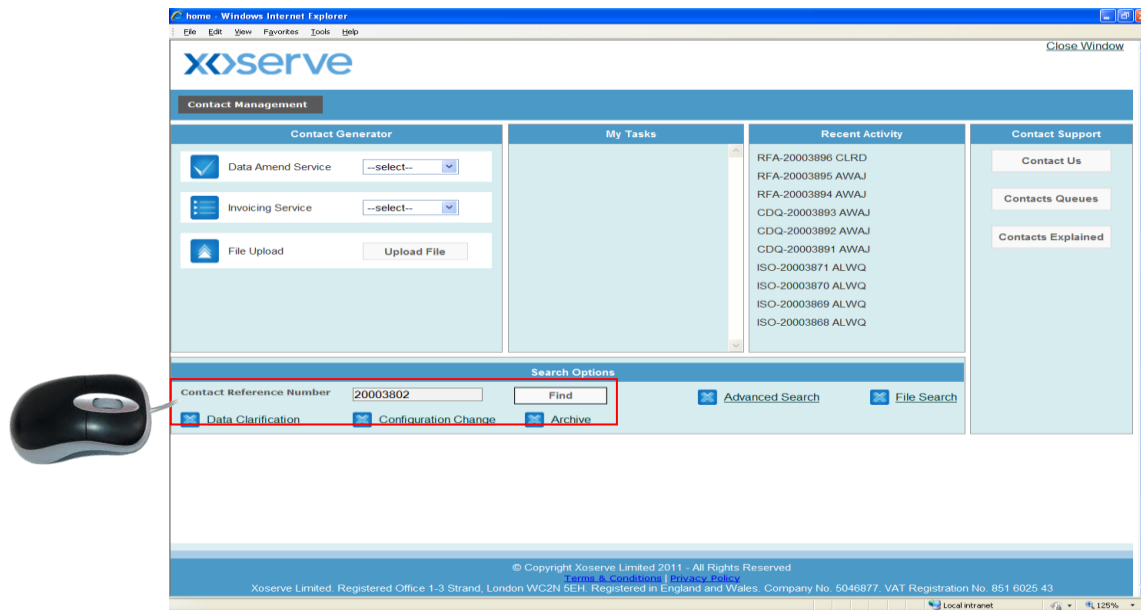
Data Clarification Search – Searching for a Contact currently at DC status or has passed through the DC status.

Configuration Change Search – Searching for a Contact currently at CC status or has passed through the CC status.

Archive Search – Searching for a Contact raised on a previous Query Management system ConQuest.
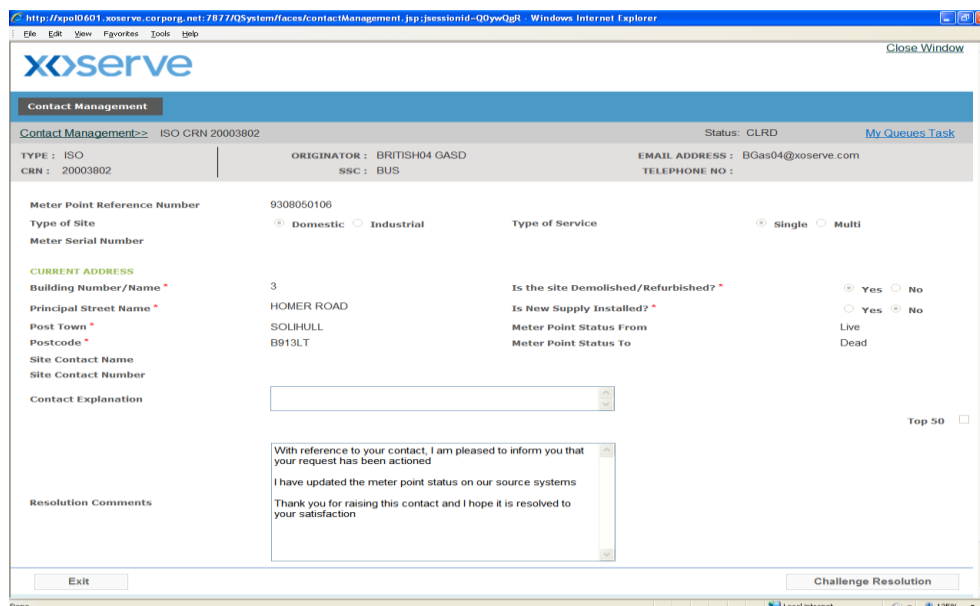
To retrieve information on a specific Contact, enter your CRN number into the field and click Find.

The following results will appear presenting the details of the Contact.

You can not edit this Contact; it is read only.

To retrieve information on Contacts, click Advanced Search.
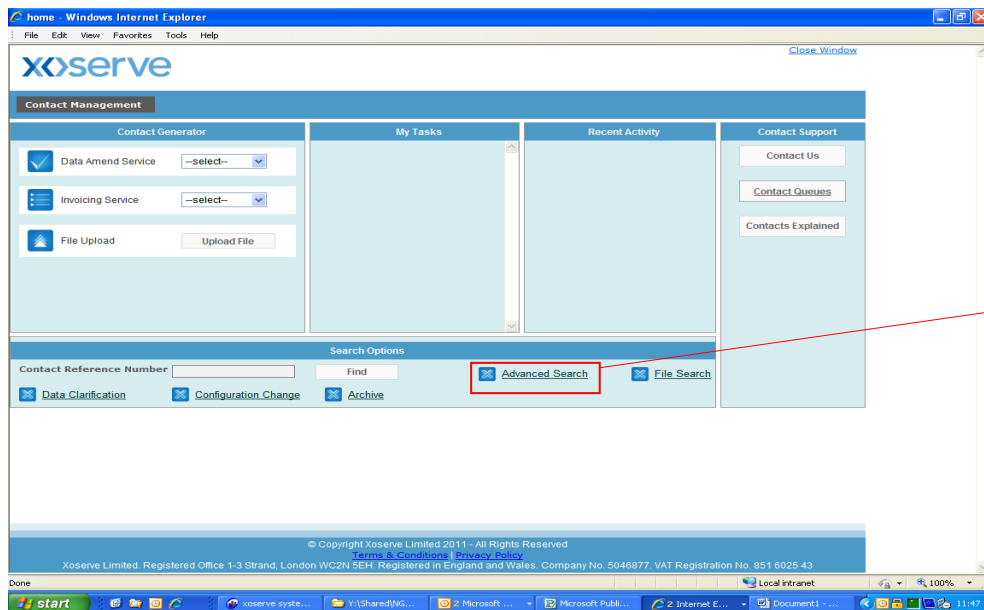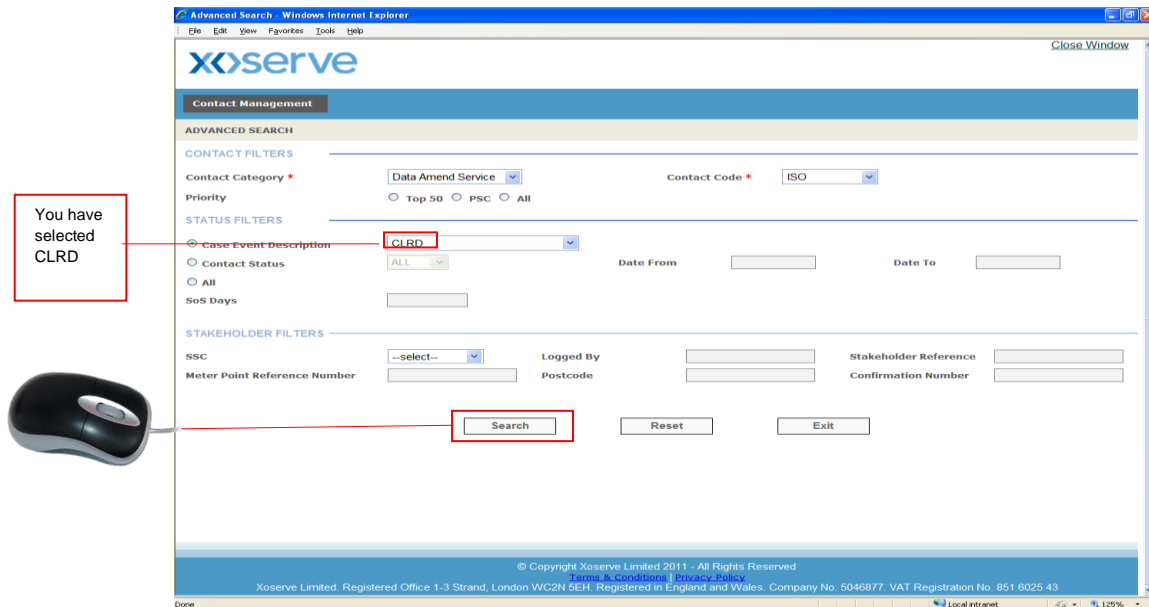
You will be taken to this screen where you can search by various filters. The first filter is Contact Filter, where you are required to select Contact Category and Contact Code, then click Search.
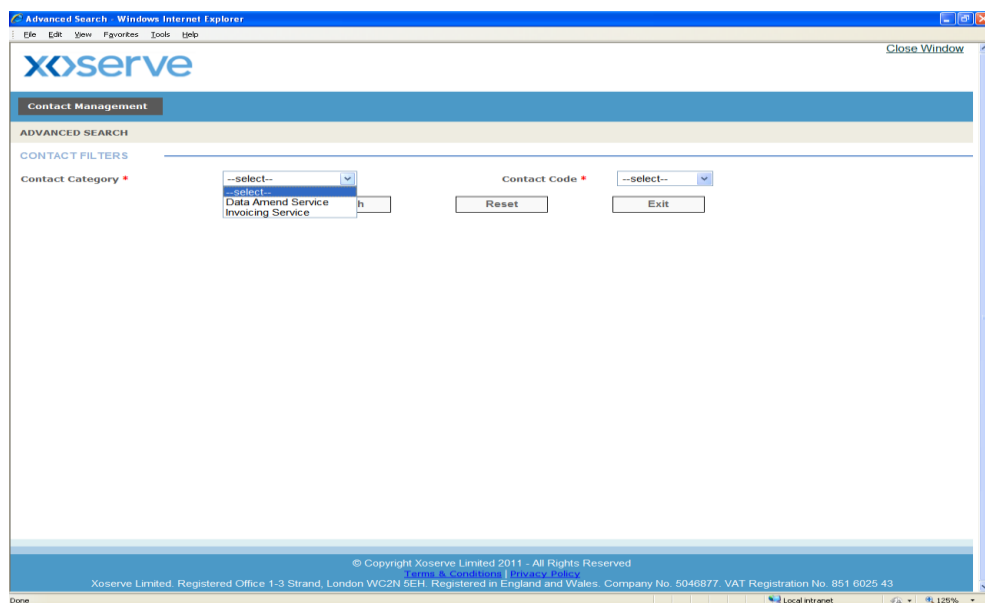
The following screen will appear and you can filter the search further by choosing data from either Status Filters and Stakeholder Filters.

Enter the necessary data, in the above example you have selected CLRD and click Search. The following results will appear presenting the CRN's relating to the search.

Did you notice that three radio buttons appeared in the Contact Filter section?

Select the relevant CRN you require and the Contact will appear showing the Contact details and the resolution for the Contact.

Modify Search

On the results returned through Advanced search there is an option to Modify Search or conduct a New Search.
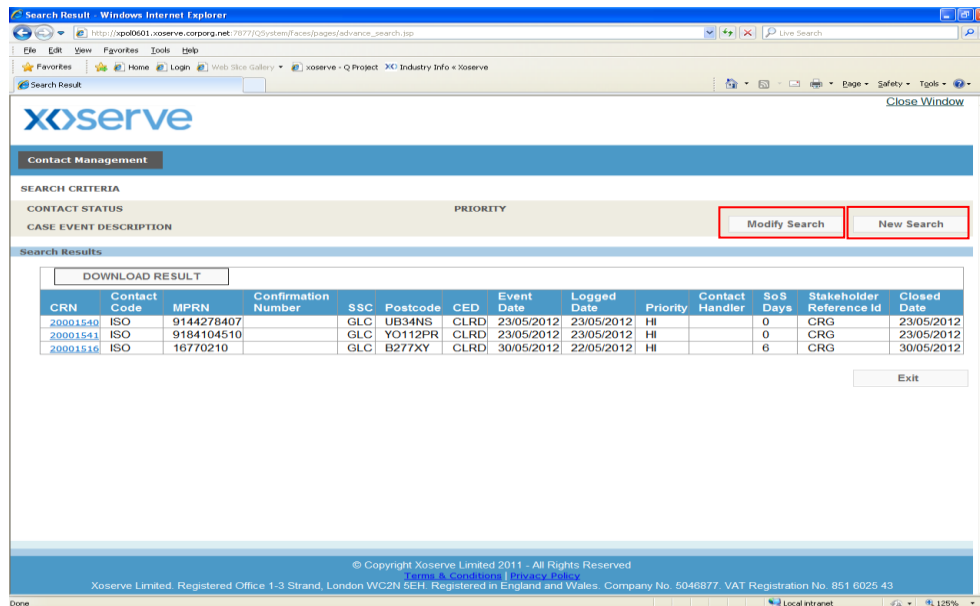
Modify Search will take you back to the initial search you have entered. From here the search criteria can be amended.
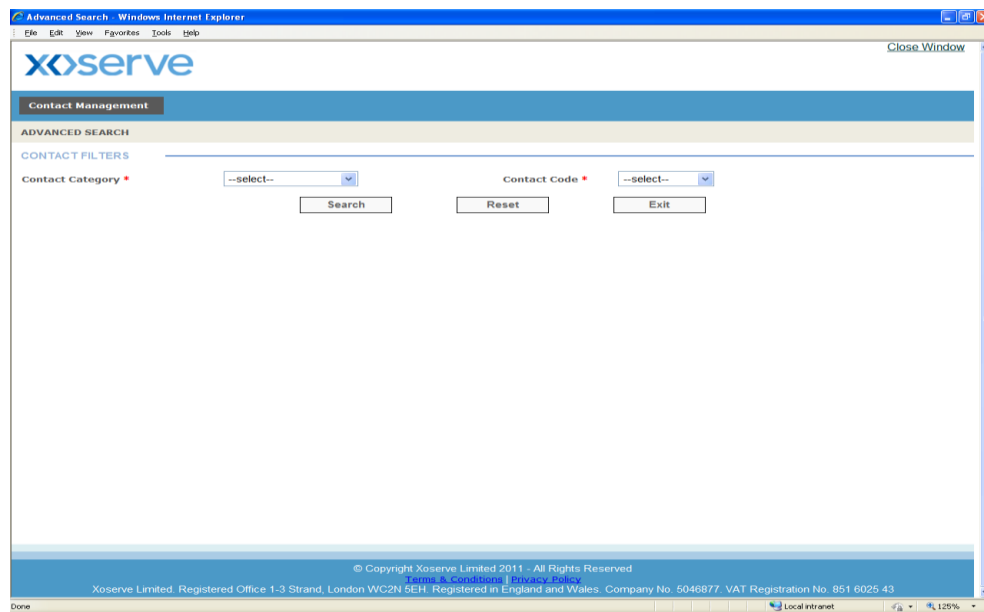
New Search

New Search takes you to the original search screen to complete a brand new search with new data.

You will need to repeat the selection step demonstrated on page 42. To pick a Contact Category and the Contact Code you require.

To retrieve information on files you have submitted to Xoserve, click on 'File Search'.
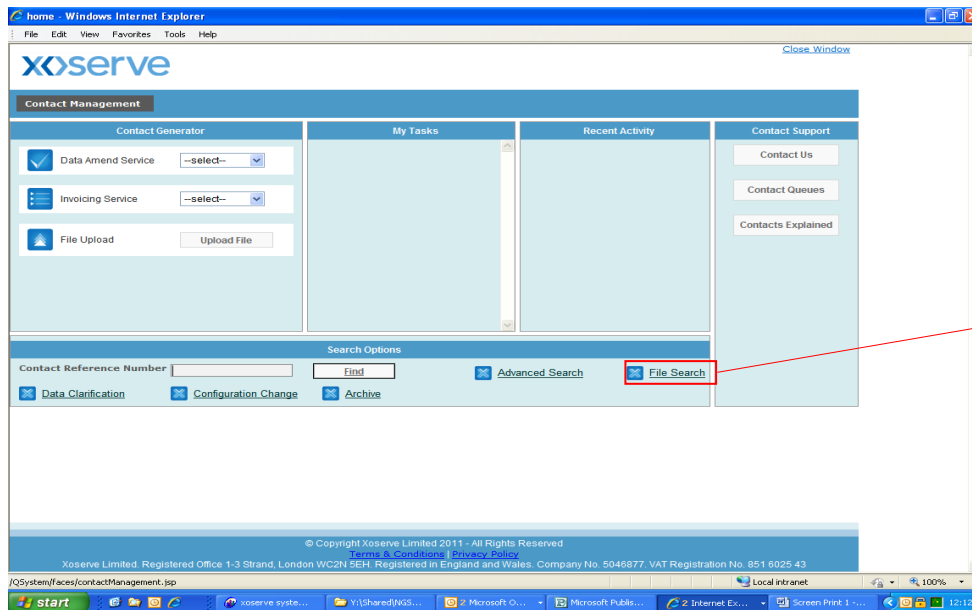
The following screen will appear allowing specific information to be entered for the search.

The screen will detail the information of the last 10 QMP files submitted to Xoserve.
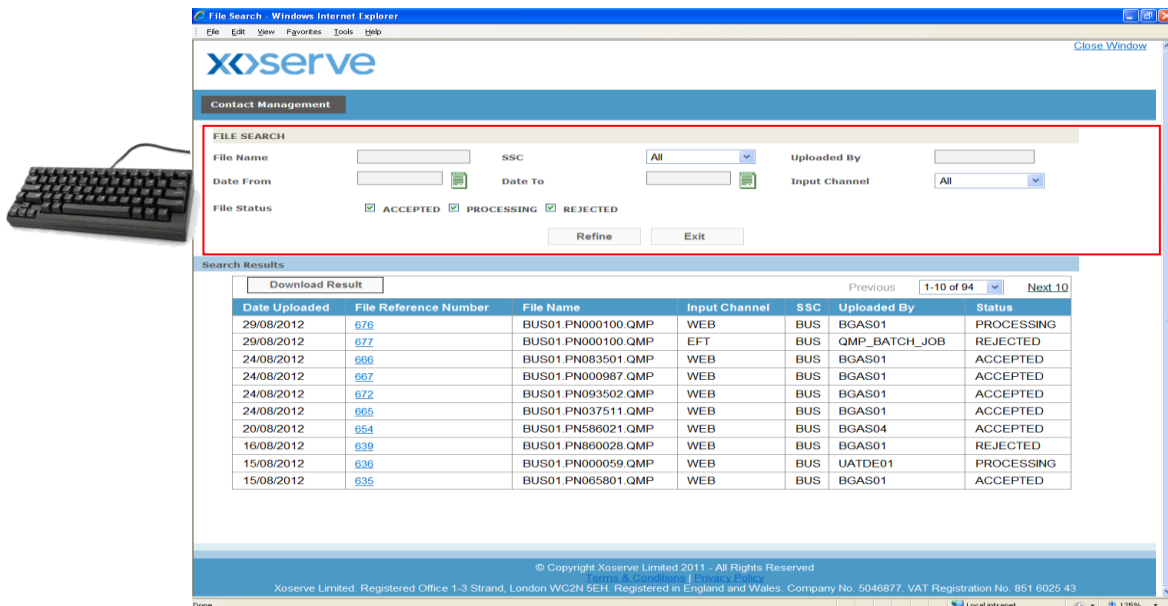
The initial screen will have all File status selected, depending on your search, these can be de-selected as necessary.

7.4 File Search

ACCEPTED: Means that each record has been through validation checks, however some of these records may have failed those checks. You will be able to identify these if you open up the file.

PROCESSING: Denotes that the file format checks have passed validation and that the records within the file are undergoing formatting and completeness checks.

REJECTED: This is a very rare occurrence and due to unforeseen circumstances you will need to resend a file with a different file name.

You will only be able to see the status of the files that have been sent by your organisation.

For the criteria selected above in the above screen the results show all files at 'Accepted' status. The following will appear.

Any files that failed to load when sent via Web Upload will not appear here. An appropriate failure message will have appeared at the time it was attempted to be sent.

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7.4 File Search

Click on the File Reference Number and the recorded results become available for each CRN in the file.

To determine why records have been rejected, select the CRN / Record ID column. A pop up message will display to show the reject code and reject reason.
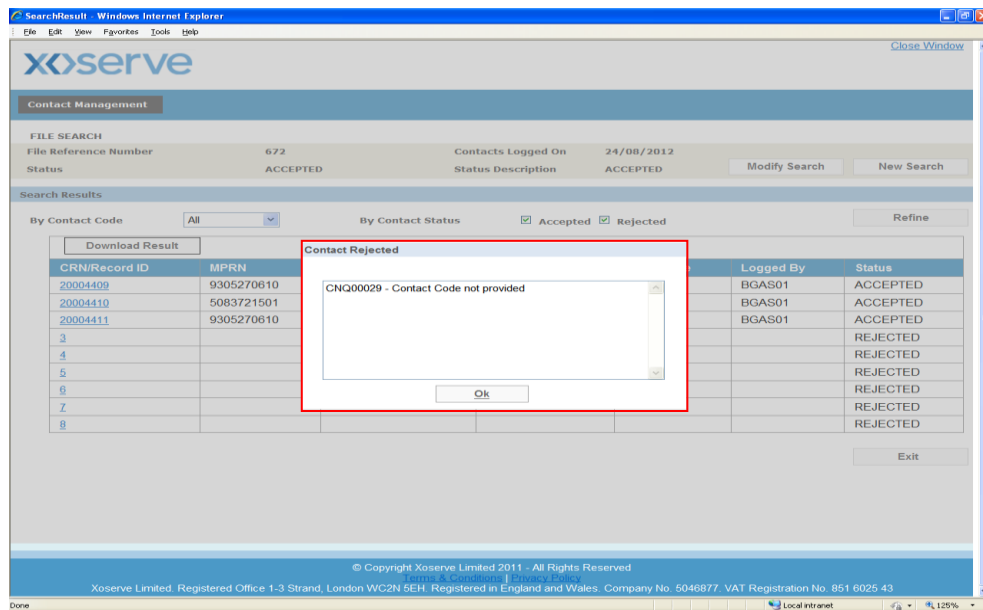
Click Ok and the screen behind comes back into full view.

To complete a search using a specific file name

Step 1 – Enter the File Name

Step 2 – Click Accepted, Processing or Rejected

Step 3 – Click Refine

The results returned are shown as follows….
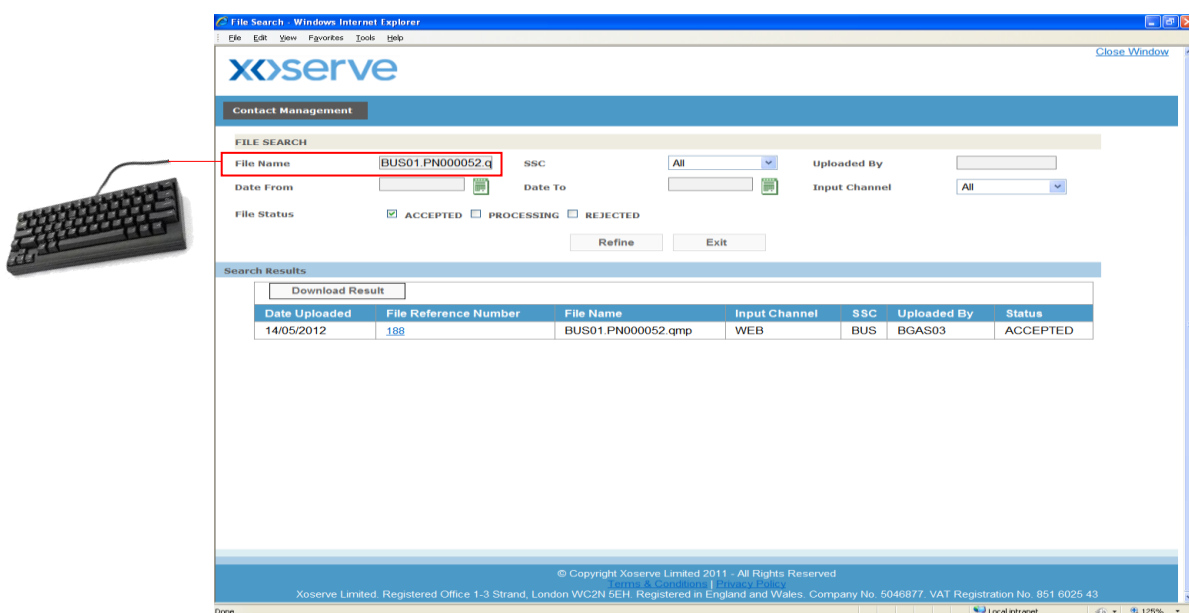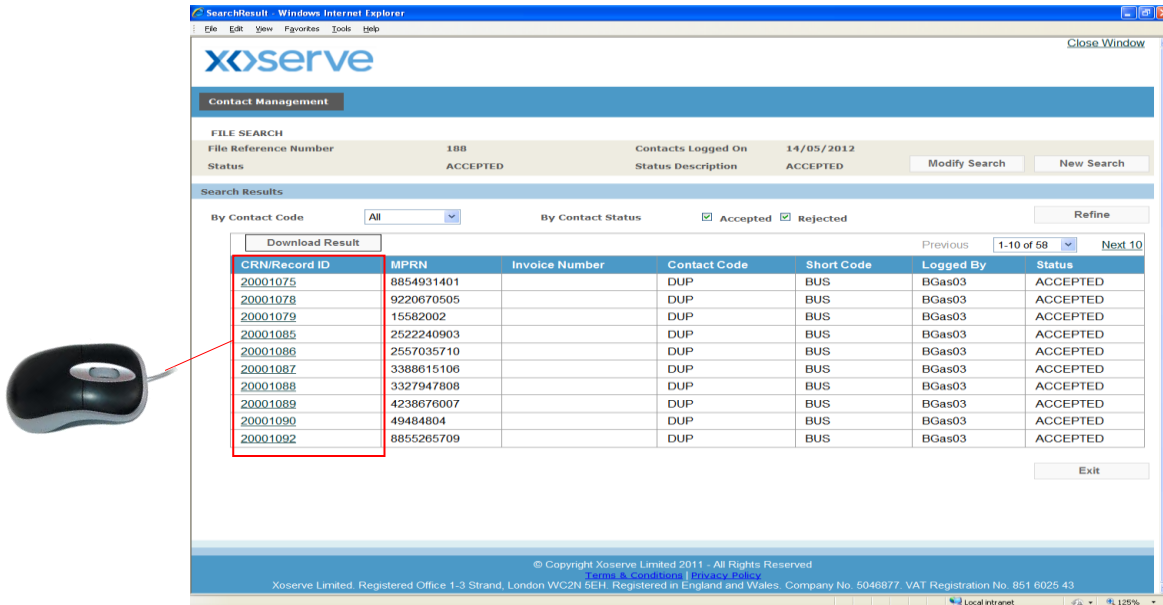
One of the File Status's must be selected in order for the search to bring back the appropriate results.

Select the File Reference Number and the records within the file will appear.
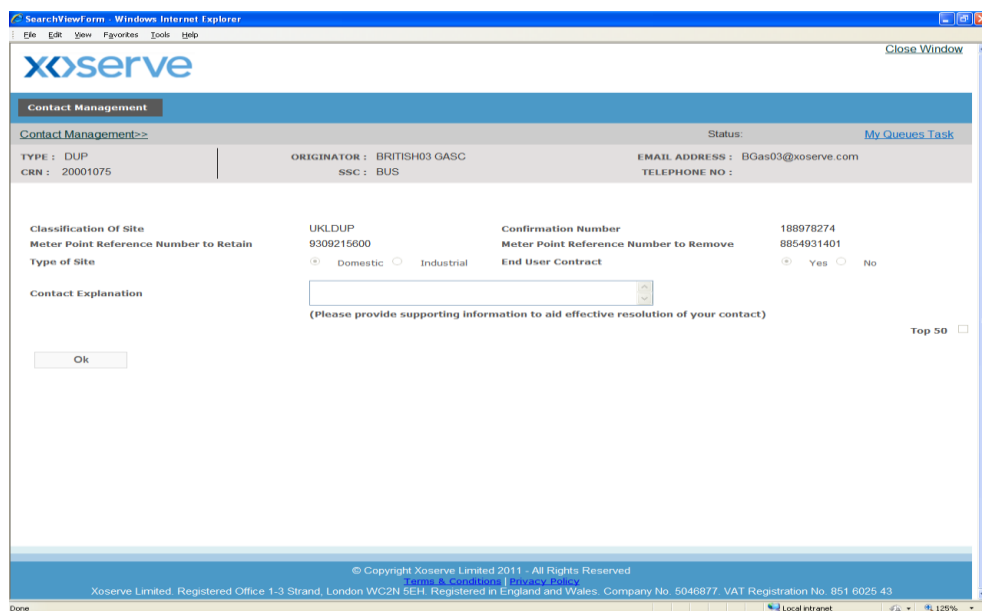
To drill down further, click on a specific Contact.

The Accepted Contact will appear as follows….

To complete a Data Clarification search, click on Data Clarification on the Contact Management home page.
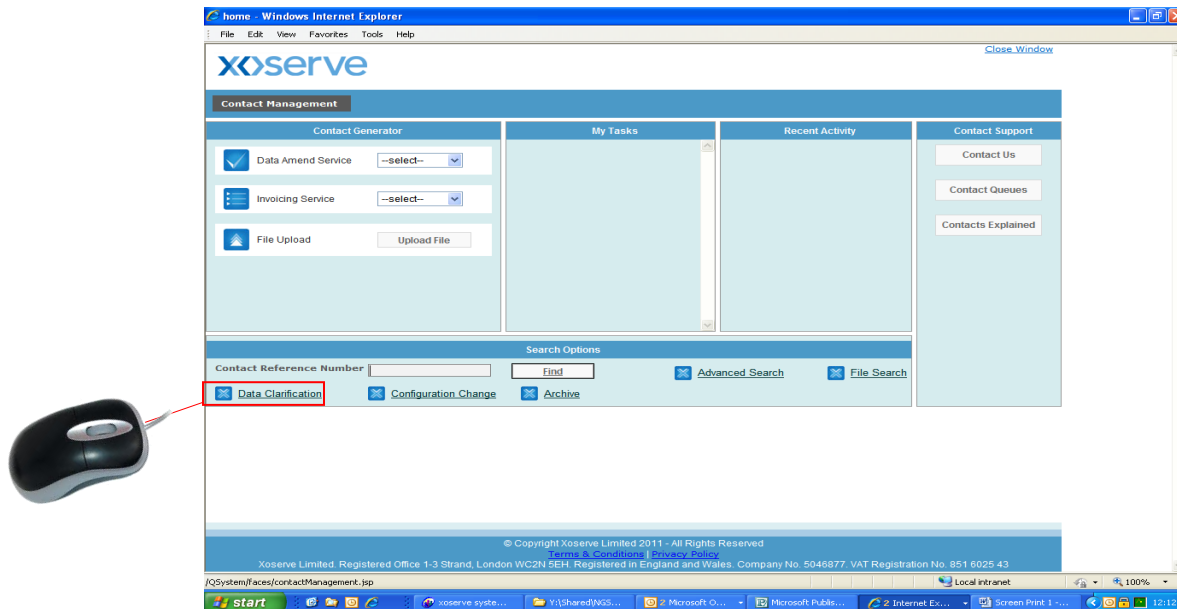
The following filters will appear to complete the search. Two levels of searching can be performed here.

Search can be completed via CRN or various Filters . CRN search will bring back the specific record. Contact Filters will bring back single or multiple results. Stakeholders Filters are available to refine the search further.

Basic Search

Step 1 – Enter your CRN into the Contact Reference Number field

Step 2 – Click Search.

The results will be displayed as follows….

Select the CRN and the Data Clarification form will appear.

Filter Search

Step 1 – Enter your required information into the Contact Filters section

Step 2 – Click Search

Further search criteria are available in the Stakeholder Filters section

Case event description allows you to search for a DC outstanding with your organisation or a DC at ADCT status which is a DC with a Third party Shipper.

The result will be displayed as follows….
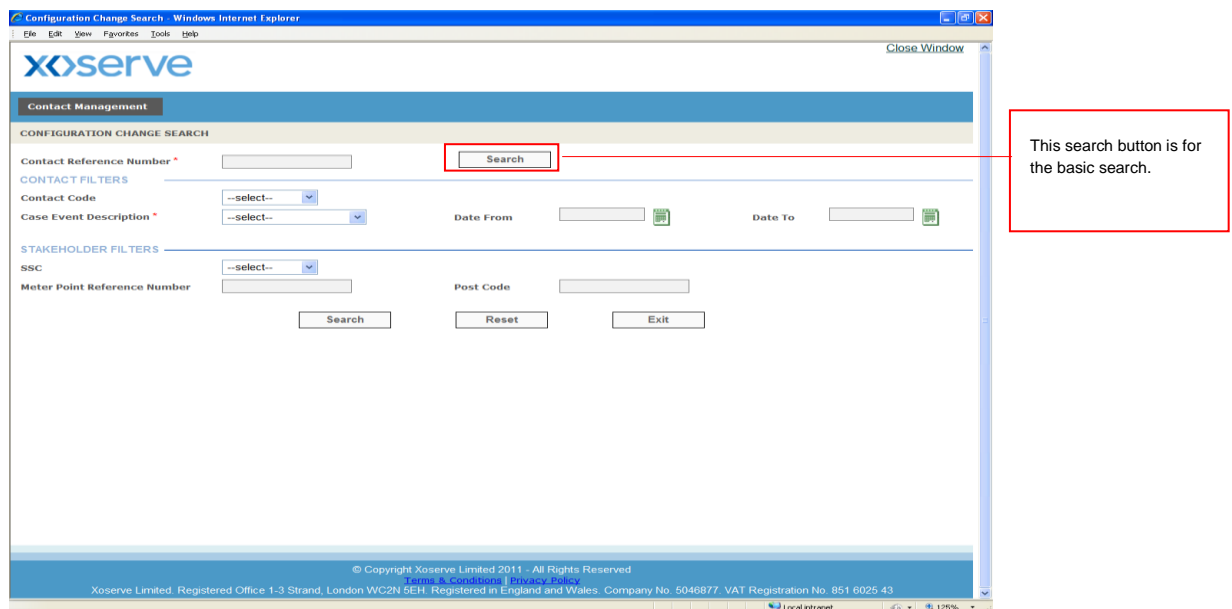

Select the CRN and the Data Clarification will appear.

To complete a Configuration Change search, click on Configuration Change on the Contact Management home page.
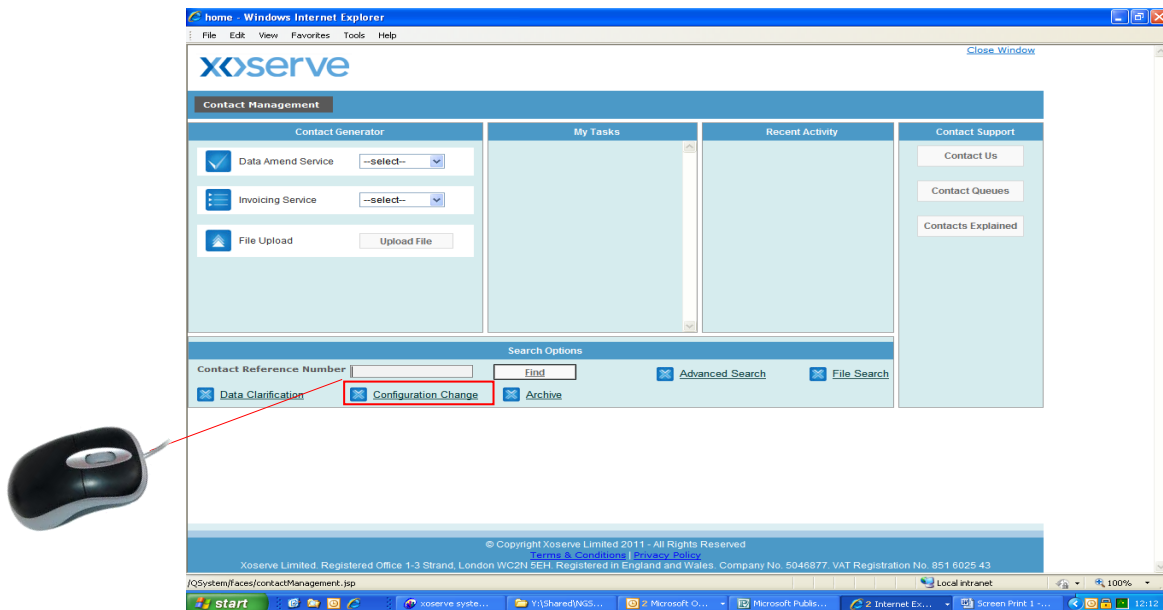
The following filters will appear to complete the search. Two types of searching can be performed here.

Search can be completed via CRN or various Filters . CRN search will bring back the specific record. Contact Filter will bring back single or multiple results. Stakeholders Filters are available to refine the search further.

Basic Search

 Step 1 – Enter your CRN into the Contact Reference Number field

Step 2 – Click Search

The result will be displayed as follows….

Select the CRN and the Configuration Change will appear.

Filters Search

Step 1 – Enter the required information into the Contact Filters section

Step 2 – Click Search

Further Search Criteria are available in the Stakeholder Filters Section

Case event description allows you to search for a CC outstanding with your organisation or a CC at WPUT status which is a CC with a Third party Shipper.


The result will be displayed as follows….

Select the CRN and the Configuration Change will appear.

Archive Search is available to search for any closed Contacts that were raised on the previous system ConQuest. Click on Archive on the Contact Management home page.
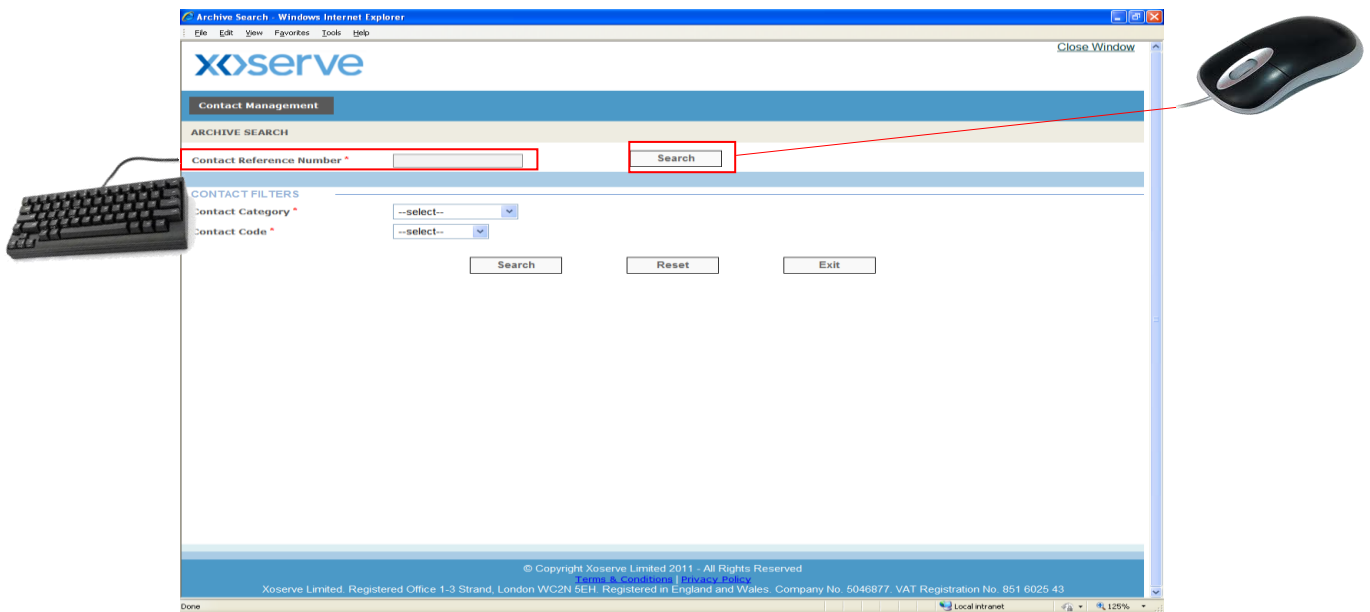

The following filters will appear to complete the search….


The Category here is the old grouping used in ConQuest
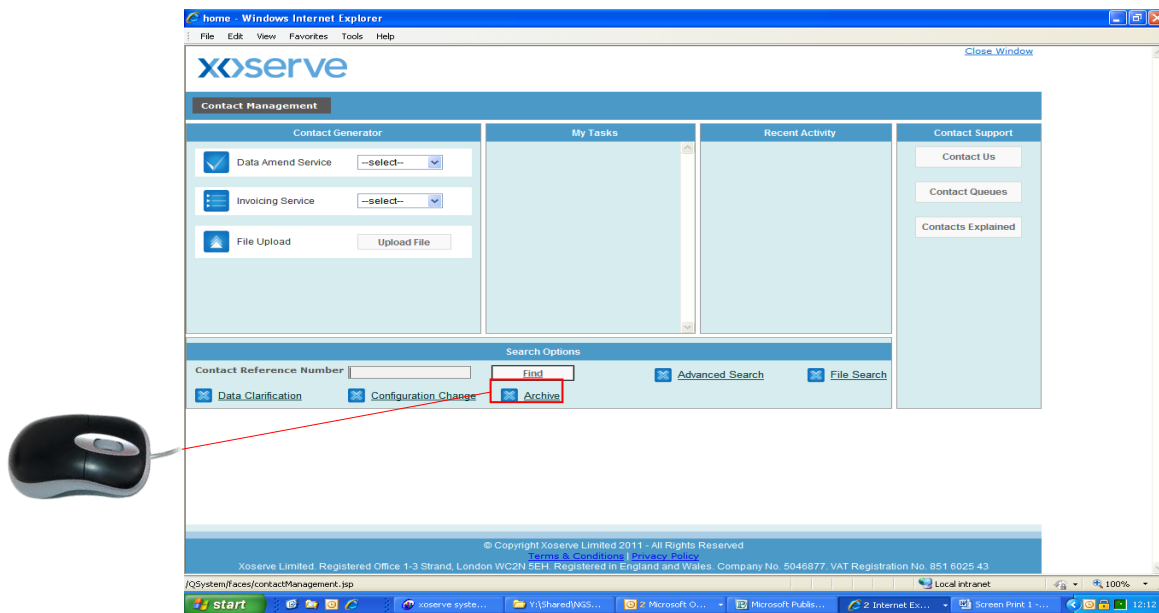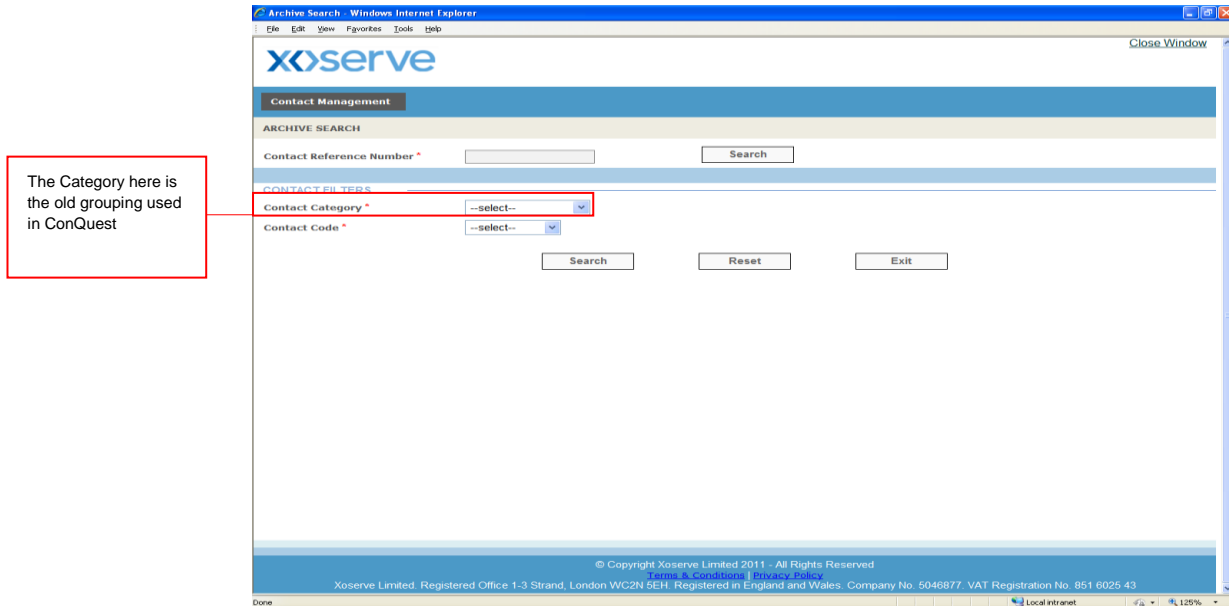
A search can be completed on a CRN or Contacts Filters. CRN search will bring back the specific Contact. Contact Filters will bring back single or multiple results.

Archive Search will allow you to locate a particular 'closed' Contact if you know the Contact Reference Number.
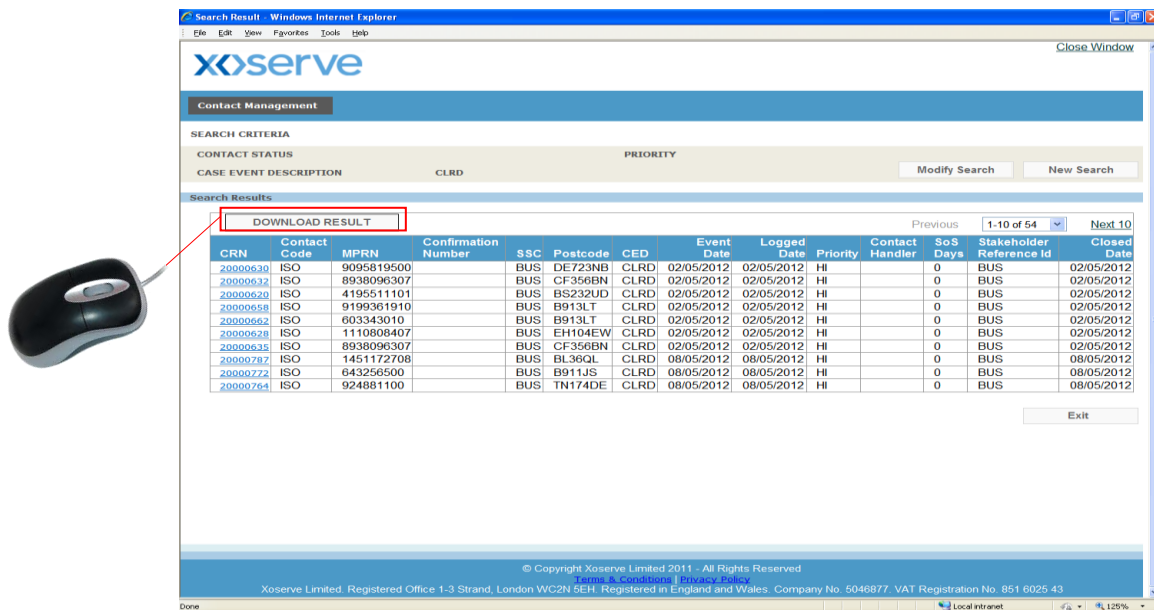

If a Contact Filter Search is chosen, enter the Contact Category and the following extra filters will appear to help refine the search.
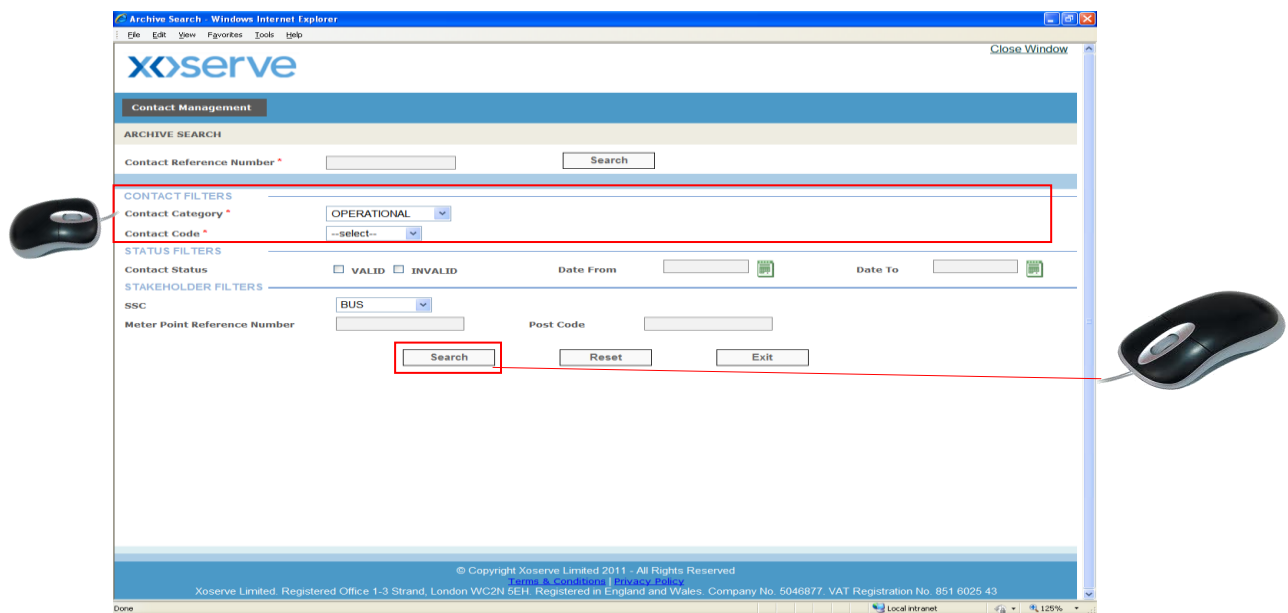

Once the data has been entered, click Search and the results of the Contact will appear.

The Download Results facility is available on Advanced Search, File Search, Data Clarification and Configuration Change.

This allows the results returned to your search to be downloaded in .CSV format which can then be opened up in Excel. Select Download Results, the message below will appear.
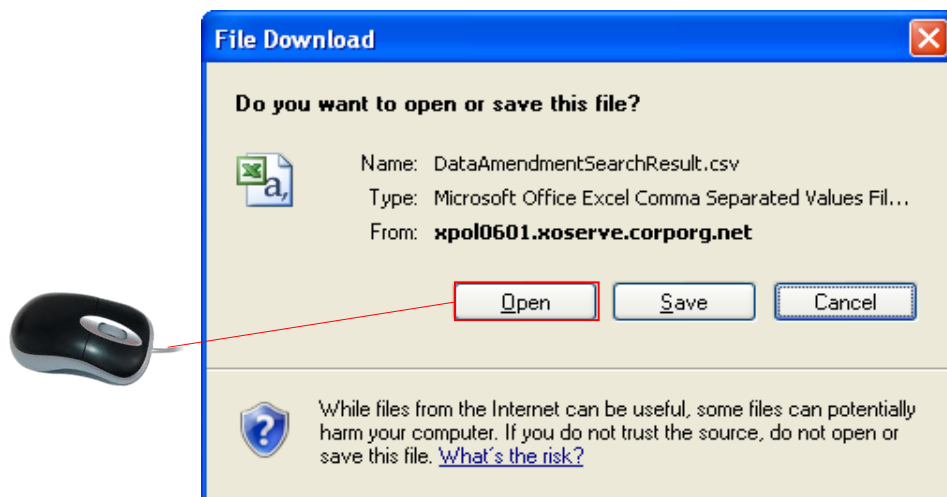
Select Open and the details will appear in an Excel format and these can then be saved where requested.

Section 8

Previously Submitted Contacts

If you do not agree with the resolution of your Contact then you have the ability to challenge it.

 This feature can be found at the foot of the screen which displays the resolution comments provided for your Contact.


You are not able to edit any details on this screen.

Data Amend Service – The response can be challenged within 12 business days

Invoicing Service – The response can be challenged within 7 business days if the Shipper has withheld.

The response can be challenged within 18 months when the Shipper has not withheld.

If the time period has elapsed beyond the window that you are able to challenge a resolved Contact, the following message will appear.
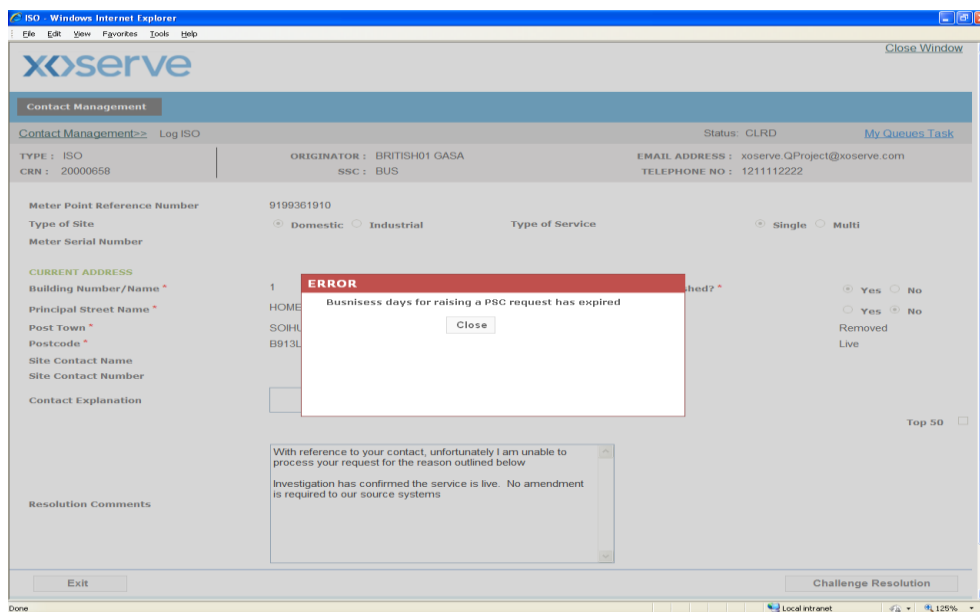
8.1 Raising a Previously Submitted Contact

If the Contact is within the correct timescales when clicking Challenge Resolution the following screen will

appear….

Step 1 – Enter your comments

Step 2 – Click Challenge.

⚠️ Your Challenge must not contain detail that was omitted from your original Contact. Please raise a further Contact if you have additional information.

ℹ️ You can write up to 2000 characters in the Comments box.

The following message will appear confirming the Contact has been submitted and the new Contact Reference Number for your request….

8.2 Receiving a Previously Submitted Contact response

Once Xoserve has investigated your challenge, it could have two possible outcomes.   Upheld or Reject.

To view the action Xoserve have completed, find the CRN through search and the response will show as follows with the relevant Resolution Comments for the PSC.

The previously submitted Contact is subject to Query Management Standards of Service and is treated as a high priority.