



Contact Management Must Read User Guide

Meter Read Agency (MRA/IGT) Edition

Version 3.0

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Version Control

Version: 3.0

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Updated by: Amar Majid

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
- ⇒ Receiving Site Visit requests and managing the responses
- ⇒ How to conduct searches

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



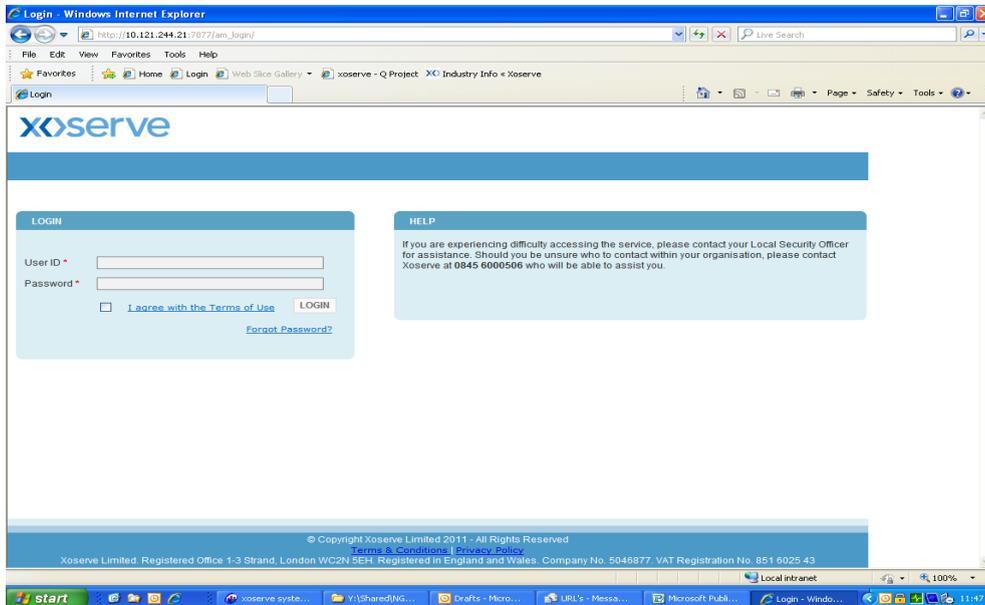
Keyboard entry required

Section 2

Log onto Contact Management

2.1 Log onto the Contact Management system

The portal Login Page looks as follows....

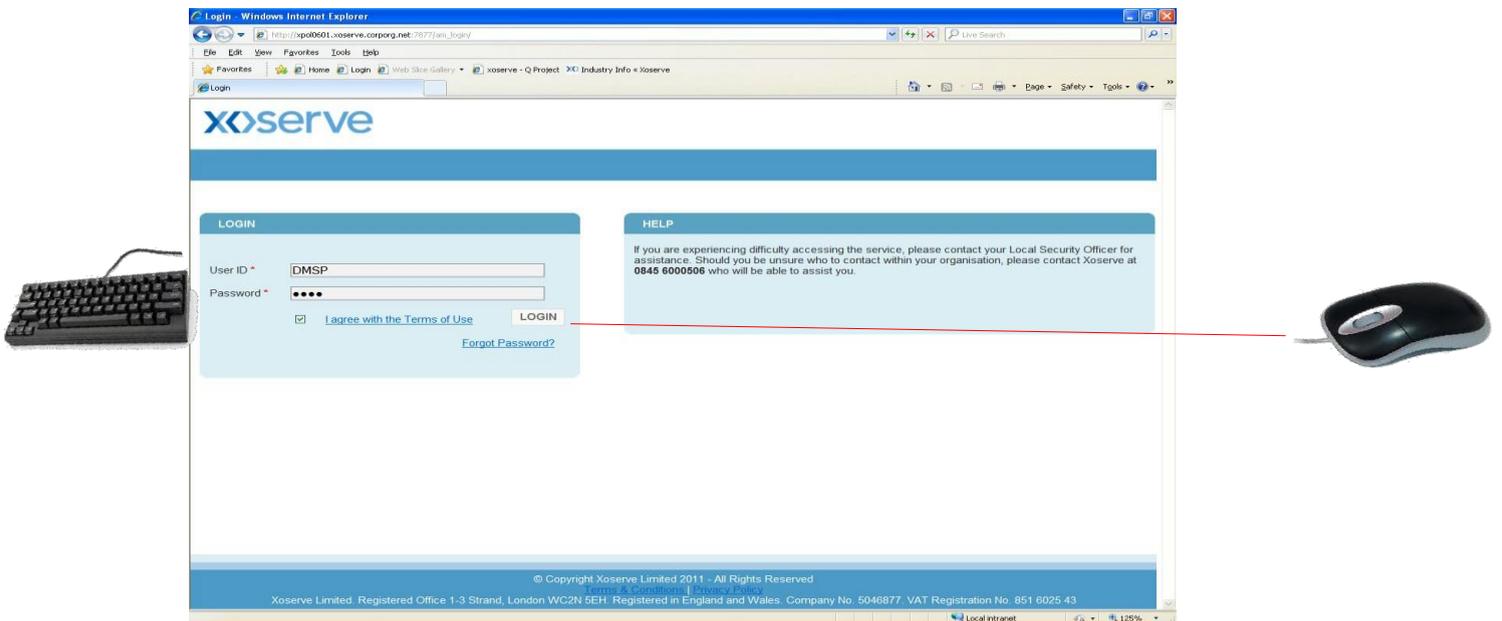


Step 1 – Enter your User ID

Step 2 – Enter your Password

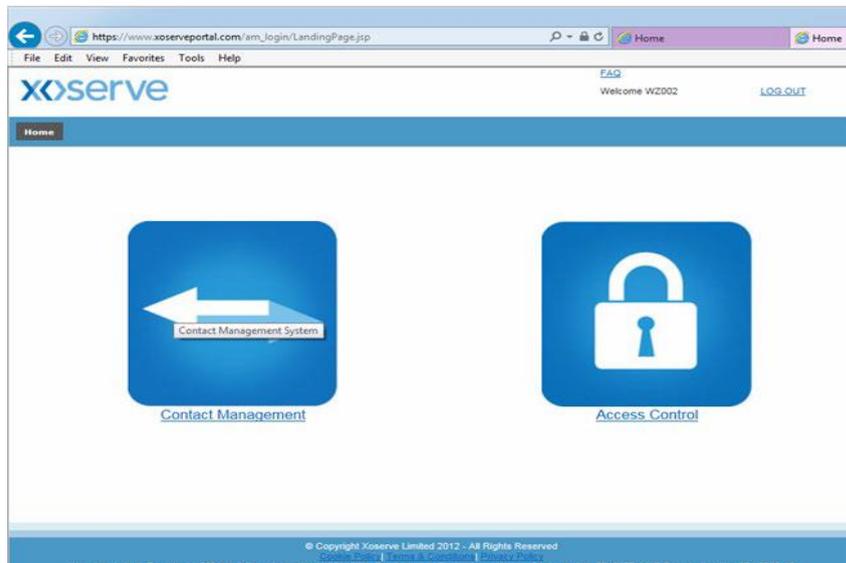
Step 3 – Tick the box to agree to Terms of Use

Step 4 – Click Login



2.2 Contact Management Service Page

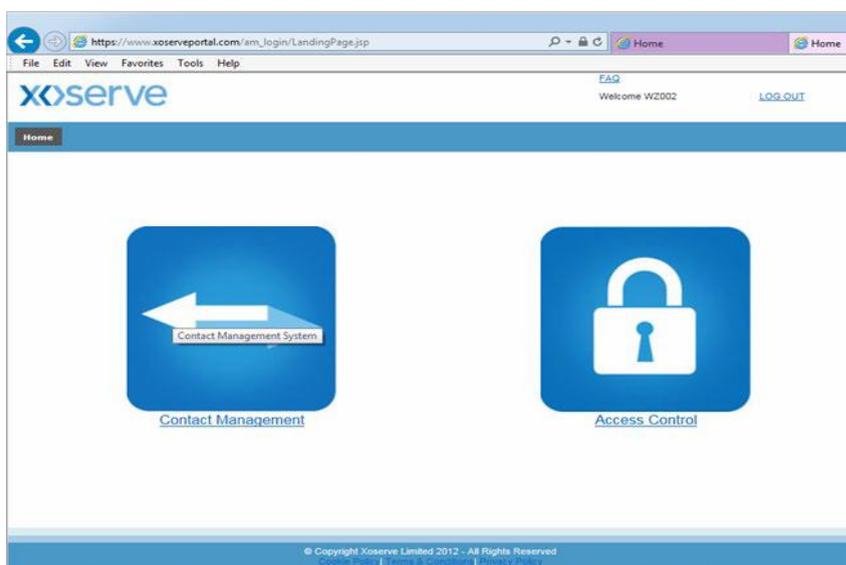
The following Service Page will appear....



There are two services on this page:-

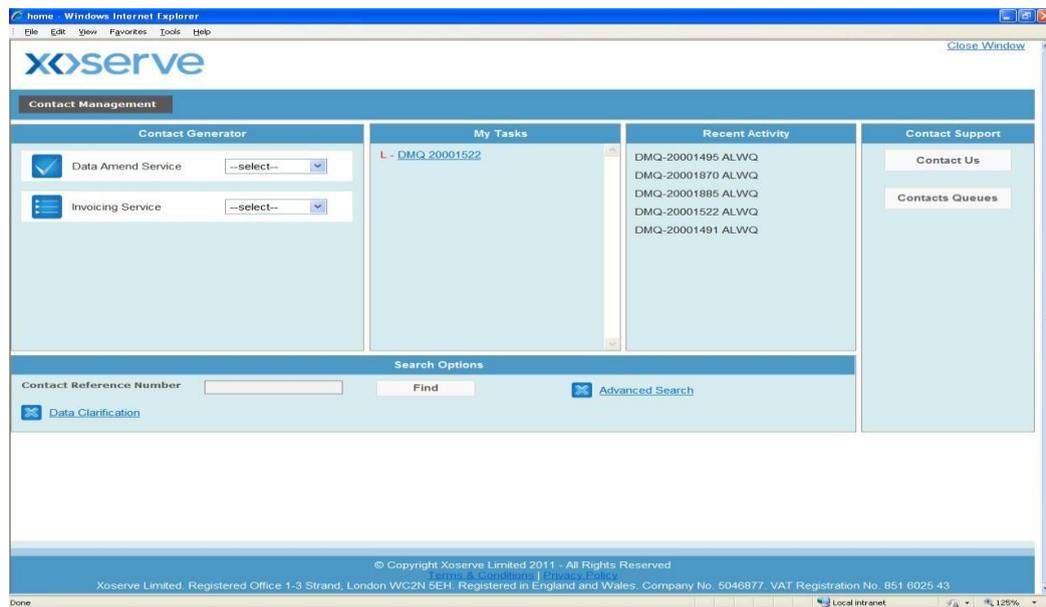
- ⇒ Contact Management
- ⇒ Access Controls

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

Contact Generator

3.1 File Formats

How Information is passed between Xoserve and the MRA

Notifications from Xoserve to the MRA will now be downloaded via Contact Management. The Meter Read Agency will receive the following Notifications via the following File Formats:

File Name	File Type	Originator	Description
MJO	Output File	CMS	Must Read Notification
LTO	Output File	CMS	Level 3 Warrant Notification
RJO	Output File	CMS	Must Read Rejection Notification

The MRA will respond to the Notifications by uploading a response file. The Meter Read Agency will upload the following response files:

File Name	File Type	Originator	Description
MJI	Input File	MRA	Must Read Notification Response
LTI	Input File	MRA	Level 3 Warrant Notification Response
RJI	Input File	MRA	Must Read Rejection Response

Please note that the data items provided by Xoserve and supplied by you will be no different to that used in the legacy process.

A number of validations will be carried out against each of the MJI, LTI & RJI files. The validations are as follows:

Record Level (functional) Validations

- ⇒ CRN and MPRN combination should match data in the system (MJI, LTI & RJI Files)
- ⇒ Comments should be provided when meter reading is not provided (MJI, LTI & RJI Files)
- ⇒ Upon Meter Read Agency response the Log Number/CRN contained within the file should not be previously recorded (MJI, LTI & RJI Files)
- ⇒ Meter Read Agency submitting the response should be same as the organisation for which the contact was logged (MJI, LTI & RJI File)
- ⇒ Non-Editable fields sent out in output file (MJO, LTO & RJO Files) should match input file (MJI, LTI & RJI Files)
- ⇒ Read date should be provided when meter read is available (LTI File only)
- ⇒ MSN should be provided when meter and is available (LTI File only)

More Information regarding the File Formats can be found on Xoserve.com at the following link :



<http://www.xoserve.com/index.php/our-systems/uk-link-documentation/>

3.1 File Formats

Must Read files optionality

Below are some of the editable fields in each of the Must Read input files (MJI, RJI and LTI) and whether they are Mandatory, Optional or Conditional Mandatory.

MJI

METER_READING	Conditional Mandatory	Mandatory if 'Comments' has not been populated
CORRECTED_READING	Conditional Mandatory	Mandatory if 'Comments' has not been populated and a CSN was provided on the RJO file
UNCORRECTED_READING	Optional	
TIME_OF_READ	Optional	
MAKE	Optional	
MODEL	Optional	
DIALS	Optional	
COMMENTS	Conditional Mandatory	Mandatory if 'Meter_Reading' has not been populated
VISIT_1	Conditional Mandatory	Mandatory if 'Meter_Reading' has been populated
VISIT_2	Optional	
VISIT_3	Optional	
LETTER_DATE	Optional	

RJI

METER_READING	Conditional Mandatory	Mandatory if 'Comments' has not been populated
CORRECTED_READING	Conditional Mandatory	Mandatory if 'Comments' has not been populated and a CSN was provided on the RJO file
UNCORRECTED_READING	Optional	
TIME_OF_READ	Optional	
MAKE	Optional	
MODEL	Optional	
DIALS	Optional	
COMMENTS	Conditional Mandatory	Mandatory if 'Meter_Reading' has not been populated
VISIT_1	Conditional Mandatory	Mandatory if 'Meter_Reading' has been populated
VISIT_2	Optional	
VISIT_3	Optional	
LETTER_DATE	Optional	

LTI

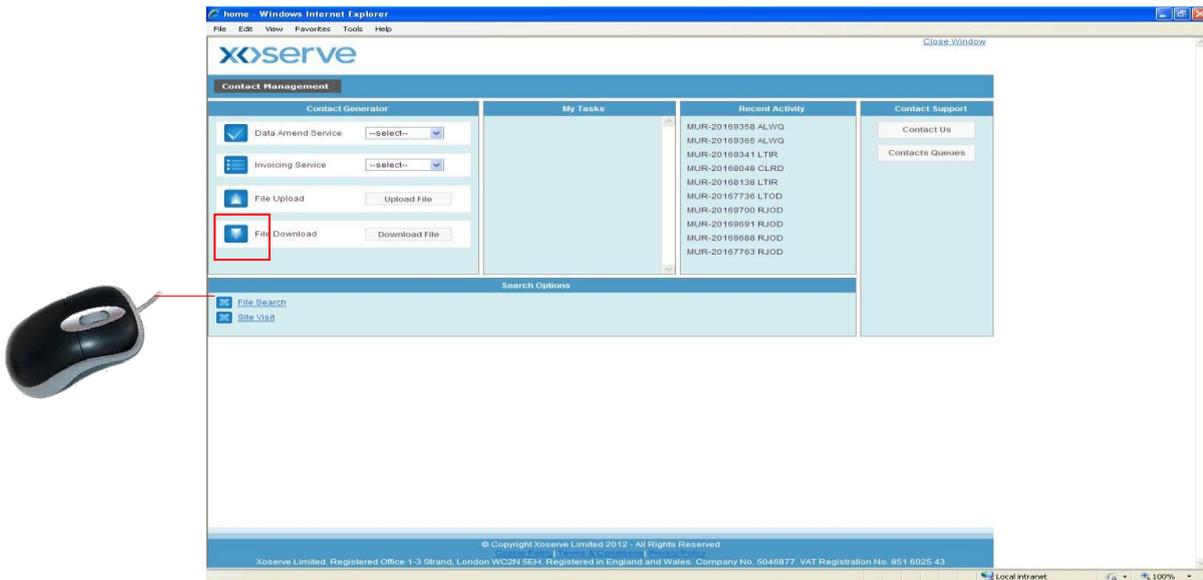
DATE_READ	Conditional Mandatory	Mandatory if 'Meter_Reading' has been populated
METER_READING	Conditional Mandatory	Mandatory if 'Comments' has not been populated
MSN_ON_SITE	Conditional Mandatory	Mandatory if 'Meter_Reading' has been populated
CORRECTOR_SERIAL_NUMBER_ON_SITE	Optional	
CORRECTED_READING	Conditional Mandatory	Mandatory if 'Comments' has not been populated and a CSN was provided on the LTO file
UNCORRECTED_READING	Optional	
COMMENTS	Conditional Mandatory	Mandatory if 'Meter_Reading' has not been populated

3.2 Download File

Download File

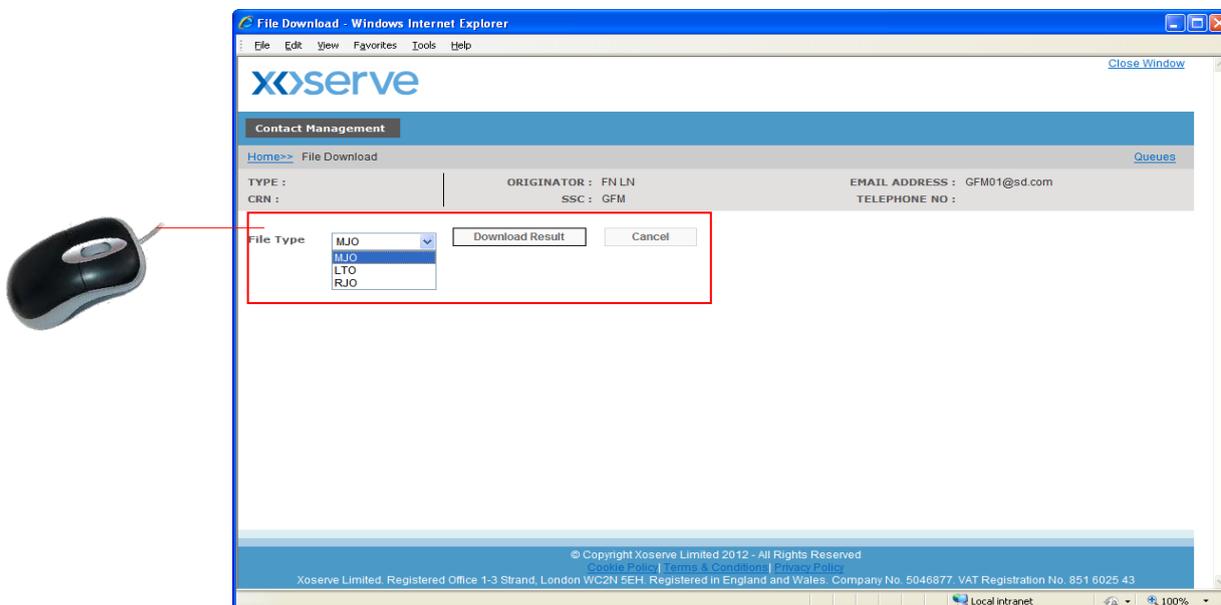
Below will show you how to Download the MJO File (MRA Request)

Step 1 – Click Download File



Step 2 – Select MJO from File Type pull down

Step 3 – Click Download Result, Save File to your specific folder/Shared area



If you require to go back to Contact Management Click the Cancel button.

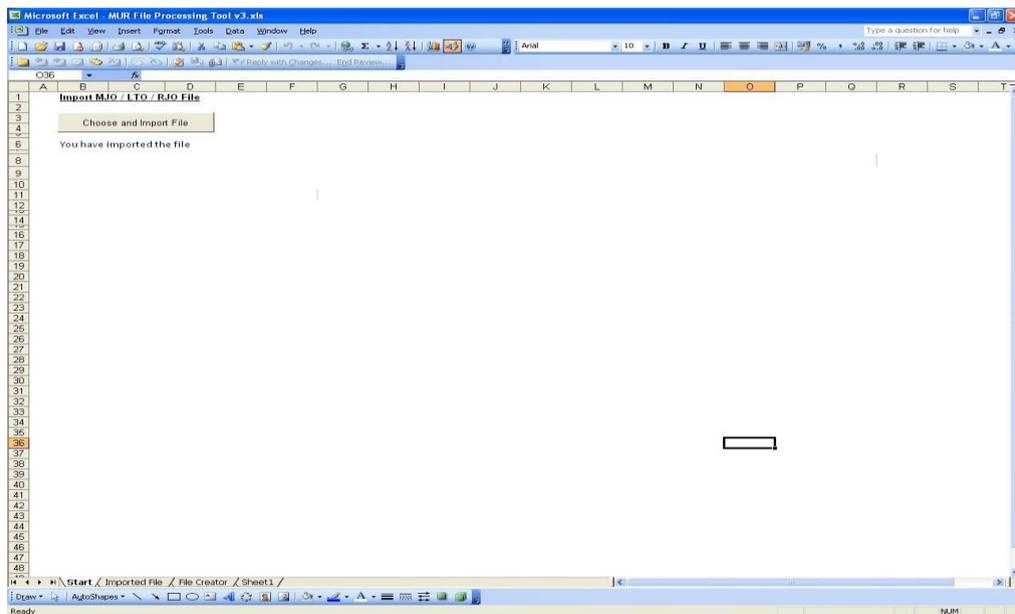
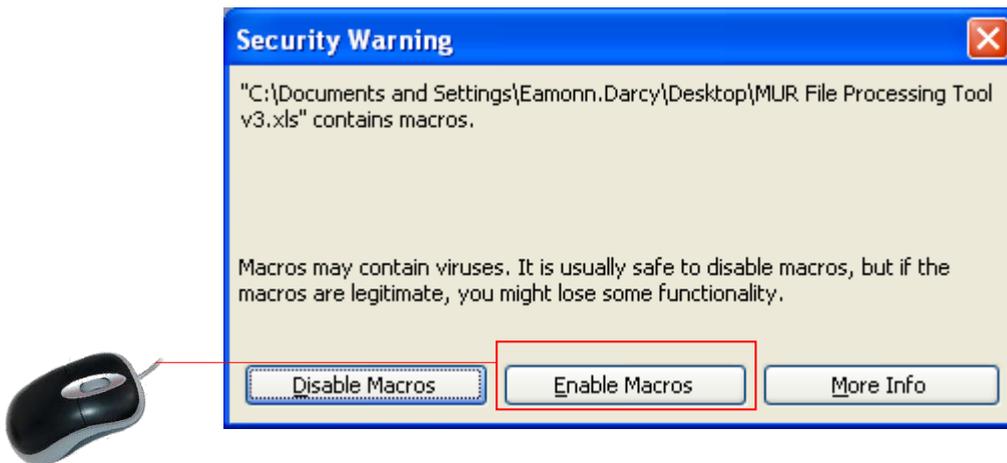
3.3 MUR File Processing Tool

MUR File Processing Tool– (Should you wish to use it)

Below will show you how to use the MUR Processing Tool

Step 1 – Open the MUR File Processing Tool

Step 2 – Click Enable Macros



Step 3 – Select Start Tab, Click Choose and Import File Button



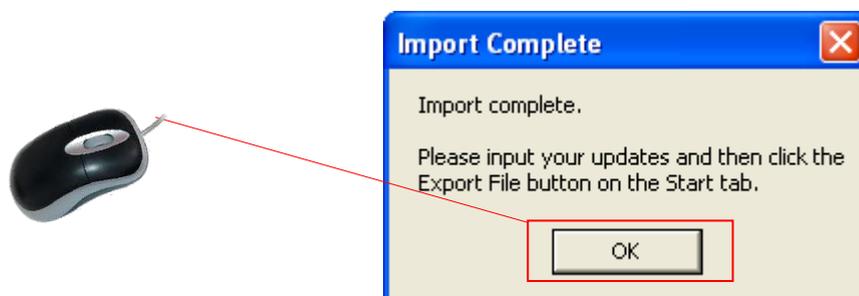
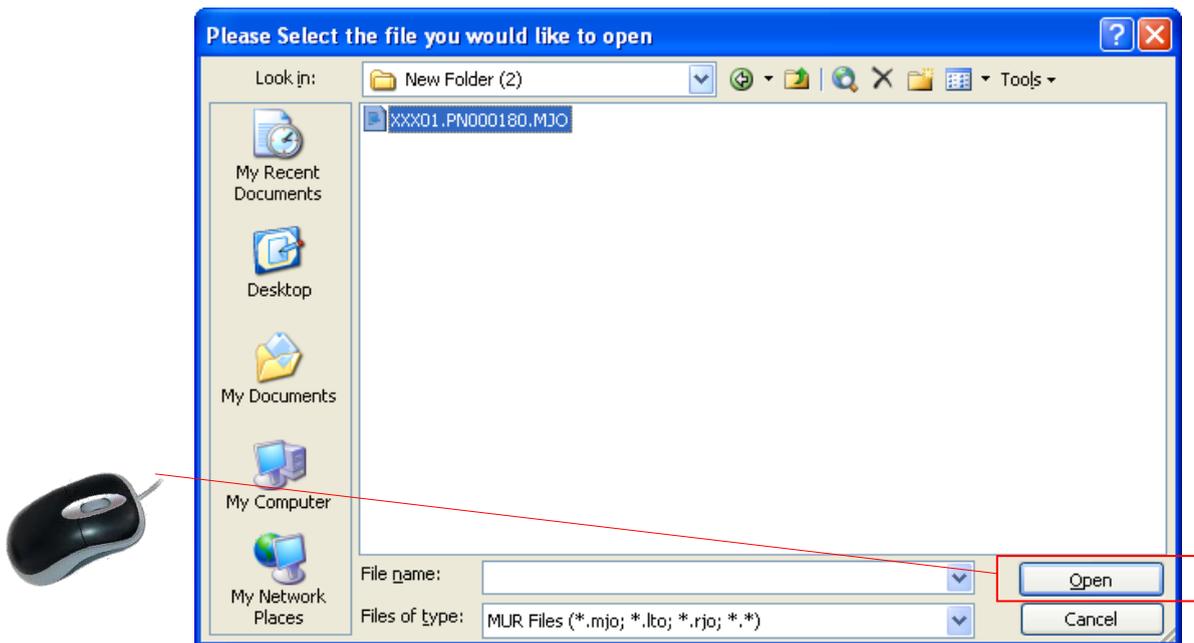
Data Deletion Warning will popup, Press OK

3.3 MUR File Processing Tool

MUR File Processing Tool

Step 4 – Locate downloaded MJO File

Step 5 – Click Open



Step 6 – Click OK



This will then Import the data from the MJO file into Tab 2 of the MUR File Processing Tool

3.3 MUR File Processing Tool

MUR File Processing Tool

Step 7 – Click on second Tab Imported File

Step 8 – Highlight Imported data (Columns A-H without headings), right click and copy

Log Number	MPR	MSN	Address	Post Code	Access Instructions	Meter Location	Corrector Serial Number	Meter Reading	Corrected Reading
1	1	1	1 ML6 BEY	1	1	1	1		
2	2	2	2 ML6 BEY	2	2	2	2		
3	3	3	3 ML6 BEY	3	3	3	3		
4	4	4	4 ML6 BEY	4	4	4	4		
5	5	5	5 ML6 BEY	5	5	5	5		
6	6	6	6 ML6 BEY	6	6	6	6		
7	7	7	7 ML6 BEY	7	7	7	7		
8	8	8	8 ML6 BEY	8	8	8	8		
9	9	9	9 ML6 BEY	9	9	9	9		
10	10	10	10 ML6 BEY	10	10	10	10		
11	11	11	11 ML6 BEY	11	11	11	11		
12	12	12	12 ML6 BEY	12	12	12	12		
13	13	13	13 ML6 BEY	13	13	13	13		
14	14	14	14 ML6 BEY	14	14	14	14		
15	15	15	15 SA11 4HN	15	15	15	15		
16	16	16	16 SA11 4HN	16	16	16	16		
17	17	17	17 B33 DDH	17	17	17	17		
18	18	18	18 SW7 5LY	18	18	18	18		
19	19	19	19 CF3 SSL	19	19	19	19		
20	20	20	20 W11 1GF	20	20	20	20		
21	21	21	21 NP4 5YE	21	21	21	21		
22	22	22	22 WA10 TEL	22	22	22	22		
23	23	23	23 M16 OJN	23	23	23	23		
24	24	24	24 LD3 OBN	24	24	24	24		
25	25	25	25 WA14 2HY	25	25	25	25		
26	26	26	26 CV37 DNR	26	26	26	26		
27	27	27	27 AL5 2JY	27	27	27	27		
28	28	28	28 LE2 3BA	28	28	28	28		
29	29	29	29 B15 2RX	29	29	29	29		
30	30	30	30 NP7 5YB	30	30	30	30		
31	31	31	31 CV6 6JA	31	31	31	31		
32	32	32	32 M12 6LE	32	32	32	32		
33	33	33	33 NN11 4HB	33	33	33	33		
34	34	34	34 N2 ODS	34	34	34	34		
35	35	35	35 RM6 2JA	35	35	35	35		

Step 9 – Click File Creator Tab and Click the Clear Existing Data button

Log Number	MPR	MSN	Address	Post Code	Access Instructions	Meter Location	Corrector Serial
14	20168845	123456 5555	6000 ,THE ROAD, ,FREDER ABC1 5KY		CONTACT CUSTOMER 6	CUPBOARD IN WAREHOUSE	
15	20167951	7891011 5555	1900 , , ,CROMER ROAD, , SO14 9VV			3 31A	

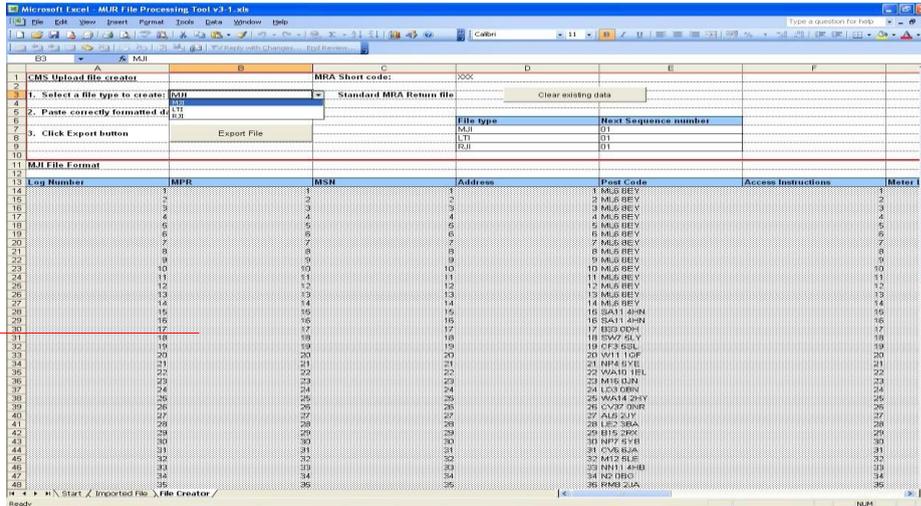


Each time you use File Creator tab, make sure you clear existing data by using the button provided

3.3 MUR File Processing Tool

MUR File Processing Tool

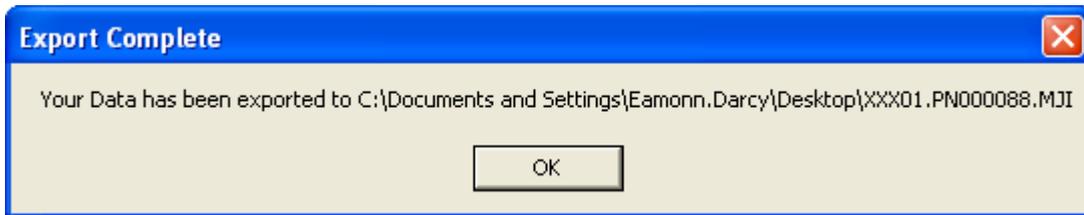
Step 13 – Once Columns I-T have been populated Press the Export File button



Step 14 – Select location of where you would like to save new file

Step 15 – Click Ok

Step 16 – Export is complete you will now need to upload file into Contact Management



 File name for your file will be auto-generated from the sequence show on the processing tool.

File type	Next Sequence number
MJI	01
LTI	01
RJI	01

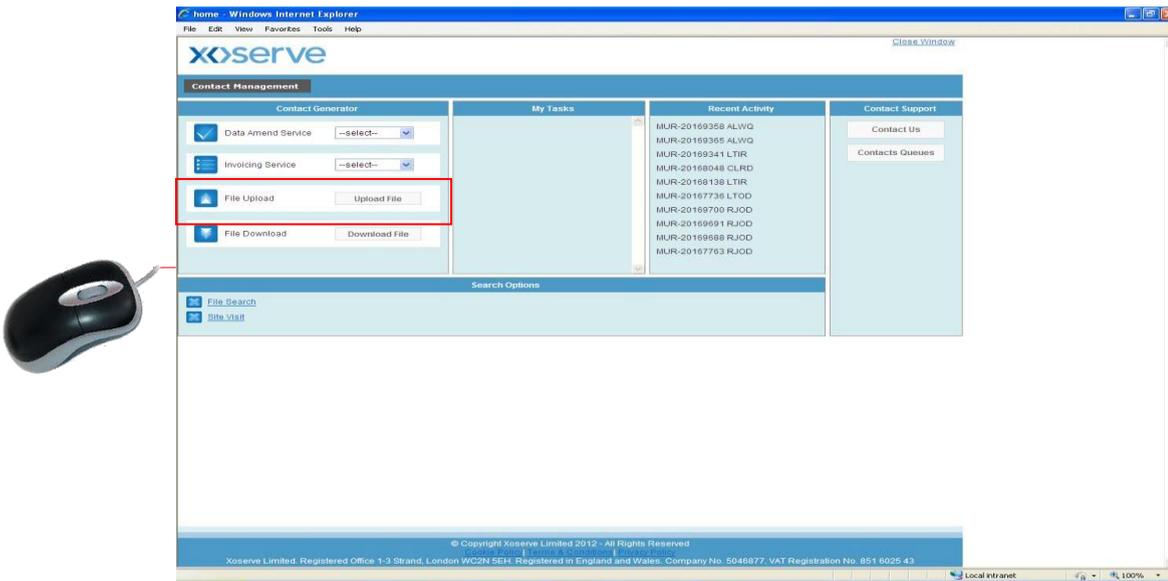
 You can also create LTI and RJI files by following Steps 1-16.

3.4 Upload File

Upload

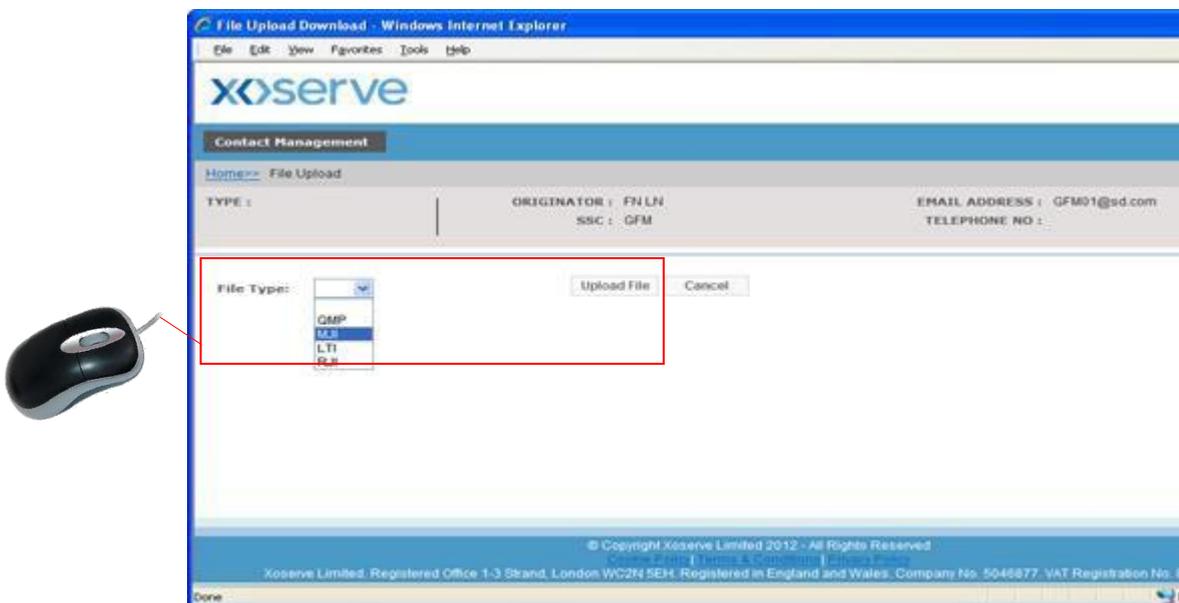
Below will show you how to Upload the MJJ File (MRA response)

Step 1 – Click Upload File



Step 2 – Select MJJ from File Type pull down

Step 3 – Click upload File Button

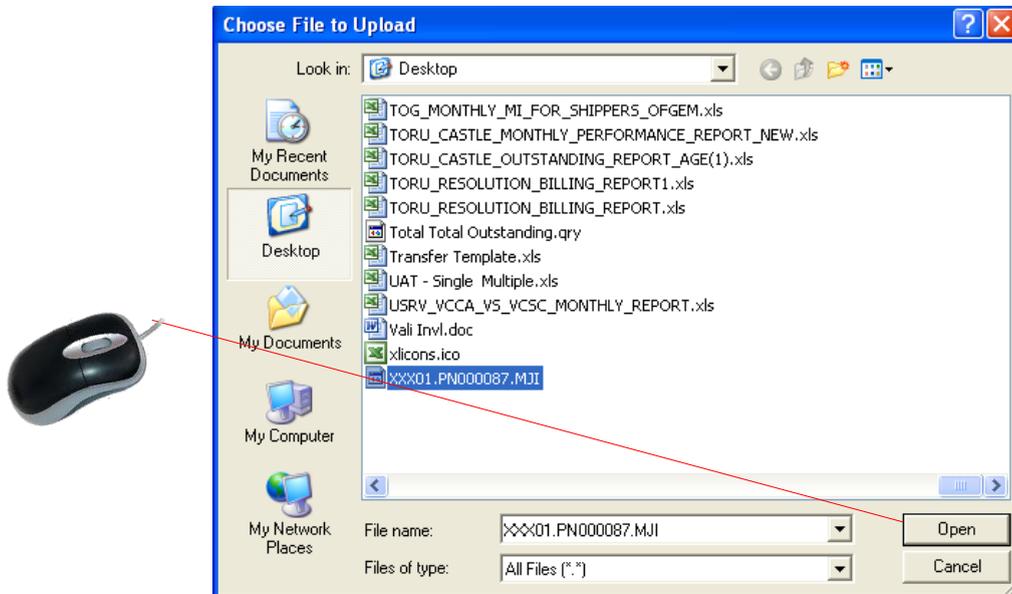


The upload process being shown for MJJ will be exactly the same when uploading LTI and RJI files.

3.4 Upload File

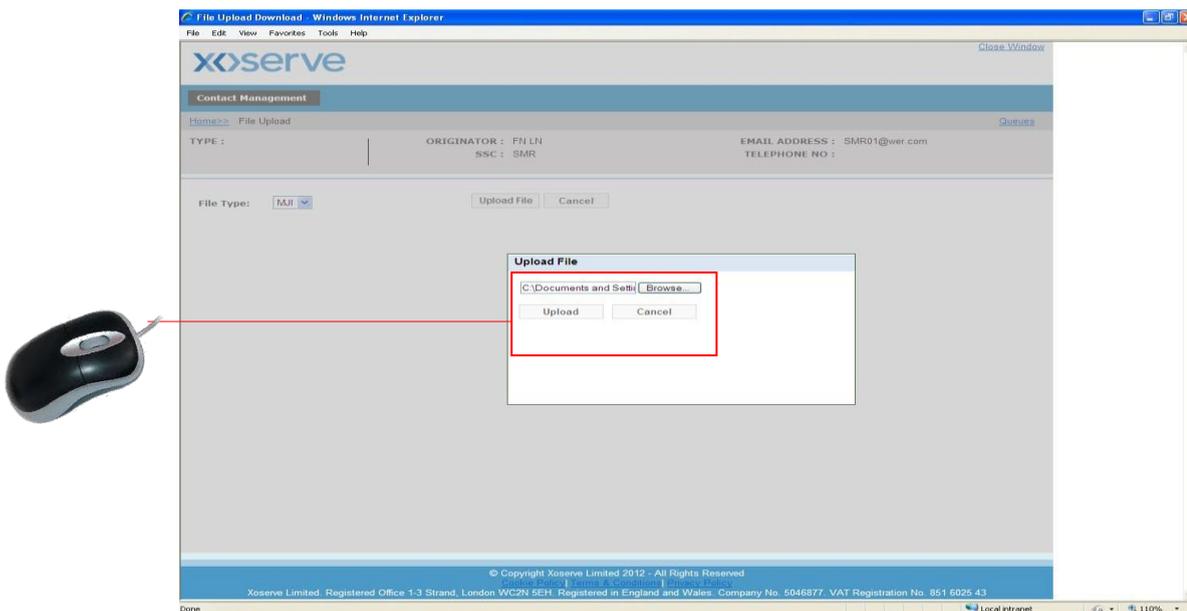
Upload

Step 4 – Select MJI File from Folder/Shared area



Step 5 – Click Open

Step 6 – Click Upload File



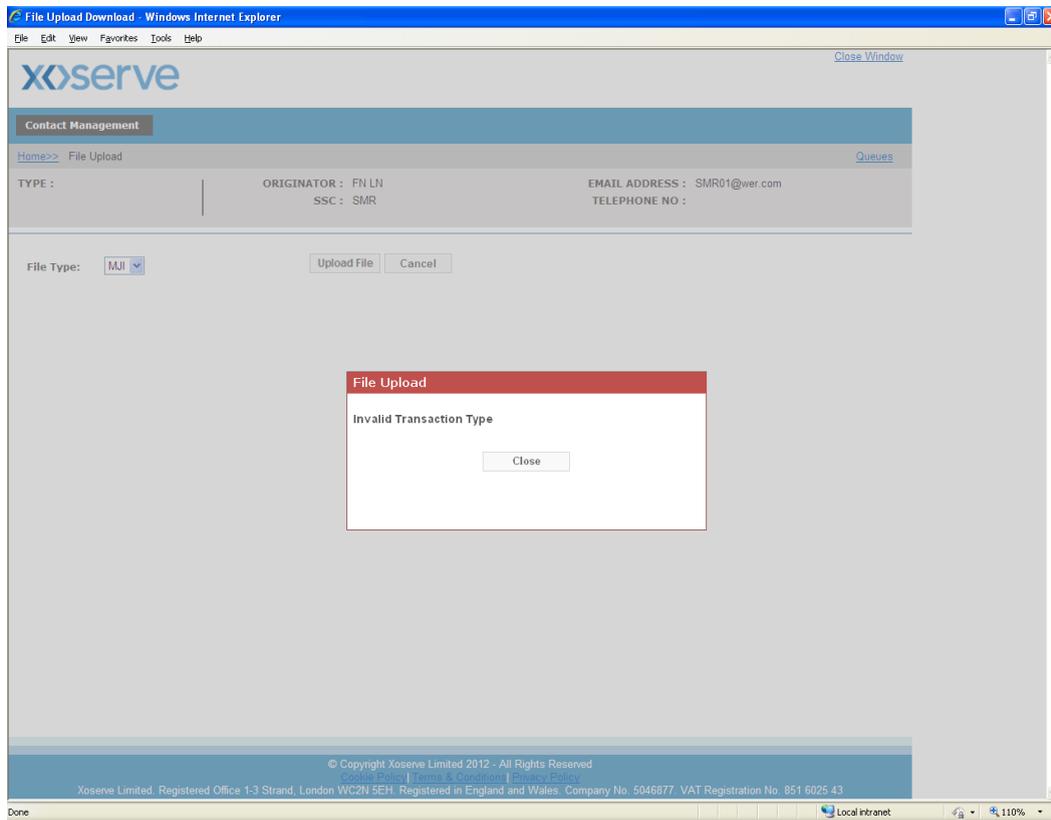
File will now be processed and updated on Contact Management

3.4 Upload File

Upload



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 the file was attempted to be sent. See example below:



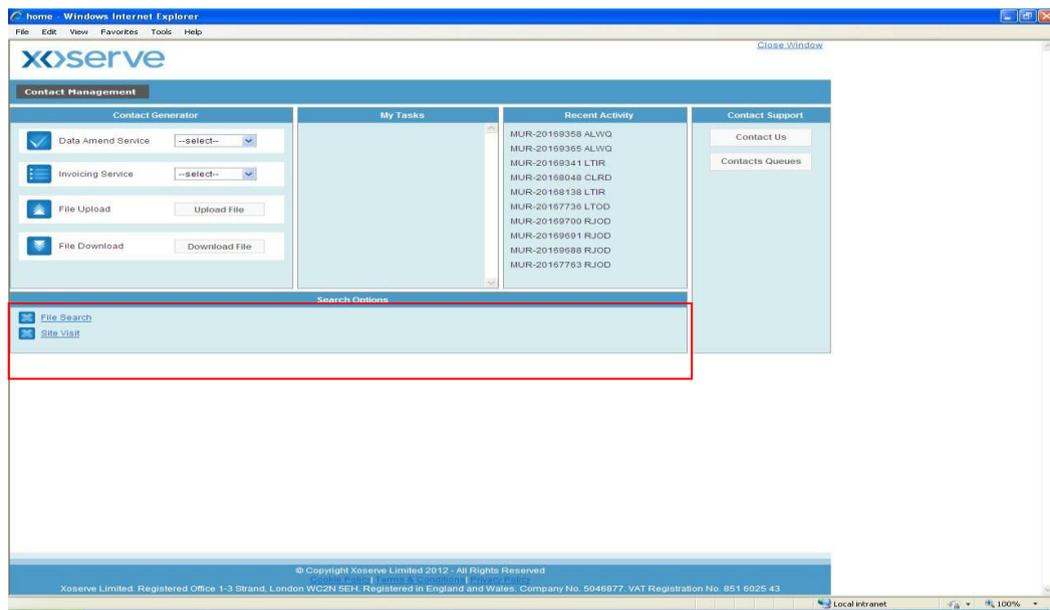
Section 4

Search Facilities

4.1 Search Options

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.

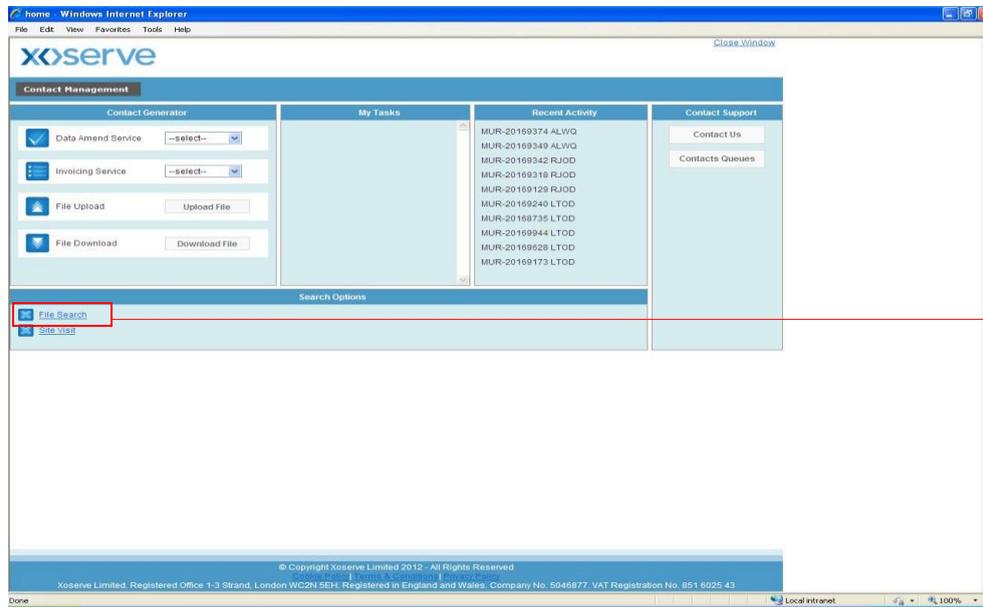


There is only one search option used as part of the Must Read Process, which is:

File Search – shows files uploaded by organisation as part of the Must Read Process.

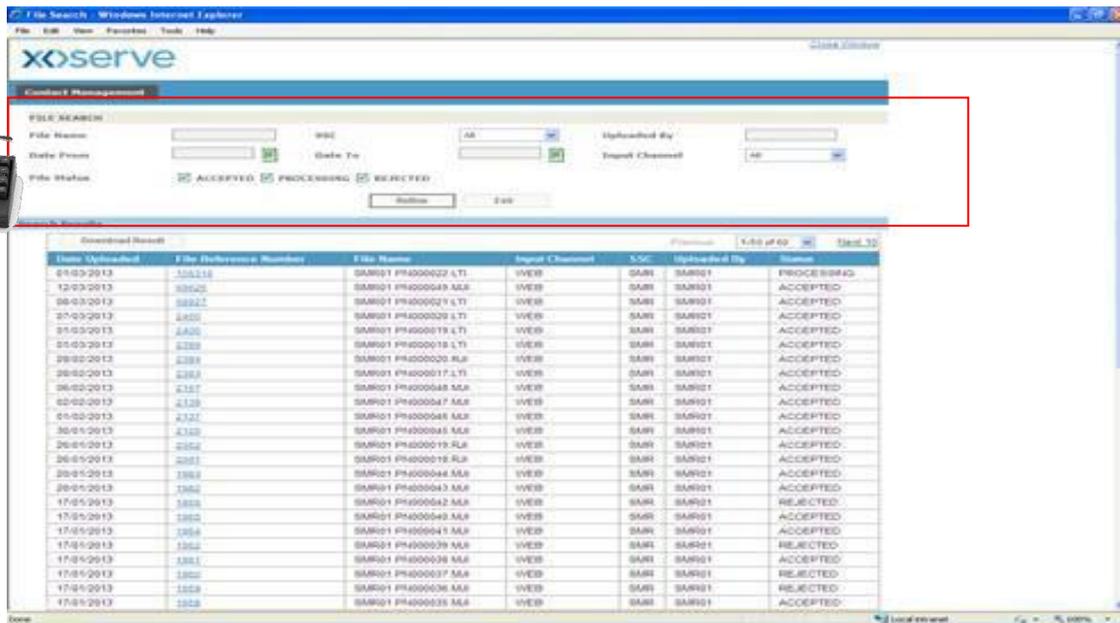
4.2 File Search

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 generated Files.



4.2 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.

The screenshot shows the Xserve File Search interface. The search criteria are: File Name: (empty), File Type: (empty), File Status: ACCEPTED PROCESSING REJECTED. The search results table is as follows:

Date Uploaded	File Reference Number	File Name	Input Channel	S/C	Uploaded By	Status
17/03/2013	10011	SAR01 F1400022.LTI	WEB	SAR	SAR01	PROCESSING
17/03/2013	10012	SAR01 F1400049.SAR	WEB	SAR	SAR01	ACCEPTED
18/03/2013	10021	SAR01 F1400001.LTI	WEB	SAR	SAR01	ACCEPTED
17/03/2013	2432	SAR01 F1400009.LTI	WEB	SAR	SAR01	ACCEPTED
17/03/2013	2433	SAR01 F1400010.LTI	WEB	SAR	SAR01	ACCEPTED
17/03/2013	2434	SAR01 F1400019.LTI	WEB	SAR	SAR01	ACCEPTED
28/02/2013	4381	SAR01 F1400020.FL9	WEB	SAR	SAR01	ACCEPTED
28/02/2013	4382	SAR01 F1400021.FL9	WEB	SAR	SAR01	ACCEPTED
28/02/2013	4383	SAR01 F1400027.LTI	WEB	SAR	SAR01	ACCEPTED
06/02/2013	4447	SAR01 F1400043.SAR	WEB	SAR	SAR01	ACCEPTED
02/02/2013	4448	SAR01 F1400047.SAR	WEB	SAR	SAR01	ACCEPTED
17/02/2013	4449	SAR01 F1400048.SAR	WEB	SAR	SAR01	ACCEPTED
30/01/2013	4450	SAR01 F1400046.SAR	WEB	SAR	SAR01	ACCEPTED
30/01/2013	4451	SAR01 F1400019.FL9	WEB	SAR	SAR01	ACCEPTED
30/01/2013	4452	SAR01 F1400018.FL9	WEB	SAR	SAR01	ACCEPTED
30/01/2013	4453	SAR01 F1400044.SAR	WEB	SAR	SAR01	ACCEPTED
30/01/2013	4454	SAR01 F1400043.SAR	WEB	SAR	SAR01	ACCEPTED
17/01/2013	1001	SAR01 F1400041.SAR	WEB	SAR	SAR01	REJECTED
17/01/2013	1002	SAR01 F1400040.SAR	WEB	SAR	SAR01	ACCEPTED
17/01/2013	1003	SAR01 F1400037.SAR	WEB	SAR	SAR01	REJECTED
17/01/2013	1004	SAR01 F1400036.SAR	WEB	SAR	SAR01	REJECTED
17/01/2013	1005	SAR01 F1400035.SAR	WEB	SAR	SAR01	ACCEPTED

For the criteria selected above in the above screen the results show all files at 'Accepted' status. The next page illustrates what 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 the file was attempted to be sent.

4.2 File Search

The screenshot shows the Xserve Contact Management interface. At the top, there's a 'FILE SEARCH' section with 'File Reference Number' set to 69625 and 'Status' set to ACCEPTED. Below this is a 'Search Results' section with a table of results. A mouse cursor is pointing at the table.

CRN/Record ID	MPRN	Invoice Number	Contact Code	Short Code	Logged By	Status
20187591	64964906		MUR	XOS	system	ACCEPTED
20188196	676172000		MUR	XOS	system	ACCEPTED
20188207	68836210		MUR	XOS	system	ACCEPTED
20188771	8827478909		MUR	XOS	system	ACCEPTED
20188140	585731105		MUR	XOS	system	ACCEPTED
2						REJECTED
Z						REJECTED

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

The screenshot shows the Xserve Contact Management interface with annotations. A red box highlights the File Reference Number '69625' in the search criteria. Another red box highlights the CRN/Record ID column in the search results table. A mouse cursor is pointing at the CRN/Record ID '20188140' in the table.

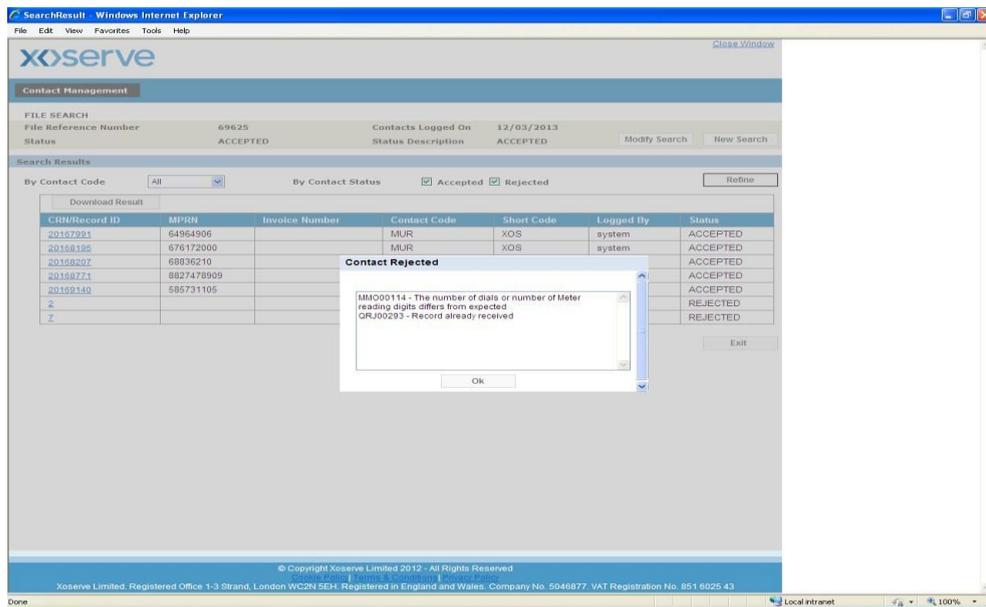
CRN/Record ID	MPRN	Invoice Number	Contact Code	Short Code	Logged By	Status
20187591	64964906		MUR	XOS	system	ACCEPTED
20188140	676172000		MUR	XOS	system	ACCEPTED
20188207	68836210		MUR	XOS	system	ACCEPTED
20188771	8827478909		MUR	XOS	system	ACCEPTED
20188140	585731105		MUR	XOS	system	ACCEPTED
2						REJECTED
Z						REJECTED

File Reference selected.

This number relates to the row that this record features in your 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.

4.2 File Search



Click Ok and the screen behind comes back into full view.

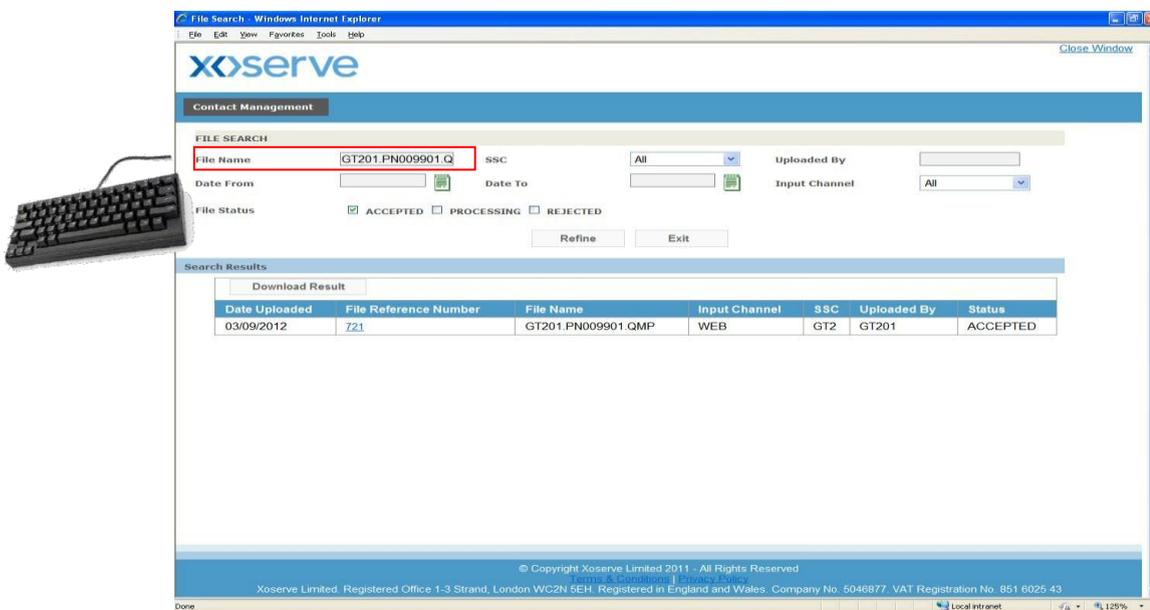
To complete a search using a specific file name...

Step 1 – Enter the File Name

Step 2 – Click Accepted, Processing or Rejected

Step 3 – Click Refine

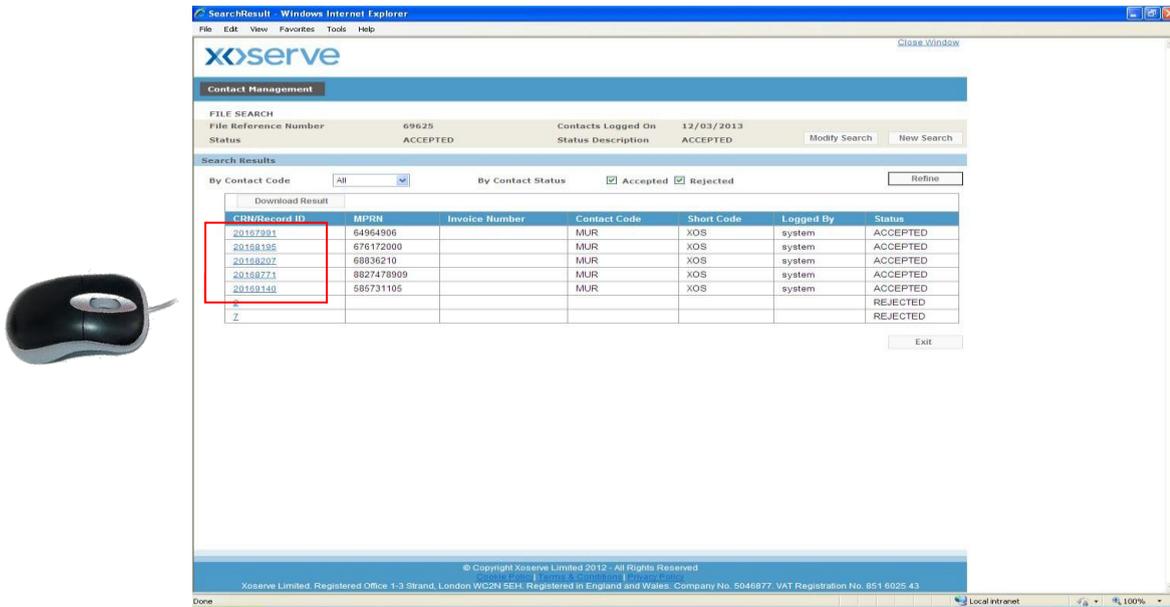
The results returned are shown as follows.



4.2 File Search

Select the File Reference Number and the records within the file will appear.

To drill down further, click on a specific Contact.



The screenshot shows the Xoserve Contact Management interface in a Windows Internet Explorer browser window. The page title is "SearchResult". The main heading is "Contact Management". Below this, there is a "FILE SEARCH" section with the following details:

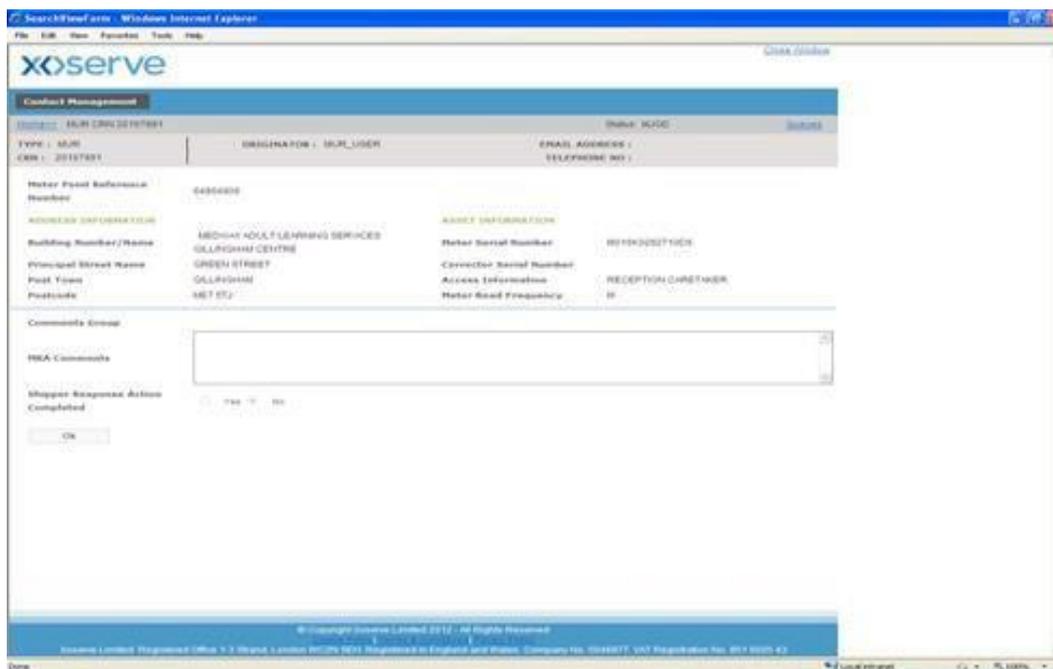
- File Reference Number: 69625
- Contacts Logged On: 12/03/2013
- Status: ACCEPTED
- Status Description: ACCEPTED

There are buttons for "Modify Search" and "New Search". Below this is the "Search Results" section. It includes a "By Contact Code" dropdown menu set to "All" and a "By Contact Status" section with checkboxes for "Accepted" (checked) and "Rejected". A "Refine" button is also present. A "Download Result" button is located above the results table. The table has the following columns: CRN/Record ID, MPRN, Invoice Number, Contact Code, Short Code, Logged By, and Status. The first five rows of the table are highlighted with a red box, and a mouse cursor is pointing at the first row.

CRN/Record ID	MPRN	Invoice Number	Contact Code	Short Code	Logged By	Status
20187991	64964906		MJR	XOS	system	ACCEPTED
20188195	676172000		MJR	XOS	system	ACCEPTED
20188207	68836210		MJR	XOS	system	ACCEPTED
20188771	882178909		MJR	XOS	system	ACCEPTED
20189148	685731105		MJR	XOS	system	ACCEPTED
Z						REJECTED

At the bottom of the page, there is a copyright notice: "© Copyright Xoserve Limited 2012 - All Rights Reserved. Xoserve Limited, Registered Office 1-3 Strand, London WC2N 5EH, Registered in England and Wales, Company No. 504877, VAT Registration No. 851 6025 43".

The Accepted Contact will appear as follows....



The screenshot shows the Xoserve Contact Management interface in a Windows Internet Explorer browser window. The page title is "SearchResult.aspx". The main heading is "Contact Management". Below this, there is a "CONTACT" section with the following details:

- CONTACT: MJR CRN 20187991
- TYPE: MJR
- CRN: 20187991
- DESIGNATION: MJR_USER
- EMAIL ADDRESS: ()
- PHONE NUMBER: ()

Below this is the "Water Point Reference Number" section with the value 64964906. The "ADDRESS INFORMATION" section includes:

- Building Number/Name: MEDWAY ADULT LEARNING SERVICES
- Principal Street Name: GULLINGHAM CENTRE
- Postcode: GULLINGHAM
- Postcode: ME7 8JZ

The "AGENT INFORMATION" section includes:

- Water Serial Number: 801002071002
- Connector Serial Number: ()
- Access Information: RECEPTION CHARACTER
- Water Road Frequency: 0

Below this is the "Comments Group" section with a text area for "PNA Comments" and a "Shopper Response Action Completed" section with a radio button for "Yes" and a radio button for "No". There is an "OK" button at the bottom.

At the bottom of the page, there is a copyright notice: "© Copyright Xoserve Limited 2012 - All Rights Reserved. Xoserve Limited, Registered Office 1-3 Strand, London WC2N 5EH, Registered in England and Wales, Company No. 504877, VAT Registration No. 851 6025 43".