Detailed Design Change Pack

# Communication Detail

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| Comm Reference: | 3098.4 – RT - PO |
| Comm Title: | XRN5556.C – Contact Management Service (CMS) Rebuild – v1.2 – Detailed Design |
| Comm Date: | 17/10/2022 |

# Change Representation

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

# Change Detail

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| Xoserve Reference Number: | **XRN5556.C** |
| Change Class: | Functional System |
| \*ChMC Constituency Impacted: | Shipper All Classes  Distribution Networks (DNs)  Independent Gas Transporters (IGTs) |
| Change Owner: | James Barlow  [James.Barlow@xoserve.com](mailto:James.Barlow@xoserve.com) |
| Background and Context: | **What is the CMS Rebuild?**  The current CMS system provides the ability for DSC Customers to query and update the data within their own portfolio. It is an ageing system that needs to be updated to cater for new ways of working and make it easier for customers to use. An extensive study was carried out with CMS users to understand their current pain points, requirements for a new version of CMS, and where possible business process improvements.  **CMS Rebuild Delivery**  CMS is being re-built using a family of methods and practices for flexible product delivery, called Agile. One of the key principles of this approach is to “satisfy the customer through early and continuous delivery of valuable solutions”.  The project will develop and test small parts of the product every few weeks, which can then be demonstrated to users during the customer focus groups, allowing early and frequent feedback. These small deliveries will be grouped into releases and a change pack will be issued per release.  Customer focus groups will continue the customer engagement and will allow users to feed into the delivery of the new solution and demo the latest developments in the Alpha Trials environment. If you would like to register for future sessions, please use this [link](https://www.eventbrite.co.uk/e/cms-rebuild-focus-groups-registration-302607797067). All minutes from these sessions will be published on the [CMS Rebuild Page](https://www.xoserve.com/products-services/data-products/contact-management-service-cms/cms-rebuild/).  To support customers in learning and adopting the system and processes, we have launched ‘Alpha Trials’ in July to customer focus group attendees. This provides the trialists access to a test environment where they can try out the system and gain familiarity with new functionality and processes. Alpha Trials will also enable the CDSP to obtain real-time feedback from customers on the solution.  Further training on the new CMS solution and processes will be provided prior to go live.  The new version of CMS will start rolling out from Q4 2022, the first processes to be moved over to the new system will be Shipper Raised Meter Number Creation (MNC) and the Supplier Theft of Gas (SUT). Additional processes will then be released as detailed in the change packs.  **CMS Rebuild Bulk Contact Upload**  In consultation with the customer focus group, it is proposed that the functionality to upload a file with multiple contacts, of multiple contact types, is implemented prior to releasing high volume processes, such as Address Amendment Contacts (ADD).  We are targeting to release bulk Contact upload functionality in Q1 2023, this date will be firmed up and confirmed by the end of December 2022.  The status of this change pack can be tracked [here](https://www.xoserve.com/change/change-proposals/xrn5556c-cms-rebuild-version-12/). |

# Change Impact Assessment Dashboard (UK Link)

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| Functional: | Upload a file of multiple CMS Contacts, of multiple Contact types |
| Non-Functional: |  |
| Application: | New Contact Management Service (CMS) |
| User(s): | Shipper All Classes  Distribution Networks (DNs)  Independent Gas Transporters (IGTs)  Utility Infrastructure Providers |
| Documentation: | BCL\_File\_Record\_V1.0.pdf |
| Other: | None |

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| --- | --- | --- | --- | --- |
| Files | | | | |
| File | Parent Record | Record | Data Attribute | Hierarchy or Format  Agreed |
| BCL | N/A | N/A | N/A | N/A |

# Change Design Description

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Current Process for Bulk Contact Upload:**  **Current “.QMP” File**  The existing version of CMS allows multiple contacts, of multiple contact types, to be raised via a file upload. This is done using a CSV file**\***, with a defined list of mandatory/supplementary data items, it is identified as the CMS file by using the **“.QMP”** extension, which stands for Query Management Protocol. The existing QMP File format can be found in the [UK Link document secured area](https://xoserve.sharepoint.com/sites/UKLink/Shared%20Documents/Forms/AllItems.aspx?RootFolder=%2Fsites%2FUKLink%2FShared%20Documents%2F3%2E%20UK%20Link%20Interface%20Documents%2F3b%2E%20System%20Interface%20Documents%2FAll%20Users%2FCMS%20File%20Formats&FolderCTID=0x0120000E46E5120CABBB4D996C1436031DED72a), the “.QMP” file format document is called QMP\_File\_Record\_V3L.pdf.  ***\**** *A CSV (Comma Separated Values) file is a plain text file where values are separated by commas. Microsoft Excel Spreadsheets can easily be converted to CSV format.*  **Current Upload Methods**  A file with multiple contacts, of multiple contact types can be uploaded in two ways; either from CMS using the user interface or via the IX file transfer, see below for an illustration of both methods.    Figure 1  **Current Method 1 – CMS UI “.QMP” Upload:**  The existing version of CMS will check if the file is valid. The user must then initiate a file search to see if the file was accepted. The user can then click on the file to see a row-by-row response. If the requested contact was rejected the user can only see the row number (record id) and the rejection reason, as shown below:    Figure 2  To find the detail about what was submitted for this rejection you would need to open the file that was submitted and find the row number.  **Current Method 2 – IX “.QMP” Upload:**  For the small number of organisations that use the IX system to upload a “.QMP” file they will get a response file:   * If the QMP file was uploaded via the IX, and the file passed file validation, then a **“.QMR”** CVS file will be available for download, showing which of the contacts were logged in CMS and which were rejected. * If the QMP file did not pass file validation, then a **“.QMJ”** CVS file will be available for download, and the Contacts will not be logged.   *NB: If the file was uploaded via existing CMS UI response files are not provided, instead file search is used.*  **Current Contact Tracking Files:**  There are also two files sent out via email to track the progress of Contacts raised.   |  |  | | --- | --- | |  | 1. Every Sunday a **“.QEX”** CSV file\* is sent via email to each stakeholder with all open contacts in their portfolio. The “.QEX” contains all their contacts that have changed status between Monday and Friday. | |  | 1. A daily report is created Monday-Saturday (including Bank holidays) containing called **“.QCL”** CSV file\*. A subset of information from the “.QCL file” is sent out via email showing the CRN and resolution message to each user who has a contact that has closed that day. | | \* Both the QEX and the QCL File *include all Contacts raised, whether that was as a single contact via existing CMS, a file via CMS UI or a file via IX.* | |   **Reason For Change:**  The process to upload multiple CMS Contacts requires changes to resolve the current pain points.  The key pain point with bulk upload is the high customer effort required to identify and track Contacts submitted via a “.QMP. For example, after uploading a .QMP file it is difficult to identify and manage rejections as the level of detail provided by the CMS response is insufficient, currently only the row number and rejection reason are provided, meaning that this must be mapped back to the original file to link it back to the submitted Contact.  The second reason for changing the bulk contact logging process is that the business processes for each Contact type have been re-engineered to be leaner, resulting in two key differences:   1. Less information is needed to raise some contacts (due to process streamlining) 2. More Contact types can be raised via file upload (for example ISO)   **Proposed Change:**  There are two changes proposed, firstly a new file used to upload multiple CMS contacts to the new version of CMS, and secondly changes and improvements to tracking Contacts submitted via bulk upload.   1. **Uploading Multiple CMS Contacts**   We propose that a new file is used to upload multiple contacts into the new version of CMS. This will also be similar to the current method in that it is a CSV file, with the ability to upload via the new CMS user interface or the IX with two differences:   1. New extension **“.BCL**” (Bulk Contact Logging), instead of “.QMP”, this will help reduce any potential confusion during dual running. 2. Different fields within the file, due to process streamlining and inclusion of more contact types (such as ISO, DTL), see attached fields [<<LINK>>.](https://umbraco.xoserve.com/media/43721/xrn5556c-bcl_file_record_v1docx.pdf)   Organisation specific templates for the “.BCL” file will be made available.  The “.BCL” file will allow all of the same contact types as the “QMP” file, with the addition of:   * **ISO:** A challenge to the status of a Supply Meter Point (service pipe) that is shown on UK-Link to be live but which is not capable of consuming gas. * **DTL:** A challenge to the status of a Supply Meter Point (service pipe) that is shown on UK-Link to be dead, but which is capable of consuming gas. * **Shipper MNC:** A Shipper raised challenge to create a Meter Point Reference Number (MPRN) for an existing Live Supply Point where UK-Link has no record. * **Set MPRN to Extinct:** A challenge to set an MPRN to Extinct, please see XRN5556.B October CMS Change pack   The following Contacts will not be included in the “.BCL” file:   * RECCo Supplier Theft of Gas (SUT) Contacts will not use this file format to upload Contacts, instead they will use a different set of fields, with the standard **.CSV** file extension. * Filter Failures, as this is a historic process, which is no longer active.   Please note specific process files for Gas Safety Regulation (GSR) and files for Must Reads (MUR) will be detailed in the change pack for these Contact Types.  **File Validation Checks:**  The “.BCL” file will be validated to confirm:   * File size is less than 15Mb * File size is greater than 0Mb * File name does not already exist * File name conforms with naming convention (see below) * Username in the body of the file is a valid CMS user   **“.BCL” File Naming Convention:**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Characters** | **1st - 3rd** | **4th** | **5th- 6th** | **7th – 12th** | **File Extension** | | **Naming Convention** | SSC | . | PN | Sequential number carrying on from the last one from SSC | .BCL | | **Example** | *SSC.PN123456.BCL* | | | | |  1. **Tracking Contacts Submitted by File**   We propose bulk Contact upload files are tracked within the new version of CMS, which will involve changing the process pictured in figure 1 to the diagram below (Figure 3).  One of the differences proposed is that in the new process Contacts submitted via IX will now use the new version of CMS User Interface (UI) to confirm the file has been successfully uploaded and quickly identify any rejected Contact submissions, rather than using response files (.QMR or .QMJ).  Figure 3  The new version of CMS will provide multiple tracking and search options, including:   * File Search (with filtering options) * File Tracking (with filtering options) * CRN Search (with filtering options) * Advanced Search (with filtering options) * Dashboard Reporting (in future releases)   Additionally, the new version of CMS will provide File Alert notifications.  **File Notification Alerts:**  When a “.BCL” file is uploaded, either via the new version of CMS or the IX, a file notification alert will be triggered for the username submitted in the file. The alert will only be shown to the raising user, however everyone in the raising organisation can view the files for their organisation.  File alerts will be presented in the same location as Contact alerts, as a small bell icon in the top right corner, as shown in the screen mock-up below. When the alert is selected, they will be taken to file tracking.    *Please note this mock-up screen have been shared to provide early sight of what the new CMS user interface may look like and, as such, are currently in development and subject to change.*  **Tracking Contacts Submitted via Bulk Upload:**  File tracking will be available via clicking on the file notification alert or searching for the file name, see below is a screen mock-up.    Figure 4  *Please note this mock-up screen have been shared to provide early sight of what the new CMS user interface may look like and, as such, are currently in development and subject to change.*  The ‘File Status’ column will show if the file has been “Accepted”, or “Rejected”. If it has been rejected the reason will be displayed in the ‘Result’ column. If the file has been accepted two files that can be viewed:   * CRNs and key submitted contact information * Rejections with key submitted contact information, this will resolve the pain point around identifying rejections, highlighted in the [Reason for Change section](#Reason).   **Transition:**  During dual running there will be two file types for raising multiple CMS Contacts:   * Contact types that have not moved over to the new version of CMS yet should be submitted using a “.QMP” file to the older version of CMS. * Contact types that have moved over to the new version of CMS should be submitted using a “.BCL” file to the new version of CMS.   The latest information of which Contact types have been moved over to the new version of CMS will be available on [CMS Rebuild Product](https://www.xoserve.com/products-services/data-products/contact-management-service-cms/cms-rebuild/) page.  When all Contact types have moved over to the new version of CMS the “.QMP” file type will be decommissioned. |

# Associated Changes

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| Associated Change(s) and Title(s): | XRN5556.B - CMS Rebuild - v1.1 - Revised Detailed Design |

# DSG

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| Target DSG discussion date: | 24/10/2022 |
| Any further information: | None |

# Implementation

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| Target Release: | Q1 2023 |
| Status: | For approval |

Please see the following page for representation comments template; responses to [uklink@xoserve.com](mailto:uklink@xoserve.com)

Industry Response Detailed Design Review

«RangeStart:HDS»  
  
Change Representation

(To be completed by User and returned for response)

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

# Xoserve’ s Response

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

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

«RangeEnd:HDS»

Change Management Committee Outcome

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| Change Status: | Approve | Reject | | | Defer |
| Industry Consultation: | 10 Working Days | | 15 Working Days | | |
| 20 Working Days | | Other [Specify Here] | | |
| Date Issued: | 17/10/2022 | | | | |
| Comms Ref(s): | 3098.4- RT - PO | | | | |
| Number of Responses: | 1 | | | | |
| Solution Voting: | Shipper | | | Please select. | |
| National Grid Transmission | | | Please select. | |
| Distribution Network Operator | | | Please select. | |
| IGT | | | Please select. | |
| Meeting Date: | 09/11/2022 | | | | |
| Release Date: | Q1 2023 | | | | |

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 |
| Version 1.0 | Issued | 13.10.2022 | Laura Poole |  |
| Version 2.0 | Approved | 15/11/2022 | Kate Lancaster | Updated after approval at ChMC 9th November 2022 |