

Contact Management Must Read User Guide

Meter Read Agency (MRA/IGT) Edition

Version 3.0

Contents Page

1. Introduction

- 2. Log onto Contact Management
 - 2.1 Log onto the Contact Management system
 - 2.2 Contact Management Services page
 - 2.3 Contact Management Home Page
- 3. Contact Generator
 - 3.1 File Format
 - 3.2 Download File
 - 3.3 MUR File Processing Tool
 - 3.4 Upload File
- 4. Search Facilities
 - 4.1 Search Options
 - 4.2 File Search

Version Control

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Introduction

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

The guide contains: -

- \Rightarrow How to log on to the system and accessing the Contact Management Home Page
- \Rightarrow Receiving Site Visit requests and managing the responses
- \Rightarrow 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

The portal Login Page looks as follows....

🖉 Login - Windows Internet Explorer	
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File Edit View Favorites Tools Help	
🚖 Favorites 🛛 🙀 🙋 Home 🙋 Login 🙋 Web Slice Gallery 👻 🖉 xose	e - Q Project XO Industry Info « Xoserve
6 Login	🦄 🔻 🖾 👘 🐨 Page 🗸 Safety 👻 Tools 🗸 🔞 🗸 🦥
XOSERVE	8
LOGIN	HELP
User ID* Password* Lacree with the Terms of Use LOGIN	If you are experiencing difficulty accessing the service, please contact your Local Security Officer for assistance. Should you be unsure who to contact within your organisation, please contact Xoserve at 0845 6000506 who will be able to assist you.
© Copyrig Xoserve Limited. Registered Office 1-3 Strand, London WC2N 5	Xoserve Limited 2011 - All Rights Reserved mr. & Conditions Investy Policy H Registered Incidand and Wales. Company No. 5046877. VAT Registration No. 851 6025 43
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- 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

C Login - Windows Internet Explorer		
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xoserve		
LOGIN HELP If you are experience. Show user ID * DMSP If you are experience. Show	icing difficulty accessing the service, please contact your Local Security Officer fr d you be unsure who to contact within your organisation, please contact Xoserve	or at
Password* Lagree with the Terms of Use LOGIN Forgot Password?	о на ос или и илия јон.	
© Copyright Xoserve Limited 2011 - A	Rights Reserved	
Xoserve Limited. Registered Office 1-3 Strand, London WC2N 5EH. Registered in England	and Wales. Company No. 5046877. VAT Registration No. 851 6025 43	
	Second intranet 🖉 + 🔍 13	15% *

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

Data Amend Service select • Invoicing Service select •	DMQ 20001522	DMQ-20001495 ALWQ DMQ-20001897 ALWQ DMQ-20001885 ALWQ DMQ-20001885 ALWQ DMQ-20001522 ALWQ DMQ-20001491 ALWQ	Contact Us Contacts Queues
sct Reference Number	iearch Options Find 🔀 Adva	nced Search	

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

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

Zone 4

<u>Contact Support</u> – 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

<u>Search Options</u> – 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)
- \Rightarrow Read date should be provided when meter read is available (LTI File only)
- \Rightarrow 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.

<u>MJI</u>

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	

<u>RJI</u>

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	

<u>LTI</u>

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

File Download - Windows Internet Explorer Ele Edk Yew Favorites Tools Help XXXSETVE Yes Yes Yes Yes Yes	Close Window
Contact Management	
Home>> File Download	Queues
TYPE : ORIGINATOR : FN LN EMAIL ADDRESS : GFM01@sd.com CRN : SSC : GFM TELEPHONE NO :	
File Type MJO V MJO LTO RJO	
Copyright Xoserve Limited 2012 - All Rights Reserved Cookie Polic Terms & Conditions Princy Policy Xoserve Limited Registered Office 1-3 Strand Londwidth Registered in England and Wales Company No. 5046877. VAT Registration No. 8511 Xoserve Limited Registered Office 1-3 Strand Londwidth Registered in England and Wales Company No. 5046877. VAT Registration No. 8511	5025 43
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If you require to go back to Contact Management Click the Cancel button.

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

	Security Warning
	"C:\Documents and Settings\Eamonn.Darcy\Desktop\MUR File Processing Tool v3.xls" contains macros.
	Macros may contain viruses. It is usually safe to disable macros, but if the macros are legitimate, you might lose some functionality.
9	Disable Macros More Info

Microsoft Excel - MUR File Processing Tool v3.xls	
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Ready	NUM

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

Please Select 1	he file you would like to open	? 🗙
Look <u>i</u> n:	🔁 New Folder (2)	
My Recent Documents	XXX01.PN000180.MJO	
Desktop		
My Documents		
My Computer		
My Network	Hile name:	Open
Places	Files of type: MUR Files (*.mjo; *.lto; *.rjo; *.*)	Cancel

Import Complete
Import complete. Please input your updates and then click the Export File button on the Start tab.

Step 6 – Click OK

This will then Import the data from the MJO file into Tab 2 of the 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

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	6	6	6	6	MIGBEY	6		6			
	7	7	7	7	ML6 BEY	7		7			
	8	8	8	E	ML6 BEY	8		8			
	9	9	9	9	ML6 8EY	9		9			
	10	10	10	10	ML6 BEY	10		10			
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	22	22	22	24	WATUTEL	22		22			
	23	23	23	20	LDBOBN	23		23			
	25	25	25	26	WA14 2HY	25		25			
	26	26	26	28	CV37 DNR	26		26			
	27	27	27	27	AL5 2JY	27		27			
	28	28	28	28	B LE2 3BA	28		28			
	29	29	29	29	B15 2RX	29		29			
	30	30	30	30	NP7 6YB	30		30			
	30	32	31	31	0 M12 6LE	31		31			
	33	33	33	33	NN11 4HB	32		33			
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	35	35	35	35	RMB 2JA	35		35		1	
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		-									

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

A	B	С	D	E	F	G	
1 CMS Upload file creator	-	MRA Short code:	XXX				
3 1. Select a file type to create: 🖪	VUI IUV	🕞 Standard MRA Return f	ile Clear existing da	ita			
4 5 2. Paste correctly formatted da	IDI TI	14					
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7 3. Click Export button	Expo	irt File	MJI	88			
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42 43							
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45							



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 10 – Select File Type you wish to create from pull down

Step 11 – Paste Data from Imported File Tab into Columns A-H

	A MUI	8	c	D	E	F	
	1 CMS Upload file creator		MRA Short code:	XXXX			
	2 3 1. Select a file type to creat	te: MJI	Standard MRA Return file	Clear existin	ig data		
	4 5 2. Paste correctly formatter						
	6	кл		File type	Next Sequence number		
	7 3. Click Export button	Export File		MJI	01		
	9		****	RJI	01		
	10 11 MILEIle Format						
	12						
	13 Log Number	MPR	MSN	Address	Post Code	Access Instructions	Meter 1
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	16	3	3	(3 ML5 8EV		3
- 1	17	6 6	A 6		A MUSBEY 5 MUSBEY		6 5
	19	6	6 6		6 ML6 8EY		6
- 1	20	7	7 3		7 ML6 BEY		7
	21	8	8 8	l.	8 ML5 BEY		8
- 1	22	9	3 E		9 Mus Ber		10
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ł	34	20 30	27 27		22 94/640 4181		22
	36	23	23 27		23 M16 GJN		23
Т	37	24	24 24		24 LO3 OBN		24
- 1	30	26	25		25 WA14 2HY		26
	39	26	26 20		26 CV37 0NR		26
	40	27 28	27 28 26		27 ALB 201 28 LE2 38A		28
	42	29	29 25		29 B15 2RX		29
1	43	30	30 30		30 NP7 5Y8		30
	44	311	31 31		31 CV& BJA		31
	45	32	32 30		32 M12 5LE		32
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	47	34	34 34 34		34 N2 0BO 35 RMB 21A		34
	47 48 N • • • N Start / Imported File \	34 35 File Creator /	34 35 35 35	1	34 N2 0B0 36 RM8 2JA		36 🖌
	47 48 H 4 + H Start / Imported File ; Ready	34 35 A File Creator /	34 3- 36 2	J.e	34 N2 060 36 RMB 204	NUT	34 35 >

Step 12 - Columns I-T will need to be populated with responses from the Site Visits

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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

Export Complete
Your Data has been exported to C:\Documents and Settings\Eamonn.Darcy\Desktop\XXX01.PN000088.MJI
ОК

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

<u>Upload</u>

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

Step 1 – Click Upload File



Step 2 - Select MJI from File Type pull down

Step 3 – Click upload File Button

Contact Mana	igement		
TYPE :	noad	ORIGINATOR : FNLN SSC : GFM	EMAIL ADDRESS : GFM01@1 TELEPHONE NO :
File Type:	GMP LTT Rut	Upload File Cancel	



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

3.4 Upload File

<u>Upload</u>

Step 4 – Select MJI File from Folder/Shared area



Step 5 - Click Open

Step 6 - Click Upload File

x>serve			
Contact Management			
Home>>> File Upload			Queues
TYPE :	ORIGINATOR : FN LN SSC : SMR	EMAIL ADDRESS : SMR01@wer.com TELEPHONE NO :	
File Type: MJI 💌	Upload File Cancel		
	Upload File		
	C:\Documents and Setti Upload Can	cel	



File will now be processed and updated on Contact Management

3.4 Upload File

<u>Upload</u>



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:

🖉 File Upload Download - Windows Internet Explorer		
Eile Edit View Favorites Tools Help		
XC)serve		<u>Close Window</u>
Contact Management		
Home>> File Upload		Queues
TYPE : ORIGIN	ATOR: FN LN EMAIL ADDRESS: SMR01@wer.com SSC: SMR TELEPHONE NO:	
File Type: MJI	Upload File Cancel	
	File Upload	
	Close	
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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.

🖉 home - Windows Internet Explorer				
File Edit View Favorites Tools Help			Close Window	6
xoserve				
Contact Management				
Contact Generator	My Tasks	Recent Activity	Contact Support	
Data Amend Serviceselect 💌		MUR-20169365 ALWQ MUR-20169365 ALWQ	Contact Us	
Invoicing Service select V		MUR-20169341 LTIR MUR-20168048 CLRD	Contacts Queues	
		MUR-20168138 LTIR		
File Upload Upload File		MUR-20169700 RJOD		
File Download Download File		MUR-20169691 RJOD		
		MUR-20167763 RJOD		
	<u></u>			
File Search	Search Options			
Site Visit				
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				Local intranet 🦓 🔹 🔍 100% 🔹

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.

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.

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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.

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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.

Contact Management					
FILE SEARCH					
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Status	ACCEPTED	Status Description	ACCEPTED	mouny see	TOT New Search
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Click on the File Reference Number and the recorded results become available for each CRN in the file.

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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.

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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.

🖉 File Search - Windows Intern	et Explorer						
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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....

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