Detailed Design Change Pack

# Communication Detail

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| Comm Reference: | 3174.2 - VO - PO |
| Comm Title: | XRN5556E - Contact Management Service (CMS) Rebuild – v1.4 – Detailed Design |
| Comm Date: | 15/05/2023 |

**Change Representation**

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| Action Required: | For Representation |
| Close Out Date: | 30/05/2023 |

# Change Detail

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| Xoserve Reference Number: | [XRN5556.E](https://www.xoserve.com/change/customer-change-register/xrn-5556e-cms-rebuild-version-14/) |
| Change Class: | Functional System |
| \*ChMC Constituency Impacted: | Shipper All Classes  Distribution Networks (DNs)  Independent Gas Transporters (IGTs) |
| Change Owner: | [uklinkdelivery@xoserve.com](mailto:uklinkdelivery@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. If you would like to register for future sessions, please use this [link](https://www.eventbrite.co.uk/e/cms-rebuild-focus-groups-registration-302607797067). All minutes from these sessions will be published on the [CMS Rebuild Page](https://www.xoserve.com/products-services/data-products/contact-management-service-cms/cms-rebuild/).  CMS Rebuild Version 1 was launched in October 2022 with the Shipper Raised Meter Number Creation (MNC) and the Supplier Theft of Gas (SUT) processes.  CMS Rebuild Version 1.1 was launched in December 2022 with the Duplicate (DUP) and Set to Ex (STE) processes.  CMS Rebuild Version 1.2 is due to be deployed in June 2023 after the release of 1.3 with the Introduction of bulk contact logging functionality – BCL file  CMS Rebuild Version 1.3 was launched in April 2023 with the Isolation (ISO) and Dead to Live (DTL) processes.  This change pack will cover the changes for CMS Version 1.4  **CMS Rebuild Version 1.4 Scope**  In consultation with the customer focus group, it is proposed that the following process will be delivered in version 1.4:   1. Address Amendments (ADD) 2. Distribution Network raised MNumber creations (DMN)   We are targeting to release version 1.4 on the 30th June 2023.  This change pack will cover the changes for the Address Amendments (ADD) and Distribution Network raised MNumber creations (DMN) processes for CMS Version 1.4. |

# Change Impact Assessment Dashboard

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| Functional: | The existing Address Amendment (ADD) and MNumber creation (MNC) processes will be moved to the new version of Contact Management Service (CMS). |
| Non-Functional: | N/A |
| Application: | New Contact Management Service (CMS) |
| User(s): | Shipper All Classes  Distribution Networks (DNs)  Independent Gas Transporters (IGTs) |
| Documentation: | None |
| Other: | None |

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| Files | | | | |
| File | Parent Record | Record | Data Attribute | Hierarchy or Format  Agreed |
| None | None | None | None | None |

# Change Design Description

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| **Address Amendment (ADD) and Unconfirmed Address amendment (UNC) processes overview:**  A request to amend an existing address on UKLink when found to reflect incorrect address detail. There are approximately 24k per month (20k ADD, 4k UNC).  **Reason for Change:**   * Reduce customer effort – currently customers must determine if the supply point is confirmed or unconfirmed before submitting either ADD or UNC. * Reduce customer effort – in some instances customers a required to check for PAF valid address outside of CMS before submitting. * Right first time – if PAF check not carried out prior to submission, in some instances contact is not resolved as valid. * Right first time – customers are not able to provide reason for a proposed address not being PAF valid where it is correct to submit a non-PAV valid address for amendment.   **New Processes:**  The new business process map for the ADD process be found inserted below:    See below for a summary of the process:   * The requirement to log address amendments as Unconfirmed Address Amendment (UNC) where the supply has never had a confirmation has been removed. * All amendments will be logged as Address Amendments (ADD). * Requirement to provide the ‘current address’ has been removed – the system will pull from UKLink. * Requirement to provide the ‘confirmation number’ has been removed – the system will pull from UKLink. * PAF valid address can be searched for within UI logging form. * PAF Override functionality with justification to avoid contacts incorrectly being resolved as invalid.     A training guide will be provided in line with the release for the new ADD process, along with standard help and FAQs that will be published on the CMS Webpage.  The CMS Rebuild will make system/process improvements to increase transparency, reduce customer effort, increase collaboration, and remove barriers to the investigation and resolution of the contact with the introduction of the following functionality:   * **Transparency:** The full history of a contact can be seen within one screen, including where applicable, Current Status, Data Clarification (DC) requests/responses, and update dates and times. * **Reduction of customer effort:** Fewer data items required to be included in the logging of the contact with the system pulling more data from UKLink * **Reduction of customer effort:** Less pre-work required prior to logging contact e.g. determining the confirmation status of the Supply Meter Point (SMP) and using different Contact codes accordingly   **Distribution Network raised MNumber creation (DMN) processes overview:**  A request to create a new Meter Point Reference Number (MPRN) on UKLink when an existing supply has been identified by a Distribution Network but is not registered on UKLink. There are approximately 40 per month.  **Reason for Change:**   * Reduce customer effort – in some instances customers are required to check for PAF valid address outside of CMS before submitting. * Right first time – if PAF check not carried out prior to submission, in some instances contact is not resolved as valid. * Right first time – customers are not able to provide reason for a proposed address not being PAF valid where it is correct to submit a non-PAV valid address for amendment.   **New Processes:**  The new business process map for the DMN process be found inserted below:    See below for a summary of the process:   * To keep the process separate from the Shipper raised MNumber creation process, this process is being renamed as Distribution Network Raised MNumber creation (DMN) * PAF valid address can be searched for within UI logging form. * PAF Override functionality with justification to avoid contacts incorrectly being resolved as invalid.   A training guide will be provided in line with the release for the new DMN process, along with standard help and FAQs that will be published on the [CMS Webpage](https://www.xoserve.com/products-services/data-products/contact-management-service-cms/cms-rebuild/).  The CMS Rebuild will make system/process improvements to increase transparency, reduce customer effort, increase collaboration, and remove barriers to the investigation and resolution of the contact with the introduction of the following functionality:   * **Transparency:** The full history of a contact can be seen within one screen, including where applicable, the current status, Data Clarification (DC) requests/responses, and update dates and times.   **Transition:**  A cut-off date will be communicated where ADD / UNC and MNC Contacts should no longer be raised via the existing version of CMS, and instead the ADD (for ADD / UNC) and DMN (for MNC) contacts raised in the new version of CMS.  For the avoidance of doubt there will be no data migration, any contacts in progress before the cut-over date will continue to be progressed to resolution in the existing version of CMS.  **Accessing the new Version of CMS:**  Please refer to the training guides published here [New Contact Management Service (CMS) - Overview | Rise 360 (articulate.com)](https://rise.articulate.com/share/dgQzl3ax38sN6oVrNCenQW1RKMFHStYO) |

# Associated Changes

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| Associated Change(s) and Title(s): | XRN5556 CMS Rebuild parent |

# DSG

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| Target DSG discussion date: | 22/05/2023 |
| Any further information: | None |

# Implementation

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| Target Release: | Release: Q2 2023 (targeting 30th June 2023) |
| Status: | For Approval |

Industry Response Detailed Design Review

Change Representation

(To be completed by User and returned for response)

# *Please consider any commercial impacts to your organisation that Xoserve need to be aware of when formulating your response*

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| --- | --- | --- | --- |
| User Contact Details: | Organisation: | ScottishPower | |
| Name: | Claire Louise Roberts | |
| Email: | Clairelouise.Roberts@Scottishpower.com | |
| Telephone: | 01416145930 | |
| Representation Status: | approved | | |
| Representation Publication: | Publish | | |
| Representation Comments: | N/A | | |
| Confirm Target Release Date? | approved | | «h1\_userDataAlternative» |

# Xoserve’ s Response

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| Xoserve Response to Organisations Comments: | Thank you for your representation, we will feed this into ChMC for a final decision. |

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

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: | 15/05/2023 | | | | |
| Comms Ref(s): | 3174.2 - VO - PO | | | | |
| Number of Responses: | 2 | | | | |
| Solution Voting: | Shipper | | | Please select. | |
| National Gas Transmission | | | Please select. | |
| Distribution Network Operator | | | Please select. | |
| IGT | | | Please select. | |
| Meeting Date: | 09/06/2023 | | | | |
| Release Date: | Adhoc | | | | |

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 | For Approval | 11/05/2023 | Georgina Cronin |  |
| Version 2.0 | Approved | 14/06/2023 | Kate Lancaster | Approved at ChMC 09/06/2023 |