Detailed Design Change Pack

# Communication Detail

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| --- | --- |
| Comm Reference: | 3265.2 - VO - PO  |
| Comm Title: | XRN 5556K - Contact Management Service (CMS) Rebuild – Delivery of Generic Workflow process (GEN)  |
| Comm Date: | 18/03/2024 |

**Change Representation**

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| Action Required: | For representation |
| Close Out Date: | 03/04/2024 |

# Change Detail

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| Xoserve Reference Number:  | [XRN5556.K](https://www.xoserve.com/media/q23dls0i/xrn5556k-cms-rebuild-delivery-of-dmq-and-generic-workflows.pdf) |
| Change Class: | Functional System  |
| \*ChMC Constituency Impacted: | Assumed impacted parties of the proposed change, all parties are encouraged to review |
| Change Owner:  | 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 was deployed in August 2023 alongside V1.4 and this contained the ability to bulk upload contacts via the new Bulk Contact Logging file (BCL) CMS Rebuild Version 1.3 was launched in April 2023 with the Isolation (ISO) and Dead to Live (DTL) processes.  CMS Rebuild Version 1.4 was launched in August 2023 with the Address Amendments (ADD) and Distribution Network raised MNumber Creation (DMN) processes.  CMS Rebuild Version 1.5 was launched in November 2023 with Request for Financial Adjustment (RFA) and Consumption Dispute Query (CDQ) processes.  CMS Rebuild Version 1.6 Contained Theft of Gas (TOG) and New MPRN Creation (FOM) and this was launched in November 2023  CMS Rebuild Version 1.7 contained the new processes Known Meter Issue (KMI) and Shipper Agreed Reads (SAR) which are linked to XRN5604 and XRN5605 this was launched on 24 February 2024. Please note change packs for this version can be found under XRN5604 and XRN5605. CMS Rebuild Version 1.8 contained the Must Reads (MUR) process and was launched on 4 March 2024CMS Rebuild Version 1.9 will contain the Daily Metered Query (DMQ) process and this is targeted to be delivered on 08 April 2024.CMS Rebuild Version 1.10 will contain the Gas Safety Regulations (GSR), Manage Unregistered Sites (MUS) and the Generic (GEN) workflow. This Detailed Design Pack contains the design for the GEN workflow. |

# Change Impact Assessment Dashboard

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| Functional: | The existing generic workflows from Legacy CMS will be delivered into the new CMS as one process, allowing the user to select which process it relates to. The Generic Workflow consists of these processes: Twin stream configuration challenge (AGG) Daily metered reconciliation (DMR) File Enquiry (FLE) Prime & sub configuration change (PRS) Prime & sub invoice (PSI) Delivery of the Daily Metered Query (DMQ) process design has been covered in a previous change pack, please use this [link](https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fwww.xoserve.com%2Fmedia%2Fwkjc2fzc%2F32032-vo-po-xrn-5556g-contact-management-service-cms-rebuild-v16-tog-dmq-fom.docx&wdOrigin=BROWSELINK) |
| Non-Functional: | N/A |
| Application: | New Contact Management Service (CMS) |
| User(s): | Shipper All Classes |
| Documentation: | None |
| Other: | None |

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| --- |
| Files |
| File | Parent Record | Record | Data Attribute | Hierarchy or FormatAgreed |
| None | None | None | None | None |

# Change Design Description

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| **Generic Workflow (GEN) Process Overview:**  It is proposed that the Generic Workflow will merge a small number of contact types together due to their infrequent usage. As such, the following contact types will be available via the Generic Workflow process:* Twin stream configuration challenge (AGG)
	+ A challenge where a Shipper believes that a Twin Stream Meter is/is not situated but not reflected on UK Link.
* Daily Metered Reconciliation (DMR)
	+ A challenge to the consumption to Daily Meter (DM) sites following or prior to invoice issue.
* File Enquiry (FLE)
	+ An enquiry regarding a rejection response received for an Supply Point Amendment (SPA) File or a Contact Management Service file.
* Prime & Sub Configuration Change (PRS)
	+ A challenge to the link code currently held on UK Link for a freestanding meter or a prime and sub meter configuration.
* Prime & Sub Invoice (PSI)
	+ A challenge to charges received for a prime or sub meter

 **Reason for Change:**   * Reduce customer effort – simple to use user interface (UI) and minimal data items need to be provided to log contact.
* Transparency: The full history of a contact can be seen within one screen, including current status.

**New Process:**  The new business process for the Generic Workflow (GEN) process can be found here:See below for a summary of the process:  * A User will be able to log a single contact in the UI as per normal.
* When they select “GEN” the UI entry form will contain a list of the processes available alongside additional fields to provide supporting information
* This is then submitted, and the user will be able to monitor progress via the usual audit trail and history.

 A training guide will be provided in line with the release for the new GEN process, along with standard help and FAQs that will be published on the CMS Webpage. **Transition:** As per earlier CMS Rebuild launches the transition plan of these contacts will be discussed at the Customer Focus Group and necessary constituency meetings. The outcome of these will then be communicated in Change Management Committee (ChMC) and Contract Management Committee (CoMC). |

# Associated Changes

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| Associated Change(s) and Title(s): |  |

# DSG

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| Target DSG discussion date: | 01/01/0001 |
| Any further information: |  |

# Implementation

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| Target Release: | Release: Feb/Jun/Nov XX or Adhoc DD/MM/YYYY |
| Status: |  |

Industry Response Detailed Design Review

RangeStart:HDS»

**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:  | «h1\_organisation»  |
| Name:  | «h1\_name»  |
| Email:  | «h1\_email»  |
| Telephone:  | «h1\_telephone»  |
| Customer decision on Change Pack:  | «h1\_userDataStatus»  |
| Commercial impacts:  | «h1\_commercial\_impacts»  |
| Representation Publication:  | «h1\_consultation»  |
| Representation Comments:  | «h1\_userDataComments»  |

**Xoserve’ s Response**

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

Please send the completed representation response to 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: | 01/01/0001 |
| Comms Ref(s): |  |
| Number of Responses: |  |
| Solution Voting: | [ ]  Shipper | Please select. |
| [ ]  National Gas Transmission | Please select. |
| [ ]  Distribution Network Operator | Please select. |
| [ ]  IGT | Please select. |
| Meeting Date: | 01/01/0001 |
| Release Date: | Release: Feb / Jun / Nov XX or Adhoc DD/MM/YYYY or NA |

Please send the completed representation response to uklink@xoserve.com

Version Control

# Document

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| --- | --- | --- | --- | --- |
| Version | Status | Date | Author(s) | Remarks |
| Version 1.0 | For Approval |  | Eamonn Darcy |  |

# Template

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| Version | Status | Date | Author(s) | Remarks | Approved By |
| 1.0 | Approved | 09/03/2022 | Rachel Taggart | Detail Design Change Pack transferred to own document | Change Management Committee on 09/03/2022 |
| 1.1 | Approved | 25/04/2023 | Rachel Taggart | Updated with new font branding | Emma Smith |