Detailed Design Change Pack

# Communication Detail

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| Comm Reference: | 3139.6 - VO - PO |
| Comm Title: | XRN5556D - Contact Management Service (CMS) Rebuild – v1.3 – Detailed Design |
| Comm Date: | 13/02/2023 |

# Change Representation

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| Action Required: | For Representation |
| Close Out Date: | 27/02/2023 |

# Change Detail

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| Xoserve Reference Number: | [XRN5556D](https://www.xoserve.com/change/customer-change-register/xrn-5556d-cms-rebuild-version-13/) |
| 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/).  **Previous Releases**  CMS Rebuild Version 1.0 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 implemented in December 2022 and delivered the Duplicate (DUP) and Set to Extinct (STE) contact processes.  In CMS Rebuild Version 1.2 the new Bulk Contact Logging (BCL) file will be delivered.  For further details of previous versions, please visit the [CMS Rebuild Page](https://www.xoserve.com/products-services/data-products/contact-management-service-cms/cms-rebuild/) or [CMS Rebuild Parent Change Proposal](https://www.xoserve.com/change/customer-change-register/xrn-5556-cms-rebuild-parent-xrn/) page, where the child changes are listed.  This change pack will define the changes to be delivered under [XRN5556D CMS Version 1.3](https://www.xoserve.com/change/customer-change-register/xrn-5556d-cms-rebuild-version-13/).  **CMS Rebuild Version 1.3 Scope**  In consultation with the customer focus group, it is proposed that the following process will be delivered in version 1.3:   1. Isolation (ISO) 2. Dead to Live (DTL)   We are targeting to release version 1.3 on 24 April 2023. |

# Change Impact Assessment Dashboard (UK Link)

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| Functional: | The existing Isolation (ISO) and Dead to Live (DTL) process will be moved to the new version of Contact Management Service (CMS) |
| Non-Functional: | None |
| 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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| **Overview of Current Processes in the Existing CMS:**  Under the DTL process, a Shipper will raise a contact to the Central Data Service Provider (CDSP) to request to set a Meter Point to ‘Live‘ in UKLink where they believe that it has been incorrectly set to ‘Dead’ when it is, in fact, live and flowing gas. There are circa 1,800 DTL contacts raised per year.  For the ISO process, a Shipper will raise a contact to the CDSP to request to set a Meter Point to ‘Dead’ in UKLink. This is done where they believe that the service has been removed and is no longer flowing gas, or to request the Meter Point status is changed from ‘Capped’ or ‘Clamped’ to ‘Live’. There are circa 8,000 ISO contacts raised per year.  **Reason for Change:**  Resolve pain points identified within the current process, including:  The existing version of CMS doesn’t have functionality to:   * Allow a referred to stakeholder (DN or IGT) to contact the contact originator (Shipper) to request clarification on the request or provide extra detail to assist in resolution * Stop contacts being incorrectly raised as DTL/ISO contacts when the scenario is an MPRN creation is required. * Easily provide an alternative address where there may be a discrepancy between the address held on UKLink/Gas Enquiry System (GES) and the address the Shipper believes the supply point resides   In the first scenario, any communication between the referred to stakeholder and the originator has to take place outside of the contact and Contact Management Service via phone calls and emails. This can have an impact on the time to resolve the contacts, uncertainty of where the contact is within the process and in some cases an unsatisfactory outcome causing the requirement to log the contact again.  In the second scenario, contacts are often logged as a DTL however, it is only during the investigation completed by the IGT or DN that it is identified as an incorrect DTL and should be a different contact type.  **New Processes:**  The new business process maps for the DTL and ISO processes be found [*here*](https://umbraco.xoserve.com/media/re3fjab4/iso-and-dtl-process-maps-external.pdf)  Please note, both process maps are the same but maps for each have been included for clarity and futureproofing. See below for a summary of the process:   * A single DTL/ISO contact can be raised via the user interface in the new version of CMS. When submitted there will be a pop-up window to show if the contact was logged, displaying the Contact Reference Number (CRN), otherwise it will show the rejection reason. * The DTL/ ISO contact can then be investigated, this may involve:   + Data Clarifications (DCs): a question raised by a CDSP agent to either the originator or a stakeholder.   + Originator Clarification (OC): a question raised by a stakeholder who did not raise the contact, to the person who raised the contact. A dialogue via this may be maintained until agreement to proceed is reached.   + Site Visit request (SV): a request from the CDSP agent to the Gas Transporter to investigate and confirm if the Meter Point status should be set to 'Live’ for DTL contacts or set to ‘Dead’ for ISOs * When the contact is resolved an alert will be displayed in the notifications area, and if selected the contact history and outcome (valid or invalid) will be displayed.   + In future releases the alert functionality will be expanded, for example it could include an alert when a DC has been sent to you or you have been responded to. * There will be the option to provide an alternative address, and this address detail will utilise the postal address look-up functionality that has previously been delivered as part of the Shipper raised MNumber creation (MNC) logging form.   To note, these processes do not require file upload/downloads. In a future CMS release the ability to upload a file of DTL/ ISO Contacts will be included.    A training guide will be provided in line with the release for the new processes, along with standard help and FAQs that will be published on the [CMS Rebuild Page](https://www.xoserve.com/products-services/data-products/contact-management-service-cms/cms-rebuild/).  The new version of CMS 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 Current Status, Site Visit (SV) requests/responses, Data Clarification (DC) requests/responses, Contact Originator (CO) requests/responses, and update dates and times. * **Transparency:** The detail (where relevant) of the contact can be viewed by all stakeholders involved in the contact * **Reduction of customer effort:** Alternative address to that currently held on UKLink can be provided to assist the Gas Transporter to whom the contact has been referred * **Increased systemised collaboration:** Where a stakeholder receives a referral (SV), they can directly communicate with the originator via the Originator Clarification (OC) functionality.   **Transition:**  A cut-off date will be communicated when DTL/ISO Contacts should no longer be raised via the existing version of CMS, and instead 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: | 20/02/2023 |
| Any further information: | None |

# Implementation

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| Target Release: | April 24th 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

Change Representation

(To be completed by User and returned for response)

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| User Contact Details: | Organisation: | SGN | |
| Name: | Sally-Ann Hardman | |
| Email: | sally.hardman@sgn.co.uk | |
| Telephone: | 07970019027 | |
| Representation Status: | Support | | |
| Representation Publication: | Publish | | |
| Representation Comments: | SGN supports the continued migration of CMS processes and the new processes set out for DTL and ISO. | | |
| Confirm Target Release Date? | Yes | | «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: | 13/02/2023 | | | | |
| Comms Ref(s): | 3139.6 - VO - 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: | 08/03/2023 | | | | |
| Release Date: | Adhoc | | | | |

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