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Project Q

Contact Management Service

UK Link Committee Meeting
10 November 2011

Agenda

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 - 1.2 Service Name
 - 1.3 Contact Management Service Landing Page
2. File Format Walkthrough
3. Exception Messages
4. Case Event Descriptions
5. User Security Controls
 - 5.1 Parent / Child Organisation
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7. Stakeholder Trials
 - 7.1 Approach
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 - 7.3 Communications
 - 7.4 Timeline

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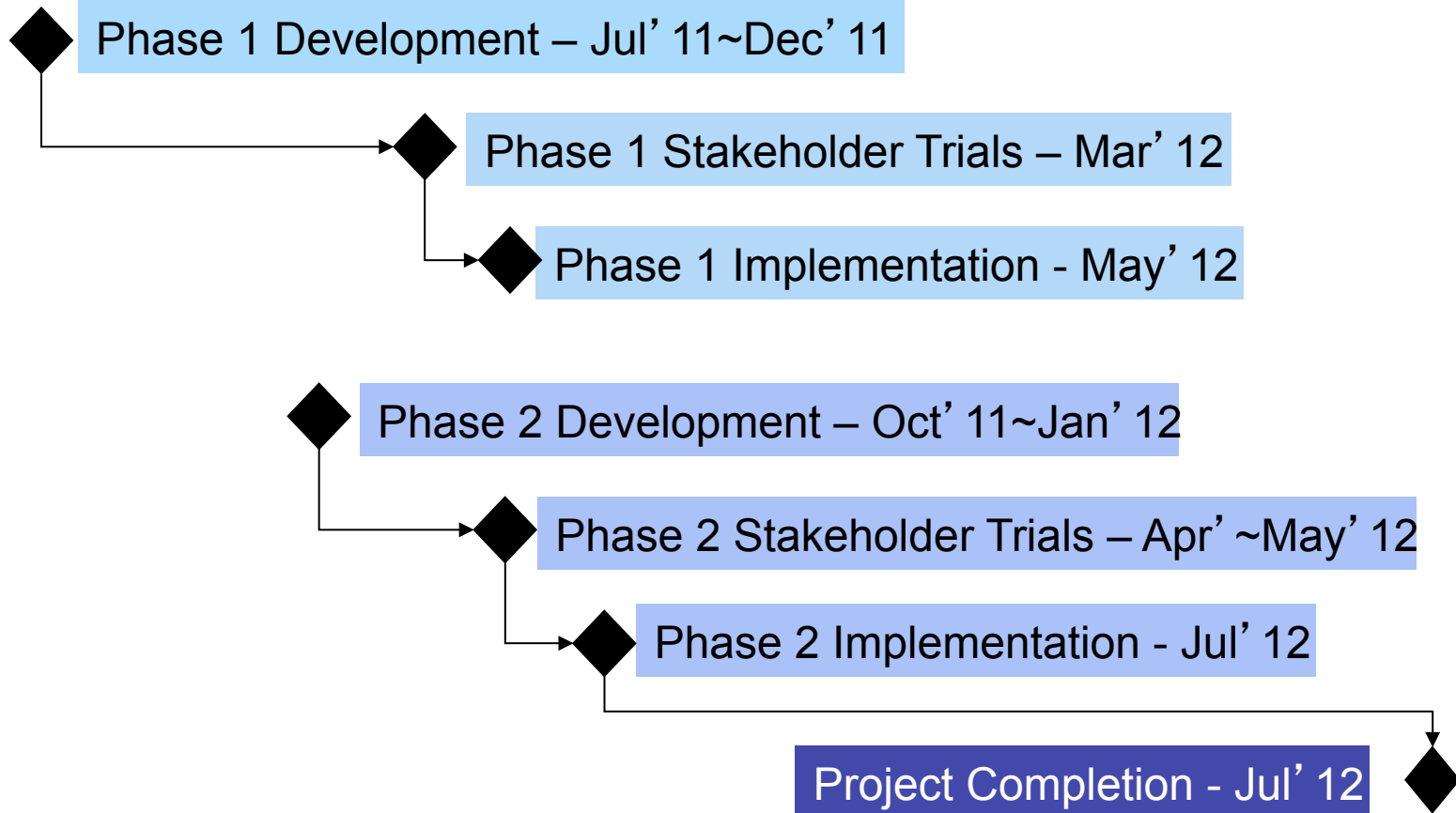
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Project Timeline
Indicative Milestones
Operational Update

Project Timeline - Indicative Milestones



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Service Name

Operational Update

Service Name

Contact Management – has three Sub Services

- **Data Amend Service:**

ADD AGG APP AQQ CDQ DMQ DUP ECO ENQ FLE FOM GSR
ISO MNC MUS PRS PSA PSI RFA SAR TOG TYP UNC

- **Invoicing Service:**

DMC DMR INV

- **Reconciliation Service:**

Filter Failure Processes



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Contact Management Service Landing Page

Operational Update

Contact Management

Contact Generator



Data Amend Service

ADD
AGG
APP
AQQ
CDQ
DMQ
DMR



Invoicing Service



Reconciliation Service



Bulk Contact Creation

File Upload

My Tasks

CC1-3456SV1

DC2-5678SV2

Recent Activity

Contact Support

Contact Us

Contacts Queues

Contacts Explained

Search Options

Contact Reference Number

Find

Advanced Search

File Search



Archive



Configuration Change



Data Clarification

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File Format Walkthrough

Technical Update

File Format Walkthrough

- Scope of walkthrough: Phase 1 File Formats proposed for:
 - 'QMP' File sent by Originator to log contacts in Q System
 - 'QCL' Report File for shippers for list of contacts closed for the Originator
 - 'QMR' Acknowledgement for QMP files
 - 'QMJ' Complete File Rejection for QMP files
 - 'QEX' Report File for shippers for list of case event status changes
- Xoserve are today seeking approval to the file formats issued
- Is potential for further File Format changes as a result of Phase 2 implementation

File Format Changes (1)

Current	
File Type	No. Of Fields
QMP	95
QMJ	No change
QMR	97+
QCL	41
QEX	106

Proposed	
File Type	No. Of Fields
QMP	68
QMJ	No change
QMR	70+
QCL	30
QEX	90

Potential	
File Type	No. Of Fields
QMP	68
QMJ	No change
QMR	70+
QCL	27
QEX*	24

File Format Changes (2)

Summary			
File Type	Removed Fields	New Fields	Name Changes
QMP	59	32	18
QMJ	N/A	N/A	N/A
QMR	59	32	18
QCL	11	0	3
QEX	16	0	3

Summary - Potential			
File Type	Removed Fields	New Fields	Name Changes
QCL	3	0	0
QEX	67	0	0

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Exception Messages

Technical / Operational Update

Reject Codes / Exception Messages

- Reject Codes are formed by 3 letters and 5 numbers
 - CNQ00034 = Domestic v. Industrial indicator not provided
 - There are 188 that exist today for ConQuest transactions
- Due to process re-engineering there are 69 additional Reject Codes
 - These are identifiable by the 3 letters of QRJnnnnn
 - New: - QRJ00066 = Meter Point Status is already live on UK-Link
 - This will increase when Phase 2 processes designed
- Reject Codes are transmitted via file
 - Currently :- sent via QMJ or QMR (code only)
 - Future :- they will also be sent via QCL (code) – if validation failures post logging a Contact (could be multiple reasons)

Reject Codes / Exception Messages

- Exception messages will appear on screen and form the resolution text if validation fails.
 - Exception messages appear if User makes an error prior to generating a Contact
 - Resolution Text is sent for validation failures post the Contact being logged
- We have similar rejection reasons – each has its own rejection code
 - CNQ00034 = Domestic v Industrial Indicator Not Provided
 - CNQ00035 = Domestic v Industrial Indicator not valid
 - CNQ00036 = Incorrect Format/Length for Domestic v Industrial IndicatorWe could simplify....
 - CNQ00034 = Please provide a valid 'domestic v industrial' indicator

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Case Event Descriptions

Operational Update

Case Event Descriptions

ADAC	Awaiting Adjustment Confirmation	INVL	Contact deemed invalid
ADCF	Awaiting DC from Originating Shipper	NETA	Network Action
ADCT	Awaiting DC from Third Party Shipper	NETR	Network Return
ALWQ	Allocated to Work Queue	QCPD	Quality Check Pending
ATCL	DC/CC Auto – closure	SMAR	Site visit request - asset
AWAJ	Awaiting Adjustment	SMRR	Site visit request - read
CCFR	Configuration Change Returned	SWAD	Swapped Address
CLRD	Contact Closed	SYIN	System Investigation
CRNG	Contact Reference Number Generated	SYUP	System Update
DCFR	Data Clarification Form Returned	VALI	Contact deemed valid
DMPA	Daily Meter Provider Action	WPUD	Configuration Change Request
DMPR	Daily Meter Provider Return		

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User Security Controls

Technical Update

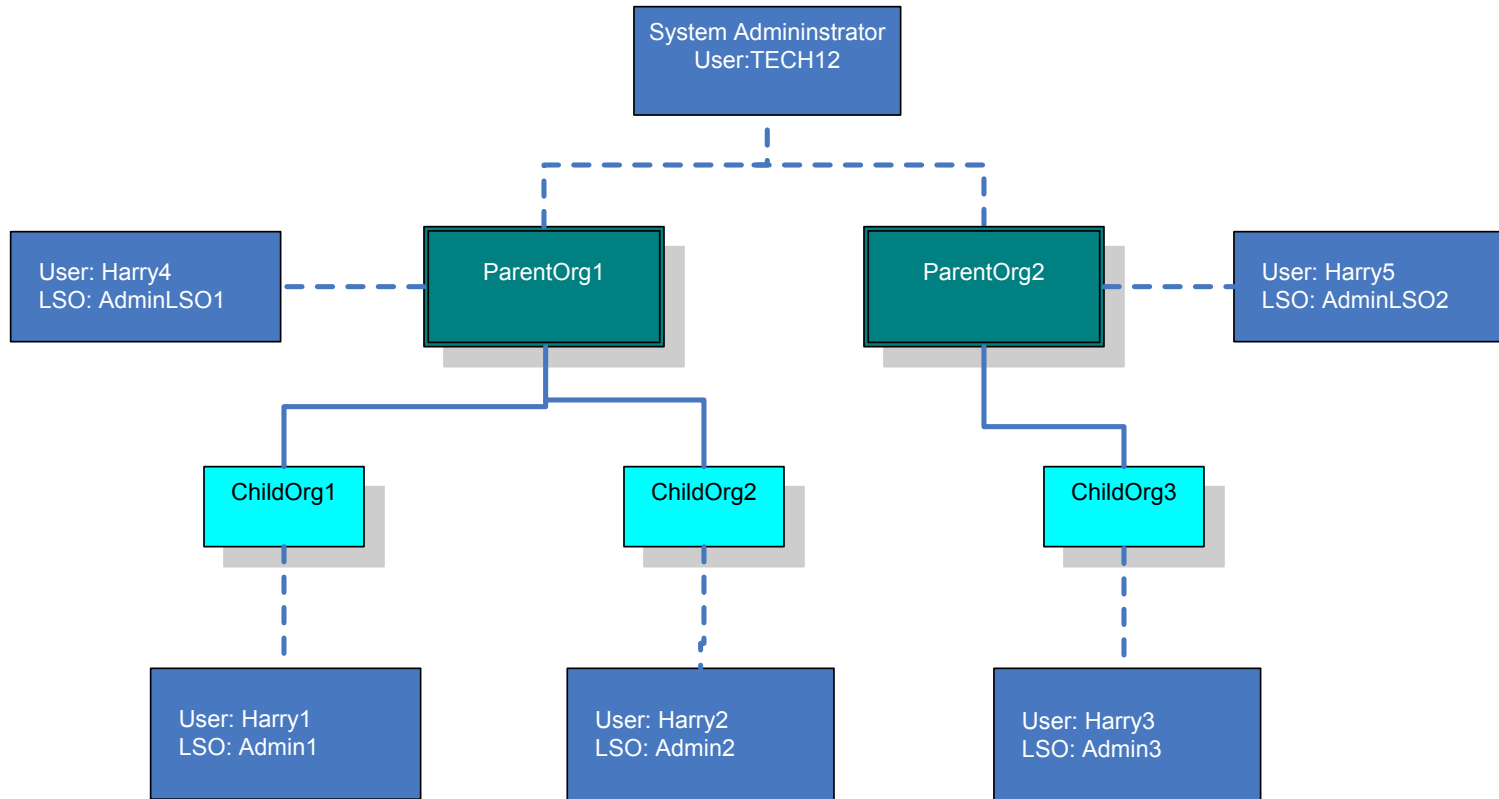
One User – One Account




- A User can only exist once in our security register
- Uniqueness of the User I.D. and email address will be tested as part of validation
- One account will provide a User access to the services that they have been granted
- An account per Shipper Short Code will be a thing of the past

Parent / Child Organisations

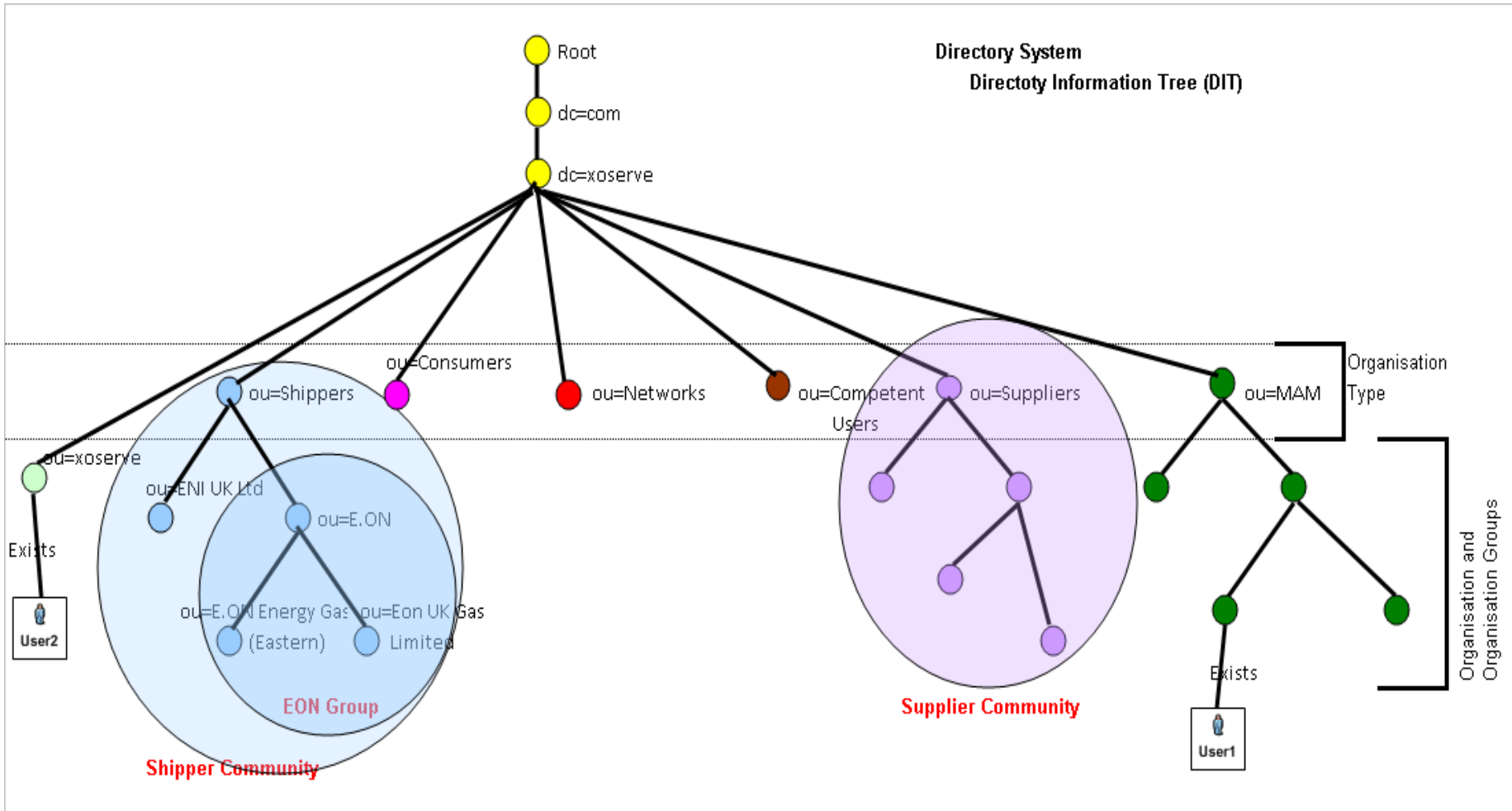
- Organisations that consist of multiple Shippers can have a 'Group' set up
- Parent / child structure provides flexibility as to how you set up your User base.
- This structure enables 'Parent' Organisations to manage User access controls across span of child organisations
- Enables the ability to confine access to 'Child' organisations

Parent / Child Organisations



-  Parent Organisation
-  Child Organisation
-  User and LSO

Parent / Child Organisations



Collecting User Profile / Role Details

STEP 1

- Xoserve to write to existing / known LSO's to confirm if they will remain the LSO
 - Xoserve can do this directly, or through CEUG representatives
 - Only relates to LSOs who have a ConQuest affiliation
- Xoserve will need Shipper to clarify, which part (group level or sub-division level) the LSO will reside
 - Only relevant to Shippers who are part of a group set-up
 - Xoserve will liaise directly to those that this relates to
- Where organisation does not have an identified LSO, Xoserve will write to organisation to obtain LSO nomination
 - There is a registration process for this

Collecting User Profile / Role Details

STEP 2

- Xoserve will write to confirmed LSO' s providing a spreadsheet for each LSO to collate User details for their organisation
 - Users will not be migrated from ConQuest
 - User profile details must be provided via the spreadsheet
 - Alternatively, the LSO' s can set up Users post phase 1 Go Live
- Xoserve will undertake validations on received spreadsheets to ensure that the User Id and Email address is unique
 - Xoserve will resolve any discrepancies identified

Collecting User Profile / Role Details

TIMESCALES

- There will be 2 opportunities to submit User details:
 - By 27-Dec-2011: will mean that the user details provided can be utilised for internal testing purposes
 - By 09-Mar-2012: to have users registered and able to use the system on Day 1 Go-Live
- User details provided post dates will not be available in system on Day 1
 - LSOs will be required to create new Users within the PAWS system

Collecting User Profile / Role Details

What you can expect to receive:

- As part of the pre-implementation activities all User Data will be uploaded and validated
- Passwords will be auto generated and emailed to Users (exact timing to be confirmed at a later date) ahead of Day 1 Go-Live

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Transition

Technical Update

Transition (1)

- Ability to create new Phase 1 contacts will be disabled in ConQuest
- Phase 1 closed contacts will be migrated to Contact Management system
- Remaining (Phase 1) open contacts in ConQuest will be closed in ConQuest and migrated to Contact Management system
- Option will be available to search migrated contacts in Contact Management system
- Changes in Helpdesk arrangements –
Communicated at a later stage

Transition (2)

Communicate and agree Q file types/formats that will be used for each phase

Q File Type Phased Approach

FILE TYPE	IN /OUT	PROPOSAL
QMP	I	Have a new QMP file implemented in Phase 1 and only route to Q. Stakeholders informed of change for Phase 1 TOG & GSR contacts via new QMP logged manually into ConQuest until Phase 2
QMJ	O	The existing format QMJ file will be implemented for Phase 1. As this is a rejection response from a QMP file, you will only receive one QMJ file back
QMR	O	As a result of using QMP file into Q then the QMR file will just be routed from Q. Need to inform users of change to file format.
QCL	O	a) Use new format QCL file for Phase 1 & stop any QCL files coming from ConQuest. Data migration script to send closed contacts from ConQuest to Q which are then closed retrospectively resulting in users getting new format QCL file albeit a possible delay. Stakeholders to be informed of new format for Phase 1 or b) New proposal is to not send any QCL files from outstanding contacts on ConQuest during Phase 1. Understanding required from Shippers at CEUG of the impact this will cause
QEX	O	Not issue QEX file from ConQuest for Phase 1, if required by stakeholders send via e-mail

Transition Approach – Data Migration

PRE-IMPLEMENTATION

- All ConQuest Closed Contacts will be migrated to new system
- Operational Contact Codes: ≤ 5 years old
- Invoicing Contact Codes: ≤ 10 years old

DURING CUTOVER

- As Contacts closed on ConQuest will be migrated nightly
- Any ConQuest contacts still at Open status at end of Cutover will be manually transferred

Transition Approach – Data Migration

- Approach will be same for both Phase 1 and 2
- Users will be able to access migrated contacts via Search Facility
- No historic data will be migrated for non ConQuest processes to Contact Management system

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Stakeholder Trials

Operational Update

Stakeholder Trials - Approach

- Open to all external Users of the Contact Management Service:
 - Shippers
 - MRAs
 - Network Operators
 - DMSPs
 - UIPs
- Trials conducted for both Phase 1 and Phase 2
- Each Trial period will be 2 weeks in duration
 - Trial Phase 1: 5th – 17th March 2012 (*indicative dates*)
 - Trial Phase 2: 30th April – 7th May 2012 (*indicative dates*)
- Scope of each Trial will be limited to processes being implemented in that phased release

Stakeholder Trials - Participation

- Participants to register interest 4 months prior to each Trial
 - Phase 1 ~ 7th November 2011 (*indicative date*)
 - Phase 2 ~ 9th January 2012 (*indicative date*)
- Provide names of Testers and contact details
 - Individuals will be invited to form the Stakeholder Trials Working Group along with Xoserve representatives
- No. of Testers will be limited to 2 per Organisation initially
- Final No. of Testers will be agreed after confirmation of number of participants,
 - Dependent upon level of take up, may be flexibility to have more testers per Organisation

Stakeholder Trials - Access

- Trial will be conducted remotely from Stakeholder participants standard office location
- User Access to Trial Environment will be granted via Internet URL
- User Accounts will be set up in advance of each Trial
- Participating Users will be required to provide User details prior to each trial
 - Xoserve will provide template to Users to collate User details

Stakeholder Trials - Communication

- **Communication Strategy**
 - Propose to establish a separate Forum for Stakeholder Trials Working Group
 - Continue to communicate progress, highlights, topics of interest through CEUG and UK Link Committee fora
- **Communication Strategy ~ Key Milestones (Proposed) :**
 - Initial Approach Walkthrough
 - Training
 - Regular Progress Checkpoint meetings - run up to the Trials
(Suggested frequency is fortnightly for the 3 months leading up to Trials – tba)
 - Regular Checkpoint meetings during the Trial
 - Post Trial Review

Stakeholder Trials - Supporting Documents

User Access	Template to provide details required to set up User Accounts to access trials environments – Security Template.
User Trials Training Pack	Training materials relating to the processes being executed in each Trial.
Stakeholder Trials Set Up Document	Instructions on how to access the Trial environment and check connectivity.
Stakeholder Trials Guidelines	Document containing key information required for User Trials.
User Trials Instruction Sheet	Document containing step by step instructions for the processes to be executed by participants during the Trials.
User Trial Schedule	Document containing a timetable for each activity during the execution of the Trials.
User Trials Scenario Document	High level details of the business processes to be executed during the Trials.
Stakeholder Trial Test Case Template	Template to capture details of the test script, expected results and actual results of each test case. (Presented at last CEUG)

Stakeholder Trials Phase 1 – Timeline

Activity	Timeline	Indicative Date
Register Participation	Trial -4 months	<i>7 Nov 11</i>
Submit Tester names & contact details	Trial -3.5 months	<i>21 Nov 11</i>
Approach Walkthrough	Trial -3 months	<i>w.c. 05 Dec 11</i>
Provide Tester Access Set Up Details	Trial -5 weeks	<i>30 Jan 12</i>
Provide Final Stakeholder Test Cases	Trial -5 weeks	<i>30 Jan 12</i>
Provide Stakeholder Training Pack	Trial -3 weeks	<i>13 Feb 12</i>
Stakeholder Training	Trial -3 weeks	<i>13-24 Feb 12</i>
Provide Stakeholder Trial Guidelines inc. Scenarios	Trial -1 week	<i>27 Feb 12</i>
Provide Stakeholder Trial Instructions	Trial -1 week	<i>27 Feb 12</i>
Provide Stakeholder Trial Schedule	Trial -1 week	<i>27 Feb 12</i>
Issue Tester Account Details	Trial -1 week	<i>w.c. 24 Feb 12</i>
URL Connection Test	Trial -1 week	<i>w.c. 27 Feb 12</i>
Stakeholder Trials	Trial	<i>5-16 Mar 12</i>

Stakeholder Trials Phase 2 – Timeline

Activity	Timeline	Indicative Date
Register Participation	Trial -5 months	<i>7 Nov 11</i>
Submit Tester names & contact details	Trial -3.5 months	<i>16 Jan 12</i>
Approach Walkthrough	Trial -3 months	<i>w.c. 30 Jan 12</i>
Provide Tester Access Set Up Details	Trial -5 weeks	<i>26 Mar 12</i>
Provide Final Stakeholder Test Cases	Trial -5 weeks	<i>26 Mar 12</i>
Provide Stakeholder Training Pack	Trial -3 weeks	<i>9 Apr 12</i>
Stakeholder Training	Trial -3 weeks	<i>9 Apr 12</i>
Provide Stakeholder Trial Guidelines inc. Scenarios	Trial -1 week	<i>26 Mar 12</i>
Provide Stakeholder Trial Instructions	Trial -1 week	<i>23 Apr 12</i>
Provide Stakeholder Trial Schedule	Trial -1 week	<i>9-21 Apr 12</i>
Issue Tester Account Details	Trial -1 week	<i>w.c. 16 Apr 12</i>
URL Connection Test	Trial -1 week	<i>w.c. 23 Apr 12</i>
Stakeholder Trials	Trial	<i>30 Apr–11 May 12</i>