Extraordinary Change Management Committee

20th February 2024

CMS Rebuild – Must Read (MUR) file formats

EChMC- February 2024

Potential impact to customer processes following changes to Must Read file formats

- Feedback was received following the MUR change pack submission that changes to the Must Read file formats from those in legacy will see negative impacts on some organisations

- Some organisations upload the downloaded must read (MJO), Rejected must read (RJO) and Level 3 must read (LTO) files into their own systems, and subsequently their own systems produce the files used in the next stage of the process that contain the outcome of the site visits MJI, RJI, and LTI

- As the files which are downloaded from new CMS will have some additional fields to those that were downloaded from legacy CMS, these organisations will potentially need to make changes to their systems in order to accept the files, and then generate create the files for upload into new CMS in the correct format

- Therefore, the CMS rebuild team has considered some different options to provide support customers for a period of time until they have been able to make the necessary changes to their systems

Proposed support options

For options 1 & 2 and extra LWI will be provided for the reformatting, as well as the full Must Read training guide that will be published for the whole process. For option 3, all the detail will be contained within the full Must Read training guide

Option 1:

- On download of the files, customer will follow a quick process using excel to change the format of the file to match that of the legacy file format so it may be uploaded into their systems (an LWI will be provided for this as well as the full Must Read process training guide that will be published).
- When must read investigations/site visits are completed and the customer is ready to provide the outcomes, rather than uploading the file into CMS themselves, they can forward to the CDSP who will amend the format on their behalf, so that it may be accepted in the system
- The CDSP will load the file, within an agreed SLA, and respond to the customer with the outcome i.e. success of the file being loaded, the number of records accepted, and the rejection reason(s) for any records which were not accepted (so that they can be investigated and a new file potentially produced for uploading

Option 2:
- On download of the files, customer will follow a quick process using excel to change the format of the file to match that of the legacy file format so it may be uploaded into their systems
- When must read investigations/site visits are completed and the customer is ready to provide the outcomes, they will use the MUR file processing tool (an LWI will be provided for this) to create the files for upload.
- The customer will upload the file into CMS and check the for success of file being accepted, the records accepted, and the rejection reason(s) for any records which were not accepted

Proposed support options

Option 3:

- On download of the file, the customer will not carry out any re-formatting to load into their systems
- When must read investigations/site visits are completed and the customer is ready to provide the outcomes, they will use the MUR file processing tool (an LWI will be provided for this) to create the files for upload.
- The customer will upload the file into CMS and check the for success of file being accepted, the records accepted, and the rejection reason(s) for any records which were not accepted

The table on the next slide shows some more detail for each option

Proposed support options

Option	Description	Actor	File	Step
Option 1	Customers self manage download MJO/RJO Custome amends formatting (using excel) to format so that their systems will accept the file When their system has creted the MJI/RJI the customer uses the MUR processing tool to produce the MJI/RJI that CMS can accept ready for upload to CMS Customer uploads to CMS	Customer	MJO/RJO	Customers download the the file
				Open in Excel
				Delete the fields their system does not currently accept
				Upload file into their systems
			MJI/RJI	Customers produce the MJI as they do today
				Open MJI in Excel
				Open MUR file processing tool
				Import the MJO into the 'Imported file' tab
				In the file processing tool, identify the contacts that are included in their MJI
				Copy and paste those rows into the 'File creator' tab
				Paste in the procurred data from the Excel MJI file into the relevant rows
				When completed, Export to MJI from the tool
				Upload new MJI into CMS UI upload
Option 2	Customers self manage download MJO/RJO Customer amends formatting (using excel) to format so that their systems will accept the file When their system has creted the MJI/RJI the customer emails the file to CDSP CDSP uses the MUR processing tool to produce the MJI/RJI that CMS can accept ready for upload to CMS CDSP uploads to CMS	Customer	MJO/RJO	Customers download the the file
				Open in Excel
				Delete the fields their system does not currently accept
				Upload file into their systems
		CDSP	MJI/RJI	Customers produce MJI as they do today
				Customer emails MJI to CDSP
				Open MJI in Excel
				Open MUR file processing tool
				Import the MJO into the 'Imported file' tab
				In the file processing tool, identify the contacts that are included in their MJI
				Copy and paste those rows into the 'File creator' tab
				Paste in the procurred data from the Excel MJI file into the relevant rows
				When completed, Export to MJI from the tool
				Upload new MJI into CMS UI upload
Option 3	Customer manages process without uploading or downloading from their systems Customer uses the MUR processing tool to update any procurred reads and visit results When ready, the MJI/RJI is created directly from the processing tool Customer uploads to CMS	Customer	MJO/RJO/MJI/RJI	Customer downloads MJO/RJI
				Imports file into the processing tool
				As and when visit results are completed, the information is added into the processing tool directly
				When customer is ready to submit a file, the MJI/RJI is generated from the tool
				Upload new MJI into CMS UI upload

File format changes – additions/changes to MJO/MJI

FIELD NAME	Populated in MJO or for population in MJI	NEW OR CHANGE FROM EXISTING MJO	Reason for change
Contact reference number	MJO	label change	To bring in line with standard field naming
Meter Serial Number	MJO	label change	To bring in line with standard field naming
Meter make	MJO	New	Added to assist reader in locating correct meter and/or identify any discrepencies with data held on UKLink
Meter model	MJO	New	Added to assist reader in locating correct meter and/or identify any discrepencies with data held on UKLink
KMI Indicator	MJO	New	Added due to MOD5605 requirement to provide meter issue flag information where a flag has been added or removed through KMI process and there is a MUR contact open at that time
Update/information	MJO	New	Added to provide any detail CDSP may have been aware of that might assist MRA/IGT/DN in investigation or if MUR still required
Meter serial number read	MJI	New	To allow the reader of the meter to provide detail of the meter that was found and read, which may be different to the Meter Serial Number is currently attached on UKLink
Comments group	MJI	label change	Was 'Comments' but changed to 'Comments group', and specific comments made available to ensure correct validation
Comments	MJI	New	Added in case extra information could be provided to assist in resolution of contact

File format changes – additions/changes to RJO/RJI

FIELD NAME	Populated in RJO or for population in RJI	NEW OR CHANGE FROM EXISTING MJO	Reason for change
Contact reference number	RJO	label change	To bring in line with standard field naming
Meter serial number	RJO	label change	To bring in line with standard field naming
Meter make	RJO	New	Added to assist reader in locating correct meter and/or identify any discrepencies with data held on UKLink
Meter model	RJO	New	Added to assist reader in locating correct meter and/or identify any discrepencies with data held on UKLink
KMI Indicator	RJO	New	Added due to MOD5605 requirement to provide meter issue flag information where a flag has been added or removed through KMI process and there is a MUR contact open at that time
Update/Information	RJO	New	Added to provide any detail CDSP may have been aware of that might assist MRA/IGT/DN in investigation or if MUR still required
Meter serial number read	RJO	New	To allow the reader of the meter to provide detail of the meter that was found and read, which may be different to the Meter Serial Number is currently attached on UKLink
Comments group	RJO	label change	Was 'Comments' but changed to 'Comments group', and specific comments made available to ensure correct validation
Reader comments	RJO	New	Added in case extra information could be provided to assist in resolution of contact
Rejection reason	RJO	Label change	Label change to highlight this is the reason the original read provided on the MJI was rejected
Latest comments group	RJI	Label change	Label change to highlight in the Contact detail that this is the comment from the most recent visit
Comments	RJI	New	Added in case extra information could be provided to assist in resolution of contact

File format changes – additions/changes to LTO/LTI

FIELD NAME	Populated in LTO or for population in LTI	NEW OR CHANGE FROM EXISTING MJO	Reason for change
Status	LTO		
Contact reference number	LTO	label change	To bring in line with standard field naming
MPRN	LTO		
Meter serial number	LTO	label change	To bring in line with standard field naming
Corrector serial number	LTO		
Address	LTO		
Post code	LTO		
Date returned	LTO		
Comments group	LTO	label change	Was 'Comments' but changed to 'Comments group', and specific comments made available to ensure correct validation
Reader comments	LTO	New	Added in case extra information could be provided to assist in resolution of contact
Date sent to MRA	LTO		
Level 3 target date	LTO		
Access instructions	LTO	New	Added to provide access instructions that were provided in MJO
Meter location	LTO	New	Added to provide meter location provided in MJO
Meter make	LTO	New	Added to assist reader in locating correct meter and/or identify any discrepencies with data held on UKLink
Meter model	LTO	New	Added to assist reader in locating correct meter and/or identify any discrepencies with data held on UKLink
KMI indicator	LTO	New	Added due to MOD5605 requirement to provide meter issue flag information where a flag has been added or removed through KMI process and there is a MUR contact open at that time
Update/Information	LTO	New	Added to provide any detail CDSP may have been aware of that might assist MRA/IGT/DN in investigation or if MUR still required
Level 3 read date	LTI	Label change	Changed to 'Level 3 read date' to differentiate from dates provided in MJO
Meter reading	LTI		
Meter serial number read	LTI	Label change	To bring in line with naming of field in MJI
Corrector serial number on site	LTI		
Corrected reading	LTI		
Uncorrected reading	LTI		
Level 3 comments group	LTI	label change	Was 'Comments' but changed to 'Level 3 comments group' to differentiate in contact detail from comment groups provided in MJI, and specific comments made available to ensure correct validation
Comments	LTI	New	Added in case extra information could be provided to assist in resolution of contact

XRN5556J - Contact Management Service (CMS) Rebuild – Delivery of Must Reads Process (MUR)

Detailed Design Summary

ChMC Action	Voting Parties	Impacted Parties	Release
Vote to approve the Detailed Design and progress into delivery	Shipper, DNOs, IGT's	Shipper, DNOs, IGT's	Adhoc – proposed 04/03/2024

Change Pack Ref	Representation Summary			Outcome
	Approve	Defer	Reject	
3248.2 - LO -PO	1	1		Deferred voting to eChMC
3256.5 - LO – PO (for information)	**No representations received – closes out on 19/02/2024**			**To be presented for voting at eChMC on 20th February**

Change Proposal	Solution Option Agreed	Service Area and Funding
CP presented at ChMC 10/01/2024 **Link to CP**	N/A - Solution Option stage not required	N/A – CMS investment funded

ANY OTHER BUSINESS

- Cloud IX Update – verbal update