

# Bilateral Transactions Programme

Pathfinder Group – Meeting 3

3 November 2020

## Agenda

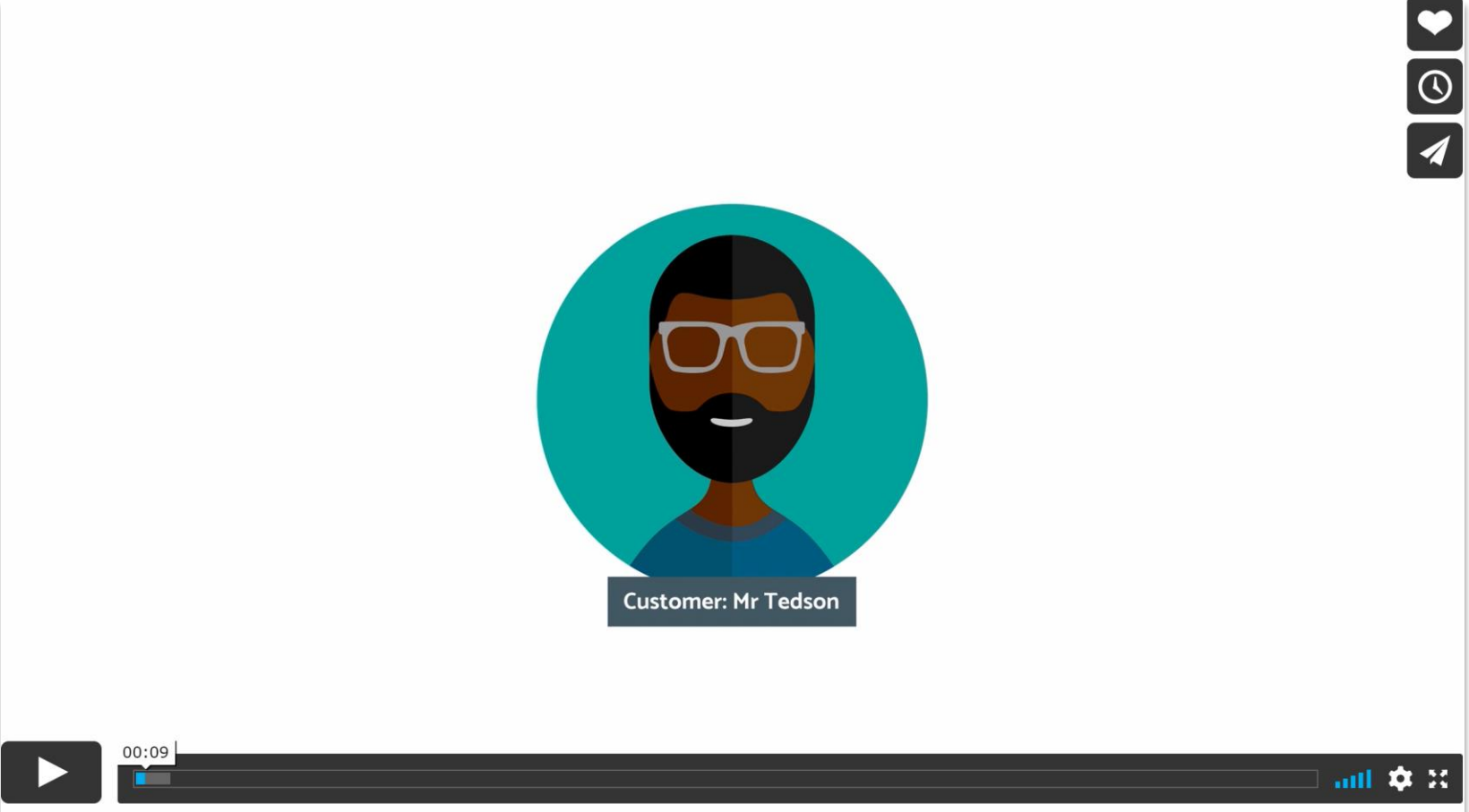
- ◆ **Welcome and Introductions (5 mins)**
- ◆ Review of outstanding actions/questions (10 mins)
- ◆ Feedback following demonstration to Contract Managers (10 mins)
- ◆ Review of Data Catalogue/Data Transactions for C1.R process (15 mins)
- ◆ Discussion on training materials (10 mins)
- ◆ AOB

- Welcome and Introductions (5 mins)
- **Review of outstanding actions/questions (10 mins)**
- Feedback following demonstration to Contract Managers (10 mins)
- Review of Data Catalogue/Data Transactions for C1.R process (15 mins)
- Discussion on training materials (10 mins)
- AOB

Pathfinder Group - action log					
Action	Meeting	Description	Owned by	Comments	Status
A01	08/10/2020	Confirm whether the Bilaterals Hub would allow for multi-user sign in for users with more than one Retailer	MOSL	This has been listed as a requirement within the development backlog as a low priority item.	Closed
A02	08/10/2020	Confirm the plans for reporting requirements	MOSL	MOSL are currently exploring different options around reporting requirements and are looking to share with the OAG next week.	Open
A03	08/10/2020	Confirm whether there will be a similar data export functionality like the CMOS Market Data Set (MDS) reports	MOSL	This has been listed as a requirement within the development backlog as a low priority item as reporting requirements are reviewed.	Closed
A04	08/10/2020	Confirm whether the Bilaterals Hub would be a separate site address or whether it would be integrated with the CMOS portal	MOSL	Initially the Bilaterals Hub will have a separate site address (i.e. to CMOS). But will be reviewed as part of the MOSL channel management strategy	Closed

- Welcome and Introductions (5 mins)
- Review of outstanding actions/questions (10 mins)
- **Feedback following demonstration to Contract Managers (10 mins)**
- Review of Data Catalogue/Data Transactions for C1.R process (15 mins)
- Discussion on training materials (10 mins)
- AOB

# Feedback following C1 demo to Contract Managers

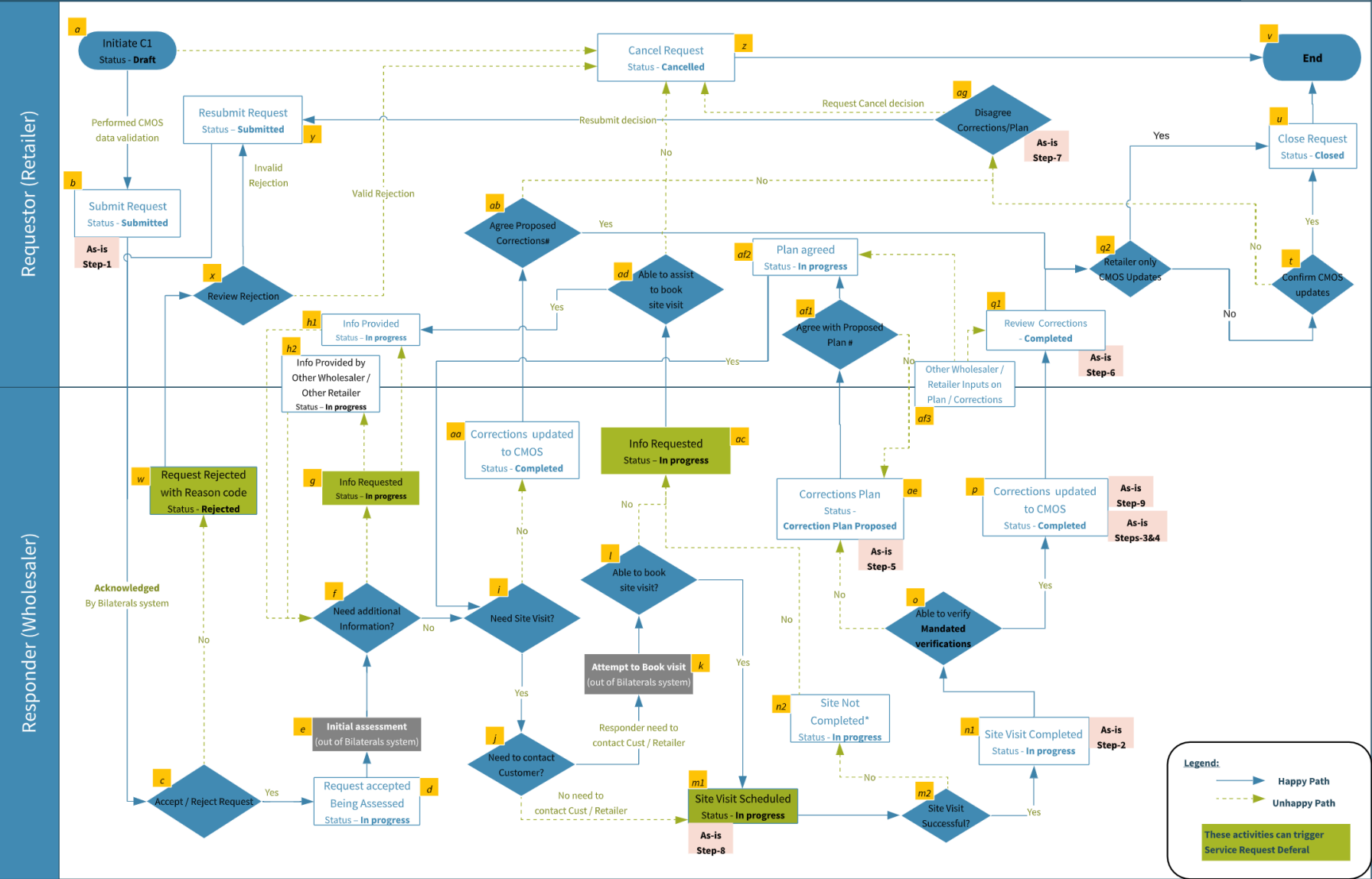


The video player interface features a central circular profile of a man with a beard and glasses, labeled "Customer: Mr Tedson". The player includes a play button, a progress bar showing 00:09, and a control panel with volume, settings, and full-screen icons. On the right side of the video frame, there are three vertical icons: a heart, a clock, and a paper plane.

- Welcome and Introductions (5 mins)
- Review of outstanding actions/questions (10 mins)
- Feedback following demonstration to Contract Managers (10 mins)
- **Review of Data Catalogue/Data Transactions for C1.R process (15 mins)**
- Discussion on training materials (10 mins)
- AOB

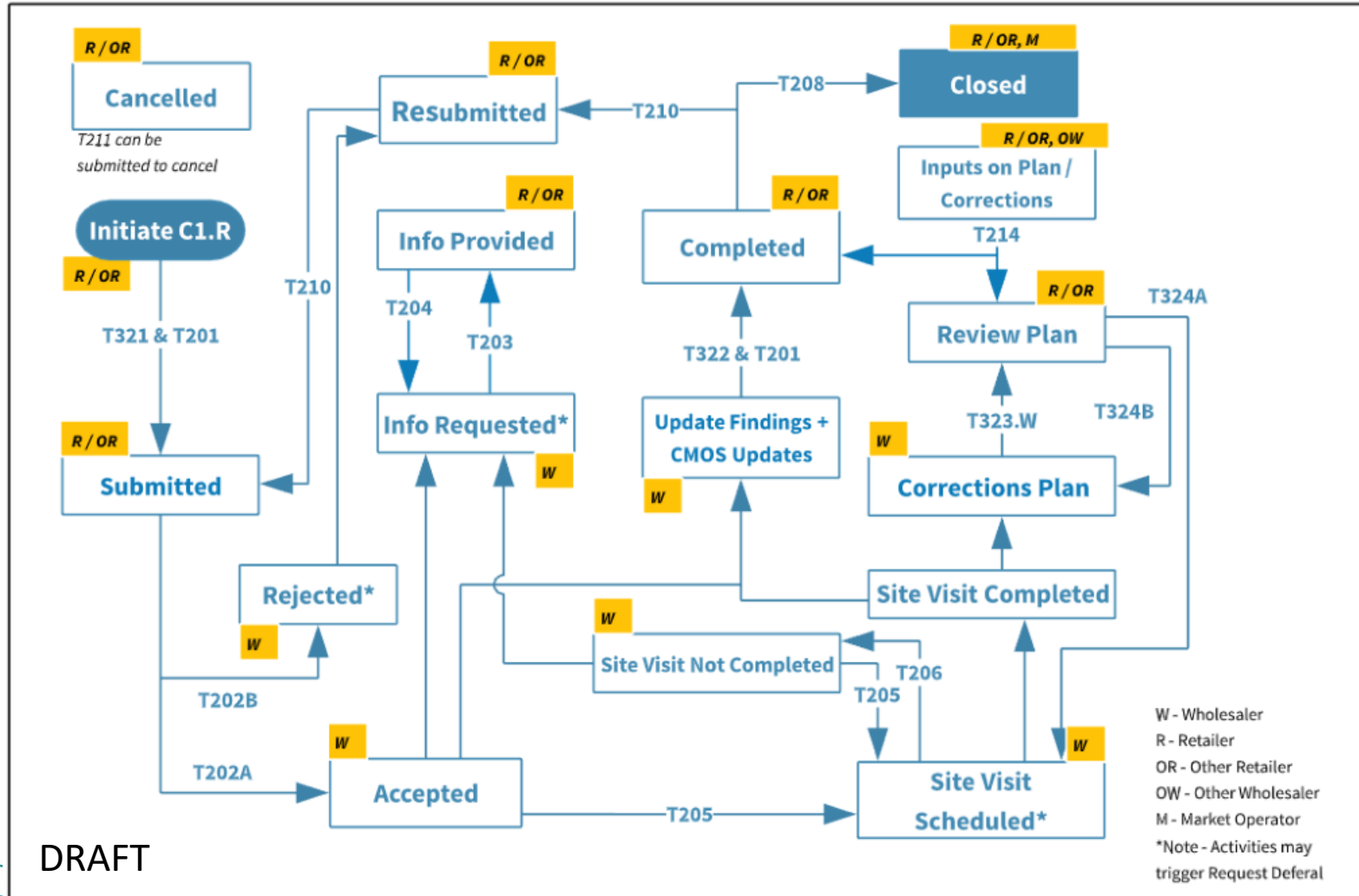
# C1.R (retailer) process diagram

## C1 – Retailer Initiated Process (Version 0.9)





# C1.R transactional process diagram



# C1.R transactions and state transitions (DRAFT)

Current Request Status	Current Activity Status	Transaction	Requestor Retailer Activities	Wholesaler Activities	Hub Activity Options	Next Status-Responsible Party (main)
SUBMITTED	SUBMITTED	T321	CANCELLED	ACCEPTED REJECTED	-	Wholesaler
CANCELLED	CANCELLED	T211	-	-	-	-
IN PROGRESS	ACCEPTED	T202A	CANCELLED	INFO REQUESTED VISIT SCHEDULED COMPLETED	-	Wholesaler
IN PROGRESS	REJECTED	T202B	RESUBMITTED CANCELLED	-	-	Retailer
SUBMITTED	RESUBMITTED	T210	CANCELLED	ACCEPTED REJECTED	-	Wholesaler
IN PROGRESS	INFO REQUESTED	T203	INFO PROVIDED CANCELLED	-	CLOSED (If no status change within 30 BDs)	Retailer
IN PROGRESS	INFO PROVIDED	T204	CANCELLED	INFO REQUESTED VISIT SCHEDULED COMPLETED	-	Wholesaler
IN PROGRESS	VISIT SCHEDULED	T205	CANCELLED	VISIT NOT COMPLETED COMPLETED PLAN PROPOSED	-	Wholesaler
IN PROGRESS	VISIT NOT COMPLETED	T206	CANCELLED	INFO REQUESTED VISIT SCHEDULED	-	Wholesaler
IN PROGRESS	PLAN PROPOSED	T323	CANCELLED PLAN PROPOSED PLAN DISPUTED	-	HUB to updated PLAN AGREED (if no status change within 10 BDs)	Retailer
IN PROGRESS	PLAN AGREED	T324A	CANCELLED	INFO REQUESTED VISIT SCHEDULED COMPLETED	-	Wholesaler
IN PROGRESS	PLAN DISPUTED	T324B	CANCELLED	PLAN PROPOSED INFO REQUESTED	-	Wholesaler
COMPLETED	COMPLETED	T322	CLOSED RESUBMITTED	-	CLOSED (If no status change within 30 BDs)	Retailer
CLOSED	CLOSED	T208	- (Locked)	- (Locked)	- (Locked)	None

# C1.R Transactions and state transitions (DRAFT)

Activity status associated with each transaction

Current Request Status	Current Activity Status	Transaction	Wholesaler Activities	Wholesaler Activities	Hub Activity Options	Next Status-Responsible Party (main)
SUBMITTED	SUBMITTED	T321	CANCELLED	ACCEPTED REJECTED	-	Wholesaler
CANCELLED	CANCELLED	T211	-	-	-	-
IN PROGRESS	ACCEPTED	T202A	CANCELLED	INFO REQUESTED VISIT SCHEDULED COMPLETED	-	Wholesaler
IN PROGRESS	REJECTED	T202B	RESUBMITTED CANCELLED	-	-	Retailer
SUBMITTED	RESUBMITTED	T210	CANCELLED	ACCEPTED REJECTED	-	Wholesaler
IN PROGRESS	INFO REQUESTED	T203	INFO PROVIDED CANCELLED	-	CLOSED (If no status change within 30 BDs)	Retailer
IN PROGRESS	INFO PROVIDED	T204	CANCELLED	INFO REQUESTED VISIT SCHEDULED COMPLETED	-	Wholesaler
IN PROGRESS	VISIT SCHEDULED	T205	CANCELLED	VISIT NOT COMPLETED COMPLETED PLAN PROPOSED	-	Wholesaler
IN PROGRESS	VISIT NOT COMPLETED	T206	CANCELLED	INFO REQUESTED VISIT SCHEDULED	-	Wholesaler
IN PROGRESS	PLAN PROPOSED	T323	CANCELLED PLAN PROPOSED PLAN DISPUTED	-	HUB to updated PLAN AGREED (if no status change within 10 BDs)	Retailer
IN PROGRESS	PLAN AGREED	T324A	CANCELLED	INFO REQUESTED VISIT SCHEDULED COMPLETED	-	Wholesaler
IN PROGRESS	PLAN DISPUTED	T324B	CANCELLED	PLAN PROPOSED INFO REQUESTED	-	Wholesaler
COMPLETED	COMPLETED	T322	CLOSED RESUBMITTED	-	CLOSED (If no status change within 30 BDs)	Retailer
CLOSED	CLOSED	T208	- (Locked)	- (Locked)	- (Locked)	None

# C1.R Transactions and state transitions (DRAFT)

The next available activities for Wholesaler and Retailer users (based on the current status)

Current Request Status	Current Activity Status	Transaction	Requestor Retailer Activities	Wholesaler Activities	Hub Activity Options	Next Status-Responsible Party (main)
SUBMITTED	SUBMITTED	T321	CANCELLED	ACCEPTED REJECTED	-	Wholesaler
CANCELLED	CANCELLED	T211	-	-	-	-
IN PROGRESS	ACCEPTED	T202A	CANCELLED	INFO REQUESTED VISIT SCHEDULED COMPLETED	-	Wholesaler
IN PROGRESS	REJECTED	T202B	RESUBMITTED CANCELLED	-	-	Retailer
SUBMITTED	RESUBMITTED	T210	CANCELLED	ACCEPTED REJECTED	-	Wholesaler
IN PROGRESS	INFO REQUESTED	T203	INFO PROVIDED CANCELLED	-	CLOSED (If no status change within 30 BDs)	Retailer
IN PROGRESS	INFO PROVIDED	T204	CANCELLED	INFO REQUESTED VISIT SCHEDULED COMPLETED	-	Wholesaler
IN PROGRESS	VISIT SCHEDULED	T205	CANCELLED	VISIT NOT COMPLETED COMPLETED PLAN PROPOSED	-	Wholesaler
IN PROGRESS	VISIT NOT COMPLETED	T206	CANCELLED	INFO REQUESTED VISIT SCHEDULED	-	Wholesaler
IN PROGRESS	PLAN PROPOSED	T323	CANCELLED PLAN PROPOSED PLAN DISPUTED	-	HUB to updated PLAN AGREED (if no status change within 10 BDs)	Retailer
IN PROGRESS	PLAN AGREED	T324A	CANCELLED	INFO REQUESTED VISIT SCHEDULED COMPLETED	-	Wholesaler
IN PROGRESS	PLAN DISPUTED	T324B	CANCELLED	PLAN PROPOSED INFO REQUESTED	-	Wholesaler
COMPLETED	COMPLETED	T322	CLOSED RESUBMITTED	-	CLOSED (If no status change within 30 BDs)	Retailer
CLOSED	CLOSED	T208	- (Locked)	- (Locked)	- (Locked)	None

# C1.R Transactions and state transitions (DRAFT)



Current Request Status	Current Activity Status	Transaction	Requestor Retailer	Wholesaler Activities	Hub Activity Options	Next Status- Responsible Party (main)
SUBMITTED	SUBMITTED	T321		ACCEPTED REJECTED	-	Wholesaler
CANCELLED	CANCELLED	T211		-	-	-
IN PROGRESS	ACCEPTED	T202A		INFO REQUESTED VISIT SCHEDULED COMPLETED	-	Wholesaler
IN PROGRESS	REJECTED	T202B	RESUBMITTED CANCELLED	-	-	Retailer
SUBMITTED	RESUBMITTED	T210	CANCELLED	ACCEPTED REJECTED	-	Wholesaler
IN PROGRESS	INFO REQUESTED	T203	INFO PROVIDED CANCELLED	-	CLOSED (If no status change within 30 BDs)	Retailer
IN PROGRESS	INFO PROVIDED	T204	CANCELLED	INFO REQUESTED VISIT SCHEDULED COMPLETED		Wholesaler
IN PROGRESS	VISIT SCHEDULED	T205	CANCELLED	VISIT NOT COMPLETED COMPLETED PLAN PROPOSED		Wholesaler
IN PROGRESS	VISIT NOT COMPLETED	T206	CANCELLED	INFO REQUESTED VISIT SCHEDULED	-	Wholesaler
IN PROGRESS	PLAN PROPOSED	T323	CANCELLED PLAN PROPOSED PLAN DISPUTED	-	HUB to updated PLAN AGREED (if no status change within 10 BDs)	Retailer
IN PROGRESS	PLAN AGREED	T324A	CANCELLED	INFO REQUESTED VISIT SCHEDULED COMPLETED	-	Wholesaler
IN PROGRESS	PLAN DISPUTED	T324B	CANCELLED	PLAN PROPOSED INFO REQUESTED	-	Wholesaler
COMPLETED	COMPLETED	T322	CLOSED RESUBMITTED	-	CLOSED (If no status change within 30 BDs)	Retailer
CLOSED	CLOSED	T208	- (Locked)	- (Locked)	- (Locked)	None

Activity statuses mapped to individual transactions

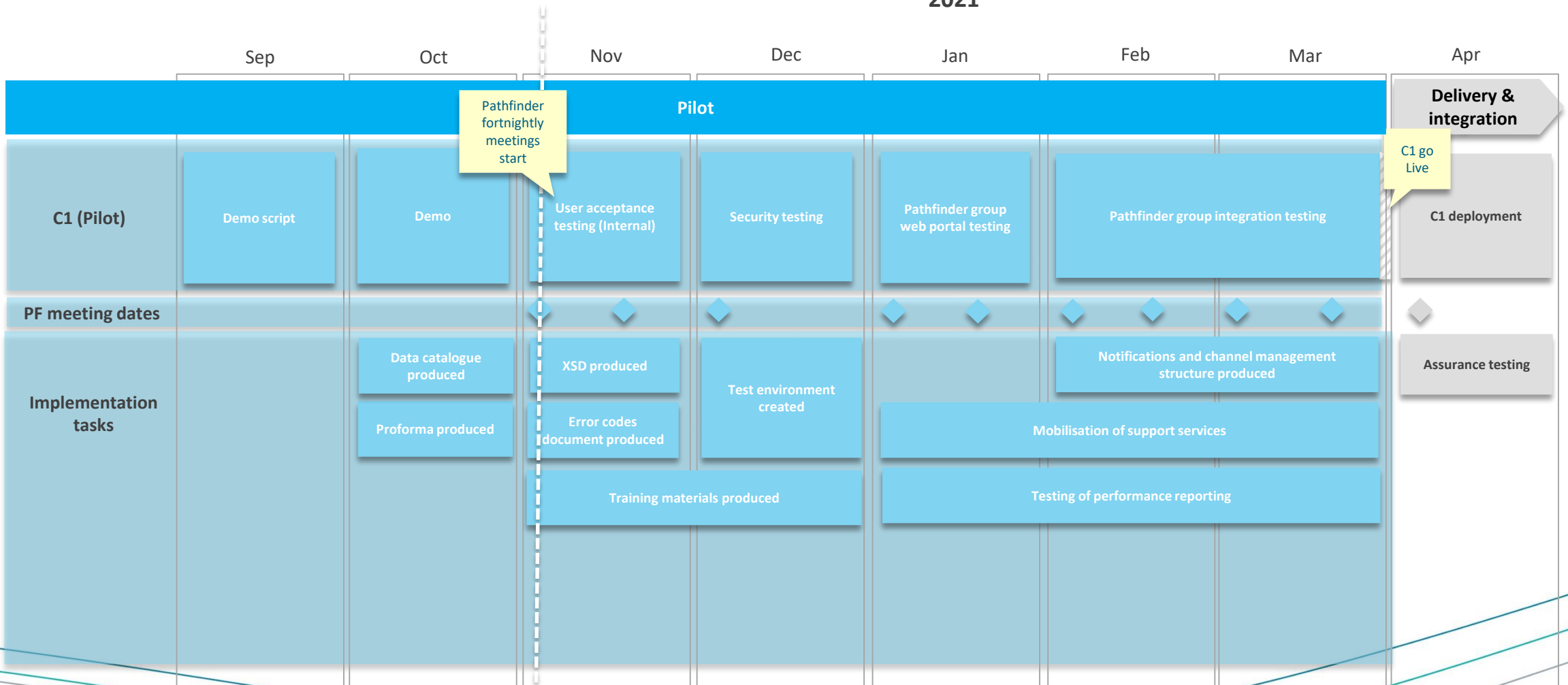
## C1.R transactions - next steps

- ◆ Feedback provided by Pathfinder Group by 10 November 2020
- ◆ Further updates to be shared with Pathfinder Group on 17 November 2020
- ◆ Additional feedback provided by 24 November 2020 (if required)
- ◆ XSDs shared with Pathfinder Group ahead of 1 December 2020 meeting

November 2020							^	v
Mo	Tu	We	Th	Fr	Sa	Su		
26	27	28	29	30	31	1		
2	<b>3</b>	4	5	6	7	8		
9	10	11	12	13	14	15		
16	17	18	19	20	21	22		
23	24	25	26	27	28	29		
30	1	2	3	4	5	6		

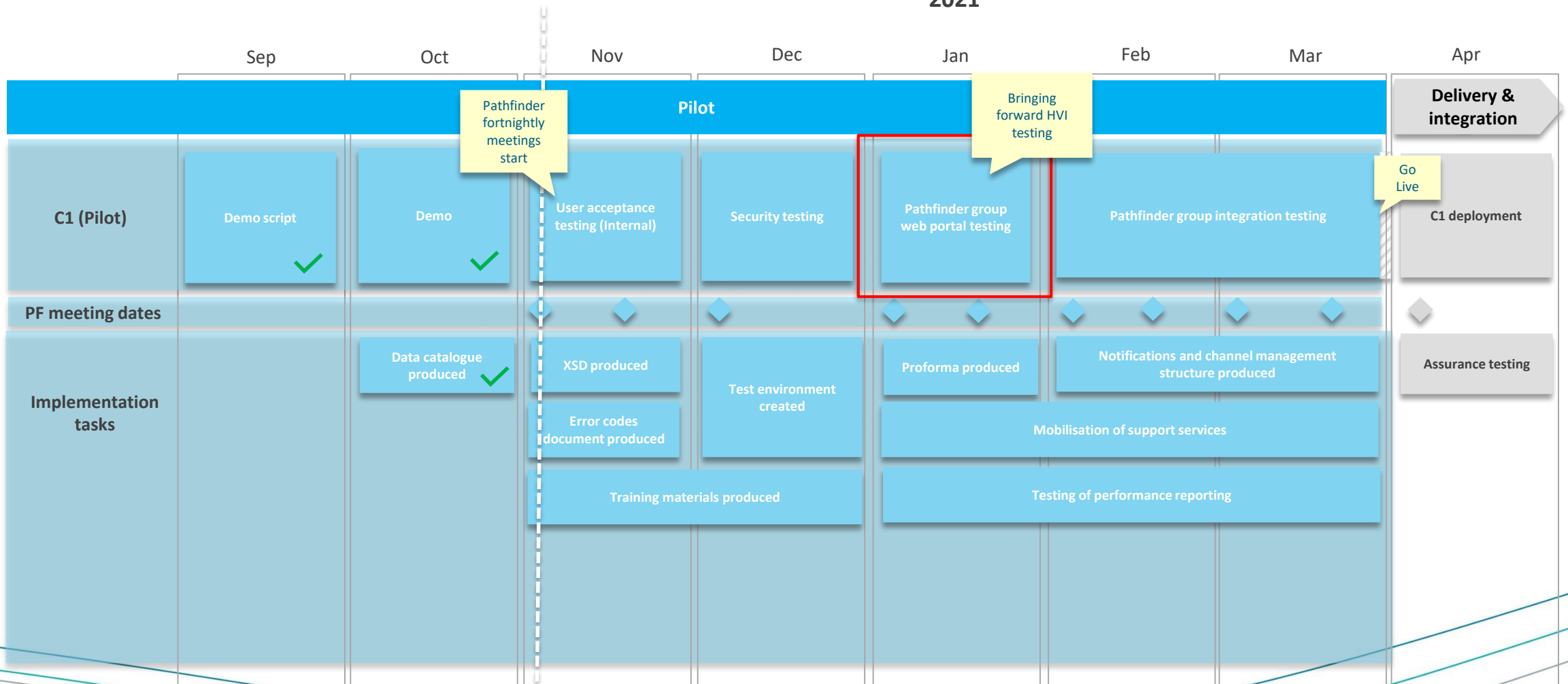
# High level plan

2021



# High level plan

2021

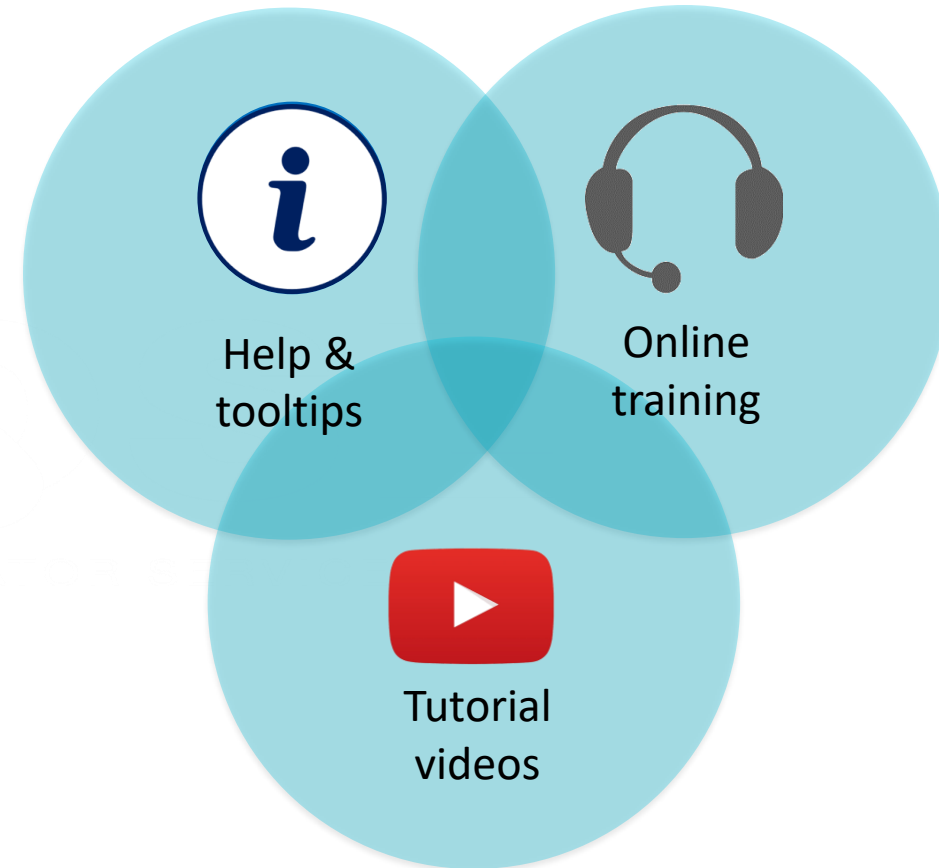




- Welcome and Introductions (5 mins)
- Review of outstanding actions/questions (10 mins)
- Feedback following demonstration to Contract Managers (10 mins)
- Review of Data Catalogue/Data Transactions for C1.R process (15 mins)
- **Discussion on training materials (10 mins)**
- AOB

Discussion:

- Is the group happy with the proposed training materials?
- Do you feel that additional training materials be produced?



AOB

Please:

- ◆ Raise your (virtual!) hand
- ◆ Comment in chat
- ◆ Email [bilaterals@mosl.co.uk](mailto:bilaterals@mosl.co.uk)