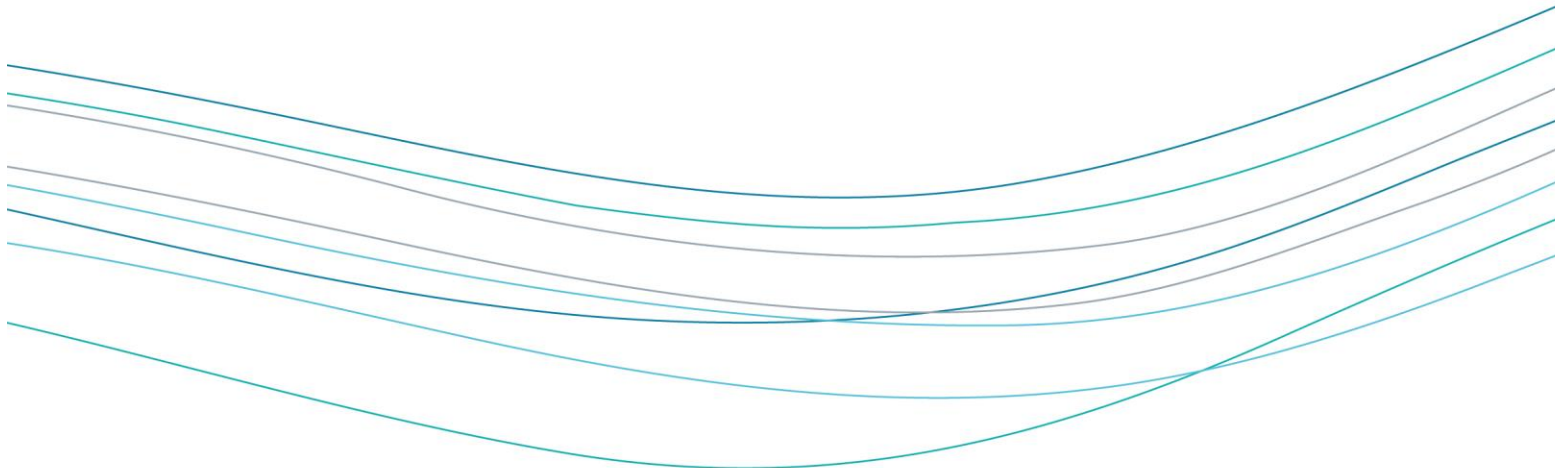


## Operational Advisory Group (OAG)

Minutes from 10 September 2020 meeting

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## Operational Advisory Group

Minutes from 10 September 2020 meeting

### Attendees

#### OAG Members and Guests

- ◆ David Moss (DM) Retailer
- ◆ Deborah Morton (DM) Wholesaler
- ◆ Jon Fuller (JF) Wholesaler
- ◆ Madeleine Moores (MM) Retailer
- ◆ Matt Garfield (MG) Wholesaler
- ◆ Patricia Quintana (PQ) Wholesaler
- ◆ Paul Baker (PB) Retailer
- ◆ Sam Dawson (SD) Wholesaler

#### MOSL

- ◆ Chris Chiorean (CC)
- ◆ Chris Dawson (CD)
- ◆ Evan Joannette (EJ)
- ◆ George Kelly (GK)
- ◆ Mayuresh Tamboli (MT)

### Agenda

- ◆ C1 process wireframe review
- ◆ AOB

## Meeting notes/minutes

### 1. CD displaying wireframe pages behind process flows

#### Initial landing page screen

- Still work in progress.
- Expand option - gives few more items to look at (last updated by/been deferred?/when is it due? etc).
- Gave brief overview of functions and parts.

#### OAG Feedback

- DM; Search and filter options - can we search by postcode? missing from SWIMpool and would be desired.
  - CD; not sure - to take away - important for gap site process
  - EJ; any other cases where postcode is only way you can search?
    - DM; sometimes SPID may not be available, thus search will have to be customer name and postcode, meter serial number, meter type - TE, for example (short term consents where SPID not available)
    - PQ; might have number of different jobs for different DPIDs - having DPID might be useful for search
  - SF; search by Retailer ID
    - CD; retailer yes, retailer ID not yet, but no reason why not
    - EJ; we do have a robust filtering option as well
  - JF; maybe have 'simple' search and 'advanced' searched (more defined criteria to use more details for searching)
- PQ; same view for Retailers and Wholesalers? Also will it tell you who the action is sitting with?
  - JF; might be beneficial to have 'at site visit stage with Wholesaler' for example
  - DM; on action required, is this the action which would come up once the Retailer submits to Wholesaler?
    - EJ; that's the activity status
  - JF; top level widgets - can we do a 'raised within the last 24 hours'?
- PB; could have individual view as well as overall Retailer view - good to be able to filter between these views? is it the same view for Wholesaler/Retailer - better to be separate views? particularly when it comes to 'action required' -
  - EJ; good point - need a balance between design and coding (double screens = double testing).
  - DM; 'individual view' point - need to be able to see who's been allocated what and who to put it out to in case of individual absence/sickness etc.
    - EJ; need to be careful we are not designing a case management system - does this belong in own workflow management systems?
    - CD; can have difference between who actioned it and who assigned it - who assigned it is going down case management route = more complex.
    - DM; we do want higher level oversight (what is due and who is in charge of it etc)
  - JF; able to unclaim tasks from individuals? - two tier access system (something to address down the line)

- 💧 **CONCLUSION (EJ); all these above points are deliverable, but might not be available for MVP. we also need a clear justification as to why these need to be added into bilaterals in addition to TPs' own case management systems. OAG members also reminded that more screens = more testing.**
- 💧 **'Create new service request' screen;**

  - CD gave another brief overview of functions and parts
  - EJ; this is a proposed CMOS validation in the step
  - CD; SPID details; read only (just to confirm what they are)
  - EJ; this does some transactions here don't currently exist - new HVI transactions; how would they work? Question we need to think about
  - EJ; 'unmeasured' accordion- looking to make some serious changes to the HVI system again here. We need to know whether the OAG feel that this ought to be altered as per CDs presentation to be included and KPI'd within bilaterals or not...
  - CD; make it clear we want unmeasured supplies to be counted in C1 process going forward - amendments to this section do this.
- 💧 **OAG Feedback;**

  - PQ; need to be able to utilise the whole computer screen - i.e. make text boxes as big as possible (e.g. 'boxes for additional info' are small). We need to be able to see these
    - EJ; modern websites have 'draggable'/user 'sizeable' text boxes (make them bigger as you like)
    - PQ; doesn't matter how it's achieved, it's worth doing for user experience.
  - PB; in terms of initial SPID validation, some allowance requests where customers transferred out of an allowance still have valid request but can't get past stage 1 - must take into account in validation
    - JF; need configurable validation for different situations in relation to gap sites etc.
  - DM; Assuming SPIDs coming up at beginning will be an item you can click on to get more info
    - CD; yes
  - DM; Any way you can get a summary of all processes taken place without having to raise a form by putting in site ID/SPID?
    - EJ; this would be on landing page/search page under the headings
  - DM; within drop down features - should valuable info not be changed to 'what was the request' and 'what was the outcome'?
    - CD; have 3 current activity status' (cancelled/closed/closed- timeout)
    - EJ; good point to take away --> if it is closed, summary info would be different to if it were a live case. maybe not on launch day but at some point.
    - DM; nice to have feature to see summaries of what has taken place
    - EJ; again, need case as to why this ought to be in the bilats system and not companies own case management systems.
  - PQ; assuming sewerage SPIDs can be entered
    - CD; yes
  - PB; want to be able to enter more contact info than the current form allows?
    - EJ; this has been fleshed out - more complex on these new forms than it was previously
    - CD; have two types now-

- extension numbers
  - preferred method
- PB; what about response from Wholesaler - is this templated? (want structured response from Wholesaler to say these are the findings on site/these are the numbers)
  - CD; haven't got there yet, but yes.
  - EJ; drafted some forms, but not as advanced as these here - in terms of graphical interface we have made it very clear to follow
- EJ; is there value worth funding here - do we want to pull this all out as individual transactions which weren't transacted back and forth to give us trackability that we want, to make these work better, or will this be too hard to make work/too costly to integrate and turn this into HVI for Trading Parties?
  - MG; we have set template to send back, rather than lots of bespoke fields - not trying to transact with 15-20 data, only the one - but you do loose granular detail. If it is simple, defiantly worth exploring as long as it's simple
  - EJ; what about the bilateral communication itself? tracking the progress of the case? - this requires transactions not included in wholesalers' systems yet
  - DM; this is what Swimpool does now - we all use differently (e.g. we have degree of automation but manually update own systems) - this could be a huge element for those who don't use Swimpool. We do encourage though
  - MG; we do similar things via different sales system (sales force)
    - EJ; these are all LVI type? we want to think about HVI type
  - PQ; have bespoke system - communicates via HVI - proportion of info which goes straight to CMOS - cost here in terms of linking up to this system in terms of hours (don't think it's doable).
  - PQ; getting into huge detail and would need to take to ALL TPs IT systems
  - EJ; the tech group are doing this in terms of tech view

💧 **What will happen once form submitted;**

- CD; less developed and internal draft forms at the moment.
- CD; gave very brief overview of draft form once Retailer submits the C1.

💧 **OAG Feedback (first 5 tabs)**

- PQ; on history tab etc - can this be exported to excel, and how will it be exported?
  - CD; it will be, but formatting is a task in itself
  - PQ; this will be important but needs to be exported in a 'good' manor
  - EJ; want to think (in future) about all screens and how they will export/what do we expect to get out of it
  - PQ; in terms of history, date is most important to be exported
- MG; this is a flat form, so will this be updated? e.g. live record as it moves through its journey/appointments booked?
  - CD; yes - by default, most recent update at top
- JF; history page - deferrals/rejections are important; do these need elevating in terms of prominence on this tab (e.g. banner saying this is deferred or rejected etc)?
  - EJ; on this point actions tab just to be subset of history tab? Action could be built into the history tab - don't want to design on the spot. --> something to think about

- MG; something useful for someone coming in blind to a request on this tab who might not be familiar with actions and their journey (e.g. deferral might be far down on that list but transactions above that dilute it).
  - DM; colourisation against points delaying the progress - home in on this then?
  - EJ; possible to do this once SLAs have been worked out
- CD; actions should be looked at a different meeting - give another week once wireframes are in place (lots of the process flow involved); 1-1.5 hours' worth of time
  - EJ; from LVI point of view- are we on the right tracks?

💧 **CONCLUSION: OAG members generally agree that we're on the right track.**

- MT points;
  - As next step after screen design, we are working on transactions and how we are to design database, and how to align with OSD0601.
  - e.g. when request is submitted, do we want to duplicate CMOS data in bilaterals database? we are not suggesting to duplicate as there are so many transactions of data, and if we duplicate this data, we have two datasets and this causes issues with data quality --> CMOS is the master copy of all data. the transaction would be simplified without this duplication of data.
  - There is no import expected as per C1 process from the requester when they submit the process.
    - EJ; is there any advantage to saving data into the bilaterals system?
      - MT; no advantage of saving this data is seen - we don't want two versions of the same data.
    - PQ; what happens if CMOS is updated if job is in process - if form is submitted, we need a capture of the data at the time of submission. This is mainly for historical reference (not to be used for anything else), if things have changed in the meantime as this is not fair on either party. Maybe have a flag in bilats to say this has been updated in CMOS?
    - DM; this form isn't checking CMOS for you and saying the retailer is correct in what they are saying, so we will look at what Retailer is requesting and whether it is acceptable from CMOS data.
    - EJ; we are looking into how it saves it, whether it be a snapshot or what details are now?
    - JF; lends itself to looking at full history of supply points - better to have a view of details at that point in time.
    - PQ; need snapshots for evidence during auditability and disputes otherwise we have no evidence to settle these disputes
      - MT; first off, right now we are focusing on premises info (nothing would change as part of the C1 process) - this info will always be pulled from CMOS. Any changes to this information will have transaction info as per CMOS against the SPID in its history.
      - PQ; can't go to another system as you assume it has not changed in the bilats system portal (can't always go into CMOS every time to check). e.g. if a postcode/premises details change, there will be ambiguity with finding/rejecting transaction. Must have snapshot of when form was sent. again, could always put a flag on it to say something has changed

- JF; work management systems are very TP specific; a flag would be useful to say something has changed - do we need to communicate updates separately as changes to information can affect things downstream?
- EJ; if anyone updates info on an active bilats request - the responsibility lies with TPs involved with the transaction
  - PQ; sometimes there are 4 parties involved so it's not always simple. people sign this form and send it, so it must be a snapshot rather than linked.
  - MG; would agree with having it as a snapshot.

💧 **CONCLUSION; don't mix CMOS data and hold the data there as long as the request has been raised for - need this snapshot of the meter data (not necessarily the premises data?)**

- MT; This storing of meter and *not premises data* where the verification is requested, is because we want to avoid requests being rejected as every time data changes, the meter version changes. There may be ambiguity in this data, therefore, for the wholesaler acting on the data.
  - PQ; this sort of thing should be standardised through all forms (e.g. TE forms - G02/G03 - that snapshot in time is a legal requirement). You are signing to say 'this data is correct' but if the data changes in the background, you cannot say this for sure
  - JF; ALL data entered into forms must be a snapshot at that time, not just meter details - goes against data principles.
  - MG; last year's OPS audit picked up what details and information look like when it is submitted.
- lots of demand for forms to be submitted and have that information as a snapshot in time - do not want these details changed once form has been submitted otherwise the audit trail gets affected.

**AOB**

- 💧 No AOB items were raised.