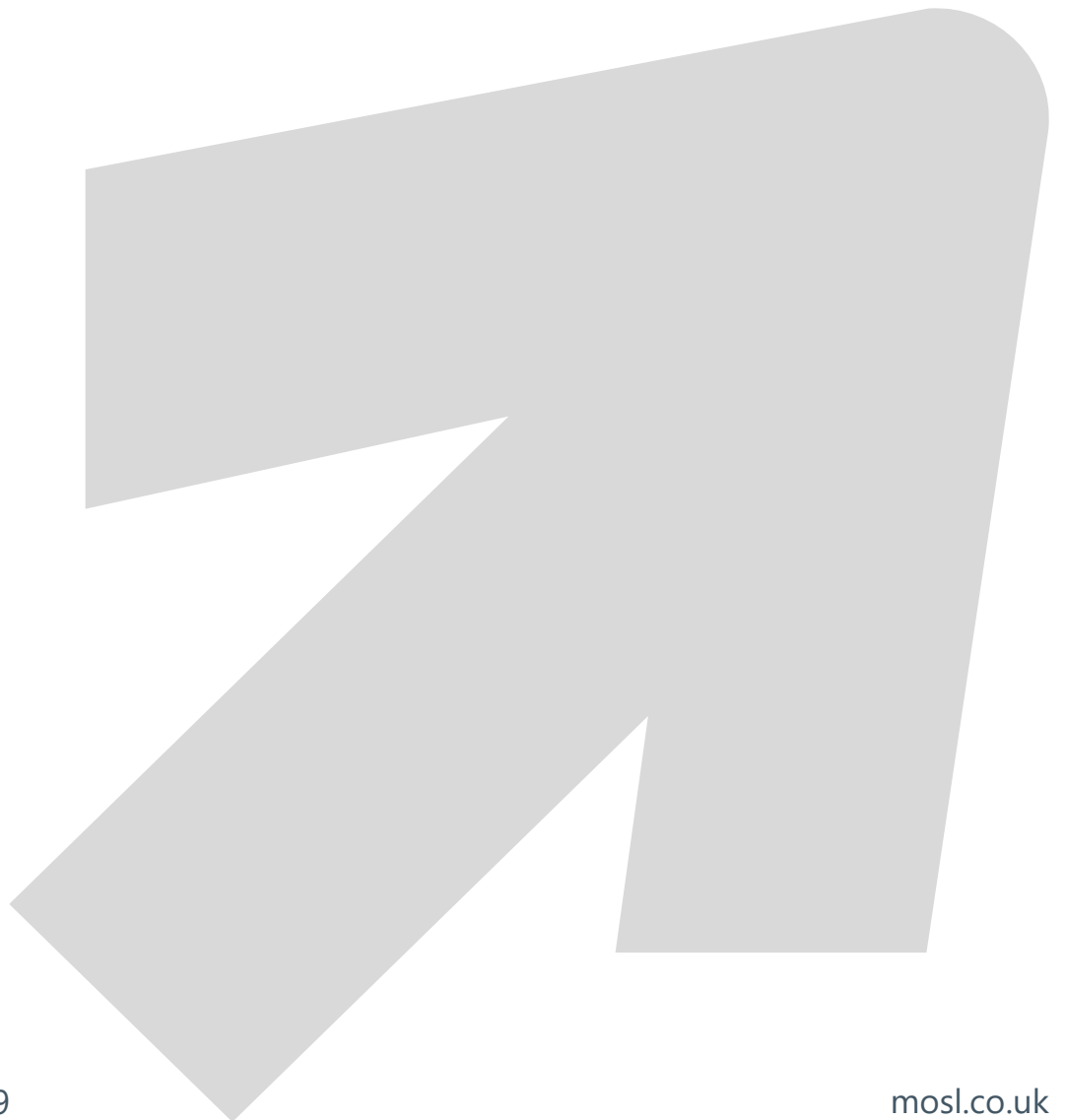


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# Operational Advisory Group (OAG)

**Date and time:** 21 March 2024, 0900 - 1030

**Status of minutes:** FINAL



# Meeting Minutes

## OAG members and guests

Name	(Initial)	Organisation	Name	(Initial)	Organisation
Ally Logan	AL	Business Stream	Heather Lamb	HL	UU
Anna Muskett	AM	Wessex	Helen Bennett	HB	Southern
Andrew Hewett	AH	Thames	Iain MacAndrew	IM	Castle
Bryony Cameron	BC	Thames	Karina Soulynha	KS	Southern
Charlotte Miles	CM	Thames	Kristofer Turner	KT	
Chris Williams	CW	Thames	Paul Baker	PB	Business Stream
Daniel Proctor	DP	Waterplus	Rosemary English	RE	Southern
David Moss	DM	Castle	Sian Forward	SF	Northumbrian
David Buchan	DB	Castle	Tracy Ware	TW	Portsmouth
Emily Jerrome	EJ	Water2Business	Tom Wells	TWe	Southern

## MOSL

Name	(Initial)	Organisation	Name	(Initial)	Organisation
Chris Dawson	CD	Chair	Jac Gibson	JG	Presenter
Monica Falasca	MF	Observer	Lisa-Ann Lott	LAL	Notes

1.	<b>Welcome</b>
	CD welcomed members and confirmed the content of the meeting.
2.	<b>Phase 14</b>
	<p><b>6795 – Email notification about service request activities from the LVI</b></p> <p>JG noted seeking to understand the problem statement for each phase 14 item and what it is going to support.</p> <p>JG highlighted need to discuss if email notifications or another solution are the most appropriate option.</p> <p>JG noted request was made early in the programme and centred on the LVI users to ensure they receive a prompt that something has changed in the Hub.</p> <p>JG highlighted not delivered due to GDPR concerns and what data could be shared by email e.g. SPID, customer data etc</p> <p>JG noted need to establish when an email should be triggered and balance between too many notifications and missing something important.</p> <p>JG further noted need to know who is to receive the notification e.g. an individual or a central mailbox.</p> <p>JG highlighted may require a solution which can be turned off by those users who work through HVI or SWIM to prevent duplication of notifications.</p> <p>SF noted they are a high user LVI user and whilst can track changes in the Hub when a trading party adds a comment to an open process cannot see on landing page if a comment has been added what it is and what is being asked for so would be useful to have email notification.</p> <p>SF further noted would like to be able to see easily when a comment is added and when and make this easier for an LVI user either via the landing page or an email notification to a central mailbox.</p> <p>SF noted email notification can simply identify an update has been made or a comment has been added to ORID X and would need to be sent to a central mailbox.</p> <p>CD noted email notification being suggested to solve an outstanding issue in the Hub and if this was resolved would not require email notification.</p> <p>SF noted no preference and likely an LVI issue.</p>

EJ noted also LVI users in the Hub and find it difficult to notice when status change happens on ORIDs however would prefer to be able to see in the Hub as opposed to email notification due to volumes of email. EJ recommended could be an additional field added to the daily report.

JG noted add comment and visibility of comment are main concerns.

JG confirmed as part of review of Wholesaler to Wholesaler and Retailer to Retailer process comment functionality added with prerequisite to provide a page within the Hub when 'add comment' functionality used or may be actioned via a comments page dependent on costs, time and quality to deliver. JG noted need for review of activity tracking within the Hub.

KS noted new transaction/system built to work with HVI to notify of updates to ORIDs and would be useful to add to the Hub as opposed to email notifications.

CW noted as a HVI user would prefer to be able to turn off email notification option if built to prevent overload. PB noted SWIM offering functionality so would prefer to be able to switch off if built.

JG enquired if transaction received on HVI if comment added, attendees noted for those using SWIM this does occur.

CW noted despite SWIM functionality still difficult to pick up as driven by status change and comments do not change status so would prefer functionality in the Hub.

DM noted some useful functionality for email notifications for escalations and for those which are not utilising the Hub on a daily basis.

DM further noted for unplanned events may require email notifications as those teams may not use the Hub on daily basis and would require prompt action.

JG noted the above may be an operational process at trading parties as opposed to Hub functionality.

CD recommended including state transition activity updates on landing page/comment page being developed.

JG noted not all parties would benefit from email notifications and problem statement is one of visibility of changes which could be built into the Hub instead.

***New G2.W transaction for Activity Status 'SPID Created (or Assigned) in Market'***

Following discussion attendees agreed the requirement relates to having a new status added in the drop down when wholesalers complete a G2.W to show the SPID has been created or assigned. Attendees noted when a trade effluent consent is logged in the Hub under a no-SPID process at some point a SPID is created and at present it is not possible to link that new SPID to the consent which was created as a no-SPID earlier nor inform the retailer what the new SPID number is.

JG enquired if this problem exists for other processes or only G2 or would it be useful if when a no-SPID process is created and then a SPID is assigned to be able to link the process to the SPID across the Hub.

AH noted not understanding the benefit of this as for G2.W customer going direct to wholesaler is very rare, if there is no-SPID this is also in the minority and if it's a short-term consent it would not require a SPID thus little value in adding this to the Hub.

CD highlighted process could be utilised for gap sites, F4, miscellaneous processes etc which can be created as no-SPID also.

SF noted would be useful across the Hub e.g. On M1 where an ORID is raised on a no-SPID the SPID once assigned/created could be added in the comments.

JG noted potentially could not action this where a no-SPID process raised against multiple SPIDs.

DB noted original request related to .W transactions not solely G2.W when SPID created or assigned in the market.

JG enquired if same for .R should be created. CD noted would be useful for the retailer to enter the SPID should a mistake be made on assignment.

CD enquired if a no-SPID to a SPID function was created should it be available across the Hub.

JG noted would not switch to a SPID process however could be linked to a SPID.

### ***707 – Linking service requests***

JG noted this request links to the above highlighting linking at present is between SPIDs not service requests.

JG noted currently Hub displays all service requests and their status against the SPID however where related ORID reference can be added is not a hyperlink only a free text field.

RE explained when a retailer raises a request for a specific property and the meter for that property is attached to a different property and it is going to have work completed following investigation it would be useful to link that request to the other SPID. RE noted retailer will have their own internal case reference linked to the previous request thus it would be useful to link to the other SPID.

RE noted related ORID reference does not allow an ORID related reference for a different SPID.

JG to review the validation to establish if can only be a valid ORID as opposed to being linked to the specific SPID.

JG noted does not provide a hyperlink and enquired if this would be useful as a build on the related ORID field.

EJ noted if other SPID is not with that retailer will not display the information of that ORID.

EJ provided the example of meter reader finding another meter for which another retailer is responsible would not be able to access info.

DM noted when entering SPID cannot view what is cascading from previous and would be useful if easy to see ORID case one relates to ORID case two.

JG noted on service requests page may be useful to show linked/sub service requests, attendees generally agreed would be useful e.g., complaints etc

JG noted no easy visual to alert trading parties if linked ORID.

JG to review with development team and revert.

DM recommended collapsible menus to drop down from ORID reference should there be linked ORIDs and the ability to see if it's a resubmission.

JG enquired if in page would a hyperlink to the related ORIDs be useful, attendees generally agreed would be useful.

SF highlighted data item 'related ORID reference' is not on all complete transactions.

JG noted may require related ORID reference and follow-on ORID within every service request's submit and complete transactions to enable the functionality throughout.

***24346 – New attachment file formats***

	<p>JG noted discussions to include ability to attach within submit and extend the file formats to include .msg and .eml is being delivered.</p> <p>JG confirmed will update OAG on inclusions from Phase 14 during next release (December).</p> <p>CW enquired if there is a list of acceptable file formats noting a MyMOSL ticket raised to enquire. JG to confirm including those to be included to enable future proofing.</p> <p>DM enquired .msg and .eml files can include an attachment as part of them will these be screened/prevented from being uploaded.</p> <p>EJ enquired if an option to remove attachments will be included in case attached in error.</p> <p>AH noted big win of having attachments within attachments e.g. an attachment to an email being retained within the Hub.</p>
<p><b>3.</b></p>	<p><b>AOB</b></p>
	<p>JG noted will provide update on Phase 14 during April.</p> <p>JG requested attendees provide their reporting wish lists by COB Friday 22 March noting will be collated and returned for voting.</p>

	Actions	Action by	Action date