



Software Release Customer Names

Software Release Note

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Revision History

Rev.	Date	Description	Author	Reviewer
Version 1	23/06/10	Draft	Gary Craig	David Nicol
Version Final	24/06/10	Published	Gary Craig	

1. Document Purpose

This Release Note sets out the changes included in CMA Central System Software Release Customer Names. These changes have been introduced through the Customer Names Phase of the Security & Customer Names (S&CN) Project.

2. Background

The Release has been developed in response to the Commission changes:

MCCP-CC 041 - Customer Names on Database,

MCCP-CC 048 - X, Y co-ordinates.

The Customer Names phase of the S&CN Software Release is being developed in response to Market Code Change proposal “MCCP-CC 041” – titled “Customer Names on Database”. The Commission has asked the CMA to expand the Central Systems database to include the customer name alongside the address and full postcode for each registered supply point (SPID). The inclusion of these data items is to facilitate the process of switching customers only. The unique SPID number will remain the determining factor in the switching process.

The Customer Names phase will also deliver fields in the database for X, Y co-ordinates (MCCP-CC 048) for meter locations along with a free descriptor field.

The development is being delivered by the Security and Customer Names (S & CN) Project and the Customer Names Stage has undergone successful User Acceptance Testing (UAT) and Market Training.

3. Release Contents

The release covers two core areas:

- i. Customer Names on Database
 - Customer Name Transactions
 - Customer Name Searches
 - Customer Name Reports

- ii. X,Y Co-ordinates
 - Meter GIS Details

- iii. Minor Enhancements, Fixes

4. Summary of Changes

	Reference	Project Phase	Title
1	MCCP-CC041	Customer Names	Customer Name Transactions (Create/Update)
			Customer Name Search
			Customer Name Reports
			Auditing
2	MCCP-CC048	Customer Names	Meter GIS Details
3	CMACP081	Customer Names	Minor Enhancements, Fixes

4.1. Customer Names on Database

In the current version of the Central System Software there is no customer name functionality.

4.1.1. Customer Name Transactions (Create/Update)

Current Arrangement

In the current version of the Central System Software there is no customer name transaction functionality.

Change

A new page on the LVI has been created to allow LPs to add/update a customer name to a SPID. This page will initiate a new transaction¹.

A new transaction (HVI/LVI) has been created called T032.0_CreateUpdateCustomerName. This transaction will

- Be made up of three elements:
 - D2001_SPID – A text field of up to twelve characters.
 - D2027_CustomerName – A text field of up to 255 characters.
 - D2028_CustomerNameType– An enumeration initially containing “Customer” or “Developer”.

A new transaction record has been created called T032.1_CustomerNameUpdated. This transaction will

Be made up of three elements:

¹ An initial data upload will be undertaken in conjunction with the Software Release to populate the Customer Name field.

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- D2001_SPID – A text field of twelve characters.
- D2027_CustomerName – A text field of 255 characters.
- D2028_CustomerNameType - An enumeration initially containing “Customer” and “Developer”.

The HVI has been modified to allow users to submit new T032.0 transactions.

New return (T009.0) error code messages have been created.

- DX has the following text associated with it:

“Either SPID does not exist or it is a Sewerage SPID that is paired to a Water SPID”
- DV has the following text associated with it:

“Invalid Customer Name”
- DW has the following text associated with it:

“Customer Name has not been entered for this SPID - Connection cannot complete”

4.1.2. Customer Name Search Functionality

Current Arrangement

In the current version of the Central System Software there is no customer name search functionality.

Change

The system will allow Users with Customer Name access² to search for SPIDs based on SPID Number, Customer Name, certain address fields and postcode. The Search rules are contained in Appendix 1.

² LPs with LPAdmin and LPRead CN roles

The next two items relate to functionality exclusively for CMA Users.

4.1.3. Customer Name Reporting

Current Arrangement

In the current version of the Central System Software there is no customer name reporting functionality.

Change

Two reports have been added to the system. The High Number of Searches report will show all instances where a high number of customer name searches have been carried out. The results of this report are based on the daily search limit which permits users to conduct 25 searches per day.

The second report will show SPIDs with no customer name assigned.

4.1.4. Customer Name Auditing

Current Arrangement

In the current version of the Central System Software there is no customer name auditing.

Change

Audit functionality has been added to customer name searches. An audit record will be created for each customer name search. The search criteria will be shown in the “data before” field, with the number of results returned shown in the “data after” field. The audit type is “search” and the action is “Customer Name”.

5. X,Y Co-ordinates

5.1. Meter GIS Details

Current Arrangement

In the current version of the Central System Software there is no X, Y or free descriptor field associated with meter details relating to the meter's geographic location.

Change

The meters table has been altered to include X and Y OS Grid coordinates, as well as a free descriptor to help identify the location of the meter. These extra details will be displayed alongside the existing meter details³.

6. Other Enhancements, Fixes

Current Situation

In the current system several fixes have been identified that will be resolved with this release.

Change

- The code has been modified so that when users enter their password wrongly three times they will now be presented with an error message on the fourth attempt asking them to contact the CMA administrator.
- The code has been modified to handle apostrophes and other characters in the admin area of the LVI allowing users with these characters to have their user properties edited by CMA users.
- The code has been modified to allow LPs to see the previous meter details on Supply Points that they own and manage.

³ The population of data will take place after the Software Release, on provision of the data from Scottish Water, via data upload. Transactional functionality to update these fields will be provided in a future Software Release.

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- The code has been modified to display the CMA Logo and the environment the code is running on. The screenshots in later sections show the “UAT” environment, the live environment will show “Production.”

5. Impact on System Functionality

Functional Area	Impact (Y/N)	Description
CMA User Interface (LVI)	Yes	<p>Customer Name Search: The Customer Name Search page will allow users to search for SPIDs based on customer or address details.</p> <p>High Number of Searches Report: An additional web page with a grid has been added to show users who perform a high number of customer name searches, suggesting possible misuse.</p> <p>No Customer Names Report: An additional web page with a grid has been added to identify LPs who have not added customer names to their SPIDs.</p>
Wholesaler User Interface (LVI)	Yes	
LP User Interface (LVI)	Yes	Customer Name Update: A new page will allow LPs to create a new T32 transaction to create/update a customer name.
Web Services (HVI)	No	<p>Addition of new transaction types T032.0 and T032.1.</p> <p>Addition of new error codes to T009.0 transaction.</p>
Aggregation and Settlements	No	
Registration	Yes	T032 transaction is now a mandatory part of the new connection process.
Work Flows	Yes	CustomerNames: New workflow to process T32 transactions to update the customer name.
Data Model	Yes	Addition of functionality to store Customer Names, Customer Name History and GIS X,Y and Free Descriptor values.
Database	Yes	Addition of functionality to store Customer Names, Customer Name History and GIS X,Y and Free Descriptor values.
Reporting	No	

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Functional Area	Impact (Y/N)	Description
Hardware and Infrastructure	Yes	<p>Auditing: Auditing table will contain more records</p> <p>Meter table will have extra columns added to store GIS X, Y and Free Descriptor data.</p> <p>New Customer Names table along with History table to store Customer Name against the Supply Point Core.</p>

6. Impact on Configured/Change Items

There are no changes to the Operational Code.

There are changes to the Market Code, including the CSDs.

Configured/Change Item	Change Impact	See section
Market Code	No	
CSDs	Yes	4
Schema (HVI) & CSD0301 Annex A	Yes	4
User Manual	Yes	4

7. Implementation

7.1. Promotion of Release to the Central Systems

The upgrade of the Central System is currently provisionally scheduled across the various environments as set out below.

Environment	Release Date	Available for use
Production	28/06/10	29/06/10

7.2. Environments included in this release

For the avoidance of doubt, the following environments will be impacted by this release:

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Production Environment (Dundee One)

Test Environment (Dundee Two)

CMA SP Scenario Test Environment (Dundee Three)

7.3. Environments included pre-release

The software has been pre-released to the following environments for testing purposes:

- System Test
- UAT/MST
- Production Environment (Dundee One);

7.4. Web Browser Compatibility

The Low Volume Interface (LVI) is configured for operation with most available browsers. The browsers that are supported by our Service Provider are:

- a. Internet Explorer 6
- b. Internet Explorer 7
- c. Internet Explorer 8
- d. Mozilla Firefox Version 2
- e. Mozilla Firefox Version 3
- f. Google Chrome Version 4

8. System changes – Technical Information

8.1. Changes to LVI User Interface

Login

The login page has been modified to use the new CMA logo, and the current environment will be shown beneath the logo, as shown.



When a user enters an incorrect password three times, they are presented with an error message on the fourth attempt asking them to contact the CMA administrator.

Customer Name Search

A new Customer Name Search page has been created. This page, in addition to all existing pages that use the master page layout, will now include the new CMA logo, as well as altering the positioning of the Bridgeall and Logical logos at the foot of the page, as shown. The current environment will also be shown beneath the CMA logo.

UAT You are logged in as admin1 [CMA] ([logout](#))

[My Account](#) [Reports](#) [Dashboards](#) [Settlements](#) [Administration](#)

[CMA Home](#) > [Administration](#) > [Customer Names](#) > **Search**

This Section ⌵



- Customer Names
 - [Search](#)

Customer Name Search

Enter Customer Name Search Criteria

SPID:	<input type="text"/>	
Customer:	<input type="text"/>	<input type="checkbox"/> Use exact match
Building Name:	<input type="text"/>	
Building Number:	<input type="text"/>	
Dependent Name:	<input type="text"/>	
Thoroughfare Name:	<input type="text"/>	
Double Dependent Locality:	<input type="text"/>	
Dependent Locality:	<input type="text"/>	
Post Town:	<input type="text"/>	
Post Code:	<input type="text"/>	<input type="text"/>

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Customer Name Update

A new Customer Name Update page has been created. This page allows LP Admin users to initiate new T32 transactions to create or update a customer name for a SPID.



UAT

You are logged in as lpadmin [OSPREY] ([logout](#))

	My Account	Dashboards	Registration	Trade Effluent	Administration
--	----------------------------	----------------------------	------------------------------	--------------------------------	--------------------------------

[CMA Home](#) > [Registration](#) > [Supply Point Updates](#) > [Customer Name](#)

This Section

- ✓ [Supply Point Updates](#)
 - > [Update Misc SPID Data](#)
 - > [Update Chargeable SPID](#)
 - > [Meter Read](#)
 - > [Special Arrangements](#)
 - > [Customer Name](#)

Update Customer Name

Enter Customer Name Details	
SPID:	<input type="text"/>
Customer Name:	<input type="text"/>
Customer Name Type:	<input type="text" value="Customer"/>
<input type="button" value="Update"/>	

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Meter Details

The Service Element display panel has been modified to show the meter GIS details.

Service Elements	
Water Meter Details [Serial Number: 08ELSTER08A167904]	
Meter Details	Meter Readings
Effective From 25/09/2008 00:00:00	Read Date Read Type Read Value
Effective To	27/08/2009 00:00:00 C 6418 edit
Meter Serial No 08ELSTER08A167904	27/01/2009 00:00:00 O 0 edit
Meter Make ELSTER	
Manufacturer Serial No 08A167904	
Physical Meter Size (mm) 30	
Chargeable Meter Size (mm) 30	
Sewerage Chargeable Meter Size (mm) 30	
No Of Digits 5	
Read Frequency B	
State Active	
Return to Sewer Allowance (%) 90.00	
YVe	
Meter Comments	
Meter Read Comments	
GIS X 327262	
GIS Y 675570	
GIS Description IN BOILER HOUSE	
Location	
-Free Descriptor IN BOILER HOUSE	
-Sub Building Name	
-Building Name	
-Building Number 20	
-Dependent Name	

Appendix 1: Search Rules

Search Functionality

Searching: General

The screenshot shows the CentralMarketAgency web application interface. At the top left is the logo. Below it, the text 'UAT' is visible. On the top right, it says 'You are logged in as admin1 [CMA] (logout)'. A navigation bar contains links for 'My Account', 'Reports', 'Dashboards', 'Settlements', and 'Administration'. Below the navigation bar is a breadcrumb trail: 'CMA Home > Administration > Customer Names > Search'. A sidebar on the left shows a dropdown menu for 'This Section' with options for 'Customer Names' and 'Search'. The main content area is titled 'Customer Name Search' and contains a form titled 'Enter Customer Name Search Criteria'. The form has the following fields: SPID, Customer, Building Name, Building Number, Dependent Name, Thoroughfare Name, Double Dependent Locality, Dependent Locality, Post Town, and Post Code (split into two boxes). There is a checkbox labeled 'Use exact match' next to the Customer field. At the bottom of the form are 'Clear' and 'Search' buttons. Below the form, there are links for 'Contact the CMA' and 'About the CMA'. At the bottom of the page, there are logos for 'bridgeall' and 'logica'.

LPs with customer name access can search on any one of the following core data items individually:

- SPID
- Customer Name
- Building name
- Thoroughfare Name
- Dependant Locality; or

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- Postcode

If SPIDs exists (partial, tradeable or PDISC) results will be returned.

Searches can be refined by entering any amount of additional data in the other (core or non core) search fields i.e. you might put in “customer name” and a “post town” prior to initiating the search.

A search on a WS or SS SPID will return the related WS or SS SPID.

The search fields are:

- Case Insensitive
- All characters including a space are significant
- Exact match except for the Customer Name field

To clear search parameters the delete button can be used or the “Clear” button next to the “Search” button can be clicked.

Searching: Individual Data Items

This section outlines the rules for searching on individual data items only.

- **Searching SPID Numbers**

Inputting the 12 digit SPID number would return the associated SPID information.

If the SPID exists both the WS and associated SS SPID information will be returned

- **Searching on Names**

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The customer name entered must be a minimum of four letters unless the exact match checkbox is ticked e.g. if you are searching for a customer name that contains only 3 letters such as “B & Q” the exact match checkbox should be ticked.

If the exact match checkbox **is** ticked the following rules apply:

An exact match lookup is performed on the entered value on the Customer Names table. For example, vans would not return Evans, Vanst and Evanso, but would return Vans

If the SPID exists both the WS and associated SS SPID information will be returned

If the exact match checkbox **is not** ticked Wildcards are applied and the following rules apply:

A check will be made to ensure that the value entered in the Customer Name box is at least four characters. If it isn't an appropriate message will be shown and the search will proceed on an exact match basis.

If the Customer Name is at least the minimum length, a wildcard search will be performed on the value entered in this box on the Customer Names table. This wildcard will be of the format *VALUE* i.e. the entered value can be contained anywhere within the Customer Name. For example vans would return Evans, Vanst, Evanso and Vans

Wildcards are automatically applied to the start and end of the customer name unless the exact match checkbox is selected.

If the SPID exists both the WS and associated SS SPID information will be returned.

- **Searching on Addresses**

The search will be an exact match against the entered fields e.g. building name will only search for exact matches on the Building Name field etc. The rules for searching these data items are

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outlined in the table. In some instances searching on one data item will be permissible e.g. Building Name. In other cases a data item must be accompanied by another data item e.g. Post Town.

If the SPID exists both the WS and associated SS SPID information will be returned.

Searching should occur on the below address items in accordance with the rules:

Column	Description	Rules
buildingName	Building Name	On its own*
buildingNumber	Building Number	Must be accompanied by one of the fields labelled "on its own"
thoroughfareName	Thoroughfare Name	On its own
dependentthoroughfarename	Dependent Thoroughfare Name	Must be accompanied by one of the fields labelled "on its own"
doubledependentLocality	Double dependent locality	Must be accompanied by one of the fields labelled "on its own"
dependentLocality	Dependent locality	On its own
postTown	Post Town	Must be accompanied by one of the fields labelled "on its own"

*These fields can be accompanied by other core non address fields to return results

- **Searching on Postcode**

Searching can occur on the full post code or the full out code (first part of the postcode) only.

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If the SPID exists both the WS and associated SS SPID information will be returned.

Search: Results

All results are returned in real time and multiple returns are presented and viewable by SPID number, Customer Name and Post Town and presented in SPID number order. There are a maximum of 50 per page and these can be sorted by SPID, Customer Name and Post Town.

To get back to the search options page the link on the top left marked "Back to search options" can be clicked.

The screenshot shows the 'Customer Name Search' results page. The table contains the following data:

SPID	Customer Name	Post Town	View
100017570106	WH Smith Ltd	GALASHIELS	More Details
100017570203	WH Smith Ltd	GALASHIELS	More Details
100042200105	WH Smith Ltd	HAWICK	More Details
100042200202	WH Smith Ltd	HAWICK	More Details
100043040103	WH Smith Ltd	KELSO	More Details
100043040200	WH Smith Ltd	KELSO	More Details
100088040101	WH Smith Ltd	EDINBURGH	More Details
100088040251	WH Smith Ltd	EDINBURGH	More Details
100127160105	WH Smith Ltd	EDINBURGH	More Details
100127160202	WH Smith Ltd	EDINBURGH	More Details
100251860151	WH Smith Ltd	CUPAR	More Details
100251860208	WH Smith Ltd	CUPAR	More Details
100251870106	WH Smith Ltd	CUPAR	More Details
100251870203	WH Smith Ltd	CUPAR	More Details
100256000102	WH Smith Ltd	LEVEN	More Details
100256000252	WH Smith Ltd	LEVEN	More Details
100348950152	WH Smith Ltd	KIRKCALDY	More Details
100348950209	WH Smith Ltd	KIRKCALDY	More Details
100367710109	WH Smith Ltd	GLENROTHES	More Details
100367710206	WH Smith Ltd	GLENROTHES	More Details
100417570109	WH Smith Ltd	LIVINGSTON	More Details
100417570206	WH Smith Ltd	LIVINGSTON	More Details
100598170105	WH Smith Ltd	GLASGOW	More Details
100598170202	WH Smith Ltd	GLASGOW	More Details
100699610252	WH Smith Ltd	DUNDEE	More Details

More Details

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The full result set containing all four data items is only be visible on screen when you click on the More Details link to that particular SPID.

To get back to the search results page the link on the top left marked “Back to search results” can be clicked.

The screenshot shows the 'Customer Name Search' page in the CentralMarketAgency system. The page is titled 'Customer Name Search' and includes a 'Back to search results' link. The main content area is divided into 'Details' and 'Address' sections.

Details:

- SPID: 100017570106
- Customer Name: WH Smith Ltd
- Customer Name Type:
- Vacant: No

Address:

- Free Descriptor
- Sub Building Name
- Building Name
- Building Number: 29-3
- Dependent Name
- Dependent Descriptor
- Thoroughfare Name: Channel Street
- Thoroughfare Descriptor
- Double Dependent Locality
- Dependent Locality
- Post Town: GALASHIELS
- County
- Post Code: TD1 1BJ

Below the details and address sections is a table with the following columns: Customer Name, Customer Name Type, and Effective Date.

Customer Name	Customer Name Type	Effective Date
WH Smith Ltd		11 Jun 2010
WH Smith Ltd	Customer	23 Jun 2010

The page also features the CentralMarketAgency logo, navigation links (My Account, Dashboards, Registration, Trade Effluent, Administration), and logos for bridgeall and logica.

The More Details screen displays the following information:

- SPID.
- Customer Name.
- Full Address Details (13 Fields).
- Postcode.

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- Customer Name History table (showing effective dates for the Customer name).
- Customer Name Type (Customer or Developer).