

# **CentralMarketAgency**

## **Software Release Customer Names**

**Software Release Note** 

June 2010

Version 1(Published)



### **Contents**

1.	Document Purpose	4
2.	Background	4
3.	Release Contents	5
4.	Summary of Changes	6
5.	Impact on System Functionality	12
6.	Impact on Configured/Change Items	14
7.	Implementation	14
8.	System changes – Technical Information	16
	endix 1: Search Rules	





## **Revision History**

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



### 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	Title
		Phase	
1	MCCP-CC041	Customer	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 transaction<sup>1</sup>.

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

- Be made up of three elements:
  - o D2001\_SPID A text field of up to twelve characters.
  - o D2027\_CustomerName A text field of up to 255 characters.
  - o 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:

<sup>&</sup>lt;sup>1</sup> An initial data upload will be undertaken in conjunction with the Software Release to populate the Customer Name field.



- o D2001 SPID A text field of twelve characters.
- o D2027\_CustomerName A text field of 255 characters.
- o 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 access<sup>2</sup> to search for SPIDs based on SPID Number, Customer Name, certain address fields and postcode. The Search rules are contained in Appendix 1.

<sup>&</sup>lt;sup>2</sup> 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 details<sup>3</sup>.

#### 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.

<sup>3</sup> 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.



• 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	Customer Name Search: The Customer Name Search page will allow users to search for SPIDs based on customer or address details.
		<b>High Number of Searches Report:</b> 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.
		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.
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	Addition of new transaction types T032.0 and T032.1.
		Addition of new error codes to T009.0 transaction.
Aggregation and Settlements	No	
Registration	Yes	T032 transaction is now a mandatory part of the new connection process.
Work Flows	Yes	<b>CustomerNames:</b> 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	



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



## 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

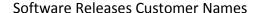
#### 7.1. Promotion of Release to the Central Systems

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:





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.

		My Account	Reports	Dashboards	Settlements	Administration				
MA Home > Administration >	Customer Nam	es > Search								
This Section (\$)	Custon	Customer Name Search								
Customer Names Search		Enter Customer Name Search Criteria								
Search	SPID:									
	Customer				Use exact match					
	Building N	ame:								
	Building N	umber:								
	Dependen	t Name:								
	Thoroughf	are Name:								
	Double De	pendent Locality:								
	Dependen	t Locality:								
	Post Town	:								
	Post Code	:								
			Clear Search							
		Contac	t the CMA   Abo	ut the CMA						



#### **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.

CentralMarketAgency You are logged in as Ipadmin [OSPREY] (loqout) My Account Dashboards Registration Trade Effluent Administration CMA Home > Registration > Supply Point Updates > Customer Name This Section (\*) Update Customer Name Supply Point Updates Enter Customer Name Details Update Misc SPID Data SPID: > Update Chargeable SPID Customer Name: Special Arrangements > Customer Name Customer Name Type: Customer > Update Contact the CMA | About the CMA









#### **Meter Details**

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

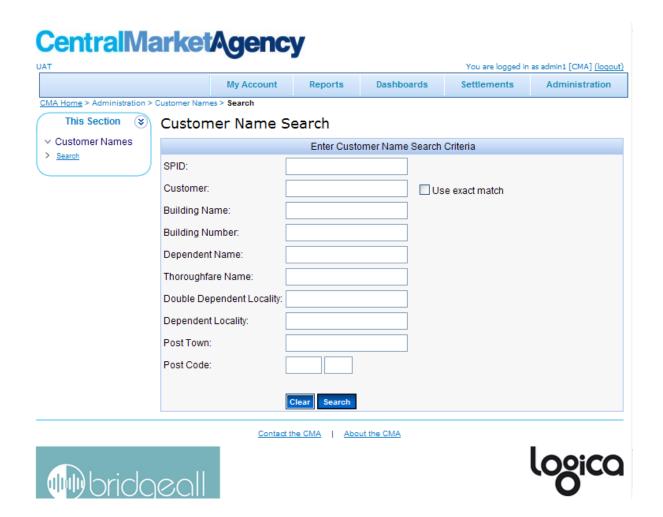
Water Meter Details [Serial Number: 06ELSTER08A167904]							
Meter Details		Meter Readings					
Effective From	25/09/2008 00:00:00	Read Date	Read Type	Read Value			
Effective To		27/08/2009 00:00:00	С	6418	edit		
Meter Serial No	06ELSTER08A167904	27/01/2009 00:00:00	0	0	edit		
Meter Make	ELSTER						
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	В						
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 Descripto	or IN BOILER HOUSE						
¬Sub Building Name							
¬Building Name							
Building Numb	per 20 me						



## **Appendix 1: Search Rules**

Search Functionality

Searching: General



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

CentralMarketAgency

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



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





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	Must be accompanied by
	Thoroughfare Name	one of the fields labelled
		"on its own"
doubledependentLocality	Double dependent	Must be accompanied by
	locality	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"

<sup>\*</sup>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.

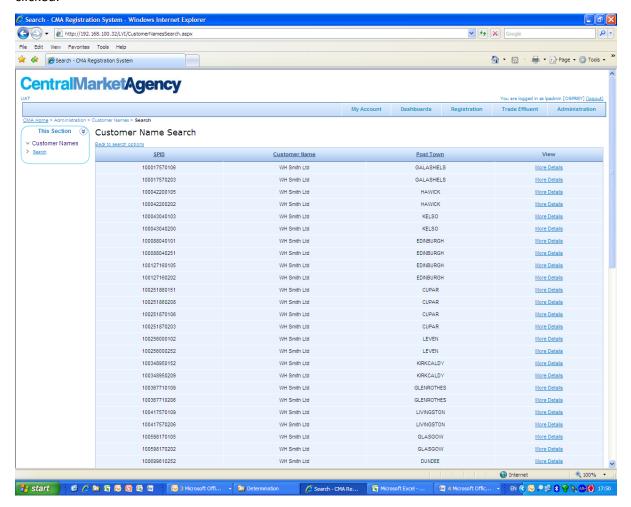


If the SPID exists both the WS and associated SS SPID information will be returned.

#### 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.

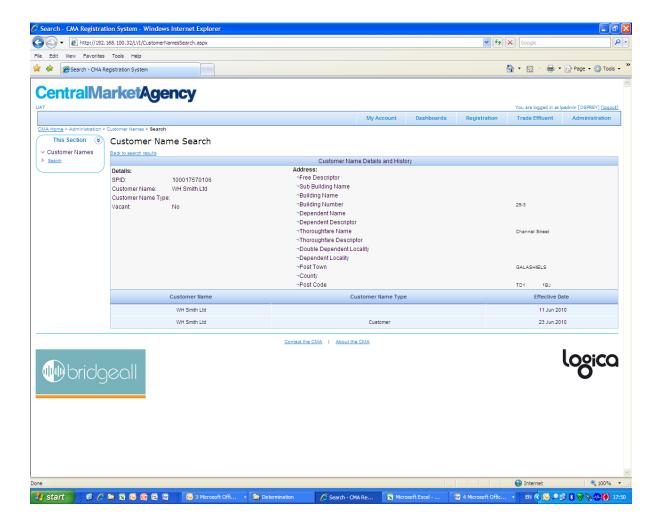


#### **More Details**



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 More Details screen displays the following information:

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



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