

## ***Third Workshop - Coventry, 24th July***

Attendees:

### 1 Metering Business

- Mary Hibbits(Business Manager)
- Dave Harper (I&C Technical Manager)
- Gareth Williams (Technical Analyst)
- Berjinder Chaira (Baz) (Design Assistant)

### 2 NG IS

- Martin Hansford(Senior Business Analyst)
- Nitin Sharma (Business Analyst)
- Anna Stoneman (Project Coordinator)

### 3 Advantica

- Jamie Priest
- Andy Hardy

## **Summary**

The workshop was intended to update the group on resolutions to outstanding queries, define the documentation that is to be uploaded to and produced by the system and the administration of the system in general.

## **Notes**

### **Questionnaire**

Q5a - Inlet/Outlet orientation - not required. This question was added to the questionnaire during the previous workshop. However, it has been determined that all meter modules are delivered with all the pipework required to allow them to be used for all the orientations that they support. It will still be necessary to know the supported orientation details of the meter modules, but the choice of orientation will be determined by the selection made by the user.

Compressor/Booster - the questions to be asked on determination of the presence of downstream compressor/booster are ongoing. DH to action.

Adversarial jobs should be automatically handled by MIP unless there is a need for purging. Therefore, new question required to allow the request for a purging service - DH to provide details.

## **Pricing**

Each selected meter module has:

- 1 a 'network' price i.e. the charge that the network performing the installation will make to D&Q;
- 2 a 'supplier' price i.e. the price that D&Q will sell the installation to the supplier for. Note: This is the installation price, not the cost of the actual meter module. Meter modules are generally rented to the supplier. The system is not required to support the selling of meter modules to suppliers. The 'supplier' price information is entered into SAP as part of the 'job' entry on quotation acceptance;
- 3 associated variable costs i.e. costs that vary from meter module to meter module:
  - housing (there will only be one housing option for each meter module), Labour is 10% of the housing cost;
  - base (there will only be one base option for each meter module), Labour is included in the Base cost;
- 4 fixed costs i.e. costs that are constant for all meter modules:
  - EMS (Energy Management System);
  - AMR Automatic Meter Reader?;
  - Converter.

Meter module prices (network and supplier) are regional i.e. the price for a meter module may differ according to the region in which the installation will take place. The current MIP5 system supports regional pricing, BC is currently updating the information. Regions are based on post-codes - D&Q will make available the region to post-code information.

All other prices are non-regional.

Where the system selects a meter module or associated item and a required supplier price is missing, the system will be unable to produce a quotation. The enquiry will be treated as a Manual Quote that requires completion by D&Q (see previous meeting notes).

Where the system selects a meter module or associated item and a required network price is missing, the system will produce a quotation but there will be a manual process during 'job' entry onto SAP to determine the relevant network costs.

Bypass pricing will be handled off-line

## **Manual Quote**

The system should provide a pro-forma of standard line items that can be charged against and also allow the entry of 'other' charges.

## **Contract Reference**

Each supplier (Market Participant) has a maximum of three contracts associated with it. The contracts refer to whether the work to be performed can be categorised as 'below 7 bar', 'above 7 bar' or 'adversarial' (the removal of a meter module without the knowledge of the consumer). The system

should be able to determine the applicable contract through the 'MARKET PARTICIPANT' (derived from user details), 'JOB TYPE' (Q5) and 'SERVICE PRESSURE' (Q6) questions.

A supplier may be a member of a larger group organization e.g. British Gas Trading and British Gas Business are part of Centrica, however the system does not need to support this relationship.

An extract of the Contract Reference details was made available by D&Q (see . BC to make a full version available.

## ***Documents to be Uploaded to the System***

It is expected that the user (agent or D&Q) may upload:

- 1 Asset Location Notes e.g. drawings, notes, plans, photographs, etc.;
- 2 GT1;
- 3 GT2 Warrant;
- 4 APA;
- 5 UIP drawings;
- 6 'Other'.

The system should limit the total of all documents for an enquiry to 10Mb. The system should allow both the agent and D&Q to remove documents from an enquiry in order to allow the addition of further documents.

The system should also allow free-form text 'notes' to be added to an enquiry by the user (may be used as a reference to where supporting documentation is being stored by the user). D&Q should also be able to add notes to a Quote. Notes entered by D&Q should not be visible to non D&Q users.

## ***Usage Reporting***

When a user 'rejects' a quote, they should be prompted to give a reason. D&Q should be able to view all rejected quotes and the reason for rejection. Note: a 'rejected' quote can later be accepted if it has not lapsed (90 Days) at which point the user will no longer be able to accept the quote.

Reports that might be of use to D&Q are:

- 1 number of live (i.e. not submitted) enquiries on the system;
- 2 number of live quotations;
- 3 list of quotations produced in this period;
- 4 list of manual quotes and their status;
- 5 quotations that were generated in this period;
- 6 quotations that lapsed in this period;
- 7 a record of interaction between the system and the user (agent) e.g.
  - when the enquiry was initiated;

- when the enquiry was submitted;
- when the quote was produced;
- when the user was informed of quote availability;

It was decided that the system should make the base information available to D&Q so that they could produce their own reports (through Excel, etc.).

## **Quotations**

The 'printed' quotation document can be produced on NG Metering 'paper', except for 'INSTALL' jobs.

The system will select the 'paper' for INSTALL jobs based on the 'SUPPLIER' and 'REGION' information.

## **Administration of the Base Data**

D&Q will be able perform Create, Update, Delete actions on:

- 1 meter modules (both technical and pricing information);
- 2 fixed materials (pricing information);
- 3 variable materials (pricing information);
- 4 relationships between meter modules and housings, drawings, etc.;

D&Q should be able to make the system unavailable to agents during a period in which the above is being performed.

The system will need to contain approximately 50 drawings that will be associated with approximately 90+ meter modules.

There was discussion on how the data for the initial running of the system and later amendments should be performed. D&Q would like the ability to perform all data manipulation through 'bulk' loading data made available in file format. JP/AH to investigate and document.

## **Documentation**

The following documentation will be required:

- 1 User Guide;
- 2 Training documentation is not required. Instead the 'Train the Trainer' method will be employed, it was thought that UAT would provide further understanding of the system for D & Q users;

## **Support**

Customer Services will form the first line of support for users with 'business-related' issues using the system. Technical issues will be handled by NG IS who will contact Advantica if application/hosting support is required.

The system should be display the Help Line numbers: these will be dependent on the 'SUPPLIER' i.e. different parts of Customer Services support different suppliers.

The system should be backed up in a manner that allows recovery to a state in which no more than 1/2 working day of data entry is lost (assumes an 8 hour working day). In the event of disaster, the replacement system should be running within 4 hours and using the latest available data backup. Manual processes will be employed to determine the need for failing over to the replacement system i.e. the system does not need to support hot standby.

## **Other**

Lapsed quotes should be removed from the system automatically.

An agent should be able to see all enquiries and quotes that are associated with their supplier.

Some suppliers can only perform limited jobs e.g. Scotia can only perform 'removals'. The system does not need to support this.

Variants i.e. where the job requirements change on arrival at the site (e.g. need for purging) do not impact on the system.

Gareth is to be the point of contact between NG and Advantica for all further queries.