

Second Workshop – Coventry, 19th July

Attendees:

- Metering Business
 - ◆ Mary Hibbits(Business Manager)
 - ◆ Dave Harper (I&C Technical Manager)
 - ◆ Gareth Williams (Technical Analyst)
 - ◆ Berjinder Chaira (Baz) – (Design Assistant)
- NG IS
 - ◆ Martin Hansford(Senior Business Analyst)
 - ◆ Nitin Sharma (Business Analyst)
 - ◆ Anna Stoneman (Project Coordinator)
- Advantica
 - ◆ Jamie Priest
 - ◆ Andy Hardy

Summary

DH and GW walked the group through their review of the questionnaire based on the current input forms. Although restricted to the changes that can be made (contractual reasons), they identified where wording could be clarified and the overall flow of the questions and the dependencies between those questions. Their flip–chart results were taken by AH as an aid to the functional requirements process.

Then handed over to JP, the main points of the agenda were:

- Questionnaire review (see above)
- Quotation engine – how are costs generated from the results of the questionnaire, rules and lookups
- The Enquiry process life cycle, who can enter/amend enquiries, when does an enquiry start its life and when does it end
- Quote life cycle, when is it initiated, the process of acceptance, who needs to be informed of acceptance, auditing, etc.
- The long–term storage requirements of enquiries and quotations, exceptions to the usual life cycles.

Notes

In these notes description Qn refers the question number as marked on the flip–chart.

Summary list of questions as presented by flip–chart:

- Q1 to Q5 Job Address Details
- Q6 Service Pressure
- Q7 Required Metering Pressure
- Q8 Annual Quantity
- Q9 Downstream Booster/Compressor
- Q10 Indicative completion date
- Q11 Other related job reference(s)
- Q12 Additional Services
- Q13 Metering Capacity – Qmax and Qmin

- Q14 Meter size
- Q15 Existing Meter: Asset details including type and serial number

Contract Reference (Supplier Details). It was thought that all supplier details would be automatically populated based on the users login and their relationship to a supplier. However, the supplier 'Contract Reference' determines the contractual terms this job will be subject to. A supplier may have a number of contracts that can be used (even if the terms for all contracts are actually the same). **DH** to confirm how this should be handled regarding validation, impact on pricing, etc. In addition we discussed how internal I&C users could create quotes using supplier information by entering the suppliers contract reference id.

Q5 *JOB TYPE* terms used in the flip-chart are defined within the manual and are/should already be understood by users. Choosing a 'Standard' job allows Q6/7/8/11 to be missed (i.e. questions referring to service pressure, required metering pressure, annual quantity, presence of downstream booster/compressor).

Q5a – The current form does not ask for inlet/outlet orientations. This information is required to be sent to the meter supplier so that they can supply appropriate pipework to allow the selected meter module to be used (all meter modules can be configured for all orientations). Therefore a *new* question is required to obtain this information.

Q9 – having asked about the presence of a downstream booster/compressor, there should be a *new* question that asks compressor related information. **DH** to provide details.

Q10 – completion date can be validated against the meter size (lead times, etc.) however this question is asked later on in the flow. Flow to be reviewed.

Q11 – this is currently unused.

Q12 – Can validate against if By-Pass is required but Twin Stream has not been selected.

Q12 – Job Description/Special Instructions is currently used to describe *all* the job requirements and may contradict other information entered into the form. There was discussion about how this should be handled. Main options were to:

1. Prevent the automatic generation of a quote if anything is entered into this field. BC suggested that this field be at least 500 characters in size; *This was the chosen option*
2. Indicate that the questionnaire information will form the basis of the quote, with this field providing additional work-related information.

Q14 – Only appropriate for 'Standard' job.

Q15 – Not required for 'Install' job.

General requirement to allow supporting documents to be attached to an enquiry. System should allow the user to classify these documents e.g. 'this is a site drawing'. System may need to limit the size and of documents (thought to be a 10Mb email limit for D&Q staff).

Enquiry life cycle

Enquiry begins when user presses a *New Enquiry* button. Each enquiry is assigned a unique reference. Enquiries may be *copied* as the basis for new enquiries to make it easier to produce quotations for similar pieces of work e.g.

another McDonalds installation. Copying an enquiry should *not* copy any files attached to the original enquiry.

An enquiry is saved after each screen is completed and available for submitting when all screens have been completed. Incorrect inputs will be highlighted when the relevant screen is saved.

An enquiry can be amended without restriction, by anyone working for the same supplier. **DH** to confirm whether the contact details for an enquiry should be: altered to match the last person to edit the enquiry; remain unchanged; have some form of 're-assign' functionality;

An enquiry ends when the users presses a *Submit for Quotation* button.

A user may request that Customer Services assist them when completing an enquiry. This would require the system to allow read-only access to all enquiries by identified CS users.

Quote life cycle

A quote begins when the user presses the *Submit for Quotation* button. A single enquiry may produce multiple quotes i.e. when a number of modules are suitable for the job. Each quote is assigned a unique reference.

If the system can generate a quote(s) automatically, it will immediately do so.

If the system cannot generate a quote automatically, the user will be informed and the **Manual Quote** process (below) will be followed.

In either case, the quote(s) will be built and stored on the system and they will be treated in the same manner.

The user has the ability to review a produced quote before deciding to accept or reject the quote. If the user has requested phone/fax as their contact mechanism then the completed quote (or reference) will be sent to D&Q so that they can communicate with user outside of the system.

The ability to 'Accept' a quote may be limited through the suppliers user roles – *but this may not need to be supported by the system*. If the user wants to accept a quote, the user should be presented with T&Cs and they will need to actively 'agree' these before the quote is recorded as accepted. The system should record who accepted the quote.

The system should allow D&Q to accept quotes on behalf of a user – this would usually be as the result of a phone request from the user. The system should note who accepted the quote and their authority to do so e.g. reference the user phone call/fax, etc.

The acceptance of a quote will cause the following to occur:

- email to D&Q to say that it has been accepted;
- email(s) to Customer Services so that details can be entered into SAP and the 'offline' database. Details required are:
 - ◆ All enquiry questions and their answers;
 - ◆ The modules chosen (format should match that of the quote form) and their costs;
 - ◆ All other documents that have been attached to the enquiry;

There was discussion of 'other' forms that need to accompany quotes or quote acceptance e.g. GT2, Manufacturer Design Request, ES Survey Form, Mechanical Form, New Housing Form, etc. Need to confirm what those

documents are and how/when the system produces them. **BC** to action.

The 'paperwork' produced by the system will differ between suppliers, but only in terms of the logos and header/footer details (both static and obtained from the enquiry/quote) to be printed. All other content will be consistent between all quotes.

Paper/Phone/Fax Requests

Users can contact D&Q and complete the enquiry without direct access to the system. The interaction should be the same as described above, but the system should record who actually entered the information and on whose behalf the enquiry was made. The contact details for the enquiry should match those of the remote person, not the D&Q user.

Users can contact D&Q/Customer Services for help in completing an enquiry on-line. D&Q/Customer Services will need to be able to access the partially completed enquiry at the same time as the user.

Manual Quotation

If the system is unable to produce an automatic quotation, the user will be informed that the quote will be completed manually by a member of D&Q. The enquiry will be 'frozen' to prevent changes before the quote has been produced by D&Q. An email will be sent to D&Q to inform them that there is a quote waiting for completion. A member of D&Q will be assigned to complete the quote. The mechanism of producing the quote will occur outside of the system, but the quote details will be entered into the system. These details will include free-form text describing the work plus a number of 'line-item' costs e.g. Material, Labour, Lifting, etc. The format should allow the system to generate the quote documentation in the normal manner. Once the quote is available on-line, the user is informed (via their preferred method) and they then follow the above general process from the 'review' stage.

The system should allow the D&Q user to alter the enquiry in order to produce a valid/consistent enquiry and quote – e.g. where an incorrect capacity value has been entered. The system should audit these changes.

The system should allow the 'request' for a manual quotation to be cancelled by the user.

Job Tracking

Currently, the 'off-line' work tracking system is used to track the generation of the manual quote – there are SLA's etc. that need to be met. The current system is felt to be cumbersome and D&Q would like the new system to take-on the manual-quote aspect of job tracking. The general process for this functionality would be:

1. Quote is requested by the user;
2. The system identifies that a manual quote is required;
3. The system emails D&Q with the enquiry details: various forms (to be confirmed);
4. The work is assigned to a D&Q user;
5. A quote is produced and uploaded to the system;
6. The quote is quality checked by an 'approver';
7. The quote is marked as 'ready' and made available to the contact/supplier for them to accept/reject;
8. The contact/supplier is informed that the quote is available (via their preferred method).

The system would track the status of manual quotations, their assignment and provide some form of work flow reporting.

Although this functionality would be useful to D&Q, it should be noted that it is outside of the **current** scope of the project and the Business would need to consider/confirm if this functionality will be delivered by Blueprint.

Post Workshop Questions

- Does the system need to send a confirmation, etc. to the user/supplier on quote acceptance?
- Should all other quotes associated with the same enquiry be 'closed' when a quote is accepted? Assume yes;
- Quote review – is the user looking at the on–line representation of the quote e.g. a line item referring to the modules, etc. or are they reviewing the 'paperwork' i.e. the full quote as it would appear as the output from the current systems. In general, when is the paperwork produced and is it required in all cases;

Quote engine

The quote engine is responsible for identifying meter modules, housing and bases that fulfil the technical requirements of the enquiry. A meter module is selected using the following criteria:

- Orientation (to be confirmed)
- Inlet pressure;
- Outlet pressure;
- Maximum capacity (Qmax)

John R Horne (john.r.horne@uk.ngrid.com – current contact for queries about the MIP5 system) attended this part of the meeting to confirm how MIP5 selects meter modules. JP & AH to investigate the MIP5 system to try and clarify the selection criteria for the modules (with JRH as reference). It was confirmed that the MIP5 system is correct and accurate in determining the correct modules.

Each candidate meter module will only be available with one housing and one base.

There was discussion on the pricing information to be held within the system. There is an issue about how costs are calculated for the various service providers (**not** suppliers) and regions. For example, the customer quote shows 'published' costs that include the labour element of the service provider and this element will differ according to region and service provider. The service provider costs are required when an accepted quote is entered into SAP. The current business processes deal with this complexity manually and the process is thought to be changing in the future. **DH/BC** to clarify the pricing mechanism to be supported by the system.

Post Workshop Questions

- Is Qmin a selection criteria or is it only used to validate the Qmax i.e. is it used to determine that a bespoke meter is required or that the values entered into the enquiry are incompatible with known meters?

Issues

- What are the data storage requirements? How long should enquiries and quotes be stored (e.g. Enquiries for 1 year, Quotes for 2 or for life of the warranty)?
- What are the data growth rates – do we expect to receive 30*10Mb files each day?