ERS User Guide

Core
Worklists
Guide to Using MPA Worklists

Version 0.4

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1. Introduction

1.1 Purpose

The purpose of this document is to describe how to access cases on the Meter Point Administration (MPA) Worklists and to describe the generic buttons, actions and functions available within the MPA worklists screens.

The document is intended to be read in conjunction with other documents that provide operational instructions for specific functions.

1.2 References

Reference Number	Document
UG-GE-GUI-100	GUI Features

1.3 Overview

The functions and accompanied actions covered include the following:

- How to access MPA screens
- Selecting an MPAN to work
- Unlocking an MPAN
- Filtering for the required worklist
- Viewing the details for a case
- Worklist actions to take
- Generic actions to take

2.   MPA Worklists

Cases on MPA worklists are created when a dataflow is received which requires manual intervention, that is, an action to be taken within ERS. Actions include resolving cases created due to exceptions which may be:

- Invalid details – for example a dataflow is received containing an MPAN that is not known to ERS.

- Overdue dataflows – a dataflow has been received and is expecting a response which is overdue.

- Rejection of a request – a request has been made to a third party agent that has been rejected.

In order to resolve the case caused by an exception, manual intervention is required to determine the course of action to be taken.

2.1 How to Access MPA

There are various ways to access the MPA screens:

- Select the Meter Point Administration option from the ERS Main Menu. The Meter Point Administration screen is displayed.
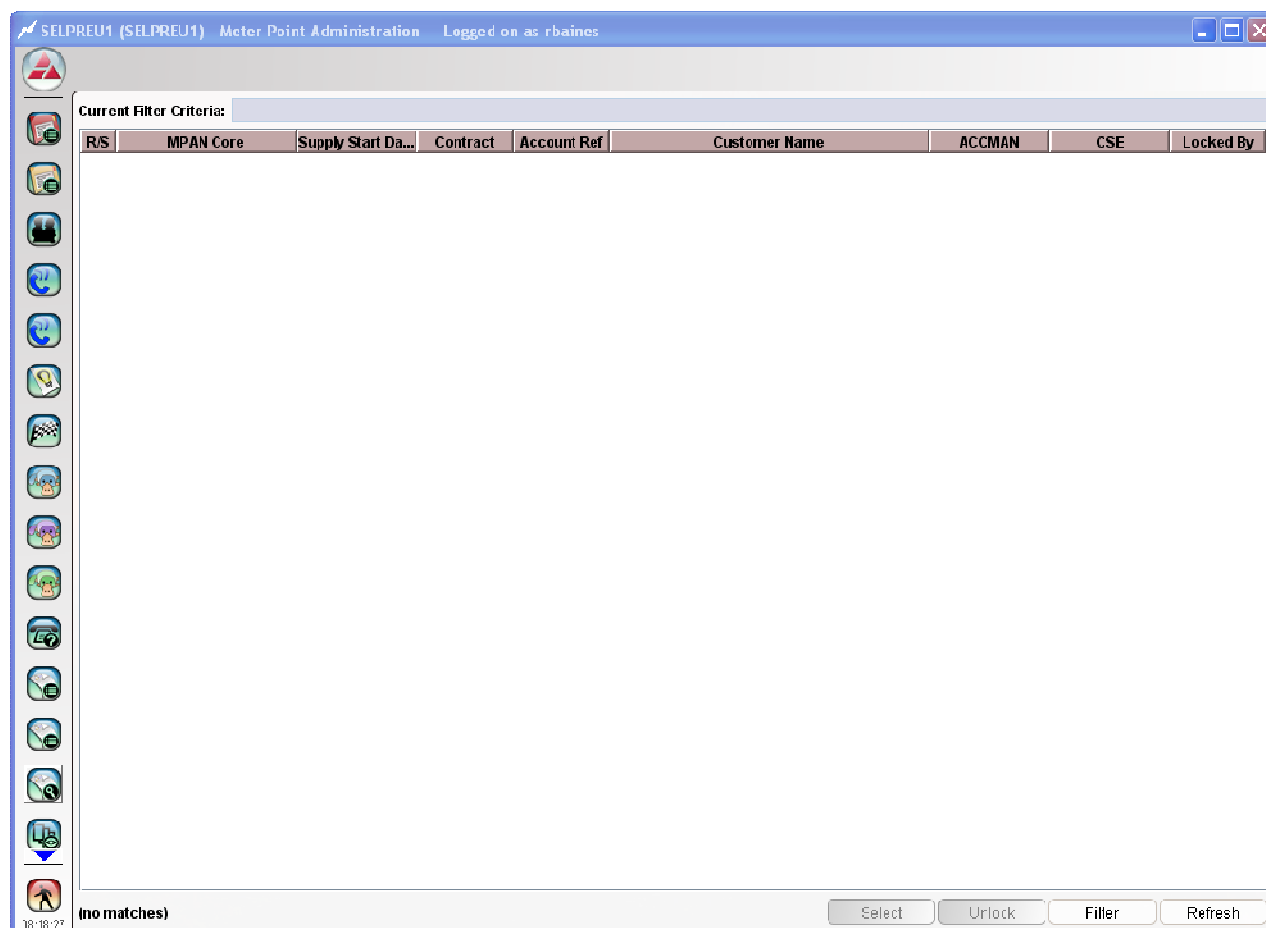
Figure 2.1: Meter Point Administration

Otherwise,

From the following screens:

- In the Master Customer Enquiry screen, select an MPAN and click the Meter Point Administration button in the Supplies, Groups or Ledger tab.

- In the Contract Enquiry screen, click the Meter Point Administration button in the top left hand corner of the screen. The Sites and Supplies pop-up opens. Select an MPAN.

- Once the MPAN has been selected, in the Contract Enquiry screen, click the Meter Point Administration button in the Sites, Usage, Registration or Actions tab. Click the Meter Point Administration for the select MPAN button.

The MPA Process Mode pop-up opens together with the Meter Point Enquiry screen. Multiple Meter Point Enquiry pop-ups can be active for different MPANs at any one time.

- In the Meter Point Enquiry screen, click the Meter Point Administration button.

Figure 2.2: Meter Point Enquiry - MPA Process Mode

2.2 Meter Point Administration Selection Screen

The Meter Point Administration screen displays a list of MPAN worklists. When the screen is entered for the first time in an ERS session, it will default to show all MPAN worklists locked by the current user. The Unlock button is disabled when no MPANs are locked. If the screen is returned to during an ERS session, it will appear in the same state as when last used. There are four action buttons available in the bottom right hand corner of the screen.
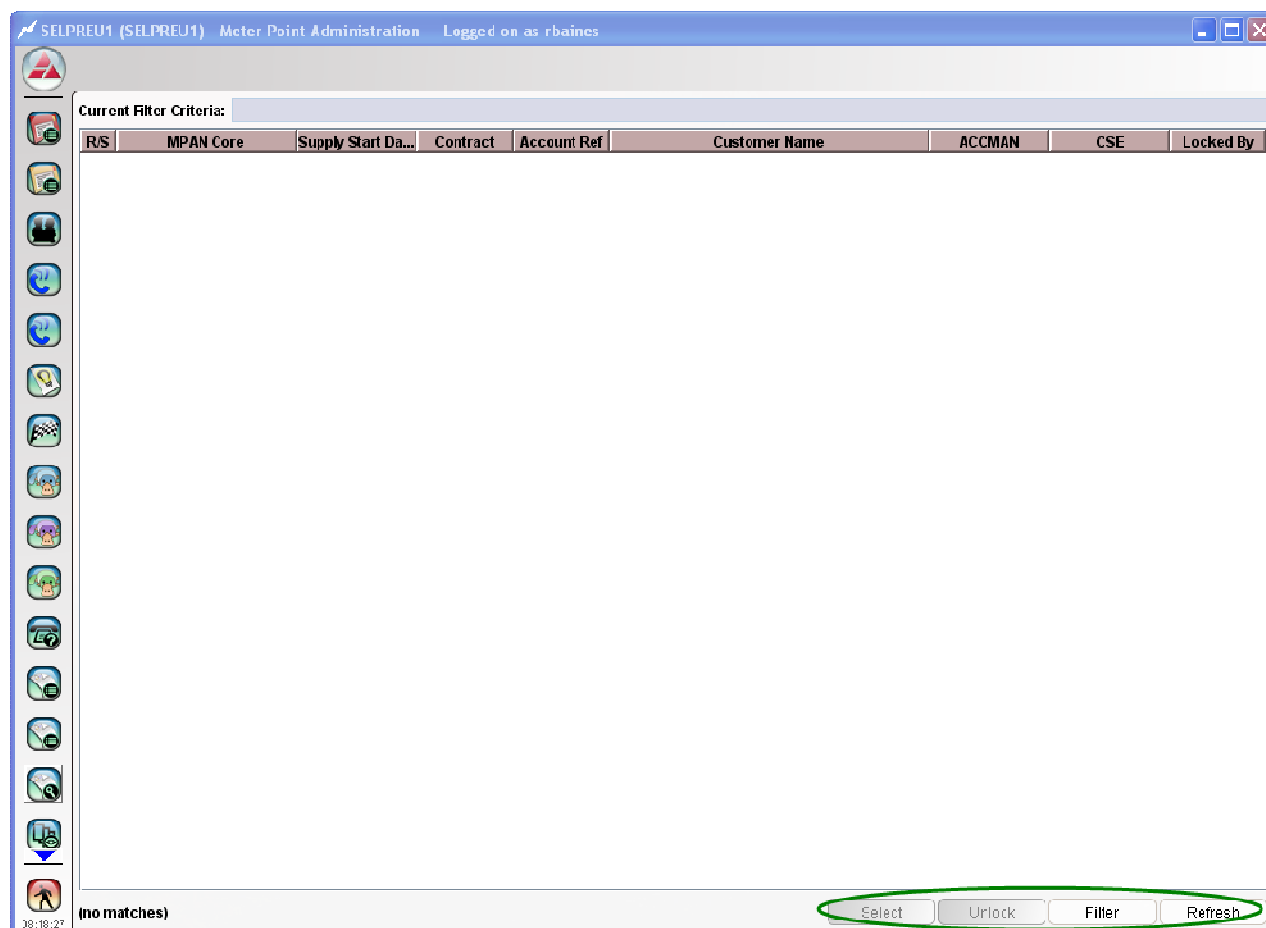
Figure 2.3: Meter Point Administration Selection

2.2.1   Filter Button

Different types of filters can be applied to the MPA worklists. When opening a new session, the filter defaults to Locked, otherwise the same filter previously used will be applied.

• Click the Filter button to change the selection filter criteria. The Transaction Filter pop-up opens displaying the different filters available.

Figure 2.4: Transaction Filter

To select the required filter criteria:

• Click on the required radio button and enter any relevant details or select the required worklist.

   • Locked – a list of MPAN worklists locked to the current user is displayed.

   • MPAN Core – enter a specific MPAN core. A list of worklists outstanding for the MPAN is displayed.

   • Contract – enter the Contract Id. A list of transactions outstanding for the Contract Id is displayed.

   • Meter – enter the meter serial number. A list of worklists outstanding for the meter serial number is displayed.

   • Worklist – select the worklist name from the list in the lower half of the screen. For each of the MPA worklist listed, the count of MPANs and the number of days the oldest case has been outstanding are displayed.

• The filter will default to showing the first 21 results. To display more results, move the Rows Returned slider before clicking on Okay.

• Click the Okay button. The Meter Point Administration Selection screen is refreshed listing the worklists that match the filter criteria. If there is only one matching MPAN worklist, the MPA Process Mode pop-up opens for that MPAN.

2.2.2 Select Button

- To select an MPAN, highlight the required MPAN and click the Select button. The Meter Point Enquiry screen is displayed and either the MPA Process Mode or MPA View Mode pop-up opens displaying details of the selected MPAN.

The MPA Process Mode pop-up opens if the MPAN is not locked by another user or is locked by the current user.

Figure 2.5: MPA Process Mode

The MPA View Mode pop-up opens if the MPAN is locked by another user.


Figure 2.6: MPA View Mode

2.2.3 Unlock Button

This button is enabled if the selected MPAN is locked by the current user.

To unlock an MPAN,

- Select an MPAN locked to the current user and click the Unlock button. The user id will be removed from the Locked By column.

  The Unlock MPAN pop-up opens if the MPA Process Mode pop-up for the selected MPAN is still open. This must be closed before unlocking the selected MPAN.
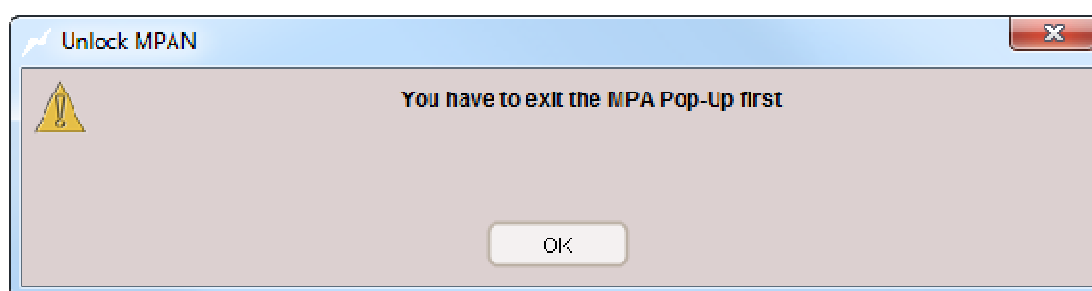
Figure 2.7: Unlock MPAN

- Click OK button to close the Unlock MPAN pop-up.

2.2.4 Refresh

To refresh the selection, click the Refresh button. The screen is updated with data relating to the current filter criteria. If the filter has not been used then it will default to the Meter Points locked to the current user.

2.3 MPA Process Mode

The MPA Process Mode pop-up contains information regarding an MPAN's status and a list of the outstanding MPA worklists cases for the MPAN.

The top panel lists the worklists cases in a table with the following columns:

- Case Started – the date the original case started. For example, the case starts for a COA Meter Technical Details Overdue worklist when the appointment request is sent to the meter operator.

- Worklist Description – the case worklist id and name.

- Task Started – the date the case was placed on the worklist.

- Decision – the action taken on the case.

The bottom panel has five tabs. Each tab displays different information relevant to the selected worklist case. The Details tab is displayed as the default.

Once a worklist case is selected, the actions that can be taken will be displayed at the bottom of the screen. There are two sets of action buttons:

- Worklist actions – shown in the bottom left hand corner. These are actions specific to the selected worklist case that need to be taken to clear the case. Some actions will only be available to users with the appropriate authority.

- Generic buttons – shown in the bottom right hand corner. These are generic actions which govern how the pop-up operates.

Figure 2.8: MPA Process Mode

2.3.1 Details Tab

To display the Details tab for the selected case:

- Click the Details tab.

The Details Tab displays information associated with the selected case. This could be details of an exception or details of when actions have been taken, for example details of the change of agent process.
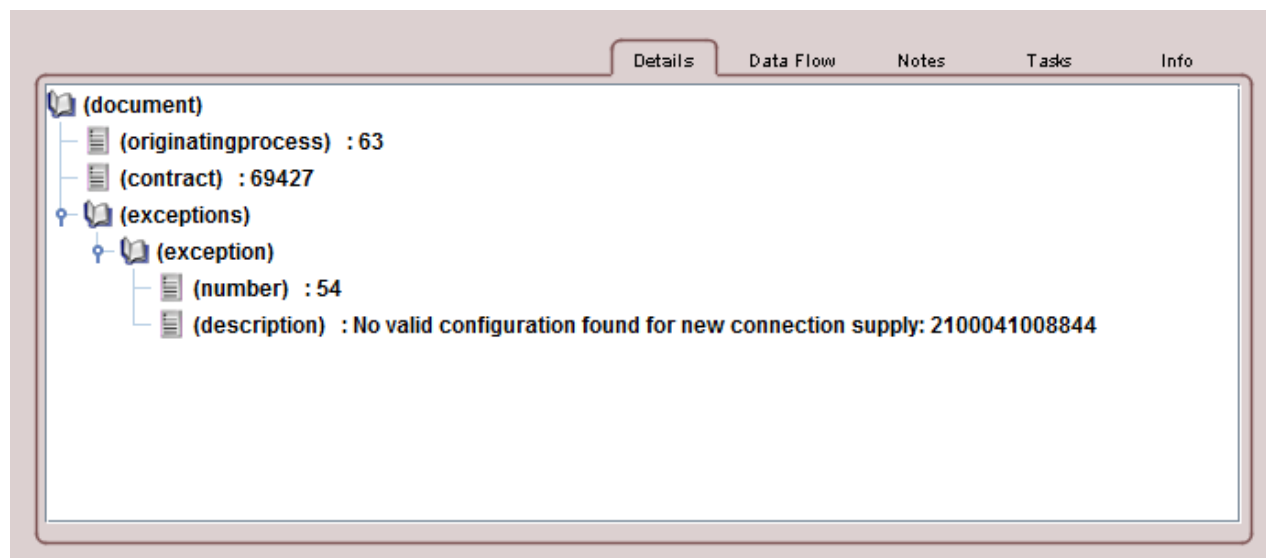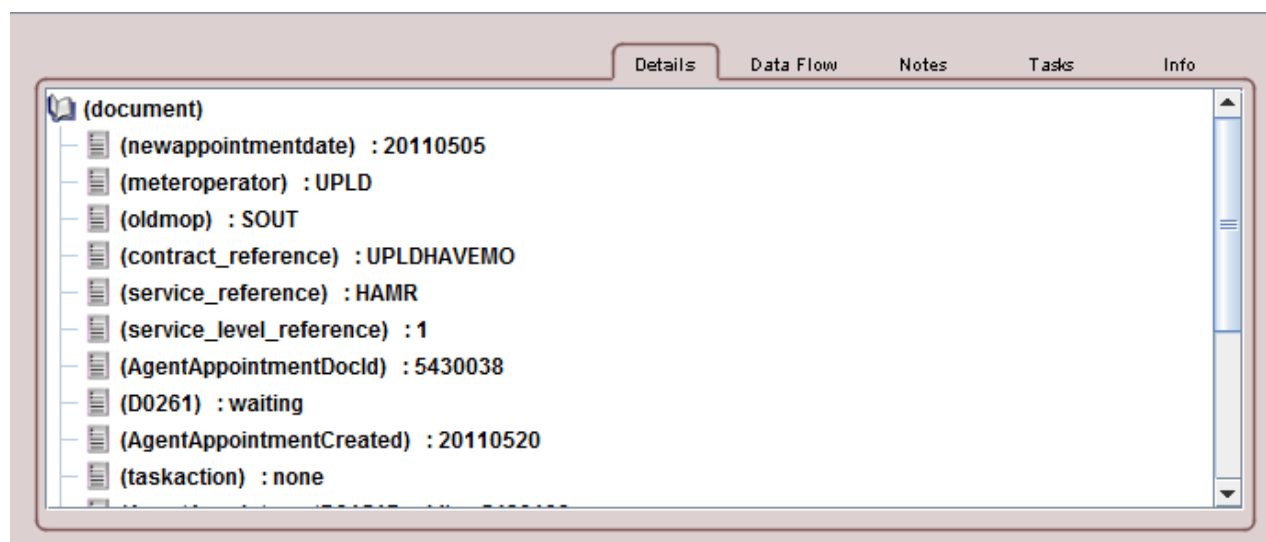

Figure 2.9: MPA Process Mode, Details Tab – exception details

*Figure 2.10: MPA Process Mode, Details Tab – action taken*

2.3.2   Data Flow tab

To display the Data Row tab for the selected case:

• Click the Data Row tab.

The Data Flow tab shows the structure and contents of the dataflow that is associated with the selected case. Not all cases will display dataflow information, for example, if the case is for an overdue response, the screen will be blank.
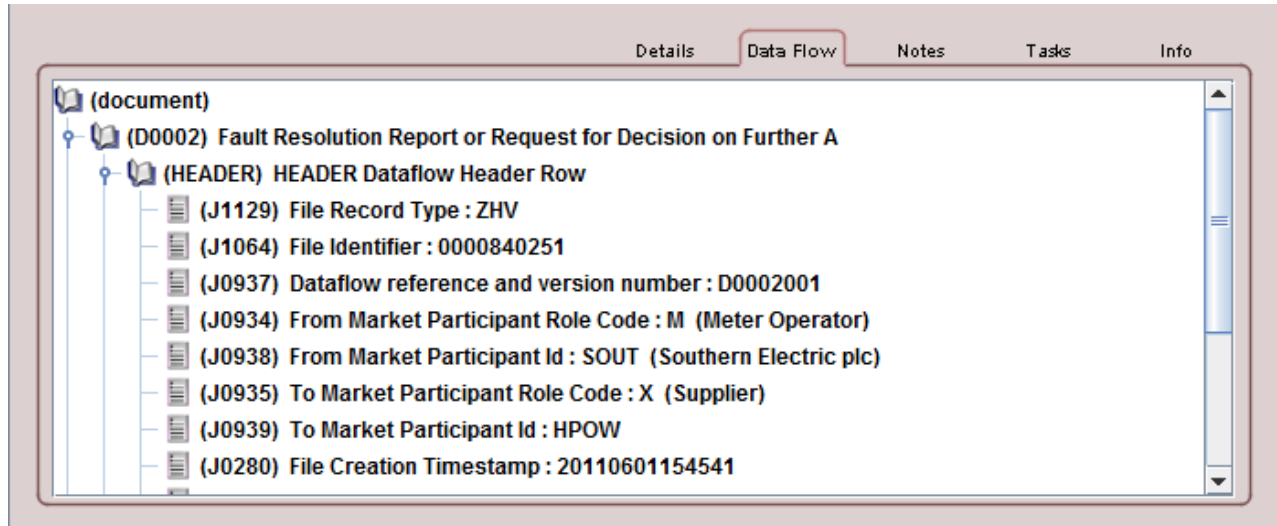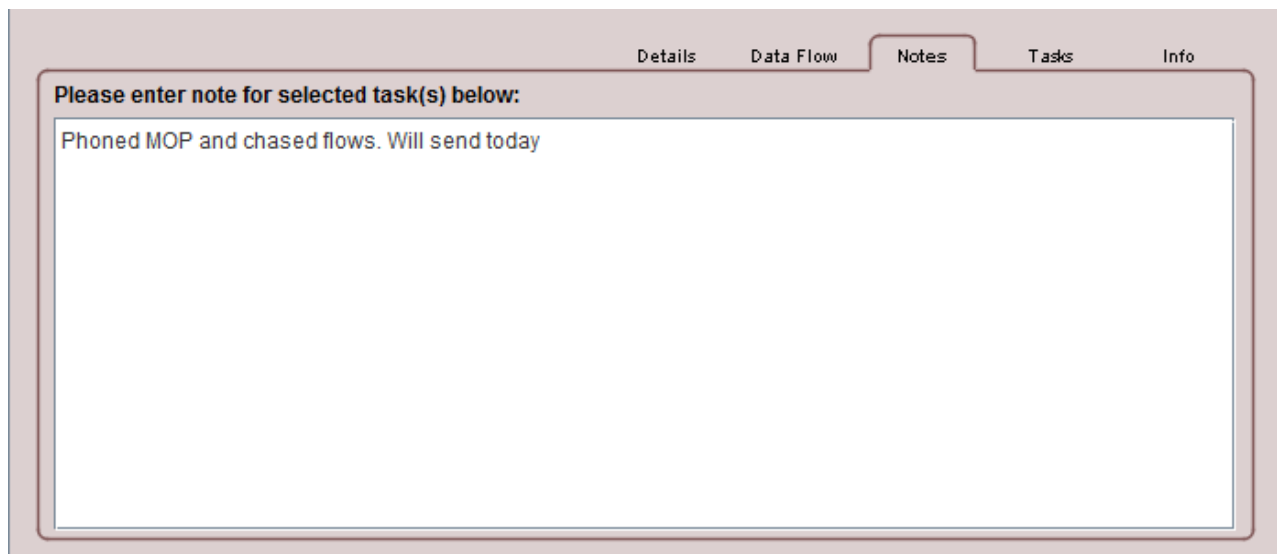

Figure 2.11: MPA Process Mode, Data Flow Tab

2.3.2.1

2.3.3   Notes Tab

To display the Notes tab for the selected case:

• Click the Notes tab.

The Notes tab is a text field in which notes relating to the selected case can be entered. A MPA Service Request is created for the selected MPAN when the action(s) are confirmed.
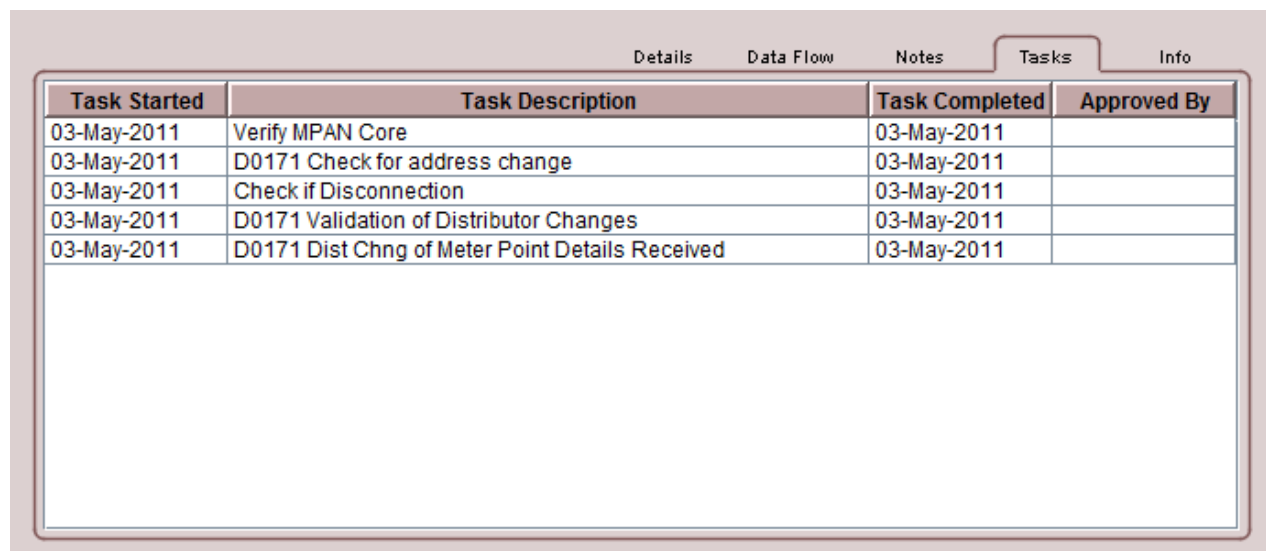

Figure 2.12: MPA Process Mode, Notes Tab

2.3.4   Tasks Tab

To display the Tasks tab for the selected case:

* Click the Tasks tab.

The Task tab lists the tasks for the selected case. The completed tasks are listed in chronological order and if the task has not been completed it will display "Pending" on the Task Completed column.
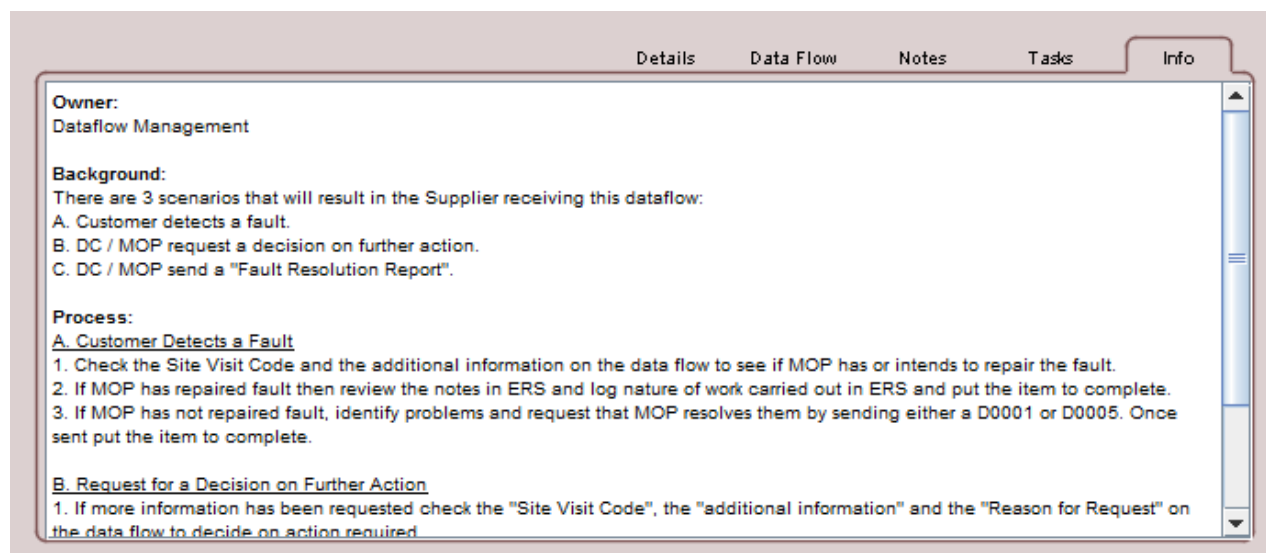

Figure 2.13: MPA Process Mode, Tasks Tab

2.3.5   Info Tab

To display the Info tab for the selected case:

* Click the Info tab.

The Info tab displays business defined help text relevant to the selected worklist case. An example of this is details of the circumstances that would cause a dataflow to be received or information on what action to take to resolve an exception.

Figure 2.14: Process Mode, Info tab

2.3.6   Worklist Actions

When a worklist case is selected, the available worklist actions are displayed. Only actions which the current user is authorised to use are displayed. These actions and the processes that are triggered as a result of the action vary for each worklist case.

For details of the actions available on individual worklists cases and the result of the taking those actions, go to the relevant MPA User Guide.

Figure 2.15: MPA Process Mode (Worklist Actions)

When an action is selected, the Decision field is populated with the action taken.

Figure 2.16: MPA Process Mode – Worklist Actions Decision

The action is not processed until the Confirm button is selected. Multiple cases can have decisions recorded before confirming the actions. Go to section 2.3.7.2 for details on how to confirm the actions.

Descriptions of the most frequent case action buttons follows:

2.3.6.1 Abandon

To abandon the selected case:

- Click the Abandon button. In the Decision field, the word "Abandon" will appear.

The case is abandoned and no further processing is carried out. The supply point is removed from the worklist.

2.3.6.2 Accept

To accept the selected case:

- Click the Accept button. In the Decision field, the word "Accept" will appear.

The information on the case is accepted. The case is removed from the worklist and process specific tasks are performed for example:

- Validation is re-performed
- Processing of the case is continued
- Processing is completed
- No further processing is performed

2.3.6.3 Complete

To complete the selected case:

- Click the Complete button. In the Decision field, the word "Complete" will appear.

The case is completed and is removed from the worklist.

2.3.6.4 Defer

To defer the selected case:

- Click the calendar button to select the date the case is to be deferred until.
- Click on the Defer button. In the Decision Field, the word "Deferred" and the selected date will appear.

The case is moved from the worklist to a "Deferred" worklist until the date selected is reached, when it will return to the original worklist.

2.3.6.5 Resubmit

To resubmit the selected case:

- Click the Resubmit button. In the Decision field, the word "Resubmit" will appear.

Processing of the dataflow is started again and the case is removed from the worklist. If processing is unsuccessful, the case will return to the worklist.

2.3.7 Generic Buttons

The Generic buttons control how the MPA Process Mode pop-up operates:


Figure 2.17: MPA Process Mode

2.3.7.1 Clear button

• Click the Clear button to erase the decision for the current selected case that has not yet been confirmed. The Decision column on the selected row is displayed blank.

2.3.7.2 Confirm button

To process all decisions made on all cases, confirm the actions. To confirm the actions:

- Click the Confirm button. The Confirm pop-up in which to enter relevant notes opens.
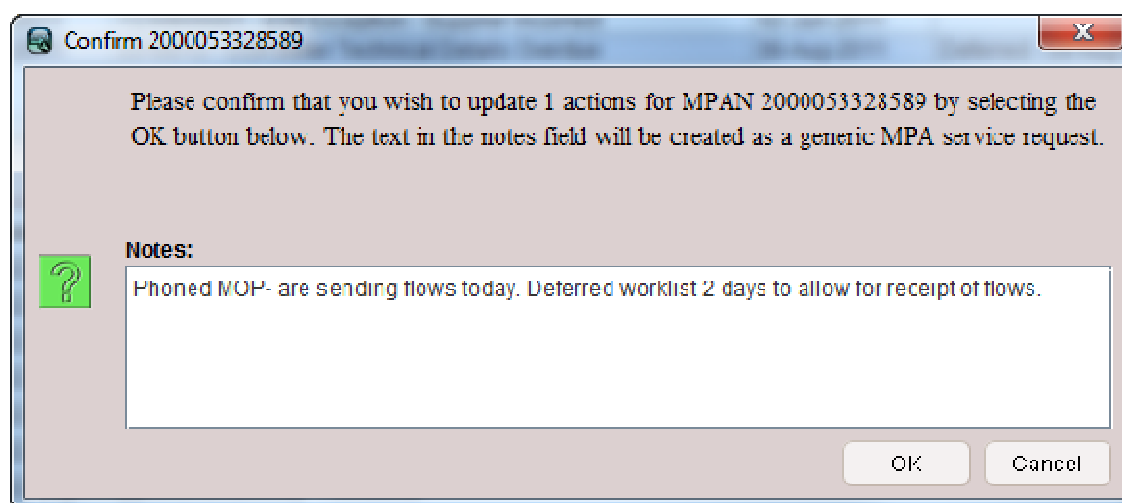
Figure 2.18: Confirm pop-up

- Enter notes regarding the action taken. Any notes entered in the Notes tab whilst the worklist was being worked will be shown. These can be edited or deleted and new notes entered.

  The note entered will appear in the Meter Point Enquiry screen, CRM tab for the MPAN to enable an audit trail of worklists that have been worked and a history of actions that have been taken.

  Multiple worklists cases can be worked from the MPA Process Mode pop-up before Confirm is selected and a note entered, however only one note will be recorded against the MPAN.

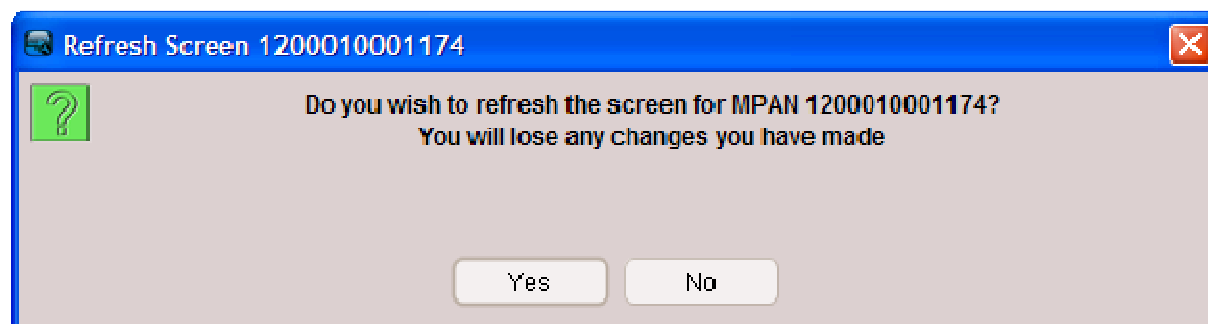- Click the OK button to confirm the actions. The Confirm pop-up closes.

  Alternatively

- To abandon the confirm action, click the Cancel button to return to the MPA Process Mode pop-up.

2.3.7.3 Refresh button

To refresh the Decisions column on the MPA Process Mode pop-up:

- Click the Refresh button. The Refresh Screen pop-up opens.

Figure 2.19: Refresh MPA Process Mode - Confirmation

- Click the Yes button to confirm. The list of any actions already recorded against cases will be lost.
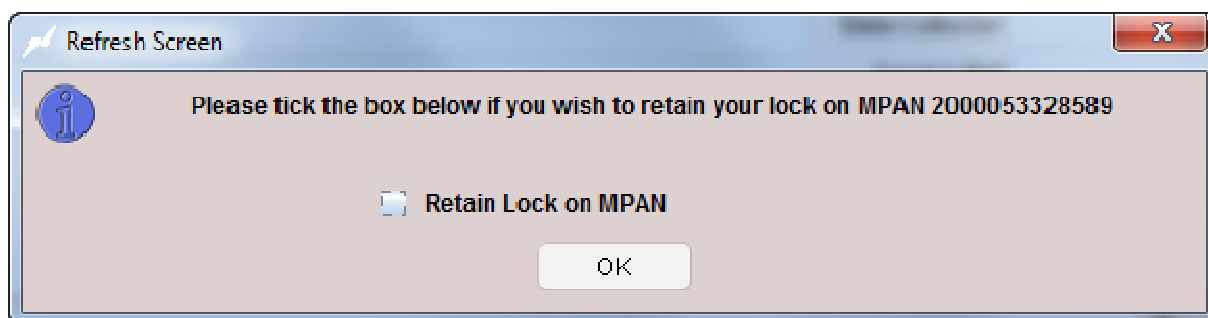
  Alternatively

- To abandon the refresh action, click the No button to return to the MPA Process Mode pop-up.

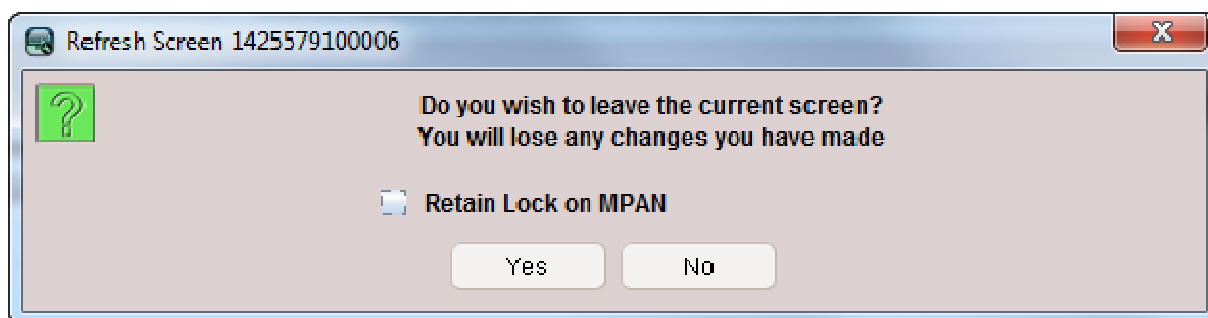### 2.3.7.4 Exit button

To exit the MPA Process Mode pop-up:

- Click the Exit button. The Refresh Screen pop-up opens.

Figure 2.20: Exit MPA Process Mode – Refresh Screen

- Check the Retain Lock on MPAN checkbox to keep the MPAN locked and click the OK button.
- Click the OK button to exit releasing the current user lock on the MPAN.

If Exit is selected without confirming the action, a warning pop-up opens

Figure 2.21: Exit MPA Process Mode – Refresh Screen, warning

To exit the MPA Process Mode pop-up without saving the changes:

- Check the Retain Lock on MPAN checkbox to keep the MPAN locked and click the Yes button.
- Click the Yes button to exit releasing the current user lock on the MPAN.

To abandon the exit action and return to the MPA Process Mode pop-up:

- Check the Retain Lock on MPAN checkbox to keep the MPAN locked and click the Yes button.
- Click the Yes button to close pop-up releasing the current user lock on the MPAN