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Cc: Rita Chohan[Rita.Chohan@ofgem.gov.uk]; Keith Avis[Keith.Avis@ofgem.gov.uk]; Paul Heigl[Paul.Heigl@ofgem.gov.uk]; Michelle Murdoch[Michelle.Murdoch@ofgem.gov.uk]
From: Sophie Jubb
Sent: 2012-08-31T12:46:37Z
Importance: Normal
Subject: FW: CRM - NI & meeting with Cantata etc
Received: 2012-08-31T12:46:38Z

All – fyi.
 Niketa please note highlighted bit below – I’ve not had a chance to look at the Discovery yet as I am still going through the Vision comments and amendments, but if you’ve not included this already it will need to be added. (It was done originally by Sonia, sorry can’t remember what folder it is in).
 Thanks

From: Sophie Jubb
Sent: 31 August 2012 13:44
To: Lindsay Goater; Ade Obaye; Cheryl Fox; Barney Merrett
Cc: Irene Harvey; Lewis Martin; Samantha Richards; Barbara Appleby
Subject: RE: CRM - NI & meeting with Cantata etc

Hi

My understanding is that actually I was going to be slightly gate-crashing Cheryl’s meet with my NI queries, so can’t really comment on a lot of this sorry!

However, I have spoken obviously with Barney, and just now with John from Cantata and can advise the following re NI specifically:

1. Cantata would be able to meet the end of October deadline including testing, as the required changes are in John’s opinion minimal for NI. He is going to double check and confirm though just in case. He suggests following a similar approach to how the CRM was used when the RHI query line was launched prior to the actual scheme and Register going live, but obviously we can discuss in more detail when Ops Team time is freed up a little more. This would be because of the lapse between the NI scheme launching and the actual changes to the Register being made (as obviously until the latter is done there can be no nightly batch run of NI data). So you should be able to create contacts for NI and these would then be married up once the Register changes are done.
2. NI Identifier – once the Register changes are done, Cantata would be able to add a clear visual identifier, e.g. a big coloured flag/box for NI ones (in addition to the RHI number being different for NI anyway – Lindsay, the plan on the Register is for it to be as you describe below – but RHINI I believe). This should be fine as we both understand that only information against accounts where an application has been submitted is pulled across in the batch. He believes this could be done for the manual period too, for the contact details.
3. Costs – he will aim to get a ball-park figure to me before next Friday’s meet (JUST for the NI work). He believes this will be minimal, and yes possibly covered under existing support (with the possible exception of the flag/coloured box identifier).
4. NI data – as above they can put a clear visual identifier on this. I have advised (**please let me know if this is incorrect**) that all Ops Team users should be able to view NI data, there won’t be a need for a different group of users and for access to be limited just to these. Lindsay/Barney when you can, please advise if you are meaning something different re “separate”.
5. Tender – John believes no change is required.
6. Friday’s meet – which I will attend - John has quite rightly pointed out that if there’s other changes in the pipeline that may fit with the NI timeframe needs, then we should do these together if possible, and also consider any possible conflicts for NI (but we don’t think there will be, as the NI changes are minimal and simple, and I have assumed that if you (Ops Team) need extra data pulled for GB, you’ll probably want the same for NI too).
7. Re DRD etc, as you know we’ve received the Discovery doc for NI from the BA – I will ensure that the CRM DRD is included in here as one that will need amending to include NI requirements (we are not looking to create new docs for NI, but to amend existing ones – this is the practice currently used for RO/NIRO etc).
8. I am not up to speed with the Sanctions work (though agree everything has been covered by you re the requirements and IT Liaison can take this forward – is there budget for this now?) but am sure Cheryl can advise. Similar with your other query re live issues.

Any queries please let me know.

Many thanks

From: Lindsay Goater
Sent: 31 August 2012 12:54
To: Ade Obaye; Sophie Jubb; Cheryl Fox; Barney Merrett
Cc: Irene Harvey; Lewis Martin; Samantha Richards; Barbara Appleby
Subject: CRM - NI & meeting with Cantata etc

Hi All
 Received from OFGEM on 11.05.2017
 Annotated by RHI Inquiry

Just wanted to flag a few points on the CRM prior to the meeting that some of you are at next Friday

The meeting is, I understand, primarily aimed at understanding how to handle Northern Ireland (NI) RHI enquiries and accreditation work from Oct / Nov.

NI RHI:

We (Barney, or me, *but not me at that meeting, sorry, on A/L*) can offer a bit of input, as ever from Ops view, but pls be advised that the original build involved a DRD (data requirements document) captured by a BA (Business Analyst) – suggest they may be needed here? I think I would agree with what I understand are initial thoughts, as for the Register, to keep NI data separate, and so a separate link to the CRM for this? (*btw, do they start installation nos at NIRHI0000000001?*)

Sanctions:

It may also touch on outstanding work on sanctions management functionality. This is all specified (in a DRD), and so I think can be completed with IT Liaison, Ade/Sam, maybe final BA input? Barney & I have little to offer here!

GB scheme accreditation:

There are some “live issues” with eg duplicates in the CRM

- Is there are scope within budgeted Cantata support costs for this?

We also have a wish for changes, eg spellchecker

- Assume need development budget

As we have no development budget, these last bits can be touched upon, but are really parked at present.

Thx

Lindsay

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