EES USER GUIDE

For Meter Equipment Managers / Supplier Agent Users

How do I…?

- Login
- Reset My Password
- Search for Information
- Refine my results
- Filter my search results
- View Meter History
- View restricted Meter data
- Set my user specific display settings
- Manage my user account details
- Crossed Meters
  - a. View Crossed Meters Cases
  - b. Filters
  - c. View Crossed Meters Case Details
  - d. Add a Note
  - e. Obligations
  - f. Linked Cases/Edited MSN
  - g. Closed Cross Meters Cases
  - h. Re-Opened Cases
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  - k. Crossed Meters Notification emails

What is/are…?

- Those 'No Entry' Signs
- Those Icons found on the results screen
- Postcards/Postcard flipper
- This Meter History Tool
- The different Supplier and Meter History views

Master Admin User Functions

- Managing Users
- Amending User Roles
- Managing Email Domains
- MAU Transfer

Other Functions

- Granting Access to Meter History Search
- MOP History
- Market Sector Indicators
- RMP Status (Terminated and Operational)
- Primary and Secondary Associations (Associated MPANs)
- Report Downloads

Change History:

Version Number	Status	Date of Issue	Reason for Change
1.1	Issued	26/07/2019	Previous version finalised and issued
1.2	Issued	16/06/2020	Crossed Meters functionality. Updated document from page 22. (D.E)
1.3	Draft	26/10/2020	Change history added to document. Changes as per November 2020 release of ECOES (v6.1) and detailed updates to entire document. Passed to K.H for initial review. (D.E)
1.3	Draft	29/10/2020	Reviewed (K.H) Passed to A.B for final review (D.E)
1.3	Issued	30/10/2020	Issued as per ECOES release 6.1. (A.B)
1.4	Draft	29.01.2021	Changes as per February 2021 release of ECOES (v6.2). Passed to K.H for initial review. (D.E)
1.4	Draft	02/02/2021	Reviewed (K.H) Passed to A.B for final review (D.E)
1.4	Issued	05/02/2021	Issued as per ECOES release 6.2. (A.B)
2.0	Issued	01/09/2021	Alignment with move of governance to the Retail Energy Code.
2.2	Draft	15/03/2022	Added Industry Role Terminology table and primary search limits
3.0	Issued	13/05/2022	Minor changes following QA review for RECv3
3.1	Draft	02/03/2023	Updates following R22 Data Access Matrix implementation

Circulation:

Version Number	Reason for Issue
2.0	Finalised for RECv2 commencement on 01 Sept 2021.
3.0	Finalised for RECv3 commencement on 18 July 2022.
3.1	

Industry Role Terminology:

The below table outlines industry roles referenced in this document where the REC name differs.

ECOES Role	REC Equivalent (where different)
Distributor	Distribution Network Operator (DNO)
Meter Operator (MOP)	Metering Equipment Manager (MEM) or more specifically Meter Operator Agent (MOA)
Agent	Supplier Agent, i.e. Data Aggregator, Data Collector, Metering Equipment Manager

For the avoidance of doubt, the Electricity Enquiry Service (EES) is the name used for the service in the REC. ECOES is the system used to deliver the EES. These terms are used interchangeably in this document.

Login to ECOES

Users should open the ECOES web browser https://www.ecoes.co.uk/ and enter in their Username and Password. Then click 'Log on'.

All users of ECOES must agree to the Terms of Usage of the system upon each session login. When logging in, users will be presented with a session login screen that requires them to positively confirm that they agree to the Terms of Usage of ECOES (as defined and visible when clicking on the blue 'ECOES Terms of Usage'.
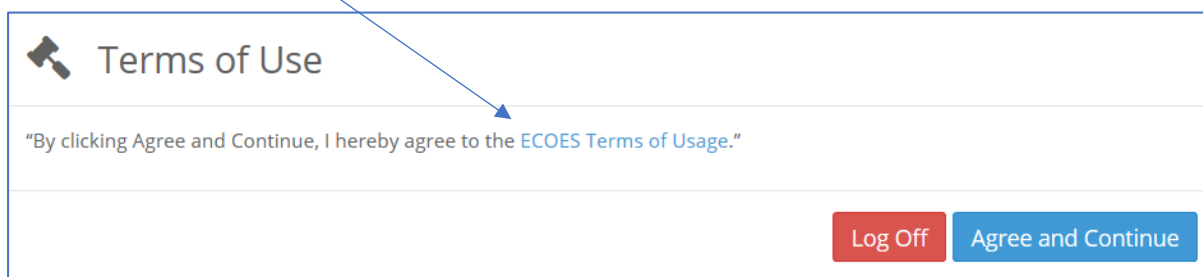
The User will have the option at this point, to log off (if they disagree with the terms of use) or agree and continue (if they agree to the terms of use).

Forgotten Password

If a user forgets their login password then they must reset it themselves, or where they do not have permission to do so, request that service from a person with appropriate permissions within their organisation. It is not the role of the ECOES Technical Service Desk or the REC Code Manager to reset passwords.

1.1   Resetting another user's password

A user with either the 'User Maintenance' or 'Reset Passwords and Delete Users' system function can reset another user's password. This can be performed by going to the Admin menu then selecting Users. When you have searched for and selected the required user, there is a button that says Reset Password.

1.2   Resetting your own password

Below are several scenarios in which a user requires their password reset and the methods they can employ to do this:

Email Address Users

- A user has forgotten their password.

  A user can initiate a password reset via the login screen by clicking on the 'Forgot your password?' link. On completion an email will be sent to their email address containing a link allowing them to enter a new password.

- A user knows their password but would like to reset it anyway.

A user can initiate a password reset via the 'Change Password' button on the 'My Account' screen. On clicking 'Change Password' button an email will be sent to their email address containing a link allowing them to enter a new password.

- A user's password has expired.

Should a user's password expire between them logging out and next logging in, a popup will be displayed the next time they log in with their expired password. On clicking the 'Reset Password' button an email will be sent to their email address containing a link allowing them to enter a new password.

Traditional Username Users

- A user has forgotten their password.

A user can initiate a password reset via the login screen by clicking on the 'Forgot your password?' link. On clicking the link, a popup is displayed whereby the user must correctly answer their memorable questions. If answered correctly a user may reset their password.

- A user knows their password but would like to reset it anyway.

A user can initiate a password reset via the 'Change Password' button on the 'My Account' screen. In order to change their password via this screen they must know their current password.

- A user's password has expired.

On logging in the user will be informed of the password expiry and prompted to enter a new password.

Proxy Email Address Users

- A user has forgotten their password

The user can initiate a password reset from the login screen, in this instance an email containing a new password will be sent to the proxy email address saved against that user. The password can then be communicated to the intended user outside of the ECOES system.

- A user knows their password but would like to reset it anyway

The user can request a password reset from the 'My Account' screen. This will send an email to assigned proxy email address containing a new password. The password can then be communicated to the user outside of the ECOES system.

- A user's password has expired

On logging in the user will be informed of the password expiry and prompted to enter a new password.

Primary Search

Search/Homepage – clicking this will take the user back to the ECOES Homepage.

My Settings – this dropdown will allow the user to access their display settings – find out more here.

My Details – this dropdown will allow the user to access their account details – find out more here.
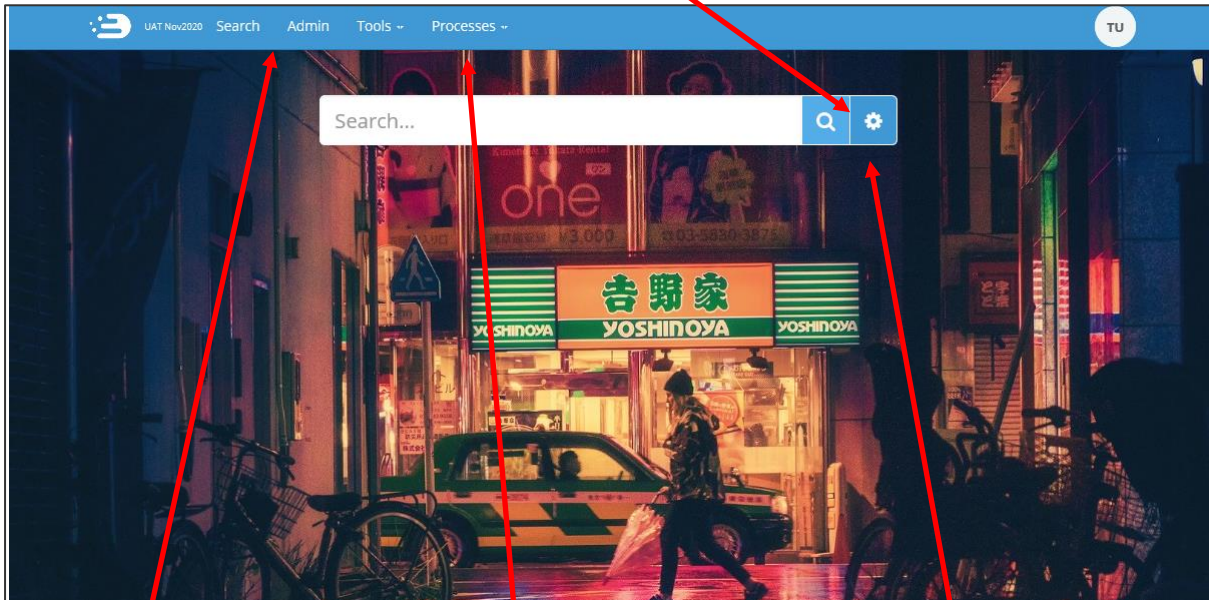
Admin – this screen will show details of the users' company group (e.g. who the MAU is). Users who have user management privileges will be able to reset passwords and create users from this page – find out more here.

Processes – Allows Users with relevant permissions to access certain process within ECOES (e.g. Crossed Meters).

Search field: in ECOES this is a 'Universal Search' function (similar to internet search engines). Users will be able to search for addresses, partial addresses, postcodes, MPANs, MSNs, multiple MPANs, multiple addresses or a combination.

Search results are limited to 200 results; if a search exceeds this the user will be required to refine their search.

By default, all users will be limited to a maximum of 600 searches per day. Once this limit is reached, access to view data will be removed for the remainder of that day. This limit will be configurable at company group level.

My Account

Users can manage their user account details via the 'My Account' page found by hovering their mouse over the circular icon in the top right of the ECOES page. This is also where a user can logout. A user can perform the following tasks in this page.

Amend Account Information.

Reset their password.

Amend their memorable questions/answers (for password resets).

View remaining MPAN Views for that day.

Change the background colour of ECOES.

Icon Identification:

Icon	Label	Icon	Label	Icon	Label	Icon	Label	Icon	Label
	Energised		Disconnected		Industrial and Commercial		Domestic Indicator		Non-Domestic
	Search		No MPAN Designation		Unmetered Supply		GSP Group		Filter
	Green Deal		New		Registered		De-Energised		Related MTC
	Export LLFC		Smart Communications		Pending Registration Currently Under Objection		Geographical Representation of GSP Group		MPAN History
	Metered Indicator		Domestic Designation		Contact Details		MPAN Relationships		Back to Results
	Export/ Download		Add a User (available to Admin/MAU only)		Current Meter		Meter History Search		User Reports

Market Sector Indicators

When viewing an MPANs, an indicator will be present to reflect the Market Sector of that MPAN (as defined in the Icon Identification above.) In the example below, the MPAN is domestic and energised.
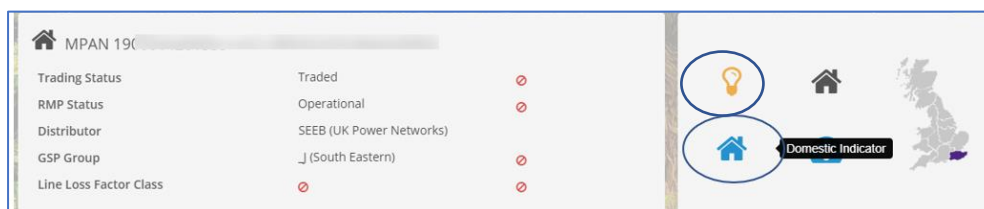
Display Settings
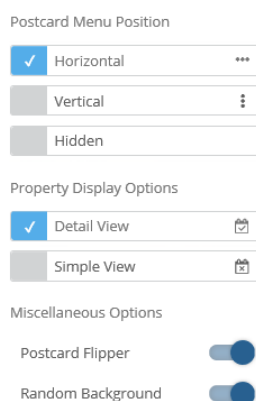
A user can choose how they view data within ECOES. To open the settings options, click on the settings icon, found to the right of search box (⚙).

You can choose where 'Postcards' are positioned, whether to hide postcards, or to allow the postcard to 'flip' or not - a flipping postcard will show additional information when a mouse is hovered over it. A user can choose to remove 'random background' which is also pre-set.

A user can also decide whether to see a 'Detailed' or 'Simple' view - the simple view will remove the dates related to some data items allowing more information to be shown on one screen without having to scroll.

Managing Email Domains – Only available to the MAU

Email domains are a security feature for ECOES organisations to ensure only valid Username/Email Addresses are used. An organisation can have **multiple email domains or none**. Whenever a new user is being created, and the organisation has a domain(s) setup, the username will only be able to have a valid email domain.

Refining Results

MPAN search results can be further refined by using either the plus and minus icons, or the lightning bolt icon, as described below.
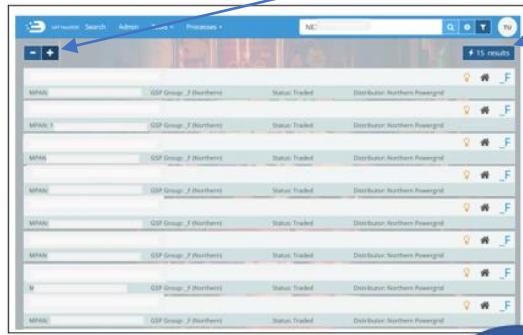
Some searches return more results than expected.

The plus and minus buttons at the top left of the results screen will provide a detailed view when plus is selected (as in the screenshot) or a minimal view when minus is selected.

For an advanced search, click on the lightning bolt icon (top right of results screen) to expand the more detailed search criteria box. Then you can free type in any extra details and click on search
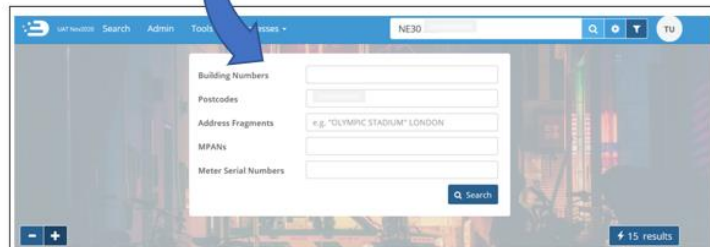
Filtering Results

To include/exclude certain MPAN attributes from the search results, you can click the 'Filter' icon ( ) to the right of the search bar which will expand the filter options.

The filter icon will move side-to-side to indicate that a filter is applied.

If you navigate away from the current search page (e.g. back to the homepage or to your account details page), the filter settings will be reset to include all attributes.

If your filter excludes all results, ECOES will advise you with the following pop up.

The 'no entry' sign indicates that those specific data items are restricted. You will not be able to view these items.

Hover the cursor over the 'Supply' icon to show date the data was last updated and by whom.

Click the contact button to open a pop-up containing the contact details of Distributor and MPAS associated with the MPAN.

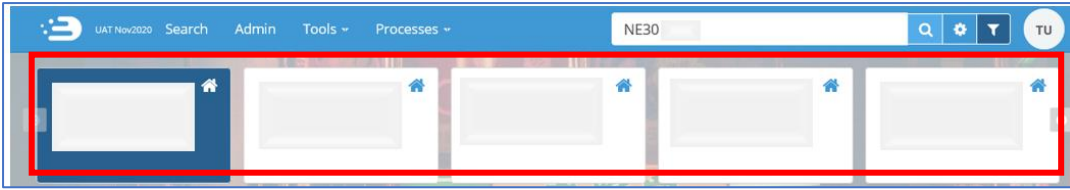Click the 'Back' icon to take you back to the main search results.

Postcards/Postcard flipper

Searching by postcode will usually result in 'Postcards' being visible within the MPAN record. Postcards (highlighted in the red box below) are designed to allow users to quickly view another search result without needing to navigate back to the results page.

The number of postcards depends on how many search results you had; if your original search yielded 4 results then there will be 4 postcards that can be scrolled through. If your search yielded 1 result, then no postcards will be pesent.

Hovering over a Postcard will rotate it to display MPAN, GSP Group, Status and Distributor. Clicking on a postcard will open that MPAN page.

Registrable Measurement Point (RMP)

The RMP is the status of an MPAN held in MPAS at a given point depending on the data provided to MPAS by Suppliers and Distribution Business. The RMP Status is visible in ECOES, under the Trading Status at the top of the page.

 Each RMP Status is defined in the REC Data Specification, available via the REC Portal.

RMP Status	Definition
Created	A new MPAN created but no Supplier registered or MPAN has a Supplier registered but not all the MPAS data has been provided
Operational	All MPAS Data Items have been provided
Terminated	The MPAN has been disconnected

An example from ECOES is shown below, with RMP status displays Operational.
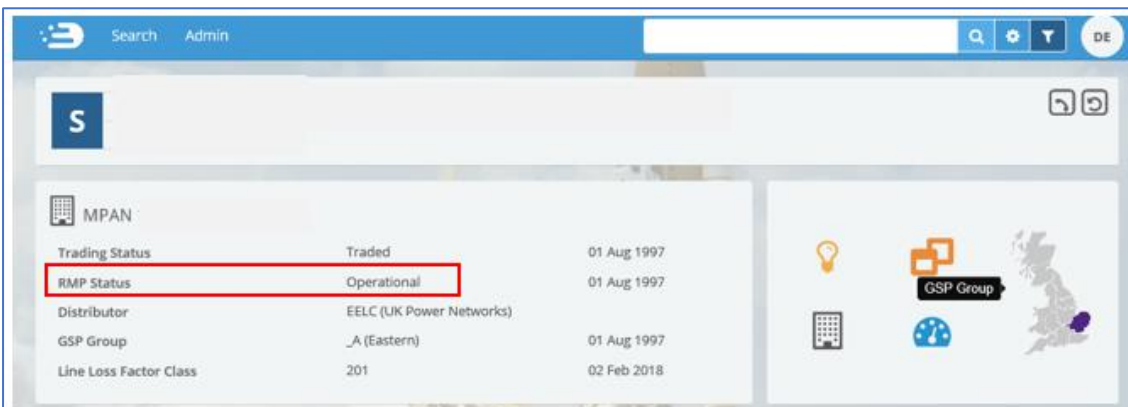
Managing Users – Only available to relevant users (MAU and User Admin roles)

Clicking on the Users option on the left of the Admin page will show users with relevant privileges all the users within their organisation. This is also where 'User' Reports can be found.
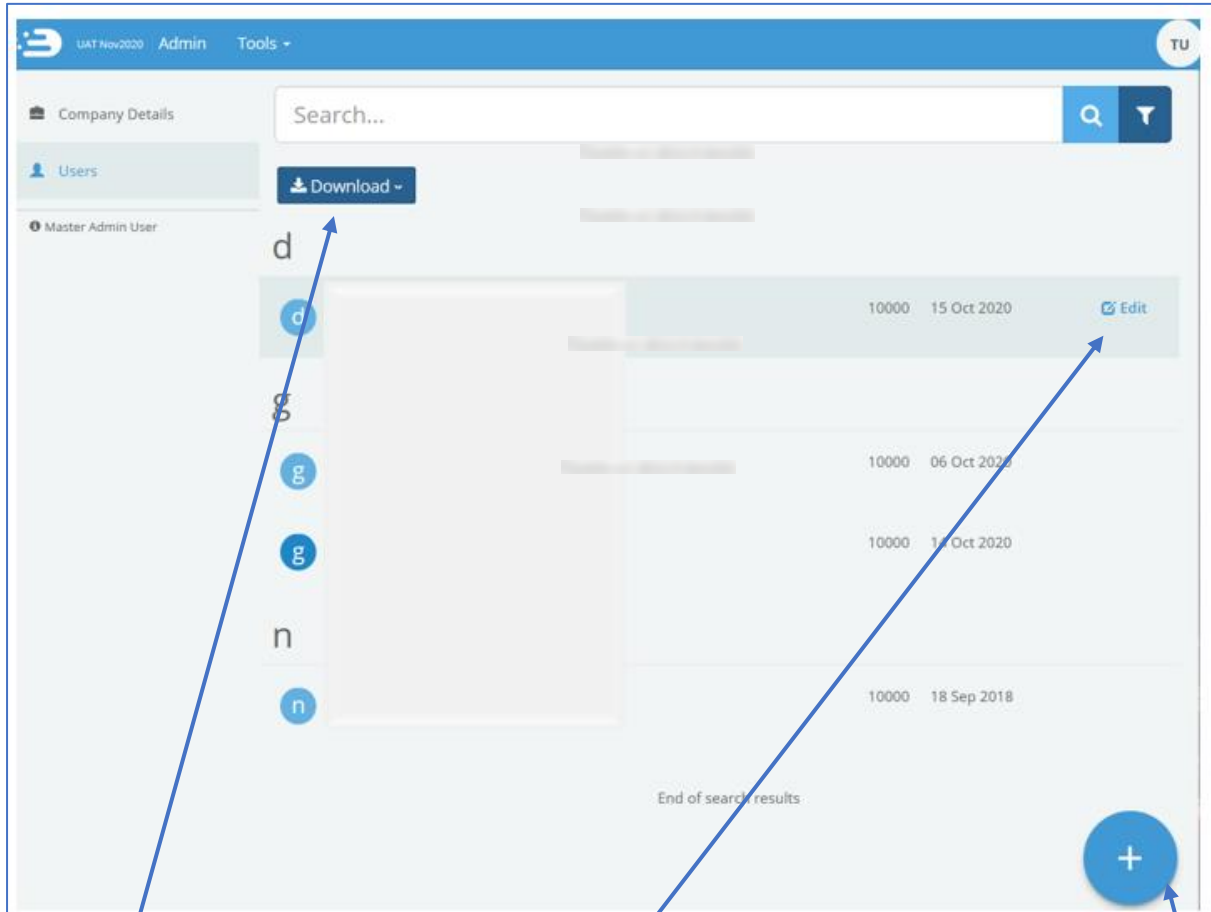
Clicking 'Download' will allow MAU and Admin users to download all the users of a company group into a report containing user details e.g. last login date.

Clicking on the 'Edit' button when hovering over a specific user will open the user's profile. The MAU can unlock user accounts, reset a user's password, delete a user, amend user account information and grant/revoke access to certain ECOES functions.

To create a new user, click on the 'Plus' icon which will open a blank user profile, identical to the way an edit user is displayed.

MPAN Search and Details View – Data Access Matrix (DAM)

Data Item Restrictions

Access to individual data items is determined by the category to which a company group is assigned. Each category represents a role within the RECCo Data Access Matrix (DAM). The Data Access Matrix defines which data items are available to which roles, e.g. a Supplier may have access to the GSP Group data item, but a Virtual Lead Party may not.

The full RECCo Data Access Matrix can be accessed through the EMAR/REC Portal.

The ECOES website applies data item restrictions to both the primary search result screen and MPAN details screen. Restrictions are implemented by obscuring the data item value with a 'no entry' icon, as seen below.

Search Result Restrictions

Search result restrictions are defined at a company group level. These restrictions limit the results that can be returned by the primary search functionality. For example, a company group may be restricted to search results for MPANs with a Profile Class of '0'. These restrictions are determined by the access agreements agreed between RECCo and individual participants.

Amending User Roles

Users with the relevant privileges (MAU and User Admin Roles) can amend what functions other users within their company group have access to. To do this open a user account within https://www.ecoes.co.uk/Admin/User by clicking on 'Edit' within that users line.
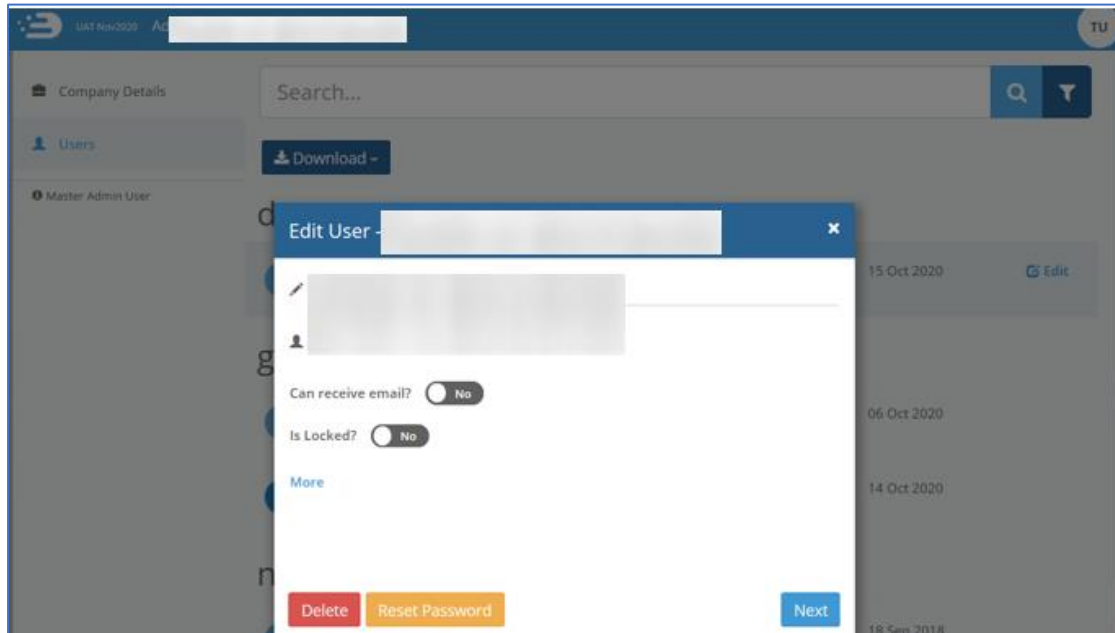
To view and amend what system functions a user has access to click on the 'Next' button.

This page lists what functions are available to each user. Here you can tick/untick as applicable. A blue highlight with a white tick alongside it indicates functions that have been selected.
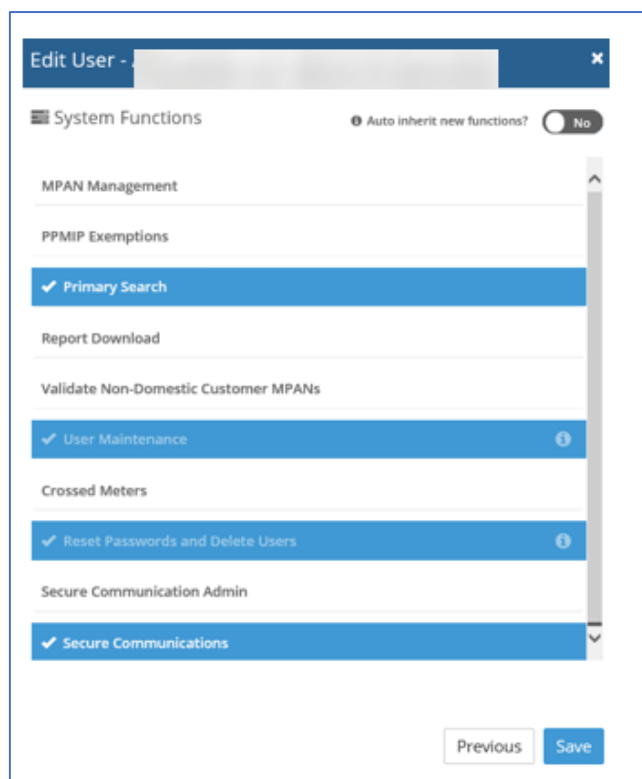
Once you click 'save', you will return to the main 'Users' page and a pop up on the bottom right of the page will confirm that this user's system functions have been saved.

Transferring MAU to another user

1. The user you are wishing to transfer the MAU privilege to must already have a user account and:
    - have a valid email address as their username.
    - must have a phone number populated (found in the 'more' section).
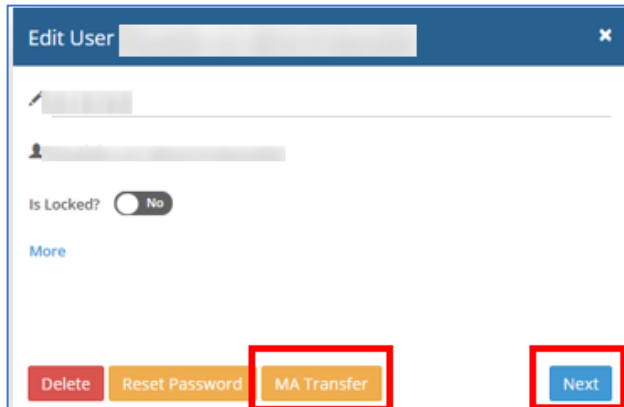
If the new MAU does not have one of the above the MA Transfer button/option will not be shown.

You must add these details and 'save' the user account, when re-opening the user account, the MA Transfer button/option will be shown.

2. Click the MA Transfer Button, this will open a pop-up, asking you to confirm or cancel the change.
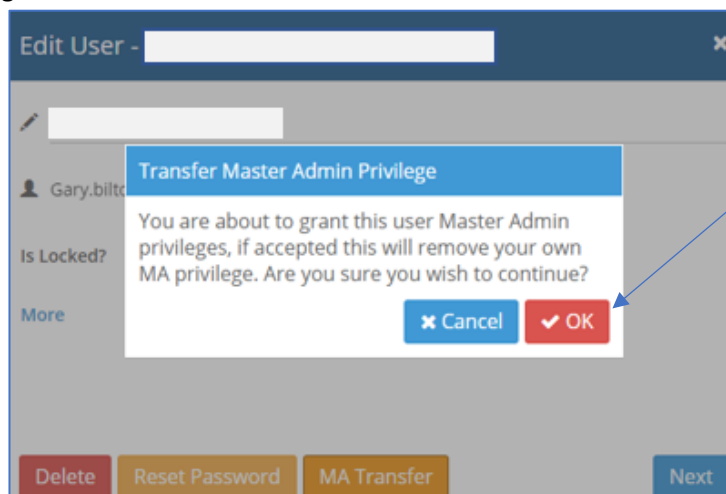
Clicking OK will generate an email to the prospective MAU.

3. The prospective MAU must click on the link in the email which will take them to the login screen. Once logged in they will see a MAU Transfer request on their 'My Details' page, within 'My Account'.

User Reports

Several reports are available to download for users with relevant privileges. They can request various reports regarding the behaviour of their users, these reports will only be available to be downloaded once logged into the system.

All available reports can be found within 'Tools' drop down and the 'User Reports' functionality can be accessed by clicking on 'User Reports'.
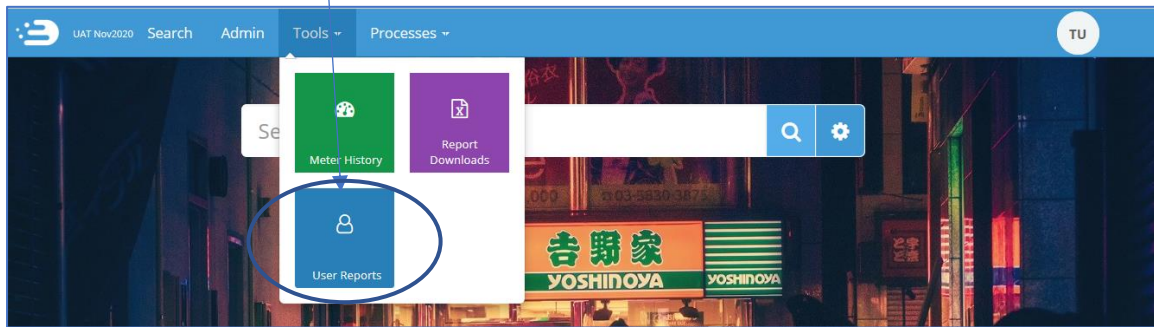
This function allows MAUs of a company group, and those with access to User Reports to generate two User reports detailing meter search details for all the users within their company group, reports are delivered in CSV format.

Once you click on Download, a pop up will advise you to please wait for the report to run.

If a report is not available for your chosen timeframe, the system will notify you like so.
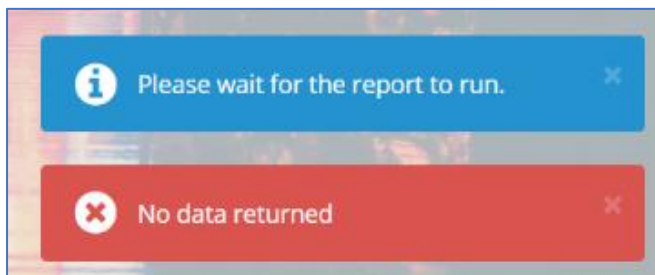
If a report exists, a pop up will ask you if you wish to open, save, or cancel the report download.

1. User summary report

The Summary report lists details for each user that has made searches in a user configurable time period, where an MPAN has been selected. The report shall display all the user details as in the User Detail Report, but only display totals instead of information about the specific reports.
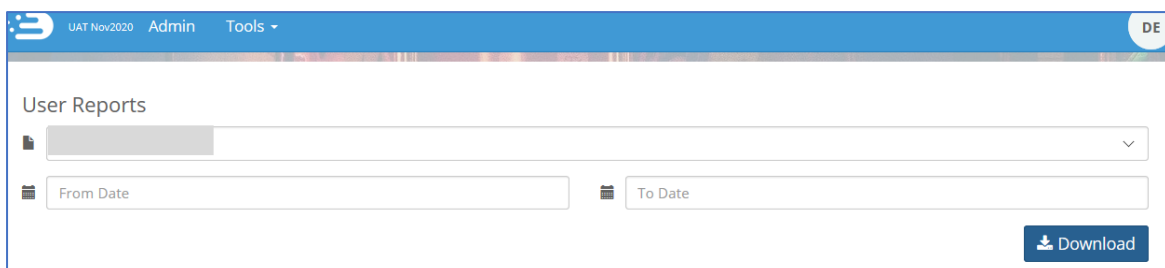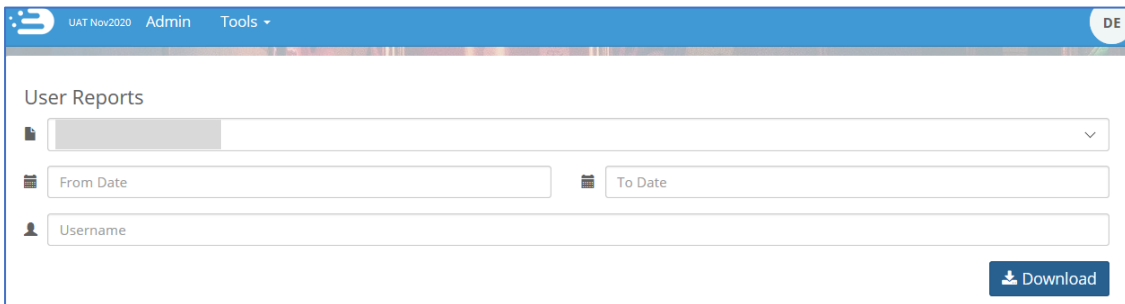
2. User details report

The User Details report lists all MPAN Searches that have been performed during a certain period of time. The search can be for a specific user (by entering a username in the search parameters), or if no username is entered, for an entire company group.

As this report lists all MPAN searches we would recommend restricting the time periods when doing reports for a company group.

It shall provide the following information:
- Supplier and address of the MPAN viewed.

- User detail information such as the e-mail address, phone number and fax number, place of work for both the user and the line manager. (If these are filled in by the users' administrator).
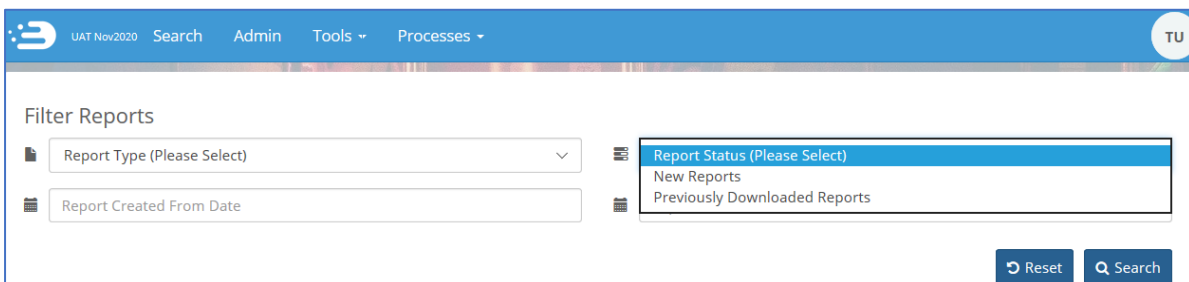
Report Downloads

the 'Report Downloads' functionality can be accessed by clicking on 'Report Downloads' within the 'Tools' drop down.
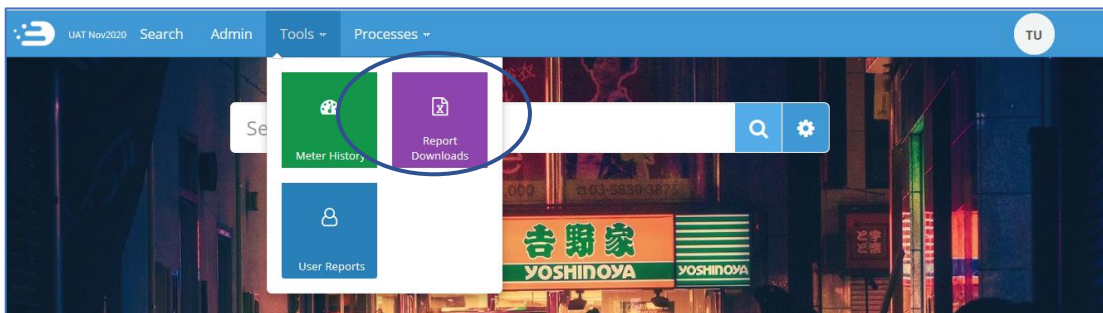
Please note that historically, a D0312 report was available within 'report downloads', however this was removed during the June 2019 release of ECOES and is no longer available in any reporting.

When a user clicks on 'Report Downloads' they will be unable to filter via report types, only by report status, as shown below.
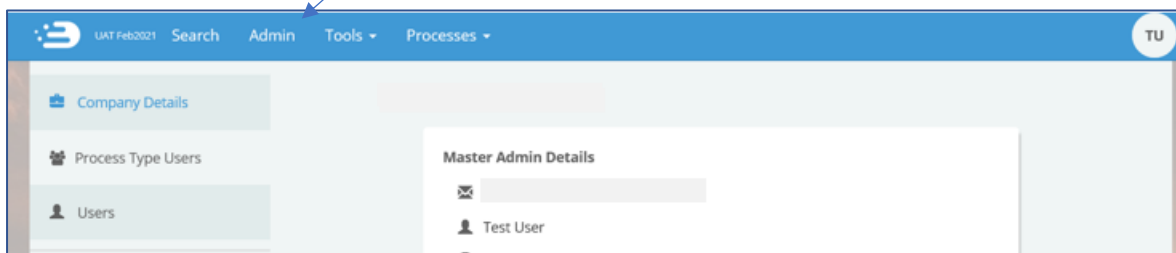
Meter History

A Meter History Module is available for Supplier and MOP users, which allows them to search for a meter's history by Meter Serial Number (MSN) or MPAN. MOP users will have a view of the MPAN Meter history that will begin on the date of the first installed Meter through to the present day.

In order to have visibility of the Meter History tool, a user must be given access within the admin System Functions tool.

Granting Access to Meter History Search

Supplier and MOP MAU's and admin users with User Maintenance privileges can grant access to other users within their own Company Group. To do so, follow the steps to log in to your ECOES account and click on 'Admin'.


Next, select 'Users' and in the search tab begin typing the name of the user who you wish to grant Meter History privileges to, user accounts with that name will become visible below the search bar.
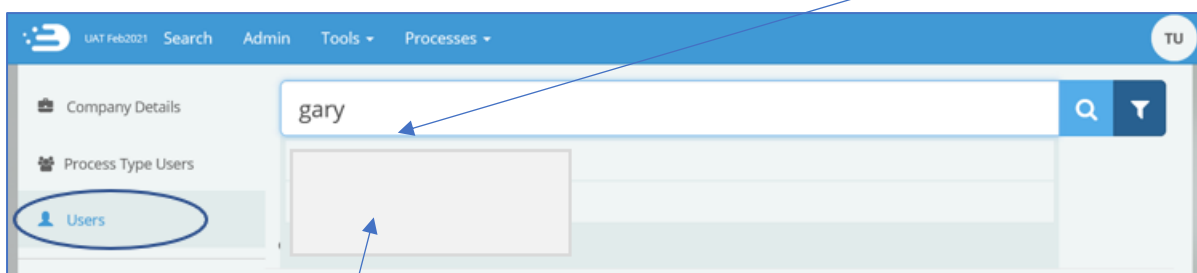

Select their name from the dropdown and the select their record to 'edit' it.
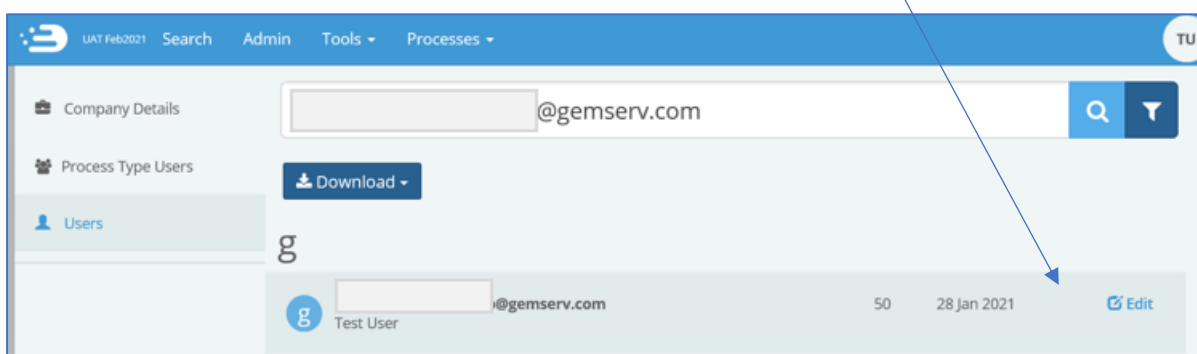
Once you have clicked on their record, you will see a pop up giving you an option to edit their name, lock the account, or add further information by clicking 'More'. At the bottom part of this edit user box, you have the options to delete the user, reset their password or to select 'next', click on next.
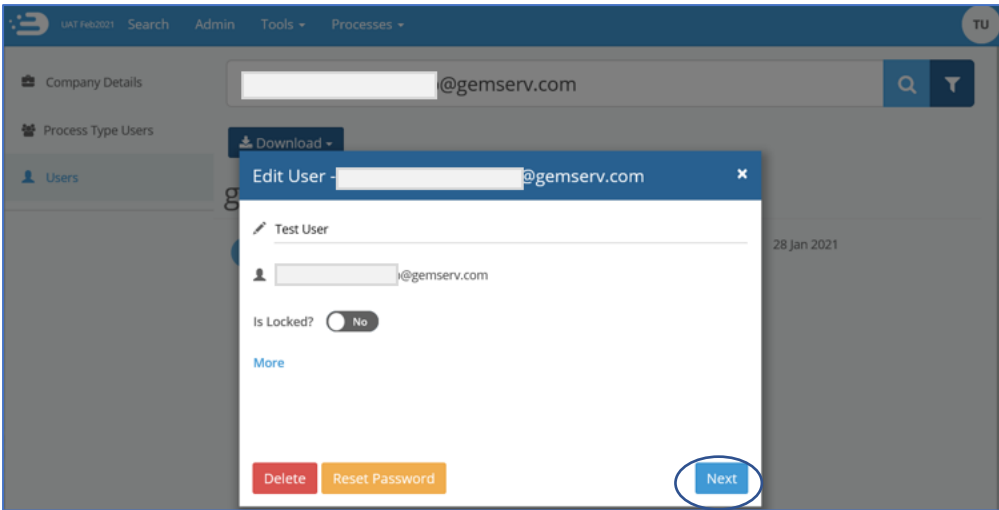
This will open the user's system functions pop-up. Scroll down to find 'Meter History', which as seen below has not been selected (as it is not blue and there is no tick against it).
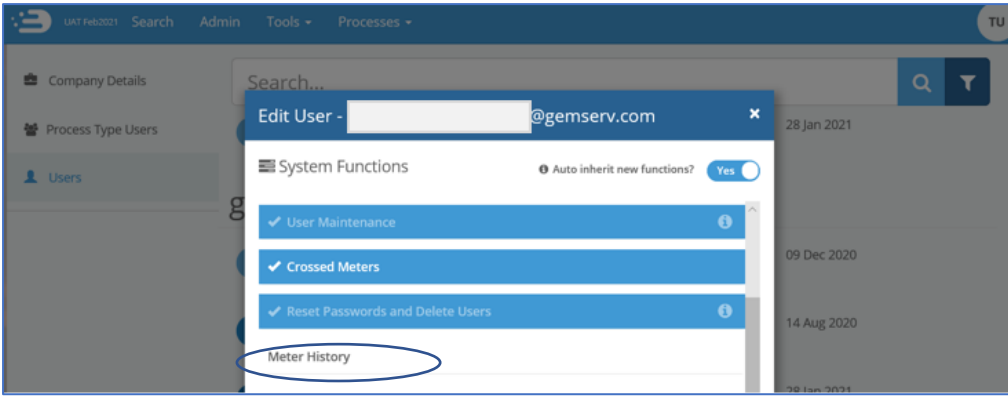
Click on Meter History and you will see it turn blue, then click 'save'
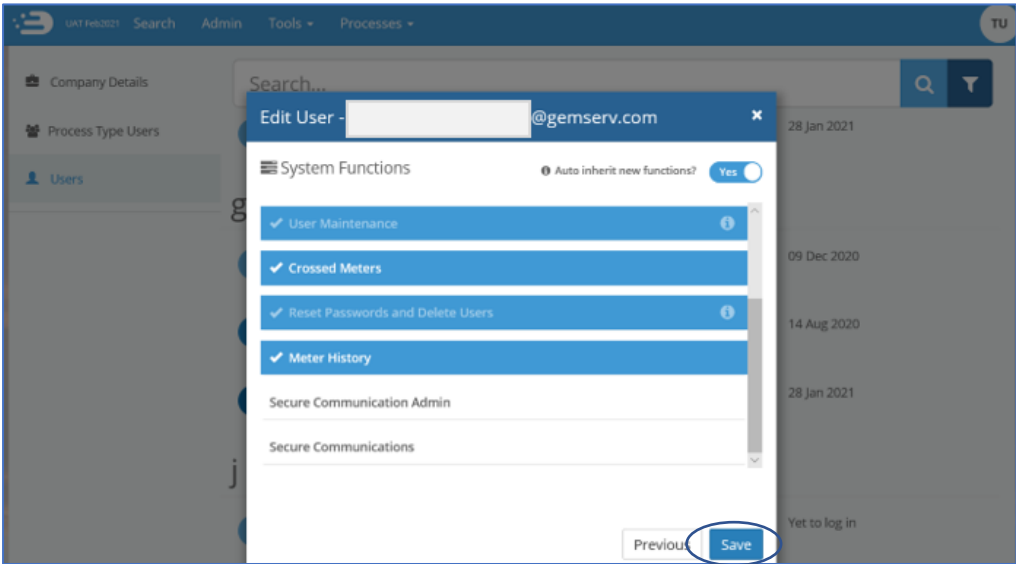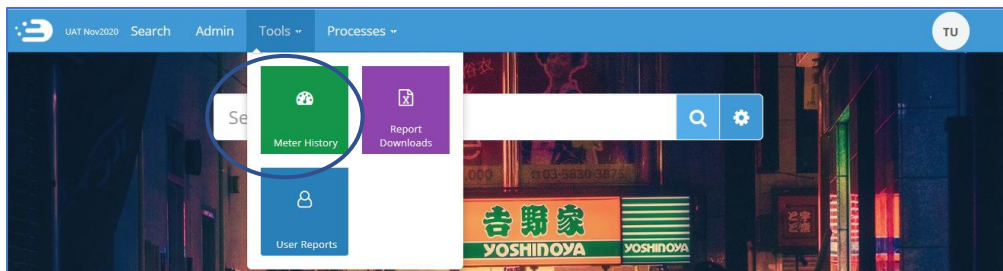

A pop up will confirm

The user will now have access to the Meter History functionality, within Tools.
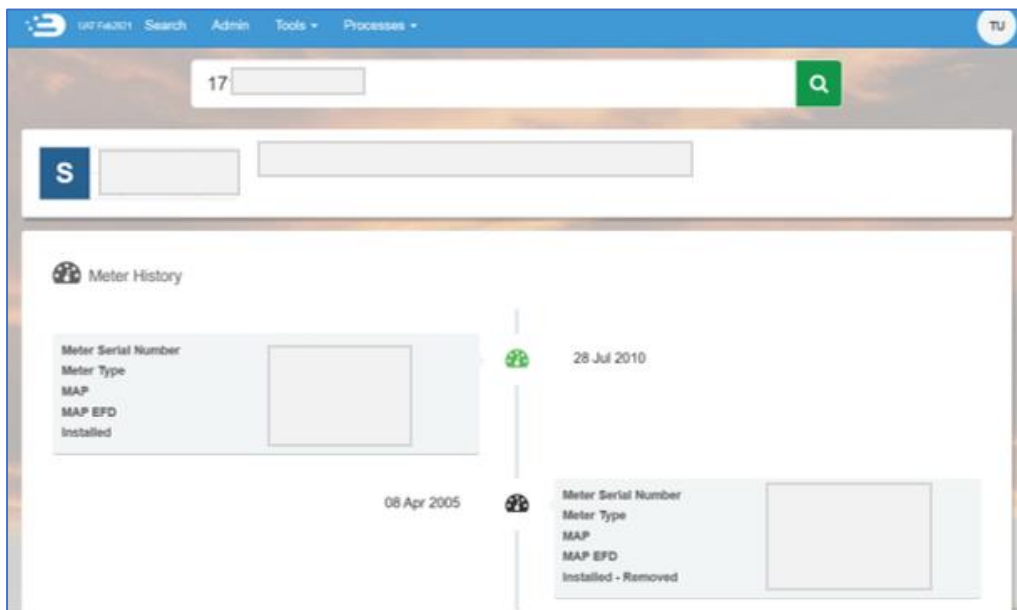
Meter History Tool

The 'Meter History' functionality within the 'Tools' drop down allows the MOP user to search and view meter history for a particular Meter.

Clicking on 'Meter History' brings up a search bar, where the user can search by MPAN or Meter Serial Number (MSN). This search icon is green and does not contain filters.
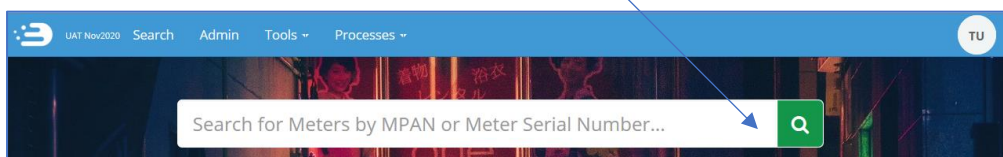
When the user enters the MPAN or MSN and clicks search on the search icon, they will be presented with the view shown below.

The Meter History for that MPAN/MSN is displayed in a timeline view (with the top being current meter) and comprises of the following data items:

- S-number
- Meter Serial Number
- Meter Type
- Meter Asset Provider & EFD
- Installation Date

Towards the lower half of the page, the user is given the option to view more details by selecting 'Show MAP History' and/or 'Show MOP History'.

Clicking on 'Show MAP History' will open the MAP history, including MSN, installation date, removal date (if applicable), MAP MPID, and associated dates.

Clicking 'Show MOP History' will open the MOP History, including Supplier MPID and associated dates, as well as MOP MPID and associated to and from dates.

When 'Show MAP History' is selected.

When 'Show MOP History' is selected.

Supplier, MOP and Meter History and Meter Maintenance

At the lower part of the MPAN detail page, users with access are able to view additional information regarding the MPAN, such as.

- Current and historical Meter details.
- MOp and Supplier history, and
- Links and details relating to to assocaited MPANs (if any).

Below, you will see the **basic - default view** – showing current and historical supplier and meter details.

Where there are related MPAN(s) the user can view the high level information here and also click on the 'Related MPAN Search' button to open that MPAN details page. This is futher covered here.

Clicking on 'Show MOP History' will open up the MOP History view, this will sit in between Supplier and Meter History and MPAN Relationships – like so.

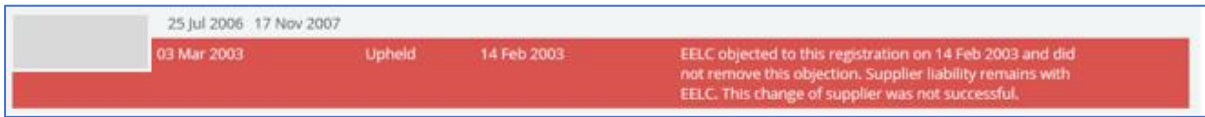The user also has options to view the records in detailed view, to show the timeline and view unsuccessful registration records (where there any any), which will show like so.

Clicking on 'Timeline' will also bring up specific details related to the MPAN and its meter, such as change of Metering, objections to COS and successful COS.
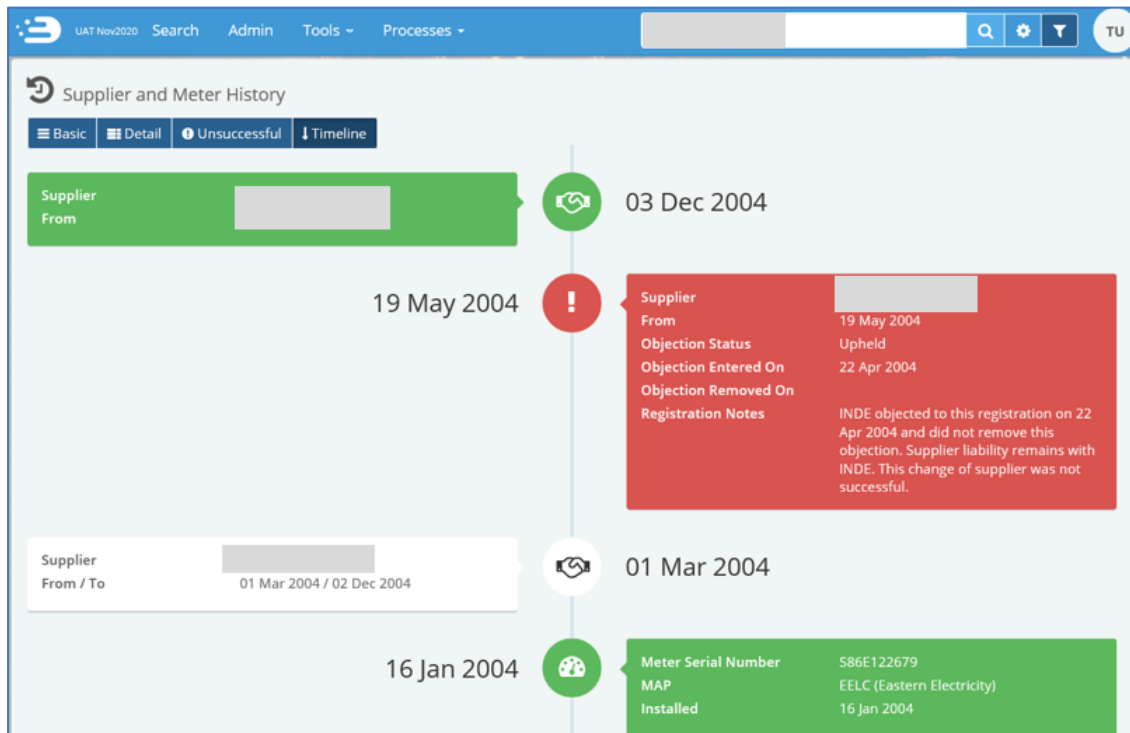
IHD Install Status following a Smart to Dumb Meter Exchange

Users should note that following a Smart to Dumb Meter exchange, an inconsistency in ECOES data may be present. When a Smart Meter is installed the In-Home Display (IHD) will be displayed in ECOES with the Meter information. Currently ECOES will continue to hold and disseminate an invalid IHD Install Status in the situation where a Smart Meter is exchanged for a Dumb Meter until a new Smart Meter is installed, this is because the value cannot be cleared. Suppliers are advised to ignore the IHD Status where the Meter is not being operated as Smart.

Primary and Secondary Associations (Associated MPAN's)

Once a user searches for an MPAN in ECOES which has an associated MPAN, they will be presented with the view below.

Both the Primary and Secondary MPAN are listed under MPAN Relationships.

To view the other MPAN records, click on 'Related MPAN Search' and you will see the following pop up.
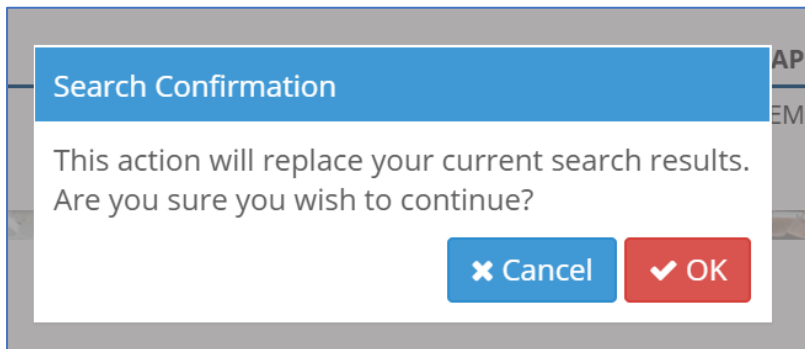
If you click Ok, you will be taken back to the MPAN search screen, where all related MPANs will be displayed and listed in the search bar.

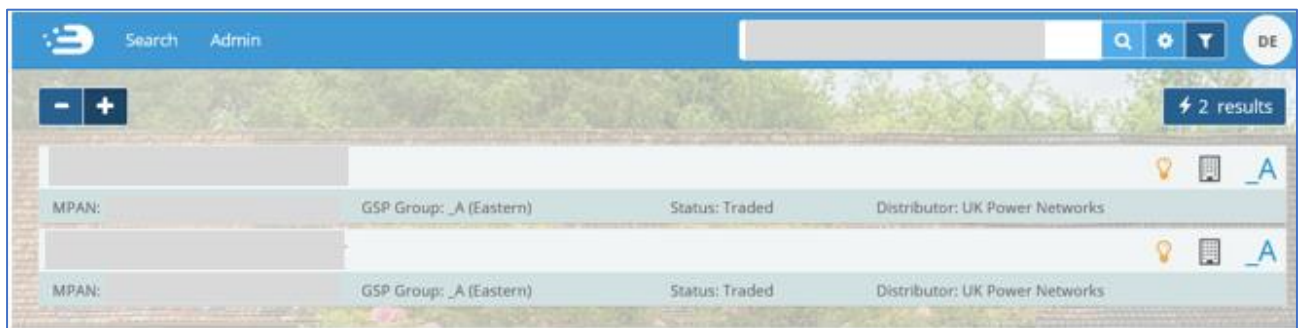Clicking into any one of the records will bring up Postcards. Postcards (highlighted in the red box below) are designed to allow users to quickly view another search result without needing to navigate back to the results page.

The number of postcards depends on how many search results you had; if your original search yielded 4 results then there will be 4 postcards that can be scrolled through. If your search yielded 1 result, then no postcards will be pesent.

Hovering over a Postcard will rotate it to display MPAN, GSP Group, Status and Distributor. Clicking on a postcardwill open that MPAN page.
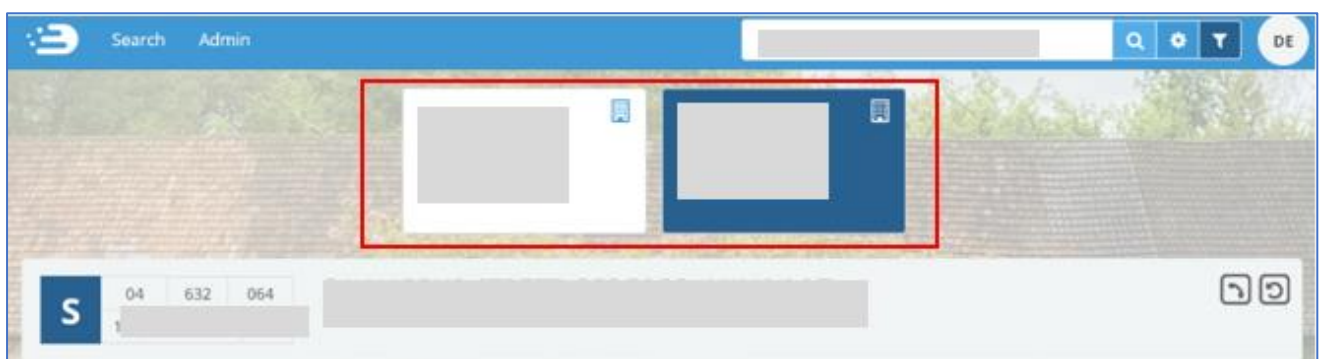
Crossed Meters

<u>Introduction</u>

A Crossed Meter refers to an issue where the Energy Meter recorded for a Premises is associated to another Metering Point. This can result in the Customer being billed for the energy usage at another Premises.

REC Schedule: Resolution of Consumer-Facing Switching and Billing Problems, sets out the requirements and processes for investigating and resolving Crossed Meters in Domestic and Non-Domestic Premises. The aim of the Schedule is to provide a mechanism by which Suppliers and their Meter Operator (MOPs) can implement a uniform approach to resolving Crossed Meters.

Additional functionality has also been added to ECOES to support the Crossed Meters process. This includes:

- The ability for Suppliers to create, investigate and resolve a Crossed Meter Case and link this with associated MPAN(s), Suppliers(s) and MOPs.
- The ability to record site visit results, upload files relating to the Crossed Meter Case and exchange information with associated Suppliers and MOPs in order to assist in the resolution of the Case.
- The ability for Users to use data from ECOES to identify impacted Suppliers based on the confirmed Meter Serial Number (MSN), and allow Suppliers to override this to manually associate additional MPANs.
- The ability to search, filter and sort Crossed Meter cases.

Each MPAN involved in a Crossed Meter chain will form its own Case. The current Supplier for a MPAN will manage and resolve the issue for that MPAN. Any linked MPANs, whether belonging to a different Supplier or not, will form their own Case. Each Case will have its own unique reference.

<u>Crossed Meters Principles</u>

- Crossed Meters only occur when more than one Premises is involved and different Suppliers are responsible for the different Metering Points.
- The Suppliers of the affected Metering Points are responsible for investigating and resolving Crossed Meters efficiently and completely.

<u>Access to Crossed Meters information</u>

Access is:

- Restricted to those organisations (Suppliers and Meter Operators) involved in a Crossed Meters Case; and
- Controlled at an organisational level via access rights, which is managed via your ECOES Master Admin User (MAU), and those with User Admin permissions, using the existing user access management controls in ECOES. Further information regarding managing users can be found [here](#).

View Crossed Meters Cases

Selecting the 'Crossed Meters' option from the Processes navigation menu will navigate the user to the 'Crossed Meter Case List' screen.
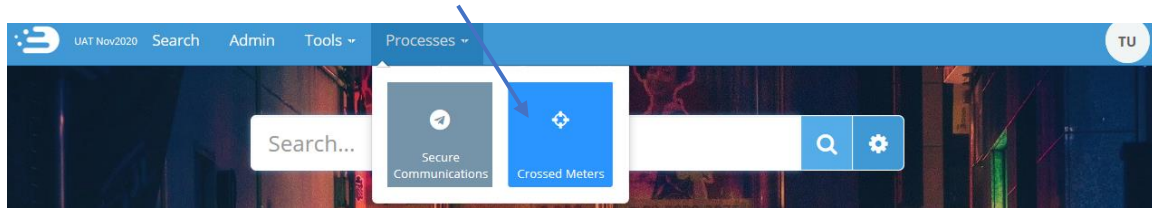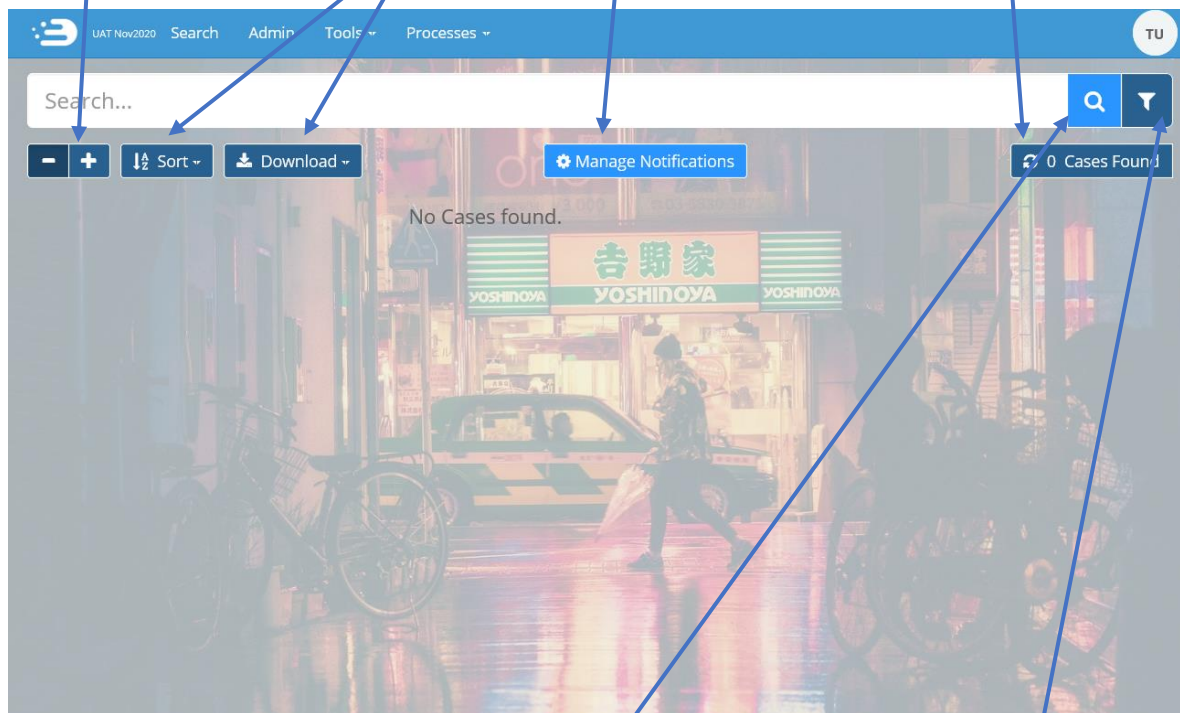

This screen lists all Cases where the current user is associated to a Case. If the user is the current MOP or Supplier or has been the MOP or Supplier since a Case was opened, then the Case will appear in this list.

Cases can be viewed in detailed view or simple view.

Sort or Download search results.

Set email notifications to daily or never.

Confirms amount of live Cases.

Users can search for Cases by Case Reference or MPAN. Users can filter the Crossed Meters Case results.
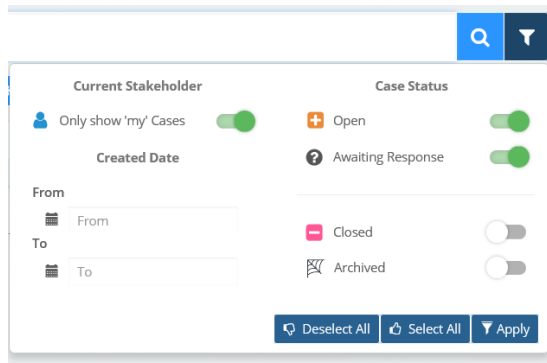
Filters

It is important for the user to use the filter as soon as they log in, as the pre-set filters might exclude pertinent information. The filter is pre-set to "Only show 'my' Cases". 'My' is in brackets due to this being a crossed meters Case and could be linked to another MPAN.
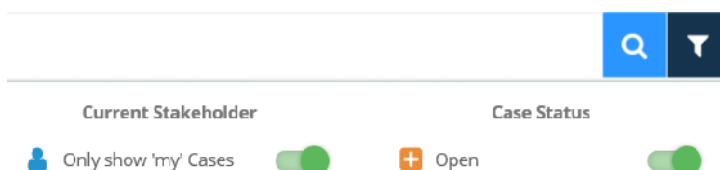
When "Only show 'my' Cases" is toggled, only the record(s) for the MPAN(s) belonging to the users Supplier group will be visible. The user will not have visibility of the records for both MPANs that are involved in the Crossed Meters Case.
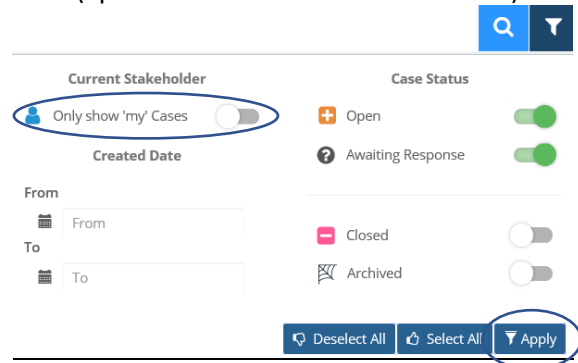
Original Filter settings
This will only show records for the users MPANs and not the full picture of the Crossed Meters Case.


Recommended Filter settings
This will show all records for the users MPANs, as well as all associated records for a Crossed Meters Case (apart from closed or archived Cases).

Any Filters that a user applies from this section will be saved and will remain when the user logs off and logs back in again.
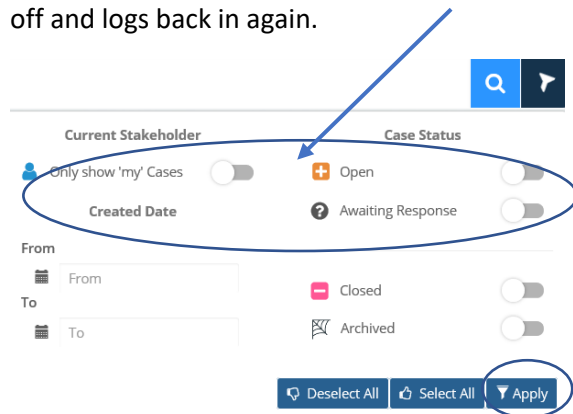
Any Filters that a user applies from this section will not be saved and will disappear when the user logs off and logs back in again.
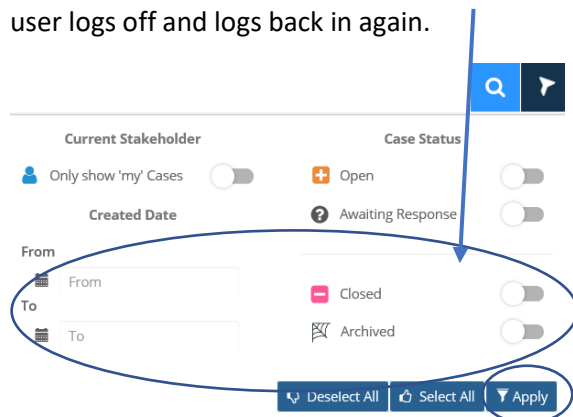
Viewing Crossed Meters Case Details

Only Supplier users can create new Cases for MPANs where they are the current Supplier. There can only be one Active Case for each MPAN.

Each MOP will need to agree how they manage Crossed Meters Cases bi-laterally with their Supplier (either via the ECOES Portal (as in the example below) or any other method as agreed bi-laterally with their MOP (e.g. D0001/D0005, email…etc).

Once a Supplier User creates a new Case, a Case Reference will be generated which will consist of the capital letters "CMC" followed by a five-digit number e.g. "CMC00001". Current Stakeholders (Supplier, MOP, and Distributor) will be linked to this open Case.

MOP users will be able to view the full information within the Crossed Meters Case Details screen. The Crossed Meter Case Detail screen provides the user with all details of the Case, including providing access to all linked Cases.

Meter Details. Only the current Supplier can amend the Confirmed On-Site MSN. Where this is amended, all Linked Cases will have a note added to the timeline, detailing the change in MSN.

Case Details
Including Unique Case Reference Number, status and MPAN.

Current Stakeholders involved in the Crossed Meters Case

Attachments section will show any related attachments.

Case Details

Reference Number	CMC00020
Status	Open
MPAN	

Current Stakeholders

Current Supplier	
Current MOP	
Distributor	

Meter Details 1

Initial MSN	
Current MSN	
Confirmed MSN	
Confirmation Date	

← →

Attachments

Obligation Details 0

There are no Obligations.

Audit Details

Created By	)@gemserv.com

Obligation Details – Where a question has been asked of the user then the obligation to respond will be highlighted, along with a deadline date for the response (5 Working Days). This will remain until a response has been sent.

Further details regarding obligations can be found here.

Audit Details – This information is updated when a user or scheduled job changes the status, enters contact details, or adds a note. User details as well as the date of the change will show here.

A user can scroll further down on this page to view the Case Timeline. Including confirmation of that Stakeholders associated with that MPAN.

A user can use the +Add Note function to add a comment. This is covered in detail in further on this document and can be viewed here.
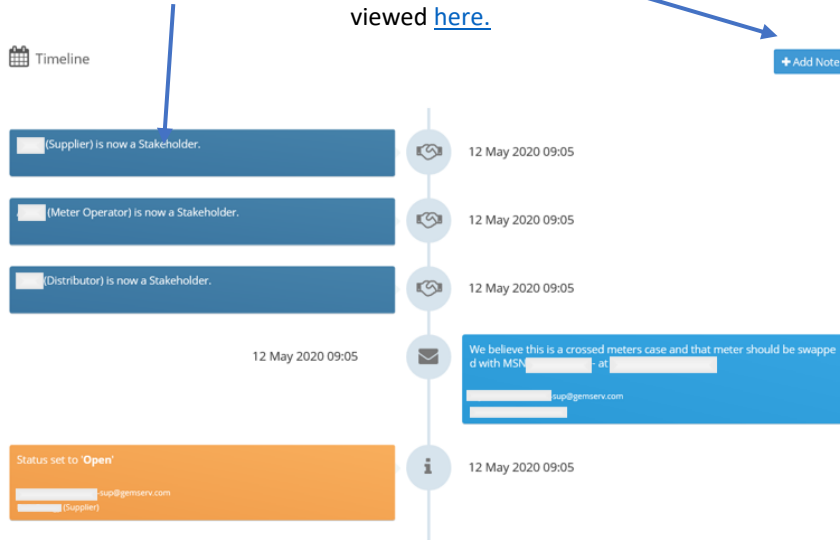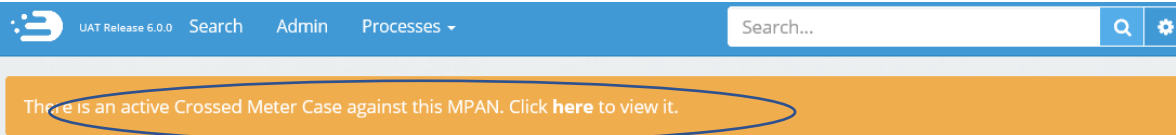

The MOP user will have visibility of this Case creation within the Crossed Meters dropdown under 'Processes'.
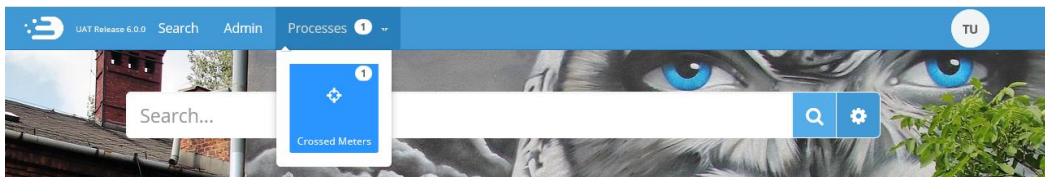
This will show only the live records for which the MOP is the agent, as well as any associated MPANs that are linked to that Case (providing that filters have been set accordingly).
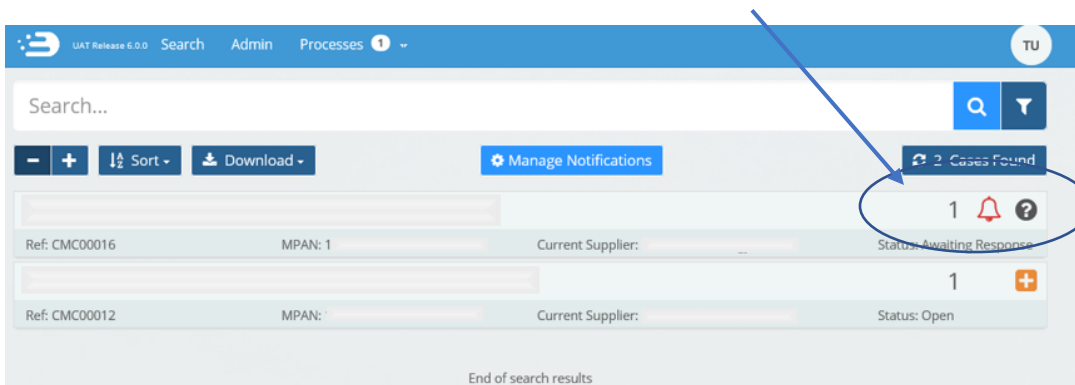
A user can now enter that MPAN record into the ECOES Search bar, and when selected they will see a note confirming that there is an active Crossed Meter Case against this MPAN. Note that only the Current Supplier and Associated Stakeholders will have visibility of this message.

The MOP user will have visibility of this Case creation within the Crossed Meters dropdown under 'Processes'. The MOP can also view all applicable Crossed Meters Cases within the Processes tab and will see a notification if the Supplier raised a note for their attention. An email will also be sent to all users within a specific Company Group whenever there is an unseen update to a Case (such as a new note added for their attention).

If the MOP user chooses to use the Crossed Meters function within ECOES to communicate with their Supplier, then at this stage they can scroll down to the timeline and view the details of the Crossed Meters Case, generated by the Supplier (shown below in blue).
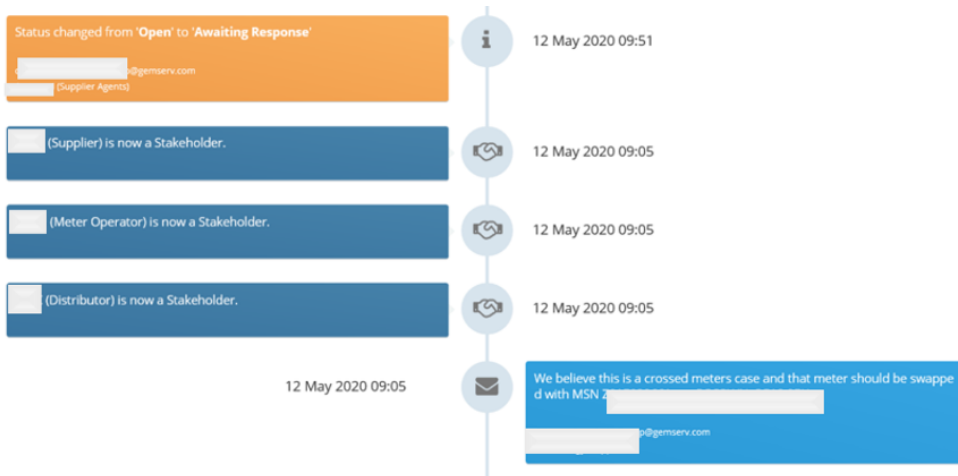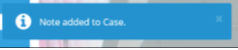
For this example, the MOP user has chosen to go on site to investigate and updated the Supplier with a note confirming what MSN is on site. Any notes from updated by the MOP user will be visible in the Case Timeline (shown below in pink).

Adding a Note

Within the Crossed Meters Case Details Screen, scroll down to the timeline and click on 'Add Note'. Clicking 'Add Note' will generate the 'Add Note' pop up, an example of this is seen below.

Content is mandatory and must be completed.

The 'Requires Response' has been moved to Yes, which asks a question of the Recipient Company and in this example will obligate the Supplier to respond.

The Recipient Company dropdown will need to be selected when asking a question.

A note can be made private by changing this to 'Yes'. If 'Private', only the recipient and note creator company will see the content of the note. The timeline will show the note is private.

'Add Files' allows the user to add an attachment(s). For example, a picture confirming the MSN on site. A limit on the size of attachments sent in a single message is set to 10 MB.

Once complete, click 'Send' to send your note.

Once sent, a notification will 'pop up', in the bottom right of the screen to confirm that a note has been added to the Case .

The note will also be visible within the Case Timeline.

Obligations

An Obligation occurs when a question has been asked of the user. Adding a new note with a question for the recipient will start off the obligation. For example, if the MOP chooses to send a note to the Supplier with "Response Required" selected, the Case Status will change to 'Awaiting Response', and an obligation will be raised. Responding to a note will fulfil the obligation.

Case Status now shows as "Awaiting Response".

Meter Details section has not changed and cannot be edited by a MOP user.

Obligation details now show 1 and confirm that the Supplier has 5 Working Days to respond to the MOPs message (which is shown above in pink).

When the MOP user clicks ↺ return, the status on the will also show as 'Awaiting Response'.

This 'Awaiting Response' status will be visible to the Supplier user when they log on to ECOES. They will see this notification.

And will also see the status as 'Awaiting Response' and a red bell will be visible to confirm that the user has an obligation to respond to. This will remain until the Supplier responds to the MOP's note.

The MOP user can also hover over the 🔔 ❓ to view obligation details. The **bell** confirms the Obligation date deadline and the **question mark** confirms the status as 'Awaiting Response'. This will remain until a response has been given. The Obligation and 'Awaiting Response' status will change once the Supplier user clicks 'Add Note' and sends a response.

Linked Cases/Edited MSN

The Supplier user can respond and then edit their MSN accordingly (as per notification of the correct MSN from the MOP). Once the MSN is edited, the Supplier user will be advised that if they accept the change, a linked Case will be created linking the MPAN relating to the updated MSN to this Case (and notifying the Associated Supplier and their MOPs accordingly).

The Associated Supplier and their MOP will be able to see their MPAN, alongside the other MPAN in the Crossed Meters Case List view (providing that their filter settings allow for this, as outlined here). Case links are bi-directional i.e. in the example below, CMC00012 is linked to CMC00013 then CMC00013 is linked to CMC00012.

MPAN address.

Initiating Supplier MPAN and MPID.

Linked Case count.

Case reference.

Associated Supplier MPAN and MPID.

Case Status.

Each MOP and Supplier involved with the Linked Case can access the Timeline detail of all Linked cases. Any actions that the Initiating Supplier or their MOP take, will be visible to the Associated Supplier when they click into the address line for the MPAN belonging to the Initiating Supplier. Only Notes that have been marked 'Private' will not be visible to all and will only be visible to users within their intended recipient Company Group. Likewise, the Initiating Supplier can see any action that the Associated Supplier takes. To see this, they must click on the address line for the MPAN belonging to the Associated Supplier and view that timeline.

Apart from a notification that the cases are linked, the Timelines run independently. For example, within the Associated Suppliers record (Address relating to their own MPAN - CMC00013 above), they can see a high-level overview of actions taken. They can see that a Case was opened by the Initiating Supplier and then later linked to them – but they cannot see any of the finer details. To view the specifics, they would need to click into the Initiating Suppliers record (Address relating to the Initiating Suppliers MPAN – CMC00012 above).

Example of Timelines for each Supplier, at the stage that the cases are linked/MSN updated

Once the Associated Supplier has familiarised themselves with the details of the Case, they are required to investigate if this is a Crossed Meters situation. They may choose to communicate with their own MOP via the 'Add Note' function within the Crossed Meters Case record belonging to their MPAN, or they may choose to process any requests with a dataflow or other acceptable method of communication.

Each Supplier and Meter Operator will need to agree how they manage these communications bi-laterally.

In this example, the Supplier adds a note and selects 'Requires a Response'. This will obligate the MOP user to respond to this note.

The MOP user will receive a notification and will be required to respond. Until they pick this up and respond, the Case Details status will be 'Awaiting Response' and the Obligation Details within this MPAN will show a count of 1 (this number will increase if more than one message is raised for the MOPs attention).
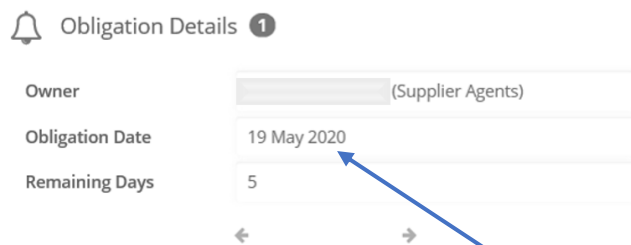
Obligation Date is the deadline for a response. If the request was for a site visit, it may not be possible to turn this around in 5 Working Days, so a response confirming a Site Visit will be booked or a note confirming a discussion with the Supplier will be enough. Further notes can be added later – e.g. once the appointment has taken place.

The MOP user will have instant visibility of this message that the Associated Supplier sent to them when they log into ECOES. All users within the MOP company group will also receive an email via a batch run, notifying them of any unseen updates.
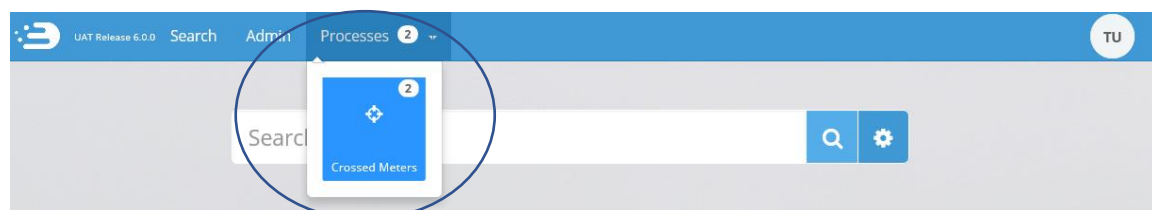
In the below example, the MOP is notified that they have two Crossed Meters Cases for their attention. As the Supplier has asked the MOP a question, then the Obligation to respond is shown, both in the form of a 'red bell' and status 'Awaiting Response'. The Case related to our example is the top one (CMC00013).
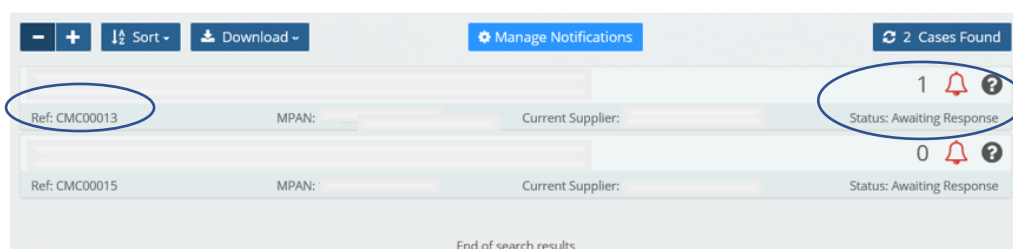
The MOP user will be able to click into the address line, review the message details and respond by adding a Note. The MOP user will also have the option to insert an attachment – for example, a photograph of the meter, taken during the site visit which confirms the MSN.

A MOP user sending this response via the 'Add Note' function will clear the Obligation.

And change the Status back to 'Open'.

The MOPs user response will trigger a notification to the Associated Supplier. The Associated Supplier can then work to resolve this Crossed Meters investigation, any further messages raised for the MOPs attention will be flagged, and the MOP user also has the ability to review any follow up communication or actions within each record that is liked to this Case.

Closed Crossed Meters Cases

Each Supplier can close their side of the linked Case. When a Supplier closes a Case, it will show as closed within the Crossed Meter's Case list, and the MOP will be able to see this providing that their filters are set to show Closed Cases.
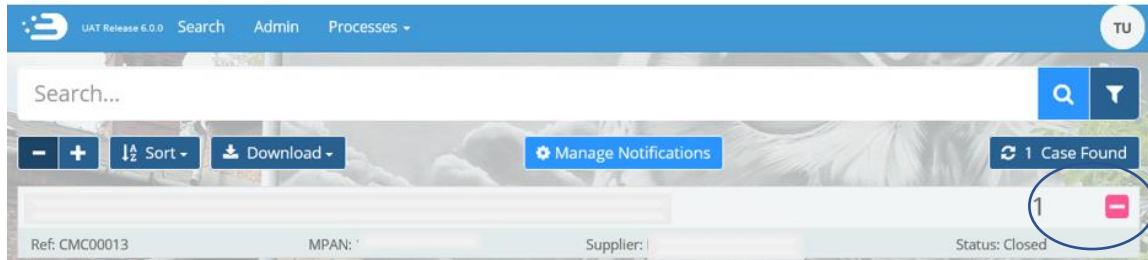
The Case Details will now show the Closed Case Symbol .
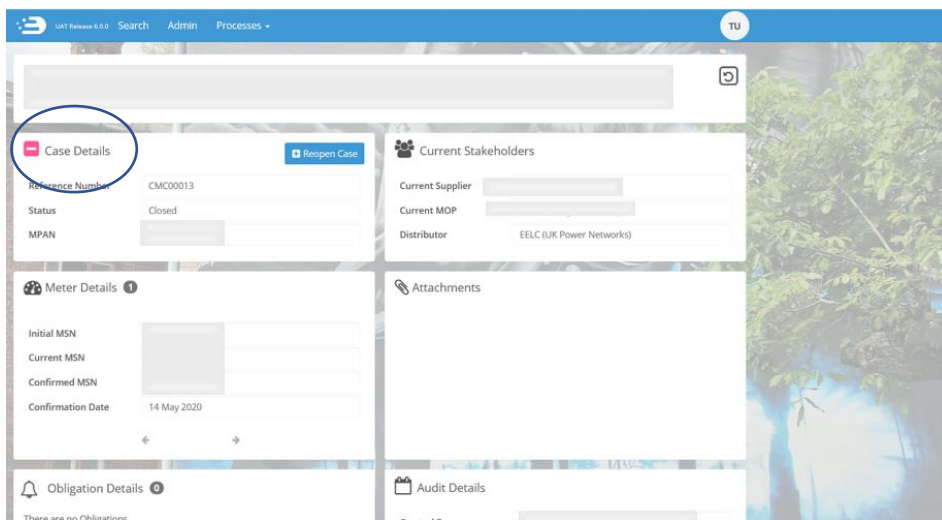
The Timeline within the Case will also confirm the status change.
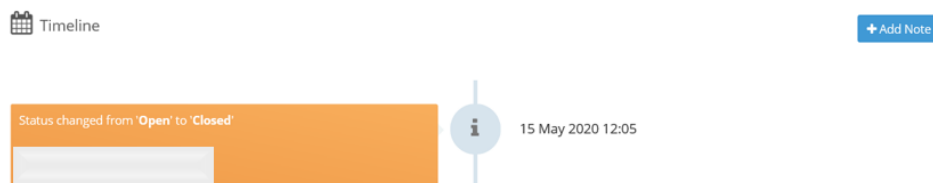
Re-opened Crossed Meters Cases

A Case can be re-opened by the current Supplier, by clicking the 'Reopen Case' button. Only the current Supplier can re-open a case for their own MPAN.

When a Case is re-opened, and the Supplier chooses to add a note for the MOP with 'Requires Response' selected, the MOP users will be notified of the re-opened Case and their obligation to respond to the Suppliers Note.

Archived Crossed Meters Cases

A job will be run every day to search for Cases with a 'Closed' status. Where a Case has been Closed for 30 Calendar Days (including weekends) it will be assigned an 'Archived' Flag. The status is not affected by the 'Archive Flag' but these Cases will be hidden by default from the Crossed Meter Case List screen. All Notes and Attachments will be irrecoverably deleted. The 'Case Detail' screen will show that the Note(s) and Attachment once existed, but the detail will be lost.

Archived messages will display a cobweb icon against them, like.
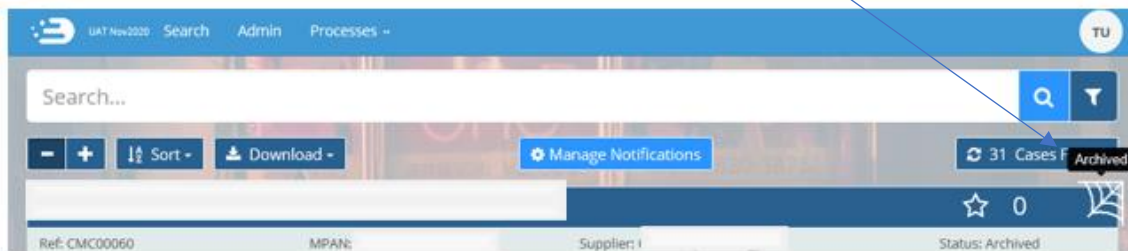
And the Case Details within the Crossed Meters Case Details screen will also confirm 'Archived' within the status, by showing the cobweb icon and if you hover over the cobweb.
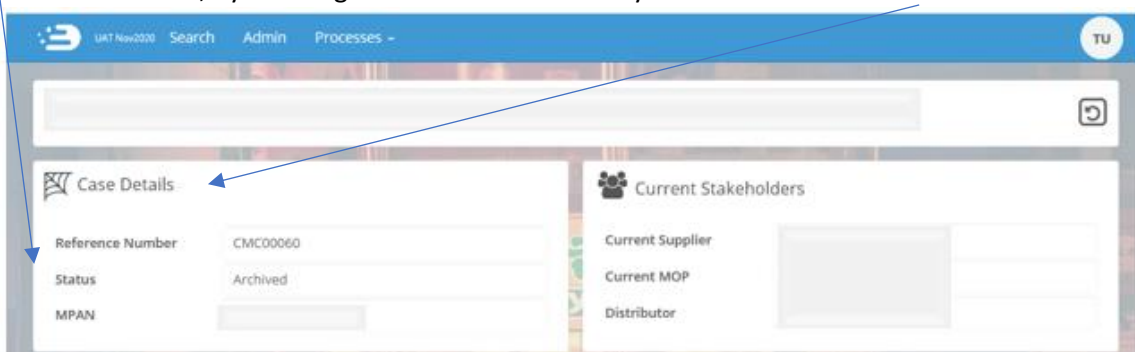
Crossed Meter Notification Emails

The Crossed Meters Notification email job runs daily (including on weekends) and searches for cases created since the job was last run. If there are any cases created since the Job was last run that have yet to be viewed by the Case's current Supplier, then an email will be sent to all Users with the Crossed Meters System Function for that Company Group.

The email will also contain details of any Case where the current Supplier has changed, and the gaining Supplier has yet to view the Case.

ICONS Found within the Crossed Meters Functionality

Icon	Label	Icon	Label	Icon	Label	Icon	Label	Icon	Label
	New Note		Back to search		Current Stakeholders		Attachments		Crossed Meters
	Search		Case Details		Meter Details		Obligation details		Filter
	Simple View		Linked Cases		Audit Details		Stakeholder History		Detailed View
	Download all attachments		Unseen updates to Linked Case		Unseen updates to Case		Timeline		Download attachment
	Open		Timeline – for information		Timeline - Notes		Timeline – Question asked.		Closed
	Archived		Attachments pending virus scan		Timeline - Now a Stakeholder				