

# Business Process Design Team

## Portal Companion Guide

### **SUBJECT: Faster Switching Program**

Title:	Portal Companion Guide
TOM Ref:	
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Version	0.5
Agreement Date	
Approver	

# Switching Programme - Portal Companion Guide

**Title:** Portal Companion Guide

**Brief Description:**

The portal is the gateway to the new model under construction and provides you with an opportunity to test-drive the interface across the model content. Your experience using the portal is very important for the development of future release(s) and ultimately the final publication for RFI. We invite you to participate in the review of the process maps using these guidance notes to assist your navigation of the portal. You can jump to any point in the switch process from the chevron drilldown icons on your Home Page, or view a policy process in its entirety, which have been presented at previous industry meetings. There are also description panes that have been applied to relevant process steps/actions and accessible reports which will be subject to amendments to best suit the requirements of the program.

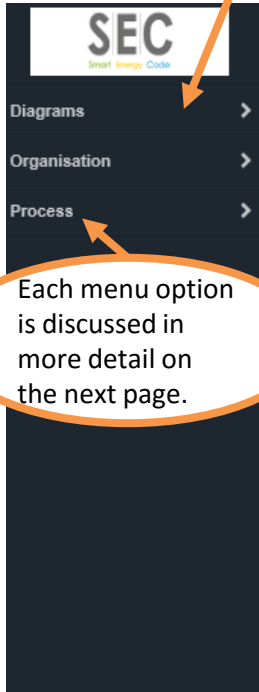
**URL:** <https://bpdt.host.casewise.com/evolve/statics/swdqppqw/index.html>

# Switching Programme - Portal Companion Guide

## Level 1 Page (Home):

The portal's website address will navigate directly to the home page, as shown here.

The menu on the left-hand side is the main 'dashboard' for navigating to content.



Each menu option is discussed in more detail on the next page.

## Switching Programme

Energy Premises  
Life Cycle

Change of  
Supplier Process

Registration  
Agent User Life  
Cycles

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Click on either of the chevron drilldown icons to jump to the relevant life cycle or process

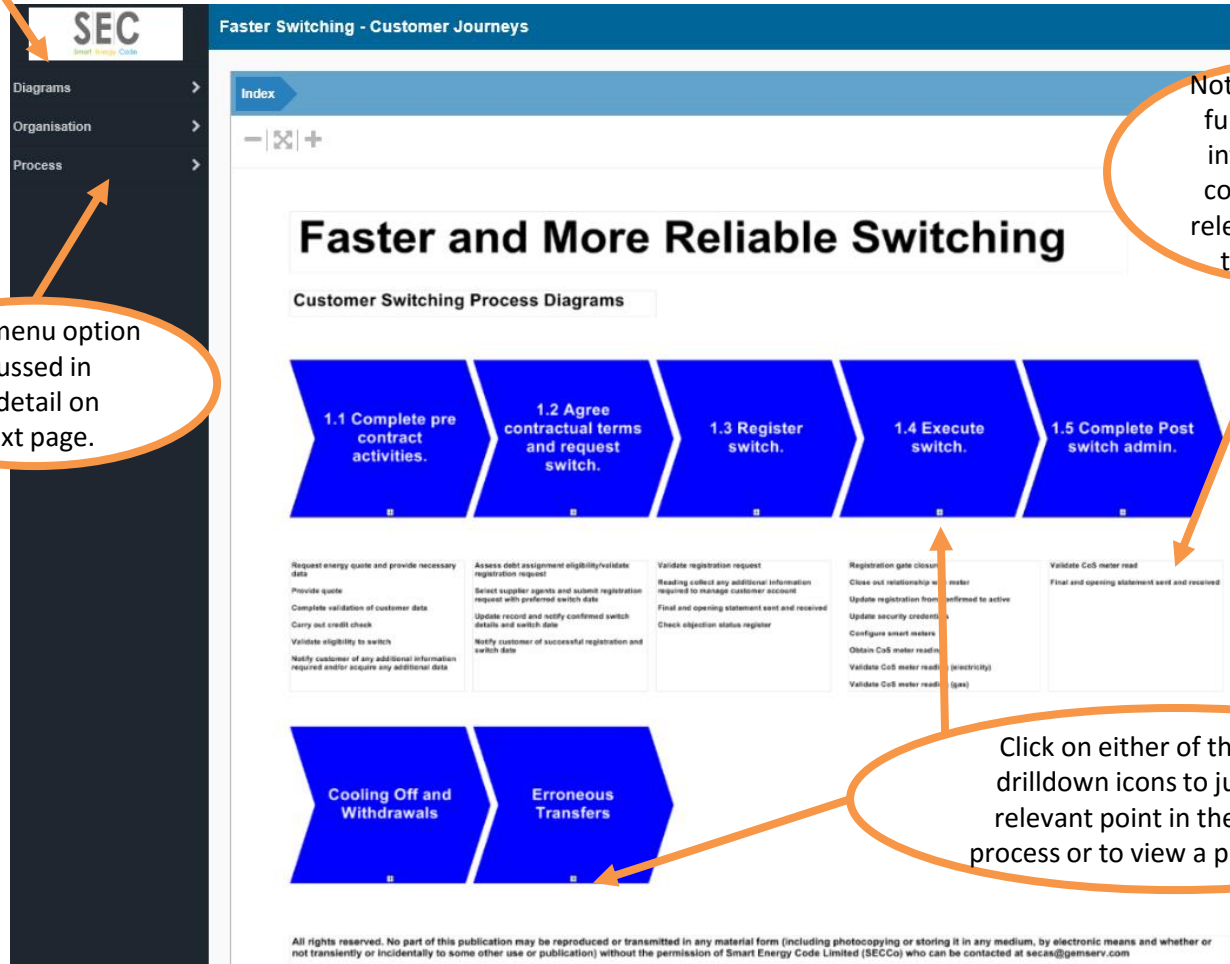
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## Level 2 Page:

Depending on the chevron selected, you will see the next level of detail of either Energy Premises Life Cycle, Registration Agent Life Cycle or Change of Supplier (below).

The menu on the left-hand side is the main 'dashboard' for navigating to content.

Each menu option is discussed in more detail on the next page.



Notes to provide further insight into the areas covered in the relevant point of the process

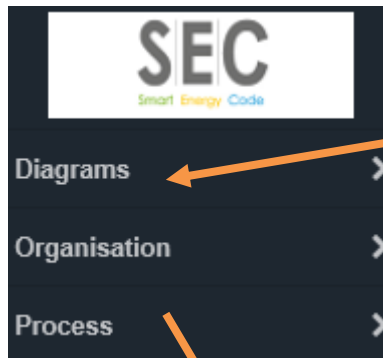
Click on either of the chevron drilldown icons to jump to the relevant point in the switching process or to view a policy process

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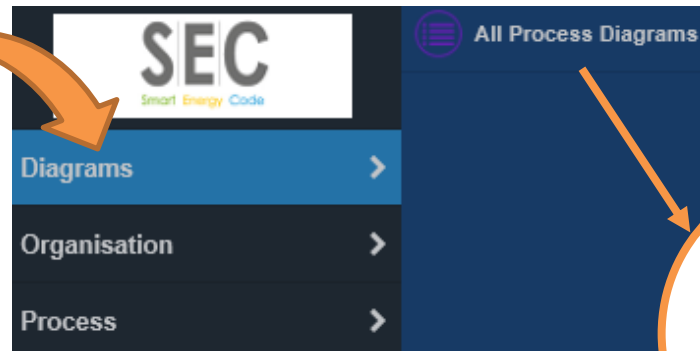
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## Menu:

The menu on the left-hand side is the main 'dashboard' for navigating to content. The white arrows indicate there is a submenu offering more content options. To return to your Home page at any time during the test-drive, simply click the Casewise Evolve logo. Please note that as the portal evolves this logo itself, along with other visual features, will be subject to change. Each menu option here is discussed in more detail on the next slide.



After clicking Diagrams you will see a link entitled 'All Process Diagrams'.



Click here to access a list of all the individual diagrams, sub-processes and policy processes.

The Organisation and Process submenus offer you an insight into how relationships between model objects can be presented in variable formats. Please note these will be subject to change during the model build.

Diagrams
Diagram: Consolidated_Level 3_1.1.1,1.1.2,1.1.3 Complete pre contract activities, Category: BPMN Diagram
Diagram: Consolidated_Level 3_1.2.1 Complete validation of customer data, Category: BPMN Diagram
Diagram: Consolidated_Level 3_1.2.2 Carry out credit check, Category: BPMN Diagram
Diagram: Consolidated_Level 3_1.2.3 Carry out triangulation/validate meter, Category: BPMN Diagram
Diagram: Consolidated_Level 3_1.2.4 Notify customer of any additional action required and/or acquire any additional data, Category: BPMN Diagram
Diagram: Consolidated_Level 3_1.2.5 Select supplier agents and 1.2.6 Submit registration request with preferred switch date, Category: BPMN Diagram

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## Tips on Viewing the Model:

It is encouraged that users develop their own preferred techniques for viewing the model, however here is some initial guidance.

To zoom in or zoom out, you can use the respective buttons here.

Expand the view of the map.

Domestic

1.1.1, 1.1.2, 1.1.3 Complete pre contract activities

This button can be pressed again to restore to the paned view.

Rectangles on a diagram can be double clicked. The description pane will open containing more information, which is in development and subject to change. See the *BPDT Customer Switching Process Mapping Conventions* for definitions.

General	
Name	1.1.1.1 Request energy quote and provide necessary data
Category	Task
Description	The requesting of an energy quote can come either from a domestic or non-domestic customer
Information Needs	
Information Needs	Minimum required information will be one of the following three items: MPXN, Meter Serial Number and Address
BPDT Assumptions	
BPDT Assumptions.	Other scenarios exist such as where a TPI is involved in the customer obtaining and energy quote.
Data Requirements	
Data Requirements	MPXN, Address, Meter Serial Number

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### Other features:

On the top right side there are additional features such as printing, downloading and sharing a diagram.

Click here to Print the diagram.

Download an image of the diagram.

Click here to Share the URL of the diagram via email.

Enter your text in these fields.

Click here to transpose the above fields into a draft email (subject to your email setup).

The screenshot displays the 'Domestic' portal interface. At the top, a grey header bar contains the title 'Domestic' and three icons: a share icon, a print icon, and a download icon. Below the header, a blue banner reads '1.1.1,1.1.2,1.1.3 Complete pre contract activities'. Underneath, a diagram titled 'Customer Switching - 1.1 Complete pre contract activities' is shown, featuring a flowchart with green and blue nodes. To the right of the diagram is a 'Share' dialog box. This dialog has a close button (X) in the top right corner. It features a radio button labeled 'Share by email'. Below this are two text input fields: 'Subject' (containing 'Please review the Domestic page') and 'Message' (containing 'Hello, Please review the Domestic page. Thank you'). At the bottom, a line of text states 'Recipients will receive an email including a link to the Domestic page', followed by a blue 'Share' button. Orange callout boxes with arrows point to the print, download, and share icons in the header, and to the subject and message fields in the share dialog.