MSATS Ombudsman Enquiry User Interface Guide

2.1 Final
March 2019

Provides guidance for using the MSATS Ombudsman Enquiry system
Important Notice

PURPOSE
This MSATS Ombudsman Enquiry User Interface Guide (Guide), prepared by the Australian Energy Market Operator (AEMO), provides guidance for MSATS under the National National Electricity Rules (Rules).

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The release of this document changes any previous versions of MSATS Ombudsman Enquiry User Interface Guide.

FEEDBACK
Your feedback is important and helps us improve our services and products. To suggest improvements, please contact AEMO's Support Hub.
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Chapter 1 Introduction

Purpose

This document is a user interface guide providing instructions for ombudsman organisations using the Ombudsman Enquiry system in the MSATS Web Portal version 3.0 - software build 46.92.

Audience

The audience for this guide is:

- Ombudsman administrators
- Ombudsman Participant Users

What’s in this guide

This guide covers use of the Ombudsman NMI Enquiry and Reports menus only. It is organised in the following way:

Chapter 2 Overview on page 3 explains the Ombudsman system, what it is used for and how to access it.

Chapter 3 NMI Enquiry on page 5 explains how to make a NMI enquiry, viewing and downloading the enquiry details, and asking AEMO to resolve.

Chapter 4 Reports on page 22 explains how to download and request a report.

Needing Help? on page 27 explains the web portal requirements, how to contact AEMO's Support Hub and information to provide.
References on page 30 contains a list of references for help with logging in or out, using the User Profile menu to view or change your password, e-mail address or telephone number, and providing Participant Users with access to your organisation’s Ombudsman Enquiry system (ombudsman administrators only).

How to use this guide

- This guide is written in plain language for easy reading.
- Where there is a discrepancy between the National Electricity Rules, and information or a term in this document, the National Electricity Rules takes precedence.
- Where there is a discrepancy between the MSATS Procedures, and information or a term in this document, the MSATS Procedures take precedence.
- Text in this format indicates there is a resource on AEMO’s website, for details, see References.
- Text in this format indicates a link to a related resource.
- Actions to complete in the web portal interface are bold and dark grey.
- Glossary terms are capitalised and have the meanings listed against them in the Guide to MSATS and B2B Terms.
- Italicised terms are defined in the National Electricity Rules. Any rules terms not in this format still have the same meaning.
- References to time are Australian Eastern Standard Time (AEST).
Chapter 2 Overview

What the Ombudsman Enquiry system is for

The Ombudsman Enquiry system provides ombudsman organisations with secure self-serve access to NMI standing data.

Using the Ombudsman Enquiry system, ombudsman organisations can:

- View and download NMI information.
- Download reports on NMI enquiries made by their organisation.
- Maintain their user profile.
- Ombudsman administrators can maintain their organisation’s users.

How do you use the Ombudsman Enquiry system

The Ombudsman Enquiry system in the MSATS Web Portal is part of AEMO’s market software solution. It is accessed by using a web browser. For help, see Web portal requirements.

Who can use the Ombudsman Enquiry system

Participant Users having access to the Ombudsman Enquiry system include:

- Registered ombudsman administrators
- Registered ombudsman users
- Registered participants (reports only)
- AEMO

Ombudsman administrators may authorise other ombudsman users, access to NMI information via the Ombudsman Enquiry system. This is achieved by using the Administration menu, to create and grant rights to other ombudsman users. For help, see Guide to User Rights Management.
Accessing the Ombudsman Enquiry system

The Ombudsman menu on the MSATS main menu is used to access the Ombudsman Enquiry system described in this document.

1. Using your web browser, access the MSATS web portal, either:
   - Pre-production: https://msats.preprod.nemnet.net.au
   - Production: https://msats.prod.nemnet.net.au

   The web portal provides you with a clear indication of the environment you are working with a different border colour around the home page. The production environment has a grey border and the pre-production environment has a green border.
Chapter 3 NMI Enquiry

Making an NMI enquiry

You can search for NMI information using the customer’s NMI, meter serial number, or address.

This section assumes that you are already logged into the Ombudsman Enquiry system. For help logging in, see Accessing the Ombudsman Enquiry system.

To make a NMI enquiry:

1. On the main menu, click Ombudsman and then click NMI Enquiry.

   The Disclaimer Acknowledgement displays; read the disclaimer and click Accept to agree and display the Ombudsman Search screen.

   **Note:** To access NMI information, you must accept the Disclaimer Acknowledgement each time you login to the ombudsman system and access the NMI Enquiry menu.
Alternatively, click Reject to disagree to the disclaimer conditions. Clicking Reject returns you to the login screen, logging you out of the ombudsman system.

2. The Ombudsman Search screen displays, where you can make the NMI enquiry. The Date Range section is pre-filled with:

- **Start Date**: the current date minus 9 months. The maximum allowable search range is the current date minus 5 years.
- **End Date**: the current date plus 65 days. The maximum allowable search range is the current date plus 90 days.

3. Enter another Date Range by clicking the calendar icons to the right of the Start Date and End Date and then select a date range from the MSATS calendar. The asterisks (*) indicate the Date Range section is required.

   - To show a different month, click a single arrow (right to go forward and left to go back).
   - To show a different year, click a double arrow (right to go forward and left to go back).
• Alternatively, use the drop-down arrows and select a month and year from the list.

4. In the Search By section, enter criteria for only one of the following:
   - NMI: enter the 10 character NMI number.
   - Meter Serial: enter the Meter Serial number.
   - Address: enter a full or partial address. The State and either the Suburb/Locality or 4 digit Postcode (or both) must be entered. If entered, the Street Number must be numeric.

   Tip: The search takes longer with more fields, therefore start by entering criteria in a few address fields and if necessary narrow your search down by entering more criteria.

5. If you want to display the Distributor name on the NMI Enquiry screen, click Enquiry on Distributor. Displaying the Distributor name is optional.

6. Click Search.

   Alternatively, click Clear to set the fields back to their default values.
7. The search criteria are validated and the Ombudsman Search Results display. To view a record, click Select in the Action column. To learn more about viewing the results, see Viewing NMI enquiry details.

Alternatively, click Back to Search to start a new NMI enquiry.

Clicking Select in the Action column sends notification e-mails to participants who are associated with the selected NMI. If Enquiry on Distributor is selected the distributor also receives a notification.

If the search criteria is not valid or there are no records found, a message displays similar to the ones below. Correct the search criteria and click Search again.
Viewing NMI enquiry details

This section details how to view NMI enquiry details, and assumes that you have followed the steps for *Making an NMI enquiry* and selected a record.

**Viewing the NMI Graph**

To view the NMI graph:

1. The Ombudsman NMI Details screen displays a graphical representation of the enquiry. If the Enquiry on Distributor check box was selected as part of the search criteria the LNSP name displays next to the NMI number and Address.

The graph displays:

- The Start Date adjusted to the first day of the requested month.
- The End Date adjusted to the last day of the requested month.
- Coloured graph lines with a legend explaining each line.
- Meter Information; see *Viewing meter information*. 
2. To zoom in and see more detail, use your mouse to click and drag across a date range. For example, to view further details for 1 Sep 2009 to 1 Dec 2009, click and drag your mouse across the date ranges as shown in Figure 3: click and drag example.

**Note:** You can zoom into a minimum of one calendar month.
Figure 3: click and drag example

3. The graph redraws to display the selected date range.

To return to the original date range view, click Reset Zoom.

You can also:

- View meter information, see Viewing meter information.
- Use the pop-up windows, see Using the graph pop-up windows.
- Return to the original date range view, click Reset Zoom.
- Start a new NMI enquiry, click Back to Search.
• Download NMI enquiry details, click **Download Data**. See **Downloading a NMI enquiry**.

• Ask AEMO for help, click **Ask AEMO to Resolve**. See **Asking AEMO to resolve**.

**Using the graph pop-up windows**

When the mouse is moved or hovers over the arrow head marking the start of a graph line, the following information displays in a pop-up window:

**Active and inactive NMI**

- Start Date of the selected date range.

- End Date of the selected date range.

**Active retailer**

- A round icon marker indicates a change of Retailer.

- Create Date of the original record.

- Days: the number of days from the Create Date to the Start Date. A negative value represents a retrospective transfer i.e. the start day is before the change request was submitted.

- Start Date of the Retailer’ responsibility.
• End Date of the Retailer’s responsibility.

**Historical retailer**

• A round icon marker indicates a change of Retailer.

• Create Date of the record or the original record if an End Date exists.

• Update Date: the date the record was updated, if change by another Retailer.

• Days: the number of days from the Create Date to the Start Date. A negative value represents a retrospective transfer i.e. the start day is before the change request was submitted.

• Start Date: the date the Retailer is responsible.
• End Date: the date the Retailer’s responsibility ends.

![Diagram showing End Date]

**Pending transfers**

Pending transfers include the following statuses: pending validation, requested, pending and objected.

• Create Date: the original date the transfer was submitted.

• Proposed Date: proposed transfer date (start date).

![Diagram showing Pending transfers]

**Cancelled transfers**

• Create Date: the original date the transfer was submitted.
Viewing meter information

The Ombudsman NMI Details interface displays the Meter Information at the bottom of the screen. By default, the first Meter Serial tab is selected, indicated by the brighter colour of the tab. The Meter Serial tabs are displayed in the following order:

- Current meters (green) ordered by serial number.
- Removed meters (pink) ordered by serial number.
- To display information for another Meter Serial number, click a tab in the Meter Information table.

This example has two removed basic meters (pink tabs), replaced with a MRIM single interval meter (green tab).
Each Meter Serial tab displays the:

- Meter Serial number
- Meter Installation Type Code
- Status Code: Current or Removed
- Start Date and End Date
- Next Scheduled Read Date
- For each corresponding Meter Register Identifier the following displays:
  - Register number
  - Register Status: Current or Removed
  - Start Date and End Date
  - Time of Day
  - Network Tariff Code
  - Controlled Load

**Downloading a NMI enquiry**

You can download and save your NMI enquiry in CSV format to your local computer. The system gives each downloaded file a unique file name that includes the date and time, see the example below.

**Note:** this section assumes that you have followed the steps for Making an NMI enquiry and selected a record.
To download a NMI enquiry:

1. On the Ombudsman NMI Details screen, click Download Data.

2. The File Download window displays.

3. Do one of the following:
   - Click Open, to open the file in a spreadsheet format such as MS Excel (see page 19).
○ Click **Save** and in the **Save As** window, choose a location on your local computer to save the file in CSV format. Use a plain text application (Notepad etc.) or spreadsheet (MS Excel) to open the saved file. The standard file name format is ParticipantID_NMINumber_Date.csv

![Save As Window](image)

○ Click **Cancel** to return to the Ombudsman NMI Details screen.

4. Opening the file displays the NMI Enquiry data. Included is a NMI **Enquiry Reference** number; shown in red in the example below (the default display is General; to display the **Enquiry Reference** as number, right-click the cell, select **Format Cells** and change the format to Number.)
The same data displayed on the Ombudsman NMI Details screen; shown in bold in the spreadsheet example below.

Spreadsheet example

If your data does not download, a message displays Data download was not successful; Retry your download again.

Asking AEMO to resolve

If you encounter complex NMI information you can ask AEMO for help. Asking AEMO for help, results in an automated e-mail sent to an AEMO staff member who manually actions your request.

Note: This section assumes that you have followed the steps for Making an NMI enquiry and selected a record.
To ask AEMO for help:

1. On the Ombudsman NMI Details screen, click Ask AEMO to Resolve.

2. The Ombudsman Enquiry - Ask AEMO screen displays with your details pre-filled. If required, type an additional note to AEMO and click Send email.

   **Note:** For your records, a copy of the e-mail is sent to you and your organisation’s administrator; this copy is useful should AEMO contact you to discuss the enquiry.
3. A confirmation message displays. To return to the Ombudsman Search screen, click Back to Search.

AEMO sends an e-mail response using the details in your user profile. To learn more about viewing or changing your user profile details, see Guide to MSATS Web Portal.
Chapter 4 Reports

The reports menu provides a report of your organisation’s enquiries made on each business name. You can request a report for the last week, the last month or the last quarter or you can define your own date range.

Note: this section assumes that you are already logged into the Ombudsman Enquiry system. For help, see Accessing the Ombudsman Enquiry system.

Requesting a report

To request a report:

1. On the main menu, click Ombudsman and then click Reports.
2. The Ombudsman Reports screen displays. Select your Date Range by choosing one of the following options:
   - Last Week: enters a Date Range for the last calendar week (Monday to Sunday).
   - Last Month: enters a Date Range for the last calendar month.
   - Last Quarter: enters a Date Range for the last quarter.
   - User Defined: enter your own Start Date and End Date by clicking the calendar icons to display the MSATS calendar (this is the default selection).
3. Click Report.

4. The Ombudsman Enquiry Business Report displays for the requested date range:

- **The Retailer name.**
- **Enquiry Count:** how many enquiries were made for the date range in descending order.
- **Self Serve:** how many enquiries for the date range were made using the Ombudsman Enquiry system.
- **AEMO Resolve:** how many enquiries for the date range were made using Ask AEMO to Resolve.

**Note:** It is possible to have more than one participant associated with an ombudsman enquiry so the number of enquiries per business may not match the number of ombudsman enquiries in the last row.
You can also:

1. Download the report, click **Download Report**. For help, see **Downloading a report**.

2. Request a new report, click **New Report** to return to the **Ombudsman Reports** screen.

### Downloading a report

This section describes how to download a report. It assumes that you have followed the steps for **Requesting a report**.
To download a report:


2. The File Download screen displays.
3. Do one of the following:
   - click **Open**, to open the file in a spreadsheet format such as MS Excel. See "Figure 4: csv spreadsheet example" on page 24.
   - click **Save** and in the **Save As** window, choose a location on your local computer to save the file in CSV format. Use a plain text application (Notepad etc.) or spreadsheet (MS Excel) to open the saved file. The standard file name format is ParticipantID_OmbudsmanReport_DateTime.csv.
   - click **Cancel** to return to the Ombudsman Reports screen.

4. Opening the file displays the report with the same data displayed on the Ombudsman Enquiry Business Report screen (shown in bold in the following .csv spreadsheet example).

If your data does not download a message displays **Data download was not successful.** Retry your download again.
Web portal requirements

The MSATS web portal is accessed using a web browser and requires:

- The website address where the application is located on AEMO’s network:
  - Pre-production: https://msats.preprod.nemnet.net.au
  - Production: https://msats.prod.nemnet.net.au

- Either the current or previous versions of Microsoft Internet Explorer or Google Chrome.

- Access to MarketNet; if your company is a registered participant, you probably already have access because it is set up during participant onboarding. For more details, see Guide to Information Systems.

- A user ID and password provided by your company's participant administrator (PA) who controls access to AEMO's web portals. For more details see Guide to User Rights Management.

PAs are set up during participant onboarding, if you don't know who your company's PA is, contact AEMO's Support Hub.

MSATS runs on both Windows and Unix-like operating systems.
To access the Markets Portal, AEMO recommends the following web browsers:

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<tr>
<td>Microsoft Edge (Microsoft recommended)</td>
<td>Windows 10</td>
<td>Edge</td>
<td><a href="https://www.microsoft.com/en-au/windows/microsoft-edge">https://www.microsoft.com/en-au/windows/microsoft-edge</a></td>
</tr>
<tr>
<td>Google Chrome</td>
<td>All platforms</td>
<td>Latest version</td>
<td><a href="https://www.whatismybrowser.com/guides/the-latest-version/chrome">https://www.whatismybrowser.com/guides/the-latest-version/chrome</a></td>
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**Environment access**

The MSATS web portal gives you a clear indication of the environment you are working in by providing a different background colour for the menu.

- The pre-production environment has a green menu background
- The production environment has a blue menu background.
AEMO’s Support Hub

IT assistance is requested through one of the following methods:

- Phone: 1300 AEMO 00 (1300 236 600)

  For non-urgent issues, normal coverage is 8:00 AM to 6:00 PM on weekdays, Australian Eastern Standard Time (AEST).

- The Contact Us form on AEMO’s website.

AEMO recommends participants call AEMO’s Support Hub for all urgent issues, whether or not you have logged a call using the contact us form.

Information to provide

Please provide the following information when requesting assistance from AEMO:

- Your contact details
- Company name
- Company ID
- System or application name
- Environment: production or pre-production
- Problem description
- Screenshots

For AEMO software-related issues please also provide:

- Participant ID (if Data Interchange (DI) problem)
- Version of software
- Properties or log files
- PDR Monitor support dump and DI instance name (if DI problem)

Feedback

To suggest improvements to this document, please contact the AEMO Information and Support Hub.
References

Rules


AEMO’s website

**Guide to Electricity Information Systems**, comprehensive guide providing an overview of AEMO’s market systems used by participants. It is relevant to IT decision making during participant onboarding and provides an understanding of the IT systems requiring set up.

**Guide to MSATS and B2B Terms**, defines the terms in the electricity retail market.

**Guide to MSATS Web Portal**, use this guide to gain an understanding of the MSATS web portal interface.

**Guide to User Rights Management**, assists Participant Administrators to manage their Participant User’s access to AEMO’s systems. It also explains how to set up single user IDs for use with the Set Participant function in AEMO’s web portals.

**Introduction to MSATS**, provides an introduction the Market Settlement and Transfer Solution (MSATS) such as how to use the MSATS web portal, the Set Participant function, and change your password. It also provides an introduction to using the MSATS file interface and Batch Handlers.
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