
	Group IT Business Requirement Specification (BRS) 2984210 Blackpearl K2 Upgrade/Replacement	Template Identifier	240-83570075	Rev	11
		Authorisation Date	31 July 2021		
		Review Date	December 2024		

Customer request number	2984210
Customer request description	Blackpearl K2 Upgrade/Replacement

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1. DOCUMENT TRACKER

Date	Author Name	Changes (section changed, page number, from what to what)
08-02-2024	Janeen Vergotine	Draft 0 – populate information from business demand
12-02-2024	Janeen Vergotine	Draft 0.1 – Update BRS with high-level requirements as per 1 st kick-off meeting
29-02-2024	Janeen Vergotine	Draft 0.2 – Update detailed requirements with major workflow requirements after 2 nd workshop
11-03-2024	Janeen Vergotine	Draft 0.3 – Continue updating the major workflow detailed requirements
13-05-2024	Janeen Vergotine	Draft 0.4 – Focus on Cost estimation phase for majors detailed requirements
10-07-2024	Janeen Vergotine	Draft 0.5 – Further expand on workflow per type of jobs for majors
22-07-2024	Janeen Vergotine	Draft 0.6 – Include detailed requirements for Grid Access IPP's
08-08-2024	Janeen Vergotine	Draft 0.7 – Focus on Budget Quotation phase for majors detailed requirements
29-08-2024	Janeen Vergotine	Draft 0.8 – Update detailed requirements with minor workflow requirements
02-09-2024	Janeen Vergotine	Draft 0.9 – Include detailed requirements for ESA contract drafting and vetting
05-09-2024	Janeen Vergotine	Draft 1.0 – Include detailed requirements for Pricing contract drafting and vetting
25-09-2024	Janeen Vergotine	Draft 1.1 – Finalise detailed requirements with minor workflow requirements
26-09-2024	Janeen Vergotine	Draft 1.2 – Clean up BRS and make final changes

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2. GLOSSARY OF TERMS / DEFINITIONS

Term	Definition
Business Continuity	Business continuity encompasses planning and preparation to ensure that an organization can continue to operate in case of serious incidents or disasters and is able to recover to an operational state within a reasonably short period.
Business Requirements Specification	Business requirements specification is the eliciting, analysing and documenting of business requirements early in the development cycle to guide the design of the solution.
Business Rule	A business rule is a rule that defines or constrains some aspect of business and always resolves to either true or false. Business rules are intended to assert business structure or to control or influence the behaviour of the business. Business rules describe the operations, definitions and constraints that apply to an organization. Business rules can apply to people, processes, corporate behaviour and computing systems in an organization, and are put in place to help the organization achieve its goals.
Disaster Recovery / Disaster Recovery Plan	A disaster recovery plan (DRP) is a documented process or set of procedures to recover and protect a business IT infrastructure in the event of a disaster. Such a plan, ordinarily documented in written form, specifies procedures an organization is to follow in the event of a disaster. It is "a comprehensive statement of consistent actions to be taken before, during and after a disaster".
Process	Set of activities that describe how an activity is executed.
System	An organized, purposeful structure that consists of interrelated and interdependent elements (components, entities, factors, members, parts etc.). These elements continually influence one another (directly or indirectly) to maintain their activity and the existence of the system, in order to achieve the goal of the system
Account	In the billing system – accounts are the entities for which bills are created. Each customer should have at least one account. An account contains information that controls when bills are created and how they are configured to apply contractual terms.
Billing system	Customer Care and Billing system (CC&B)
Independent Power Producer	Independent power producers are non-utility generators that are typically not owned by the national electricity company or public utility. IPPs generate electricity for sale to the national electricity network. They can also sell power to a single third-party via customer via a power purchase agreement (PPA).
Person	In the billing system – a person exists for every individual or business with which your company has contact. Besides customers, persons exist for landlords, contractors, accountants at corporate customers, third party guarantors, energy distributors, collection agencies etc.
Premise	In the billing system – a premise is created for every location to which a company supplies service. A premise contains information describing the address and characteristics that determine tax jurisdictions etc.
Service agreement	In the billing system – a service agreement is seen as a contract between a company and a customer. A service agreement contains the terms and conditions controlling how the system calculates charges for the specific service supplied to the customer.

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3. ABBREVIATIONS

Abbreviation	Description
ARIS	Architecture of Integrated Information Systems
BCP	Business Continuity Plan
BRS	Business Requirements Specification
BSDS	Business Solutions Development Services
DR	Disaster Recovery
Group IT	Group Information Technology Division, also referred to as Group IT
IT	Information Technology
KPA	Key Performance Area
KPI	Key Performance Indicator
PCM	Process Control Manual
ESA	Electricity Supply Agreement
Dx	Distribution
PLCM	Project Lifecycle Management
CC&B	Customer Care and Billing
CC&I	Customer Care and Interaction
BI	Business Intelligence
EWA	Enterprise Workflow Application
IPP	Independent Power Producer
ACNAC	Acquire Customer Network Asset Creation
SMS	Short Message Service – texting
SSEG	Small Scale Embedded Generation
PCM	Process Control Manual
POPI	Protection of Personal Information
NTCSA	National Transmission Company of South Africa
SAP	Systems Applications and Products - Finance
CRA	Concept Release Approval
DRA	Design Release Approval
ERA	Execution Release Approval
FRA	Finalisation Release Approval
DoA	Delegation of Authority
QoS	Quality of Supply

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4. REASON FOR THE REQUIREMENT

4.1 Current business challenges / issues that need to be addressed

K2 Blackpearl (previously known as ACNAC) is a custom built workflow system that processes customer applications for supply and other requests for energy, maintenance, refurbishment and strengthening. The application enables both the Minor and Major processes which integrates across both the Distribution Wires and Retail business areas.

In 2017 the ACNAC workflow system was replaced by Blackpearl as a like for like solution. The intention of the replacement project was to implement the solution in 3 phases where the phases were going to be implemented as per below:

Phase 1

- Migrate the current solution into K2 Blackpearl with minor changes
- Centralisation of the system
- Technical Upgrade
- Integration with CC&B, CC&I and BI

Phase 2

- Enhancements to the system (New Functionality)
- Integration to all other outstanding applications
- Major Reporting development in BI and EWA - Completed

Phase 3

Nice to have enhancements and functionality

The below information details what was in scope and out of scope for the project.

In Scope:

- All current ACNAC functionality with minor enhancements
- Smartforms as part of the new system
- Dashboards as the landing page for each user login
- Centralisation of the system
- Split the Customer Base processes in the new system into the following categories
 - Minor
 - Major
 - Recoverable Work
 - Electrification
 - IPP
- Repository for the storage of all completed (historical) data/projects so that it is easily available
- Workflow data and governance approvals
- Smartforms as the Web interface
- Reports currently available in the system
- Integration to applications in the current "As Is" scenario
- Automatic creation of minor quotation letters (new)
- Cost Estimation letters and KPI limits (new)


Out of Scope:

- Exclude any new functionality that is not already included in the scope
- Development of any new reports
- Verification and validation on K2 Blackpearl

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The purpose of this BRS is to document the requirements to complete phase 2 of Blackpearl /K2. To update and develop changes not implemented in phase 1. This includes workflow adjustments, new workflow, etc. Phase 1 focused purely on the system move from the old platform to Blackpearl. These requirements can also be used as input to replace the current K2 Blackpearl solution with a new enterprise workflow solution

4.2 High level gaps between the “As-Is” and “To-Be” state

As Is Statement	To Be Statement	Therefore the high level gap is:
Current version of K2 Blackpearl no longer supported by the vendor	New enterprise workflow solution with full maintenance and support.	Eskom is having an unsupported product that business is unable to update when there are enhancements that are required.
Current Blackpearl K2 workflow system with no development opportunities for enhancements	New enterprise workflow system implemented	New enterprise workflow features as part of new implementation.

5. PRECONDITIONS

Unique identifier number	Business Activities	Processes	Projects (IT and Business)	Technology (if known)	Other (define)
PD1	Current System and Data Migration	PCM's support the requirement.	None	Existing K2 Blackpearl system	Precondition

6. AS IS AND TO BE BUSINESS PROCESS ACTIVITY MAPPING


6.1 As-is business process

PCM Number	PCM Description
240-55054906	Manage Customer Base Activities in: <ul style="list-style-type: none"> ○ Quote Customer ○ Manage Customer Response ○ Connect Customer ○ Manage Move-in, Move-outs and Reinstatements

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7. BUSINESS REQUIREMENTS

7.1 High level Requirements

A. Workflow adjustments

A1. Majors:

- 1.1 All workflows to be mapped based on the Distribution PLCM
- 1.2 Workflow should be mapped per type of job required
 - 1.2.1 Direct Customer (DC) standard
 - 1.2.1.1 Refurbishment
 - 1.2.1.2 Strengthening
 - 1.2.2 DC Short
 - 1.2.3 DC No asset upgrade/downgrade (NMD changes, etc.)
 - 1.2.4 DC Transmission connection
 - 1.2.5 DC Grid Access (IPP's) as per above excluding no 1.2.2 and 1.2.3
 - 1.2.6 SSEG
 - 1.2.7 Self-build monitoring (Link Eskom projects to it)
 - 1.2.8 Non DC queries to Network Planning & Design & Land Development
 - 1.2.9 Include select standard or fast-track timeline (selection or separate workflow)
- 1.3 Include workflow specifically for Grid Access (IPP's)
 - 1.3.1 XRM function outputs in ACNAC (form with additional pre-determined project information)
- 1.4 Populate account number on the form
- 1.5 Allow for change in project type as per (1.2)
- 1.6 Simplify current costing sheets in Cost Estimation Phase
- 1.7 Cost estimation and budget quotes from NTCSA
- 1.8 Budget Quote Phase changes
- 1.9 Validity period for quotations – allow for an array of days, warn customer execs before validity period expires
- 1.10 Inclusion of payment for quotation prior to execution (steps before start of quotation)
- 1.11 KPI's to be included
 - 1.11.1 Standard timelines
 - 1.11.2 Fast-track timelines
 - 1.11.3 Overview timelines
 - 1.11.4 Distribution only vs NTCSA only timelines
- 1.12 Renaming of terminology of certain steps based on Dx PLCM
- 1.13 Ability to hold projects in the major process
- 1.14 Provide customer workflow campaigns (Grid Access and other identified workflows)


A2. Minors

- 1.1. Workflow should be mapped per type of job required
 - 1.1.1. Workflow for move-in and move-outs
 - 1.1.2. Workflow for SSEG's
 - 1.1.3. Workflow for no asset changes, no connection, only quotation required
 - 1.1.4. Rerouting workflow for customer contracted (signed-off) delays (Between activities Q & U)
- 1.2. Measurement of 2 or 3 KPI's for the same output required
- 1.3. Allow for project name changes prior to issuing of quotation
- 1.4. Allow for area and CNC selection on quotation
- 1.5. Cater for validity period for quotations
- 1.6. Account number on the form after acceptance of the quotation
- 1.7. Allow for type changes up to a certain point in the workflow
- 1.8. Costing at Conceptual Design
- 1.9. Expand customer response phase
- 1.10. Allow hold function timeline to be stipulated by the workflow controller (customer related, legal/regulatory)

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- 1.11. Moving of tasks between activities
- 1.12. Script for information on meter from ACNAC handover sheet, reading transformer info from MATS based on meter (PCS data should be started after signing contract with customer)

Note:

- Obtain wording for all minor sms's, need to be aligned
- On Connection phase possibly move Q before N and P
- Activity S should only be material picked/selected
 - Add TA – Pick up material by contractor


B. Implement new workflow and functionality

- 1.1. Application form changes
- 1.2. Home page and Landing page
- 1.3. Provide a flexible search function
- 1.4. Provide comment box for each activity
- 1.5. Activate escalations via email
- 1.6. Re-evaluate cancellations, reactivations and amendments of projects
- 1.7. Email notification to be provided (Determine Criteria)
- 1.8. Closing out of projects to be included
- 1.9. Document Management
 - 1.9.1. Automatic import/export from an acceptable template into ACNAC
 - 1.9.2. Auto population of forms, pro-forma's and contracts
 - 1.9.3. Possibility of a merge function, auto-populate certain templates for IC, etc.
- 1.10. Include Pricing and ESA (Electricity Supply Agreement) activities in workflow
- 1.11. Changes to Manage Customer Response phase applicable to all workflow types
- 1.12. Reporting function
- 1.13. Text field on ACNAC, to be smart links
- 1.14. Identify which tasks are compulsory and optional
- 1.15. All business rules and policies to be available on the system
- 1.16. Integration between the application tool (Phase 2 to include Grid Access) and CC&I to be more robust
- 1.17. Integration to Opentext for all documents
- 1.18. Integration into SAP PPM from ACNAC - Gates of PLCM
- 1.19. Integration between ACNAC and the analytics tool (Power BI)
 - 1.19.1. Analytics tool to be included in system
- 1.20. Possible integration with CC&B (wishlist)
- 1.21. Possible integration to Maximo for work-order information (wishlist)
- 1.22. Integration with mobility/EDA, create template on the EDA for the CNC's for tasks to be done, include a push notification
- 1.23. Include tabs for systems you need to work on
- 1.24. Provide an audit trail functionality
- 1.25. Training Website/E-Learning to be provided – update existing material and provide train-the-trainer sessions

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According to the requestor the high level requirements support the following *strategic intent statements*:

STRATEGIC INTENT STATEMENT

As a state-owned entity, Eskom must implement government policy and strategy. The Shareholder's Strategic Intent Statement (SIS) outlines government's short-to-medium-term and long-term objectives for Eskom to achieve. Eskom has adopted these SIS objectives to ensure that Eskom remains a critical and strategic contributor to government's goal of ensuring security of electricity supply to the country, and enabling economic growth and prosperity.



Figure: Distribution's vision, mandate, and mission

The Distribution mandate is to "Power economic growth through the provision of reliable electricity and related energy services to our customers in a sustainable manner." Distribution is a customer-focused organisation that strives to provide reliable, uninterruptable, affordable energy supply by understanding and adapting to the customers' changing needs and to improve the customer experience.

The objectives of a customer-focused organisation are:

- Improve customer experience and engagement
- Achieve operational efficiency in customer service delivery
- Retain customers and reduce churn
- Provide diversified products and services to respond to customers evolving needs
- As per the objectives outlined for Eskom by the shareholder in the Eskom Corporate Plan


This demand would be associated with and would positively influence outcomes on the following:





- Provide reliable, predictable, and affordable electricity in line with NERSA models.
- Ensure and maintain a financially viable and sustainable company.
- Modernise the power system by responding to changing energy landscape.
- Align its socio-economic contributions to national transformation imperatives.
- Reduce the impact on the environment through the application of low carbon technologies.

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Strategic Objective	Corporate Plan initiatives	Measure of success
 Pursue financial and operational sustainability	<ol style="list-style-type: none"> Continue to execute the asset management plan to improve network stability and reliability Leverage NT debt relief programme to contain arrear debt from municipalities however enabling Eskom to ligate municipalities which could lead to their licences being revoked Execution of Debt management strategy to recover all debt across Dx business. Further enhancements are being investigated* Implementation of sales and marketing strategy that focuses on sales volumes, expanding to new products and services, and active marketing of all products and services. Further enhancements are being investigated. Installing prepaid and smart metering, recoding of the prepayment meters, upgrading of the online vending platform and collaborating with stakeholders to reduce network energy losses 	<ol style="list-style-type: none"> SADI < 36.5hrs :SAFI <16 Payment levels > ~95% p.a.* Payment levels > ~95% p.a.* Retain existing customer sales and revenue* Reduce energy losses to 9.46
 Facilitate a competitive future energy industry	<ol style="list-style-type: none"> Drive legal separation for NEDCSA to be operationalised in FY26 Revising business model and operating model and exploring various value adding services to remain competitive in the future markets created by the evolving ESI. Introduction of Distribution System Operator (DSO) and Distribution Energy Trader (DET) 	<ol style="list-style-type: none"> Legally separate by FY26 Implementation of Demand side response, ancillary services, O&M services for DER's, energy wheeling, prosumers net metering, energy arbitrage, etc.
 Modernise our power system	<ol style="list-style-type: none"> Execute Distribution Network plan, similar to Tx TDP, by expanding and strengthening the Dx network Assemble and commission containerised microgrids Roll out of smart meter programme Implement Demand Side Management 	<ol style="list-style-type: none"> Construction of ~4 000 km of lines and installation of ~482 Transformers (~1 406 MVA) 233 microgrids Roll out smart meter installation (~995 000) DSM (~1 250 MW)
 Strive for net zero emissions by 2050	<ol style="list-style-type: none"> The fleet electrification project aims to procure EVs and chargers over the planning horizon 	<ol style="list-style-type: none"> 145 EVs and e-mobility charging infrastructure


Footnote: NT – National Treasury; Dx – Distribution; SADI – System average interruption duration index ; SAFI – System Average Interruption Frequency Index ; NTCSA – Transmission division will be legally separated to National Transmission Company of South Africa during the planning period; ESI – Energy Supply Industry; O&M – Operations and Maintenance; DER's – Distributed Energy Resources; Tx – Transmission; TDP – Transmission Development Plan; Dx – Distribution; EVs – Electric Vehicles

Figure: Distribution planning horizon goals aligned with Eskom's strategic objectives

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7.2 Detailed requirements and Business rules

A. Workflow adjustments


A1. Major Workflow

Functionality grouping	BRS Number	Functionality	Business Rules	Precondition	Weight
Map workflow according to Dx PLCM	F01	Map the Major workflow according to the Dx PLCM: Pre-Planning, Concept, Definition, Execution, Finalisation and Post Project <ul style="list-style-type: none"> ▪ Simplify activities within the major process <ul style="list-style-type: none"> ○ Minimize activities, identify activities that are not crucial ○ Shift around certain activities to align with how work is done currently ▪ Include the Dx PLCM gate approvals in the workflow ▪ RACI to be mapped according to the Dx PLCM and Manage Customer Base PCM ▪ Schedule to be aligned to the Dx PLCM i.e. all activities required and in the correct sequence ▪ Location of customer acceptance to be revised <ul style="list-style-type: none"> ○ Currently it's after DRA approval 			Very Important

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Functionality grouping	BRS Number	Functionality	Business Rules	Precondition	Weight
Workflow per type of job required	F02	<p>Map workflows according to the following job types:</p> <p>1.2.1 Direct Customer (DC) standard</p> <p>1.2.1.1 Refurbishment</p> <p>1.2.1.2 Strengthening</p> <p>1.2.2 DC Short</p> <p>1.2.3 DC No asset upgrade/downgrade (NMD changes with no scope, etc.)</p> <p>1.2.4 DC Transmission connection</p> <p>1.2.5 DC Grid Access as per above excluding no 1.2.2 and 1.2.3</p> <p>1.2.6 SSEG</p> <p>1.2.7 Self-build monitoring (Link Eskom projects to it)</p> <p>1.2.8 Non DC queries to Network Planning & Design & Land Development</p> <p>1.2.8.1 This will be to recover costs for the time and work effort</p> <ul style="list-style-type: none"> ▪ Include the ability to select a standard or fast-track timeline <ul style="list-style-type: none"> ○ This can either be achieved with a selection or a separate workflow ▪ Build in case base reasoning to determine which workflow will be followed ▪ Provide separate workflows per type of job with separate attributes/timelines ▪ Develop a work instruction for the different job types ▪ Ability to provide storage facility to store and share documents for record keeping 			Showstopper
Grid Access (IPP's)	F03	<ul style="list-style-type: none"> ▪ Grid access to be a separate workflow from major load customers ▪ This workflow will have its own timeline to be measured separately ▪ IPP applications – Manage Customer Response Phase <ul style="list-style-type: none"> ○ Holding cell to be provided to ensure no impact on the timelines ▪ CC&I applications for Grid Access (IPP's) to flow to the Grid Access (IPP's) workflow and not DC Major workflow ▪ Move populate CRA form activities down to after activity AK which is the acceptance of the cost estimation <p>XRM function outputs in K2 Blackpearl</p> <ul style="list-style-type: none"> ▪ Develop form with additional pre-determined project information ▪ XRM outputs to be developed in the new solution ▪ Information that is currently in XRM to be included on the customer information sheet 			Showstopper

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Functionality grouping	BRS Number	Functionality	Business Rules	Precondition	Weight
Account number on the form	F04	<ul style="list-style-type: none"> User to populate the account number on the form at the start of the cost estimation phase <ul style="list-style-type: none"> This should be a mandatory field Under the account number, include the link to the project file 			Showstopper
Allow for change in project type	F05	<ul style="list-style-type: none"> After scope study, allow for change in project type <ul style="list-style-type: none"> This is as per workflow under "Workflow per type of job required (1.2.1)" 			Very Important
Simplify Costing Sheets in Cost Estimation Phase	F06	<ul style="list-style-type: none"> Form Revisions <ul style="list-style-type: none"> Scope changes (with no change in costs) from customers after CRA approvals <ul style="list-style-type: none"> Ability to make and present scope changes instead of the process being so rigid by not allowing scope changes at all (Currently need to cancel project and redo all the work) Allow for flexibility on the forms to make changes Option for time revision (CRA, DRA and ERA) , allow for a short-cut just for signatories Ability to add jobs to scope of revised forms – add jobs midway without affecting timeline of project (potential governance issue regarding adding of jobs) Stability of system an issue if projects get corrupted – need to review all forms and do work over again – backup of forms to be provided Ability to select portions of the project (basket of jobs) to the next step instead of individually Costing sheet – redesign of the costing sheet, simplify sheet, include carried over costs, variations to be included on the costing sheets <ul style="list-style-type: none"> Separate costing sheets for the different phases, CRA, DRA, etc. Developer projects for short major <ul style="list-style-type: none"> Costing sheets to allow the requesting of the total funds Separate costing sheet designed specifically for short major projects Manage Customer Response phase for majors to align to the minor workflow <ul style="list-style-type: none"> Timelines to be included (expire after some time) Allows for revision of scope 			Very Important
Cost estimation and budget quotes from NTCSA	F07	<ul style="list-style-type: none"> Provide separate workflow for NTCSA linked projects This workflow will cater for the extra time that NTCSA take for cost estimations and budget quotes Build in a function to request cost estimations and budget quotes from NTCSA <ul style="list-style-type: none"> Request via a link or a prompt to an email notification No NTCSA linked projects will go through the major short process 			Showstopper

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Functionality grouping	BRS Number	Functionality	Business Rules	Precondition	Weight
Budget Quote Phase	F08	<ul style="list-style-type: none"> Move the 3 RPM activities from Cost Estimation phase to the beginning of the Budget Quote phase to kick-start this phase <ul style="list-style-type: none"> Prepare for RPM RPM meeting submission RPM management approval 			Very Important
Validity periods for quotations	F09	<ul style="list-style-type: none"> Include quotation validity periods in the Manage Customer Response phase <ul style="list-style-type: none"> Cater for various quotation validity periods (default and user specified date) based on the type of project Warn customer execs before validity period expires Build in an automatic stop for projects going over the quotation validity period 			Very Important
Inclusion of payment for quotation prior to execution	F10	<ul style="list-style-type: none"> Include the ability for customer to pay the cost estimate fee in the Cost Estimate Phase 			Very Important
Allow for multiple KPI's/Timelines	F11	<ul style="list-style-type: none"> Include the ability to select a standard or fast-track timeline <ul style="list-style-type: none"> This can either be achieved with a selection or a separate workflow Provide project overview timelines <ul style="list-style-type: none"> Activity timeline Phase timeline Total timeline User timeline Include KPI's at activity level <ul style="list-style-type: none"> Activity start and end times to included Overall KPI's per Gate: Cost Estimation and Budget Quote, etc. <ul style="list-style-type: none"> Each Gate's KPI to be populated based on quotation Currently these are the verified KPI's <ul style="list-style-type: none"> Cost Estimate – valid for 365 days Budget Quote – 120 days/6 calendar months Closing out of projects – 3 months Also cater for a fast-track timeline for strategic projects Provide separate KPI's and timelines for Dx only quotes and Tx only quotes 			Showstopper

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Functionality grouping	BRS Number	Functionality	Business Rules	Precondition	Weight
Renaming of terminology of certain steps	F12	<ul style="list-style-type: none"> ▪ Rename all activities to align to the PLCM and to the terminology used currently Cost Estimate: 3 Steps before AA <ul style="list-style-type: none"> ▪ Add cost estimate fee require ▪ Raised fee on CC&B ▪ Confirm payment before clarification of customer requirement <ul style="list-style-type: none"> ▪ Between AK and AN – Possibly add activity to confirm resource planning 			Very Important
Hold projects in the major process	F13	<ul style="list-style-type: none"> ▪ Ability to hold/park projects <ul style="list-style-type: none"> ○ Projects that will not proceed <ul style="list-style-type: none"> • Add rejection basket ○ Customer Response: Waiting for customer's decision to accept budget quote <ul style="list-style-type: none"> • To ensure no impact of customer response delays on KPI's or an item laying in a user's worklist after budget quote was send to customer ○ Customer not ready to take supply 			Very Important
Provide customer workflow campaigns	F14	<ul style="list-style-type: none"> ▪ Allow for customer campaigns via sms to be generated at certain time periods <ul style="list-style-type: none"> ○ Start of Cost Estimate and Timelines associated with it ○ Issuing of Cost Estimate ○ Start of Budget Quotation and Timelines associated with it ○ Issuing of Budget Quotation ○ Activate account 			Important

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A2. Minor Workflow

Functionality grouping	BRS Number	Functionality	Business Rule	Precondition	Weight
Workflow should be mapped per type of job required	F15	<ul style="list-style-type: none"> ▪ Workflow should be mapped per type of job required, <ul style="list-style-type: none"> ○ Workflow for move-in and move-outs ○ Workflow for SSEG's ○ Workflow for no asset changes, no connection, only quotation required ▪ Provide function to select the relevant workflow after the Manage Customer Response phase: <ul style="list-style-type: none"> ○ User should select (Asset Build, No Asset Build, Conversion required, Meter Change, System Update only, etc.) ▪ Include the ability to select a standard or fast-track timeline <ul style="list-style-type: none"> ○ This can either be achieved with a selection or a separate workflow ▪ Allow for the rerouting of workflow for customer contracted (signed-off) delays (Between activities Q & U) <ul style="list-style-type: none"> ○ Contact customer to establish if customer is ready to take supply (add sms automation) 			Showstopper
Measurement of 2 or 3 KPI's for the same output required	F16	<ul style="list-style-type: none"> ▪ Allow for multiple timelines per project 			Showstopper
Area and CNC selection	F17	<ul style="list-style-type: none"> ▪ All applications to include a field, via a drop-down to select the Area coupled with the CNC 			Important
Validity period for quotations	F18	<ul style="list-style-type: none"> ▪ Build in an automatic stop for projects going over the quotation validity period ▪ 			Very Important
Account number on the form	F19	<ul style="list-style-type: none"> ▪ User to populate the account number on the form after acceptance of the quotation <ul style="list-style-type: none"> ○ This should be a mandatory field ○ Under the account number, include the link to the project file 			Showstopper

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Functionality grouping	BRS Number	Functionality	Business Rule	Precondition	Weight
Type changes up to a certain point in the workflow	F20	<ul style="list-style-type: none"> Final selection for type changes will be done up to activity G, second last activity (Define and estimate scope of work) 			Important
Costing at Conceptual Design	F21	<ul style="list-style-type: none"> Add an extra parallel step for Project Execution to check recoverable works costing at Conceptual Design 			Important
Expand customer response phase	F22	<ul style="list-style-type: none"> Customer response phase to include all activities from Manage Customer Base PCM Include a step to cater for the customer response phase in the connection process <ul style="list-style-type: none"> Stop the clock when waiting for customer response, thus not impacting the KPI's negatively 			Very Important
Hold function timeline	F23	<ul style="list-style-type: none"> Allow hold function timeline to be stipulated by the workflow controller <ul style="list-style-type: none"> The criteria for to hold the timeline will be between 1 and 90 days 			Very Important
Moving tasks between activities	F24	<ul style="list-style-type: none"> Only administrators to move tasks between activities 			Very Important
Script for information on meter from ACNAC handover sheet	F25	Provide a script for information on meter from ACNAC handover sheet, reading transformer info from MATS based on meter (PCS data should be started after signing contract with customer)			Useful

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B. Implement new workflow and functionality

Functionality grouping	BRS Number	Functionality	Business Rule	Precondition	Weight
Application form	F26	The following changes to the application form to be effected: <ul style="list-style-type: none"> Application form should be editable Attachments should be allowed Allow for an Account Number to be populated Allow for a second project naming line <ul style="list-style-type: none"> The original project name maps to the application the second one will be the common name of the project (NED) The Retail Lead name under the account number should be populated Identify PLCM gate for major projects Drop-down list to select area coupled with CNC on application form <ul style="list-style-type: none"> This should be changeable up to quotation stage 			Showstopper
Home page and Landing page	F27	Homepage <ul style="list-style-type: none"> Homepage to be flexible/adaptable/agile and allow user to adapt what and how they want to view information Provide tabs/links on the homepage to all the systems user need access to Landing Page <ul style="list-style-type: none"> Provide a landing page for each activity Summary of project information to be displayed on each page of the project as follows: <ul style="list-style-type: none"> Account number, Retail lead, Identify PLCM gate 			Very Important
Provide a flexible search function	F28	<ul style="list-style-type: none"> Provide an improved search functionality for projects – filter functionality to be more robust Allow user to search for projects through multiple options - not exact name, project ID only Allow partial name searches, advanced searches, etc. 			Important
Help Guide and Comment box for each activity	F29	<ul style="list-style-type: none"> Provide a help-guide/question prompts (information box) on selected activities A comment box should be available on each activity <ul style="list-style-type: none"> Comment box should allow for traceable timelines and user details User not allowed to delete comments, only allowed to add comments 			Very Important

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Functionality grouping	BRS Number	Functionality	Business Rule	Precondition	Weight
Activate escalations via email	F30	<ul style="list-style-type: none"> Provide the facility for the user to escalate when a task is not actioned in the required time User to escalate by ticking an escalation tick box Provide facility to inform the relevant manager that a task for the user is overdue and subsequently escalated The system then to generate an email to the delegated authority (manager) that will address the escalation 			Very Important
Re-evaluate cancellations, reactivations and amendments of projects	F31	<ul style="list-style-type: none"> No cancellations of projects will be allowed Allow amendment of project names 			Important
Email notification to be provided (Determine Criteria)	F32	<ul style="list-style-type: none"> Provide email notification to users when a job is assigned in their worklist Provide a Report/warning email/alarm to alert user before CRA/DRA, etc. expire <ul style="list-style-type: none"> Notification to be provided at a specified time period (xmonths) before it expires Determine at what activity/gate the notification should be provided Provide email notification to user of documents that are uploaded into ACNAC 			Very Important
Closing out of projects to be included	F33	<ul style="list-style-type: none"> Map activities of the closing of projects in the workflow Link closing out KPI for adherence and monitoring Each Project that is stopped/closed out must have the following verifications: <ul style="list-style-type: none"> Prompt user to determine if a cost reconciliation require <ul style="list-style-type: none"> If a cost reconciliation is required, a cost reconciliation form needs to be completed If no cost reconciliation is required, the project stop must be verified by the workflow controller 			Very Important

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Functionality grouping	BRS Number	Functionality	Business Rule	Precondition	Weight
Documentation Management	F34	<p>Automatic import/export from an acceptable template into the system</p> <ul style="list-style-type: none"> Ability to automatically import/export forms/documents from an acceptable template into the system <p>Auto population of forms, pro-forma's and contracts</p> <p>Forms</p> <ul style="list-style-type: none"> Provide the facility to auto-populate forms, pro-forma's and contracts <ul style="list-style-type: none"> Default to Capcon values (if available), can be edited based on business rules Allow for editing, to effect changes Create an auto-populated submission contract memo after quotation for Pricing contract vetting in preparation for electronic signatures Create auto-populated Investment Committee (IC) forms Provide push notifications via email for contract sign-offs <ul style="list-style-type: none"> Attach all the relevant documents Deadline for validity period on pro-forma's Integrate with the possible new ESA solution for auto-population of pro-forma's and contracts Provide links to all the required pro-forma's documents in Opentext <p>General Forms/Pro-forma Requirements</p> <ul style="list-style-type: none"> Template / forms to be available, which can be downloaded or populated on the file and printed / saved Merging of forms <ul style="list-style-type: none"> Provide capability to group the information of the 3 phases on one form when all 3 phases are presented together for governance approval Provide user with a warning when not all signatures are on the form as required Allow for linking of individual ERA's on bulk form (Major short process) Identify which field on the form constitute an approval step for reporting purposes <ul style="list-style-type: none"> Make this field mandatory If that field is ticked, it means the form is approved <p>Presentations</p> <ul style="list-style-type: none"> Suites of projects <ul style="list-style-type: none"> Ability to combine costs of different projects that will be presented together Presentation for governance approval for individual projects and suite of projects to be linked <p>Document Storage</p> <ul style="list-style-type: none"> Ability to provide storage facility to store and share documents for record keeping The application should initiate a Project Folder with all documents and templates 			Very Important

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Functionality grouping	BRS Number	Functionality	Business Rule	Precondition	Weight
Include ESA (Electricity Supply Agreement) activities in workflow: Top Customer ESA above 50MVA	F35	<ul style="list-style-type: none"> ▪ Provide a trigger (prompt) for ESA contract drafting and vetting <ul style="list-style-type: none"> ○ Allow email task to be send to contract management to start the ESA drafting and vetting process ○ When issuing the budget quote, trigger the process to start working on the ESA activities ▪ Develop case-base reasoning to verify that the request received aligns to the rules and that all the required documents are provided and completed in full <ul style="list-style-type: none"> ○ Example: Questions with Yes/No tickbox <ul style="list-style-type: none"> ➢ Must this request go to ESA ➢ Is this supply request for above 50MVA ➢ If answer is no, then route to Pricing for example ○ Allow for a task list to tick off if all the information was provided <ul style="list-style-type: none"> ➢ This tick box must allow for a yes and no indication ○ Next to the tick box provide facility to upload/attach the following documents <ul style="list-style-type: none"> ➢ Request form for ESA ➢ Copy of Existing Agreement and any Amendments to the Existing ESA ➢ Grounds for Granting BOD [Approval via Pricing DoA] ➢ All required original Guarantees to be couriered to head office ESA ➢ Schedule of Standard Supply Equipment ➢ Schedule of Premium Supply Equipment ➢ Copy of Letter of Quotation and signed Acceptance Letter ➢ Completed Quality of Supply (QoS) Specification by QoS Specialist ['Word' version of QoS on pro forma annexure] ➢ Completed Load/Energy Forecast [for all POD's on the pro forma document] ➢ Estimated Connection Costs Annexure where applicable ➢ List of Customer Connection Equipment ▪ Ability to attach all the required information to the request when sending the ESA contract for drafting and vetting (contract request form, quality of supply specifications etc.) ▪ Build-in a control to accept/reject the task based on insufficient information provided with a comment to identify what information is missing or if additional information is required <ul style="list-style-type: none"> ○ The task must then go back to the sender to action 			Showstopper

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Functionality grouping	BRS Number	Functionality	Business Rule	Precondition	Weight
Include Pricing activities in workflow	F36	<ul style="list-style-type: none"> ▪ User will select the option whether the contract must go for vetting to Pricing ▪ Provide a trigger (prompt) for Pricing contract drafting and vetting <ul style="list-style-type: none"> ○ Allow email task to be send to the relevant Pricing department (HO or Cluster) to start the drafting and vetting process for the contract ○ This will be based on a specific criteria that was met ▪ Develop case-base reasoning to verify that the request received aligns to the rules and that all the required documents are provided and completed in full <ul style="list-style-type: none"> ○ Example: Questions with Yes/No tickbox <ul style="list-style-type: none"> ➢ Must this request go to Pricing ➢ Select the supply size to determine if contract must go to HO or Cluster ○ Allow for a task list to tick off if all the information was provided <ul style="list-style-type: none"> ➢ This tick box must allow for a yes and no indication ○ Next to the tick box provide facility to upload/attach the required documents ▪ Report for quotations vetted through Pricing and ESA assistance 			Showstopper
Manage Customer Response Phase	F37	<ul style="list-style-type: none"> ▪ Provide drop-down lists for rejections, etc., ▪ Ability to create a lists feature for certain activities 			Very important
Reporting	F38	<p>Allow for a flexible reporting tool with build-in intelligence for user to create their own reports</p> <ul style="list-style-type: none"> ▪ Provide standard reports as per the current reporting tool and system ▪ Ability for user to create own reports and dashboards <p>Majors: Load Reports</p> <ul style="list-style-type: none"> ▪ Provide report for latest approvals at that specific phase (CRA, DRA and ERA) ▪ Provide report that include the presentation information (form information) for governance approvals ▪ Report of all major customer projects served with budget quotes, to take action proactively before they expire ▪ Bulk Projects – How do you manage these projects? <ul style="list-style-type: none"> ○ List of projects supporting a specific gate (CRA, DRA, ERA) ▪ Physicals – Check that physicals are captured, Include report for physicals <p>Minors:</p> <ul style="list-style-type: none"> ▪ Report detailing outages booked and cancelled 			Very important

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Functionality grouping	BRS Number	Functionality	Business Rule	Precondition	Weight
Integration	F39	Provide integration to all the relevant systems as mentioned below: <ul style="list-style-type: none"> ▪ Integration to Opentext for all documents <ul style="list-style-type: none"> ○ Provide facility for the linking of documents (Opentext) ▪ Integration between SAP, E-forms and ACNAC required <ul style="list-style-type: none"> ○ Integration between ACNAC and SAP PPM for the gates of the Dx PLCM ▪ Integration between CC&I and K2 ACNAC <ul style="list-style-type: none"> ○ Automatic uploading of all (additional) application documentation into K2 ACNAC ○ User to get email notification after documents were uploaded into ACNAC ▪ Integration between the application tool (Phase 2 to include Grid Access) and CC&I to be more robust ▪ Integration between ACNAC and the analytics tool (Power BI) ▪ Integration with mobility/EDA, create application form template on the EDA for the CNC's for tasks to be done to collect customer and other data, include a push notification ▪ Possible integration with CC&B required 			Important
Provide an audit trail functionality	F40	<ul style="list-style-type: none"> ▪ An audit trail should be available for each project <ul style="list-style-type: none"> ○ Viewable by anyone working on the project - You can find this currently on the Project report 			Showstopper
Training/ E-Learning	F41	<ul style="list-style-type: none"> ▪ Update the existing training material to the modern requirements ▪ Develop learning modules ▪ Provide train-the-trainer sessions for K2 controllers and administrators ▪ Provide the required tools for the K2 controllers and administrators to provide classroom training to users ▪ Re-train users, especially on the engineering side to ensure adherence to governance 			Very Important

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7.3 Data flow diagram / Context diagram

The diagram below depicts the current data flows between K2 Blackpearl and other systems

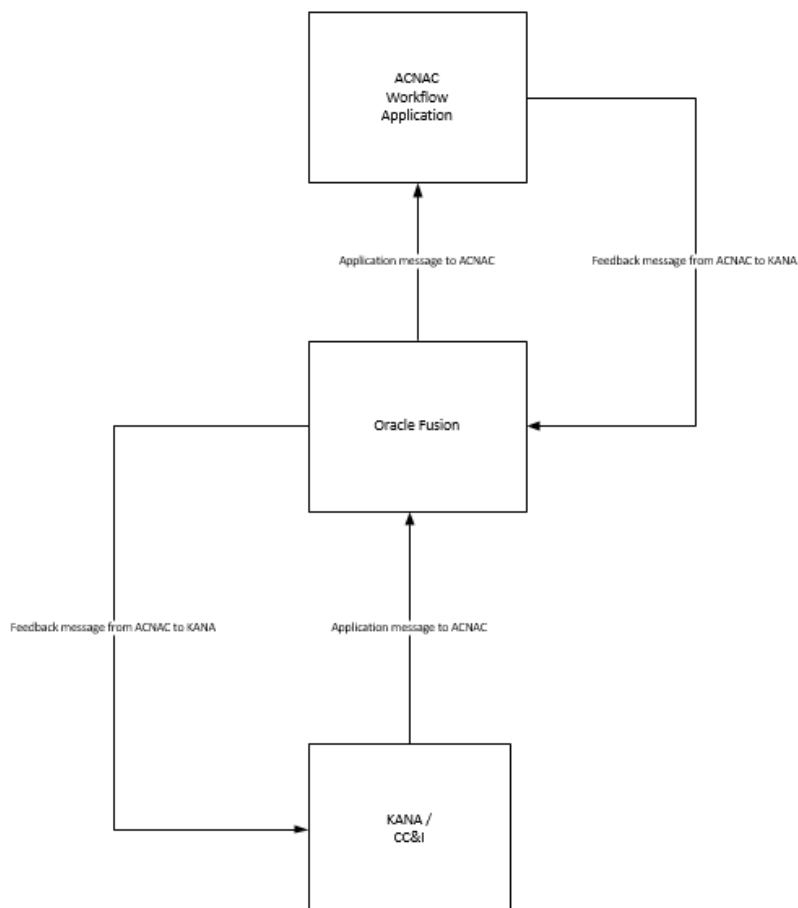



Figure: K2 Blackpearl Data Flow Diagram

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7.4 Reporting requirements

No detailed KPIs identified. See reporting and KPI requirements in section [8.2 Detailed requirements and Business rules](#)

Nr	Report Name	Functionality	Define business objective being supported	Define KPI being measured	Weight (refer to rating table)	Comments
N/A						


8. INFORMATION / DATA REQUIREMENTS

Classification of data / information	Data / Information type	Confidentiality of information (refer to previous page for quick reference)	Confidentiality level of information (refer to previous page for quick reference)	Availability of data	Migration of data
System Data	Customer and Premise Data <ul style="list-style-type: none"> Customer Name Account Number Premise Details 	Confidential	High	Available	
System Data	Network Data <ul style="list-style-type: none"> Supply size Tariff information NMD information 	Confidential	High	Available	
System Data	Financial Data <ul style="list-style-type: none"> Quotation Fees Connection Fees 	Confidential	High	Available	

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9. USER INTERFACE REQUIREMENTS

BRS Number	Functionality	Type of user interface
UI1	Home and Landing pages	User friendly interactive web portal
UI2	Ability to notify users of tasks in their workload	Email notifications


10. SYSTEM INTEGRATION REQUIREMENTS

BRS Number	Functionality	Impacted Systems (if known)	Sending System	Receiving System	Comments
SI1	Provide links to all relevant documentation <ul style="list-style-type: none"> Forms Pro-formas Contracts Documents Presentations 	Open text & K2 Blackpearl	Opentext	K2 Blackpearl	
SI2	Identify which activity falls into which gate for reporting purposes <ul style="list-style-type: none"> Integration between ACNAC and SAP PPM for the gates of the Dx PLCM 	SAP PPM & K2 Blackpearl	SAP PPM	K2 Blackpearl	
SI3	Analytics and Reporting	Analytics tool (Power BI) & K2 Blackpearl	Power BI	K2 Blackpearl	
SI4	Application form information <ul style="list-style-type: none"> Automatic uploading of all (additional) application documentation into K2 ACNAC User to get email notification after documents were uploaded into ACNAC 	CC&I & K2 Blackpearl	CC&I	K2 Blackpearl	
SI5	Application form for EDA <ul style="list-style-type: none"> Customer information Meter information 	Mobility/EDA & K2 Blackpearl	Mobility/EDA	K2 Blackpearl	
SI6	Provide Customer information <ul style="list-style-type: none"> Completing account number Load account information 	CC&B & K2 Blackpearl	CC&B	K2 Blackpearl	
SI7	Provide work-order information	Maximo & K2 Blackpearl	Maximo	K2 Blackpearl	

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11.ACCESS REQUIREMENTS

BRS Number	Role	Define different types of access and what permissions that role has
AR1	System Administrator K2 Controller	<ul style="list-style-type: none"> System implementation installations and configuration setups. Maintain users and user profiles Read, write and edit
Ar2	Users	<ul style="list-style-type: none"> Read, write and edit

- Access to the system must be limited to profiles granted by the administrator
- Users to complete the prescribed training before access is granted to the system
- The following security policies will apply:
 - 32-85 Information Security Policy
 - 32-359 Information Security Access Control Procedure
 - 32-351 Logical Access Control Standard
- Ensure secure login via Active Directory

12.ARCHIVING REQUIREMENTS

Retention Period
<ul style="list-style-type: none"> Major Customers: no less than 10 years Minor customers: no less than 5 years


13.DISASTER RECOVERY REQUIREMENTS

- The system is deemed to be a business critical system and 99% availability is required

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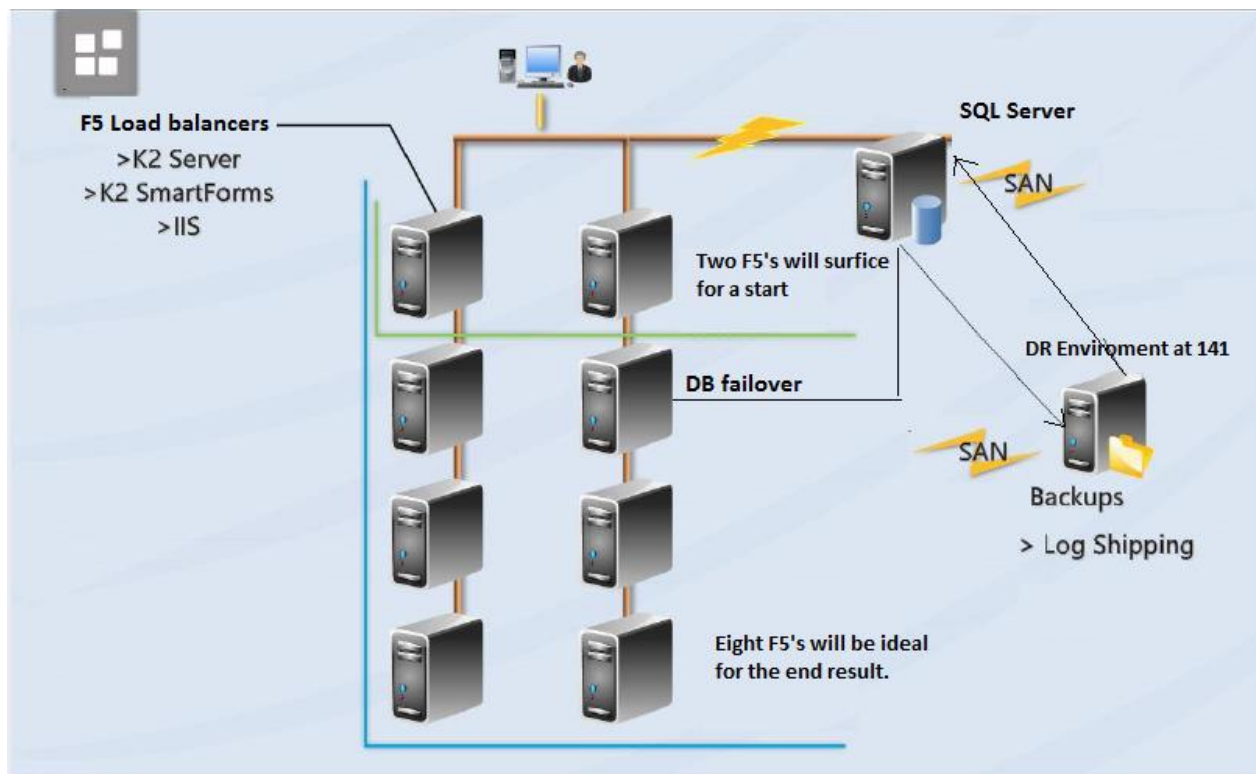


Figure: K2 Blackpearl DR Architecture

Data loss	Time to recover
24 Hours data loss	Recovery down limited to 48 Hours


14. BUSINESS CONTINUITY REQUIREMENTS

Business continuity plan exists	Yes
Name of BCP	K2 Blackpearl Disaster Recovery Plan
Name of BCP owner	Ayesha Hardien
If BCP does not exist, what plans are in place from a customer view to define a BCP	
If BCP needs to change, what plans are in place from a customer view to update the BCP	Group IT along with the business to change existing BRP as part of new project implementation

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15. LEGAL REQUIREMENTS

BRS Number	Functionality	Legal Requirement. Response Y/N If Yes, provide legal document number / clauses
L1	Adherence to Protection of Personal Information (POPI) act i.e. privacy and security of customer information.	Y

16. INTELLECTUAL PROPERTY

All intellectual property (requirements) belongs to Eskom.


17. REFERENCES

Number	Name
240-119986004	Contracts Work instruction
240-55054906	Manage Customer Base PCM
ESA 0023	ESA Request Form
	ESA Pro-forma's
240-142795664	Vetting of quotations checklist
240-101709917	Distribution Delegation of Authority

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19. DOCUMENT ACKNOWLEDGEMENT

By signing this document, the people listed record their agreement / acknowledge the contents of this document.


Disclaimer: Formal governance processes will need to be followed prior to obtaining approval for the implementation of the business requirements specification and the initiation of a project.

Name	Role	Signature	Date
Janeen Vergotine	Group IT Business Analyst Business and Process Analyst Management Customer Experience Business Solutions Development Services		27/09/2024
Ayesha Hardien	Business Requestor		27/09/2024
Elma Mmakola	Group IT Business Relationship Manager Portfolio Management Services Business Solutions Development Services		
Shareen Lombard	Group IT Portfolio Manager Portfolio Management Services Business Solutions Development Services		30/09/2024
Thabo Rakosa	Group IT Application Operations Advisor Application Operations		
Thabo Mashegoane	Group IT Architect Enterprise Architecture Business Solutions Development Services		

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19. DOCUMENT APPROVAL

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Disclaimer: Formal governance processes will need to be followed prior to obtaining approval for the implementation of the business requirements specification and the initiation of a project.

Name	Role	Signature	Date
Riaan van Wyk	Group IT Business and Process Analysis Management Manager Customer Experience Business Solutions Development Services		
Johan Scholtz	Group IT Application Operations Manager Application Operations		

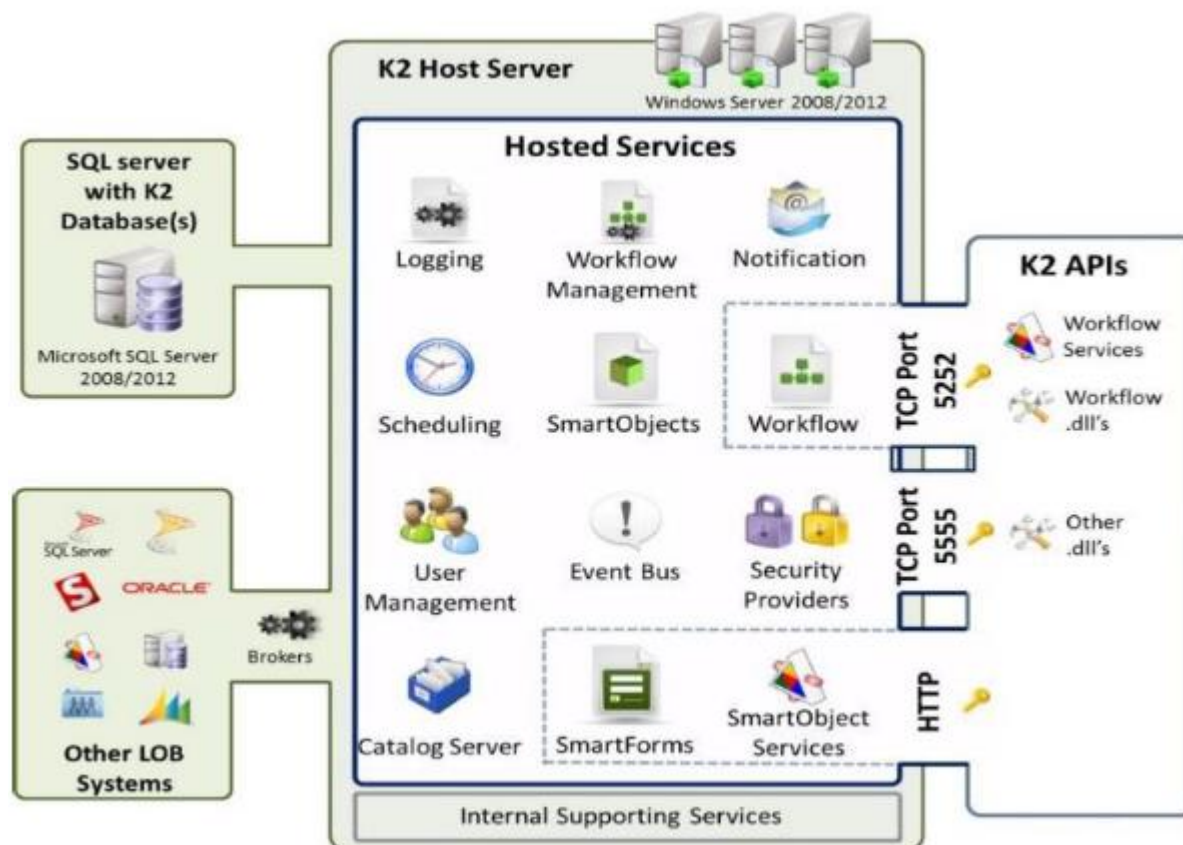
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20. ANNEXURE A – K2 Blackpearl Logical Access



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21. APPENDIX B: Current K2 Blackpearl Integration Messages


DetailTable

Interface Name	Interface Status	Interface Frequency	Source Application	Source Protocol	Message Name	Destination Application
Customer Applications Approved		Real-time	KANA (CC&I)		ApplicationForGridConnection	ACNAC Workflow (K2)
Customer Applications Feedback		Real-time	ACNAC Workflow (K2)		ApplicationForGridConnection	KANA (CC&I)
Customer Applications Feedback		Real-time	ACNAC Workflow (K2)		ApplicationForGridConnection	Microsoft Dynamics XRM
CustomerApplications (Application for Supply Feedback)			ACNAC Workflow (K2)	SOAP	ApplicationFeedback	KANA (CC&I)
CustomerApplications (Application for Supply Feedback)			ACNAC Workflow (K2)	SOAP	ApplicationFeedback	Microsoft Dynamics XRM
CustomerApplications (Application for Supply)			KANA (CC&I)	SOAP	ApplicationForSupply	ACNAC Workflow (K2)
CustomerApplications (Application for Supply)			Microsoft Dynamics XRM	SOAP	ApplicationForSupply	ACNAC Workflow (K2)

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22. APPENDIX C: Requirement Rating

Weight	Rating Name	Description
0	No interest	This rating verifies the requirement has been considered by the appropriate subject matter experts, and they have no need of it now or in the future.
1	Nice to have	If satisfied, the features associated with this requirement could possibly be used. Nothing to worry about if this requirement is unsatisfied.
2	Useful	If satisfied, the features associated with this requirement are very likely to be used. If this requirement is unsatisfied, there would be no inconvenience.
3	Important	Without features to satisfy this requirement there is noticeable inconvenience, but that can be worked around with some effort.
4	Very important	If the software does not adequately meet this requirement, there would be significant effort expended in working around that limitation.
5	Critical	There would be major limitations using the software without this requirement being adequately met. If the features are missing or inadequate, this software has a significant chance of being excluded from the software selection.
6	Show stopper	If the software does not meet this requirement, the software is automatically excluded. Few requirements are true show stoppers, usually most of these are critical.

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23. ANNEXURE D – Workflows

A_Inform Customer of Contract Terms Links [Help](#)

Process Info
 Process Move in Move out
 Activity Inform Customer of Contract Terms
 Folio
[Add/View Activity notes](#)

Request all required documents ☐ ☐ ☐

- ~ Identification e.g. Passport Registration property etc
- ~ Lease/Deed
- ~ CoC

Inform customer of required Fees/Deposit ☐ Yes ☐ No

Customer must agree to pay required fees/deposit

Create Account for Customer - only Entity Name & Deposit at this stage

Provide customer with Account Number to make required Payments

Provide customer with Reference Number

Manage Customer Response Select an item

[Send To K2 Controller](#) [Edit Areas](#) [Update](#) [Next >](#) [Close](#)

Application form needs to be formulated (to get information from CRM System)

- * The form should be editable
- * Attachments should be allowed
- * Should allow for an Account Number to be populated
- * Should allow for a second Naming Line - the original maps to the application the second will be the common name of the project (NED)
- * Should have the Retail Lead name under the account number

Search Function

Should be able to search for projects through multiple options - not exact name, project ID only. Should allow partial name searches, advanced searches, etc

Quotation

- * Template / forms to be available, which can be downloaded or populated on the file and printed / saved
- * Automated population of form should be allowed
- Default to Capcon Values (if available), can be edited based on business rules

Folder / Jacket / Project File

- * The application should initiate a Project Folder with all documents and templates
- * Create submission memo after Quote for Pricing Vetting (Auto populate)
- * Create IC forms - auto-populate

General

- * An audit trail should be available for each project (Viewable by anyone working on the project) - You can find this currently on the Project report
- * Projects cannot be cancelled if cost are involved

Workflow Allowances

- * Function to select workflow after Manage Customer should be enabled
- User should select (Asset Build, No Asset Build, Conversion required, Meter Change, System Update (Small world, CC&B, MV90) only)
- * Stopping a project should be simplified - for minors
- * Each Project that is stopped must have the following verifications
- User, reason, is a cost reconciliation required
- * if a cost reconciliation is required, a cost reconciliation form needs to be completed
- * if no cost reconciliation is required, the project stop must be verified by the workflow controller
- * Comment box should allow for traceable timelines, user details - add comment should be available on each activity
- * Workflows depicted under Minor Connection will duplicate for SSEG workflow for Asset build and Meter reprogramming
- * Workflows depicted Under Cost Estimate & Budget Quote (Major) will be duplicated for IPP
- * There will be changes during the design phase for some of the workflows
- * The addition of 1 or 2 additional workflows can be anticipated
- * Every Activity will have tasks associated with it - see image on left
- Will either be compulsory or optional
- Drop down list options should also be available for Tasks or workflow selections


Hold Function

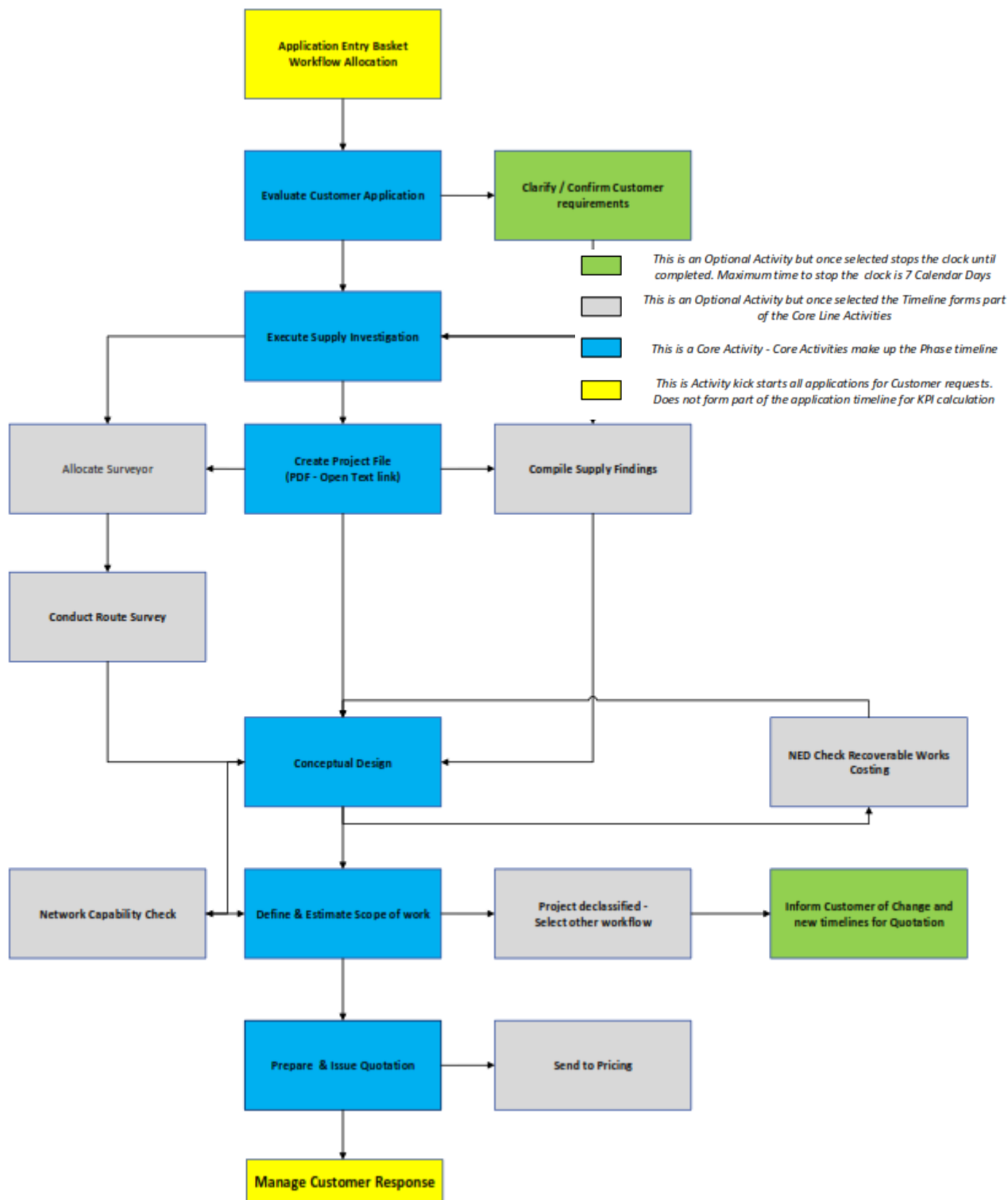
- * Minor / SSEG Workflow - Hold Functionality to be available in Connection Phase with applicable business rules
- * Major / IPP Workflow - Hold functionality to be available in Cost Estimate, Budget Quote, ERA Phases
- * Hold Function only to be allowed to enable by the Controllers / Administrators

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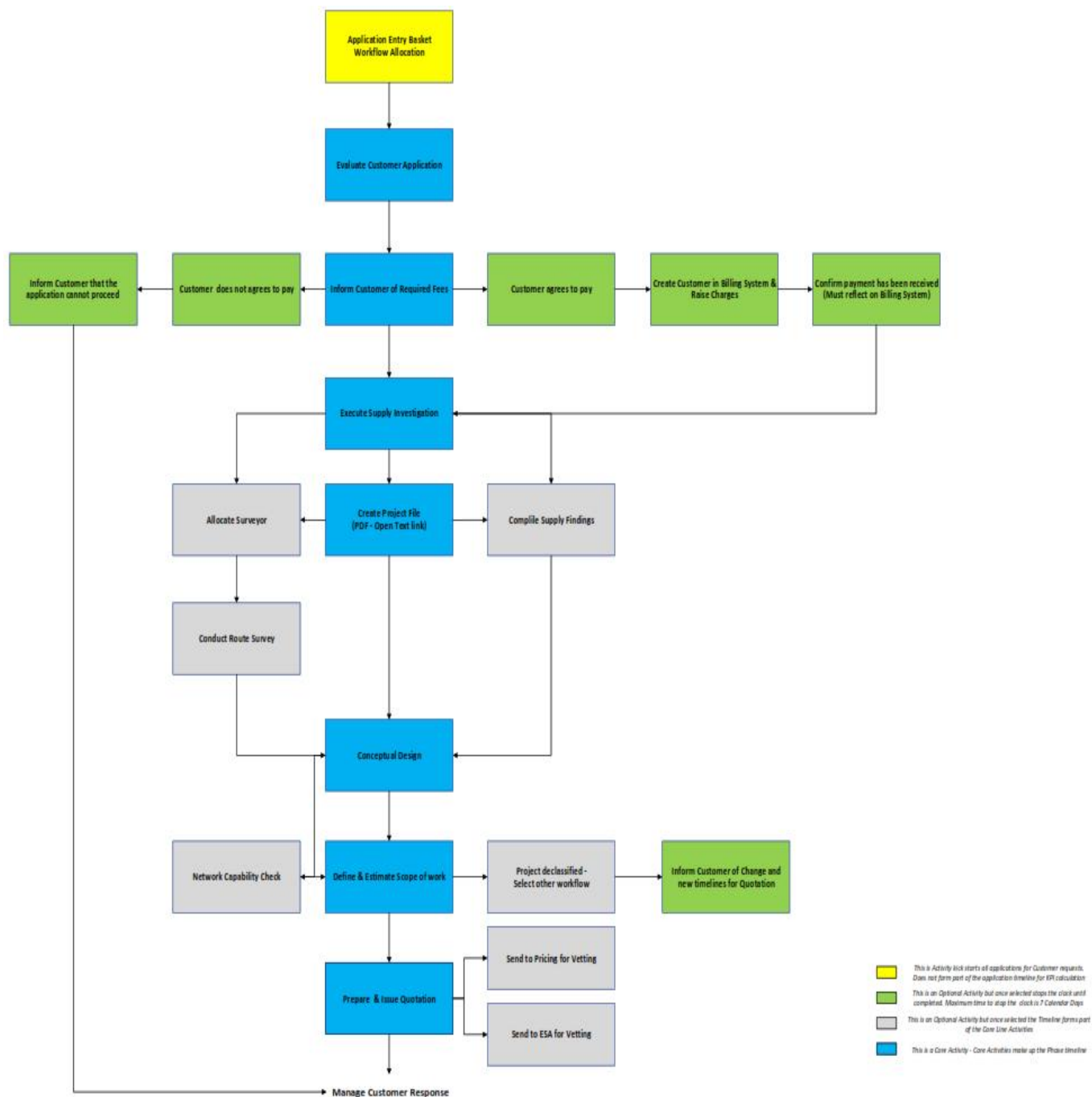


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Evaluate Application *		Links
Process Info		Help
Process	Move in Move out	
Activity	Evaluate Application	
Folio		
Add/View Activity notes		

New Customer Application Evaluated *

☐
☒ Major Process
☐ Minor Process
☐ SMG Process
☐ Move in Move out

Please select an option *

Send To K2 Controller

Edit Area
Update
Next >
Close

NB: When 'Move in Move out' option is clicked Yes / No options displays

☒ Yes
☐ No

!! Proceed with Move in
!! User to complete Move Out

Inform Customer of Contract Terms *

Select an item

Send To K2 Controller

Edit Area
Update
Next >
Close

When Yes is clicked - Inform Customer of Contract Terms * activity appears with drop down names
User selects name from drop down and clicks Next : Below screen displays

A Inform Customer of Contract Terms *		Links
Process Info		Help
Process	Move in Move out	
Activity	Inform Customer of Contract Terms	
Folio		
Add/View Activity notes		

Request all required documents *

☐ ~ Identification e.g. Passport Registration property etc
☐ ~ Lease/Deed
☐ ~ CoC

Inform customer of required Fees/Deposit *

Customer must agree to pay required fees/deposit *

☒ Yes
☐ No

Account Name * (Current Account or Create New Account in CC&B)

Deposit
R

Payment Made *

☒ Yes
☐ Not Yet
☐ Payment Arrangement

Reference Number Provided * (Add a filed for the RefNumber)

Manage Customer Response *

Select an item


Send To K2 Controller

Edit Area
Update
Next >
Close

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User completes the form and selects name from drop down and clicks Next : Below screen displays

B_Manage Customer Response *		Links
Process Info		
Process	Move in Move out	Help
Activity	Manage Customer Response	
Folio		
Add/View Activity notes		

Proof of payment sent *	<input type="radio"/> Yes <input type="radio"/> No	(PoP reflecting on CC&B)
Required documents Submitted *	<input type="radio"/> Yes <input type="radio"/> No	
Conclude Customer Contract *	<input type="text" value="Select an item"/>	

Send To K2 Controller	Edit Areas Update Next >> Close
---------------------------------------	---

User completes the form and selects name from drop down and clicks Next : Below screen displays

C_Conclude Customer Contract *		Links
Process Info		
Process	Move in Move out	Help
Activity	Conclude Customer Contract	
Folio		
Add/View Activity notes		

Complete Voice Contract with Customer *	<input type="radio"/> Yes <input type="radio"/> No	NB: (Customer Confirms conditions of supply docs read)
Conditions of Supply document read *	<input type="radio"/> Yes <input type="radio"/> No	
Utility Service Agreement on Account as per the Contract made *	<input type="radio"/> Yes <input type="radio"/> No	
Deposit Service Agreement Concluded	<input type="radio"/> Yes <input type="radio"/> No	
Reference Number Provided *	<input type="radio"/> Yes <input type="radio"/> No	
Start Service *	<input type="text" value="Select an item"/>	

Send To K2 Controller	Edit Areas Update Next >> Close
---------------------------------------	---

User completes the form and selects name from drop down and clicks Next : Below screen displays

D_Start Service *		Links
Process Info		
Process	Move in Move out	Help
Activity	Start Service	
Folio		
Add/View Activity notes		


Customer linked to new premise *	<input type="radio"/> Yes <input type="radio"/> No
Service Points Linked *(If existing, Three points must be linked)	<input type="radio"/> Yes <input type="radio"/> No
Confirm Meter Number	<input type="text"/>
Start Service *	<input type="radio"/> Yes <input type="radio"/> No
Meter Read received *	<input type="radio"/> Yes <input type="radio"/> No
Meter Reading	<input type="text"/>
Service Started *	<input type="radio"/> Yes <input type="radio"/> No
(Attach the docs on this activity, verify if the attachemnet can be done on ACNAC)	

Send To K2 Controller	Edit Areas Update Next >> Close
---------------------------------------	---

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Evaluate Application *		Links
Process Info		Help
Process	Move in Move out	
Activity	Evaluate Application	
Folio		
Add/View Activity notes		

New Customer Application Evaluated*

Please select an option*

☐ Major Process
☐ Minor Process
☐ SMG Process
☐ Move in Move out

Need To Call Customer

NB: When 'Move in Move out' option is clicked Yes / No options displays

Inform Customer of Contract Terms *

☐ Yes **!! Proceed with Move in**
☐ No **!! User to complete Move Out**

Need To Call Customer

When No is clicked - A_Inform Customer of Contract Terms * activity appears with drop down names
 User selects name from drop down and clicks Next : Below screen displays

A_Inform Customer of Contract Terms *		Links
Process Info		Help
Process	Move in Move out	
Activity	Inform Customer of Contract Terms	
Folio		
Add/View Activity notes		

Request all required documents *

- Identification e.g. Passport Registration property etc
- Lease/Deed
- CoC

Inform customer of required Fees/Deposit *

Customer must agree to pay required fees/deposit *

Create Account for Customer - only Entity Name & Deposit at this stage

Provide customer with Account Number to make required Payments

Provide customer with Reference Number


☐ Yes ☐ No

Need To Call Customer

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User completes the form and selects name from drop down and clicks Next : Below screen displays

B_Manage Customer Response *		Links
Process Info		Help
Process	Move in Move out	
Activity	Manage Customer Response	
Folio		
Add/View Activity notes		

Customer to send proof of payment to email *	<input type="radio"/> Yes <input type="radio"/> No	(PoP reflecting on CC&B)
Customer Submits all required documents *	<input type="radio"/> Yes <input type="radio"/> No	
Conclude Customer Contract *	<input type="text" value="Select an item"/>	



User completes the form and selects name from drop down and clicks Next : Below screen displays

C_Conclude Customer Contract *		Links
Process Info		Help
Process	Move in Move out	
Activity	Conclude Customer Contract	
Folio		
Add/View Activity notes		

Complete Voice Contract with Customer *	<input type="radio"/> Yes <input type="radio"/> No	NB: (Customer Confirms conditions of supply docs read)
Confirm Customer has read all the condition of Supply	<input type="radio"/> Yes <input type="radio"/> No	
Create Utility Service Agreement on Account as per the Contract	<input type="radio"/> Yes <input type="radio"/> No	
Start Service *	<input type="text" value="Select an item"/>	



User completes the form and selects name from drop down and clicks Next : Below screen displays

D_Start Service *		Links
Process Info		Help
Process	Move in Move out	
Activity	Start Service	
Folio		
Add/View Activity notes		


Link Premise to new customer Account *	<input type="radio"/> Yes <input type="radio"/> No
Ensure all service points are linked *	<input type="radio"/> Yes <input type="radio"/> No
Create Field Activity for Start Service/ Meter read *	<input type="text" value=""/>
Receive Meter Read *	<input type="radio"/> Yes <input type="radio"/> No
Start Service *	<input type="radio"/> Yes <input type="radio"/> No
(Attach the docs on this activity, verify if the attocemnet can be done on ACNAC) Move Out ??????	



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From Evaluate Application * activity
When No is clicked - (User to complete Minor Pocess) Asset Change * activity appears with drop down names
User selects name from drop down and clicks Next : Below screen displays

E_Asset Change*

Process Info

ProcessMove in Move out

ActivityAsset Change

Folio

Add/View Activity notes

Links

Help

Tariff Change *

YesNo

Upgrade/Downgrade*

YesNo

Conversion *

Add Generator

Search an item

Search To BT Controller

Edit AssetSelectAsset IDClose

F_Add Generator *

Process Info

ProcessMove in Move out

ActivityAdd Generator

Folio

Add/View Activity notes

Links

Help

SSEG process

YesNo


Search To BT Controller

Edit AssetSelectAsset IDClose

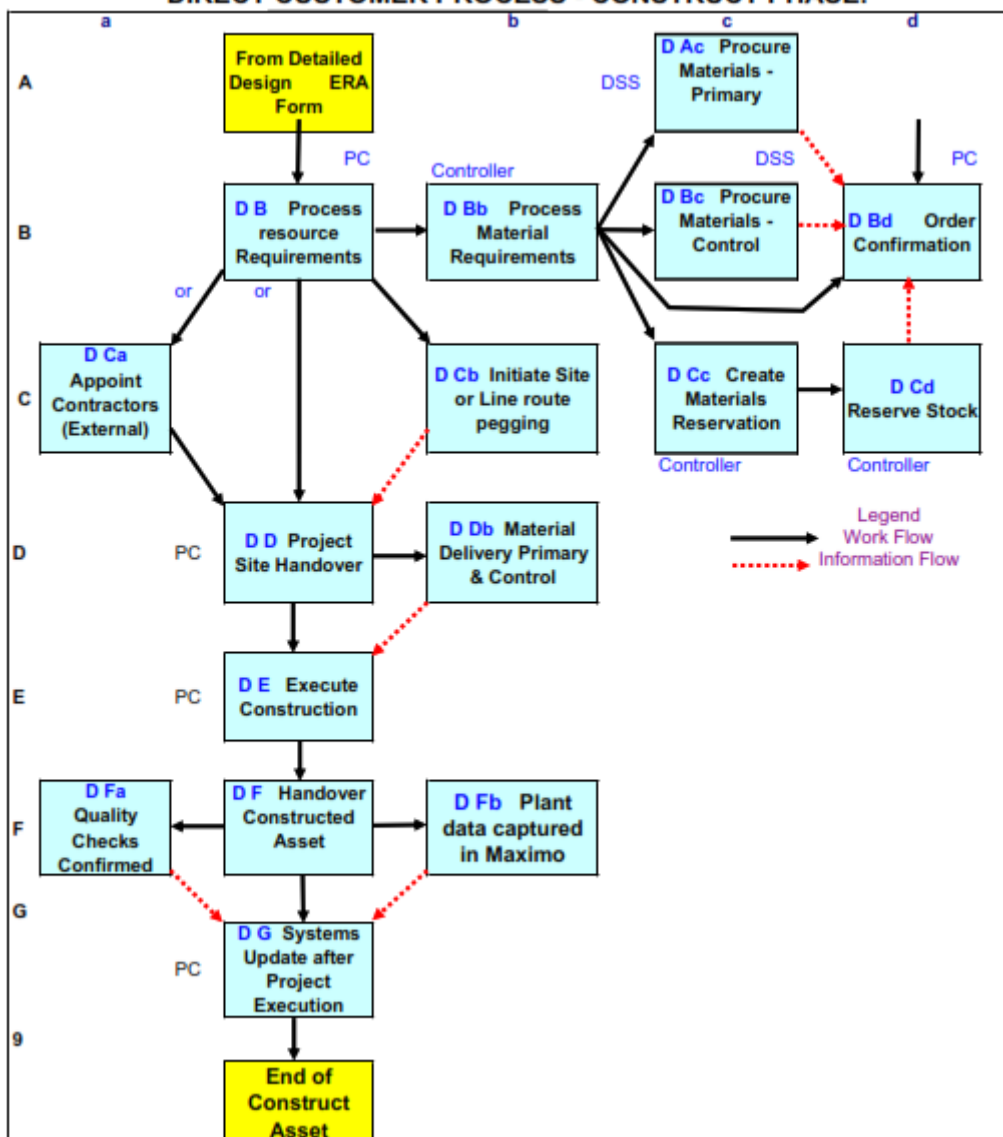
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DIRECT CUSTOMER PROCESS - CONSTRUCT PHASE.

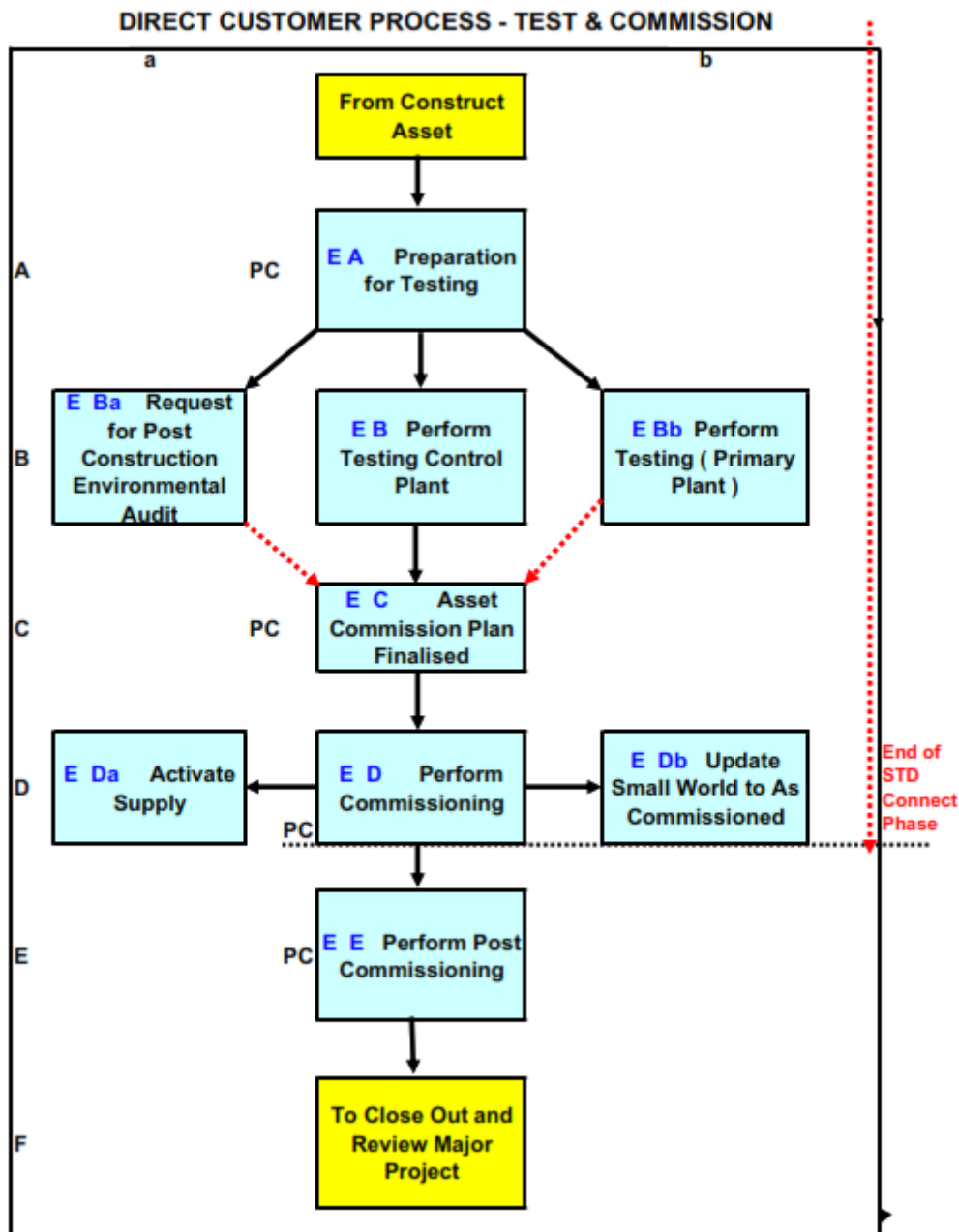


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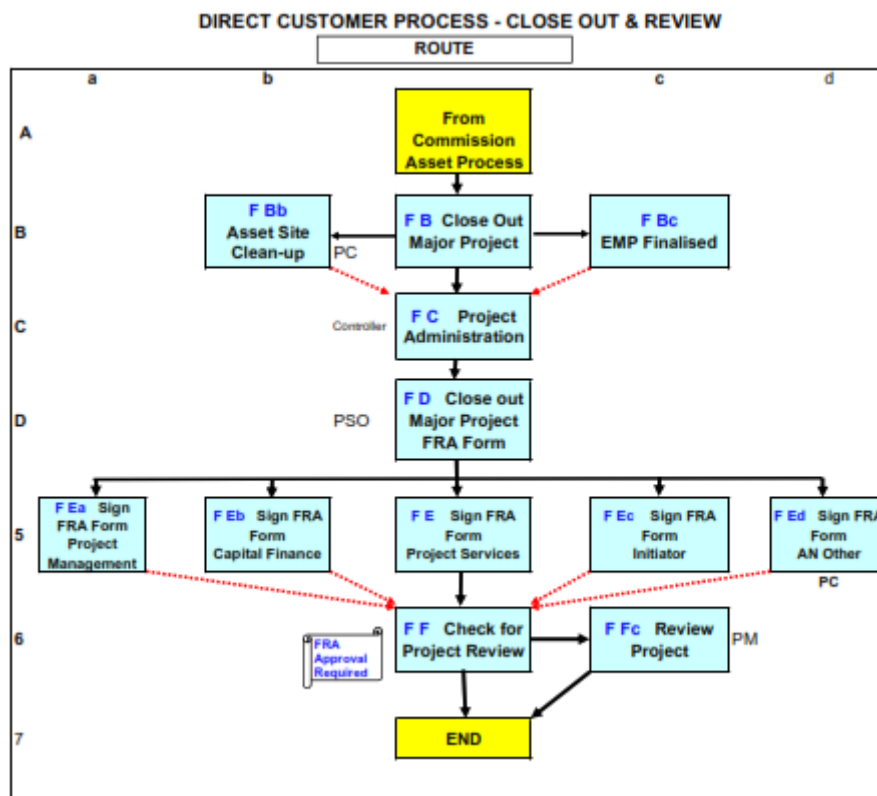


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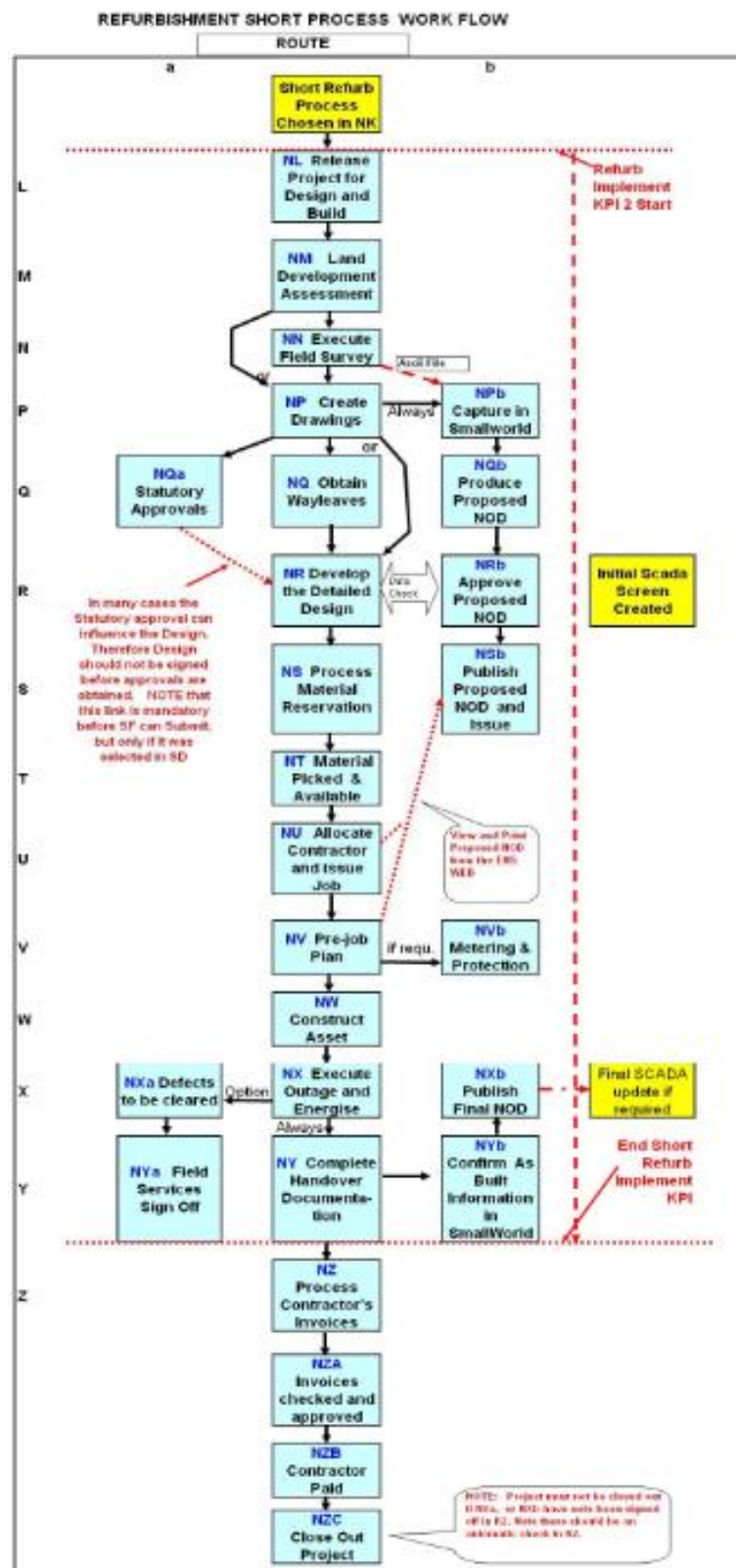




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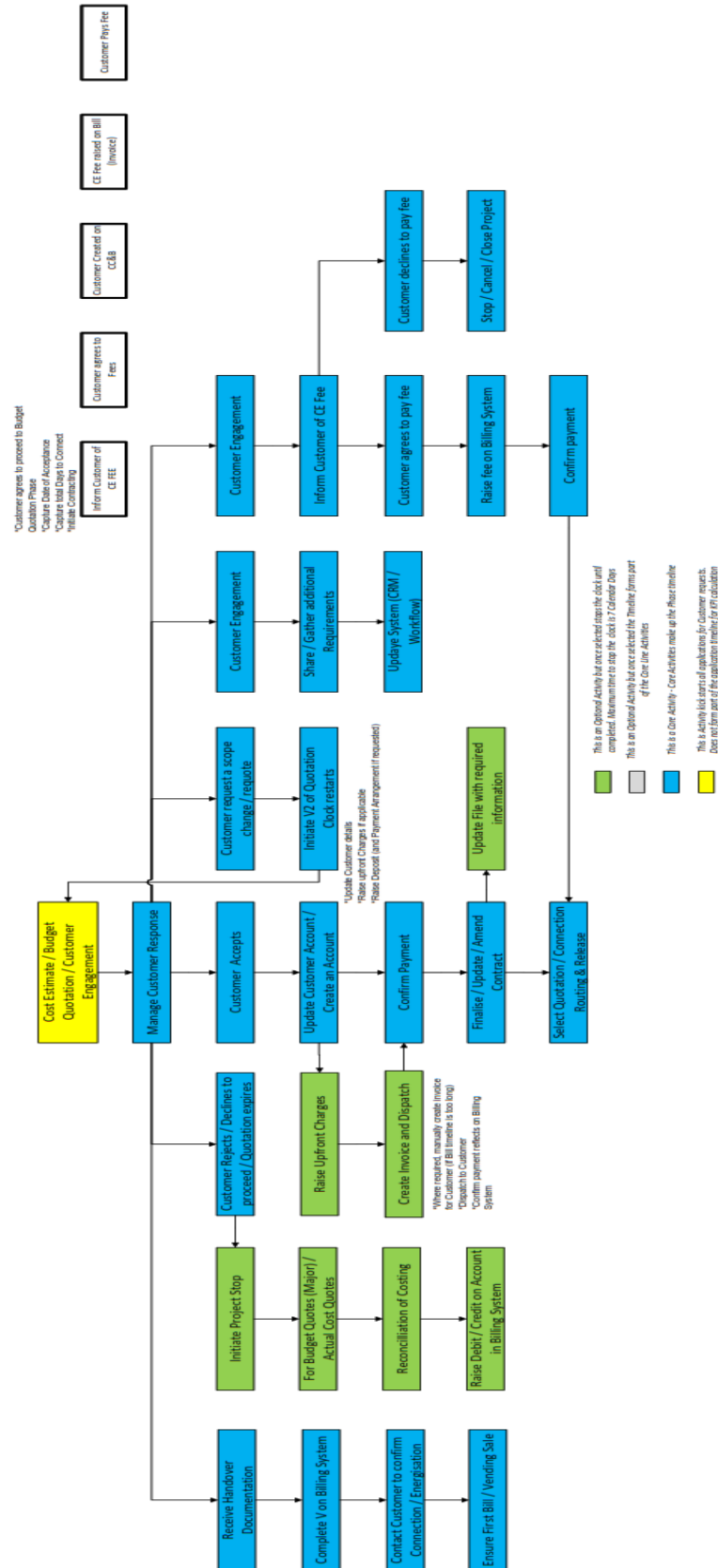


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		Authorisation Date	31 July 2021		
		Review Date	December 2024		

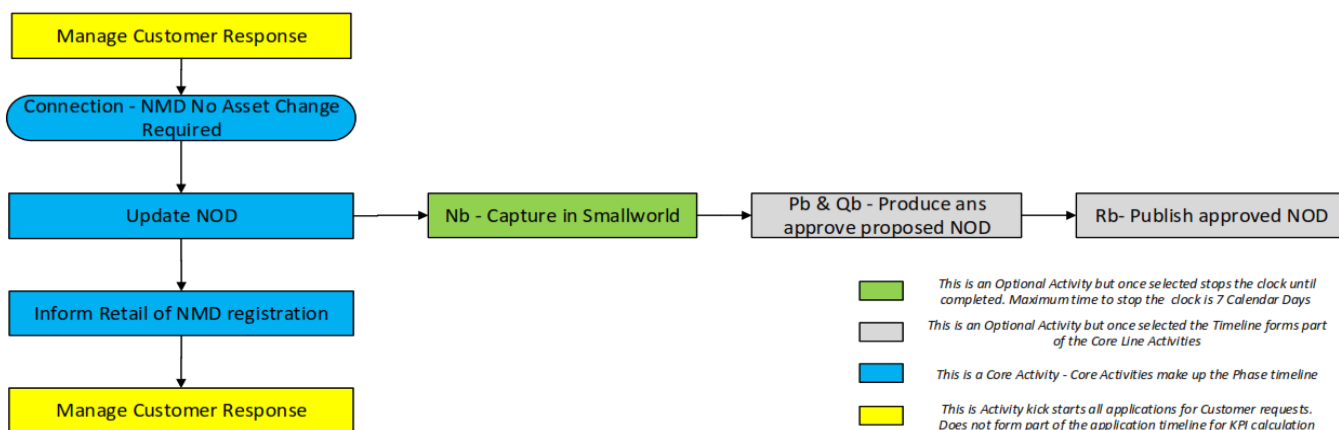
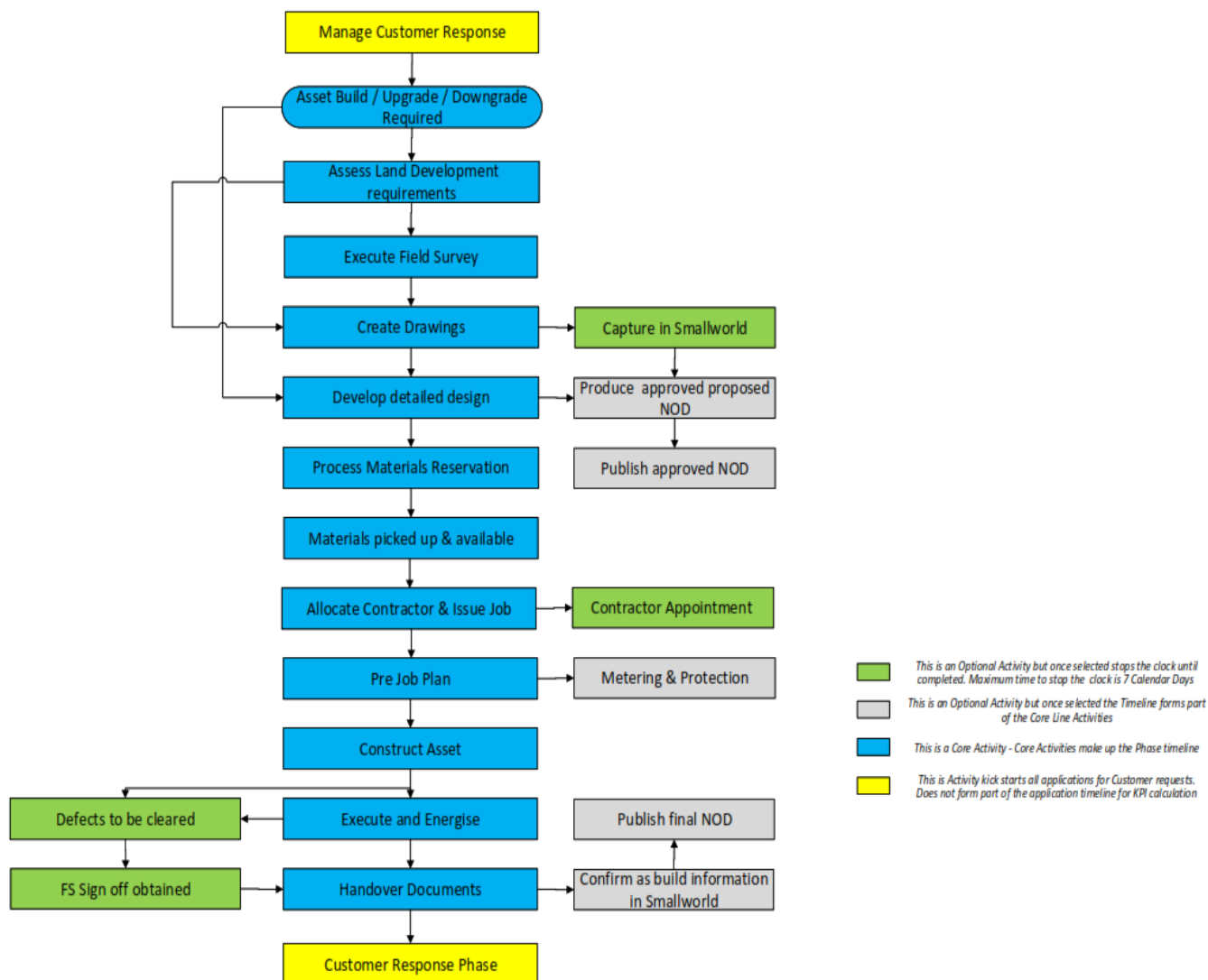


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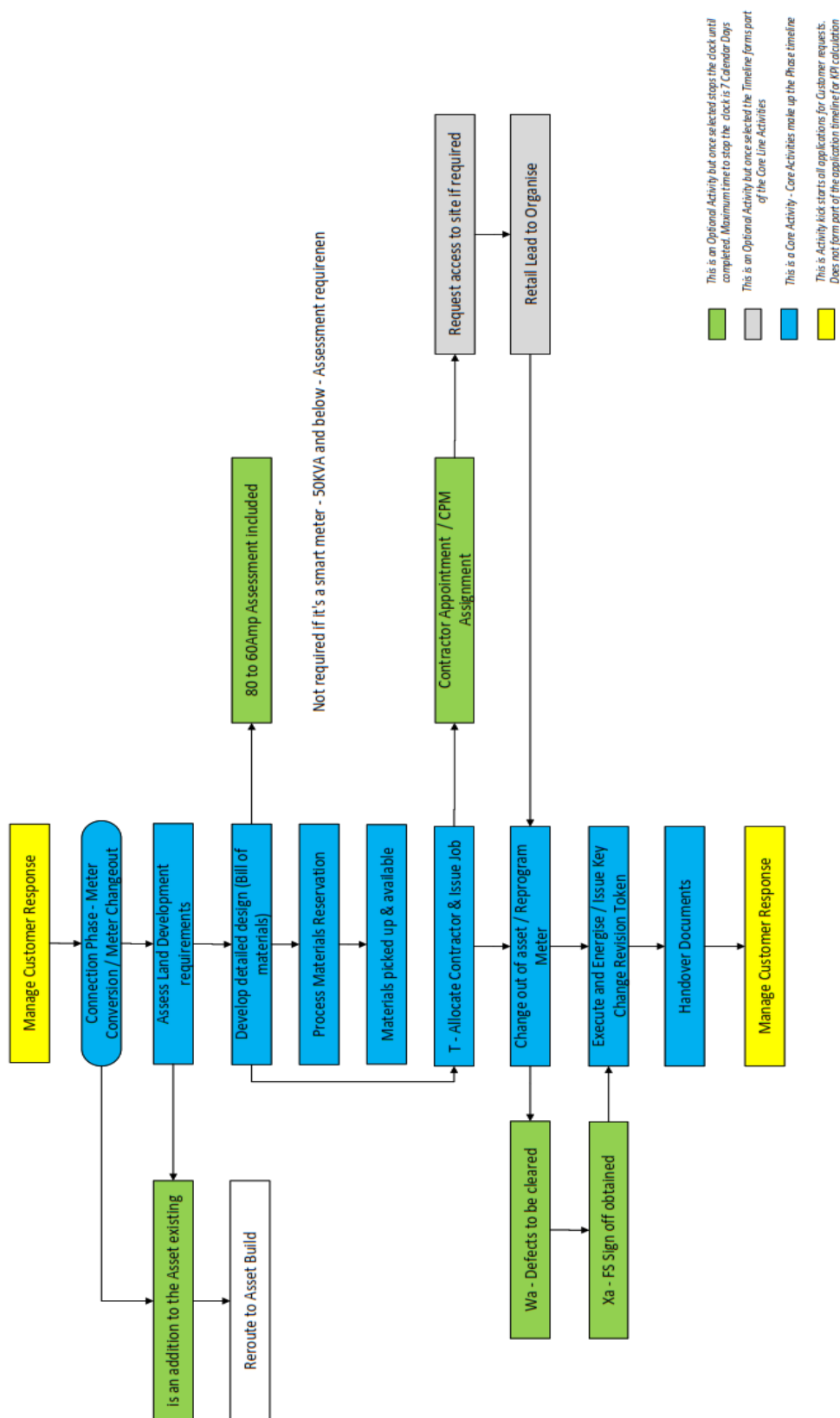


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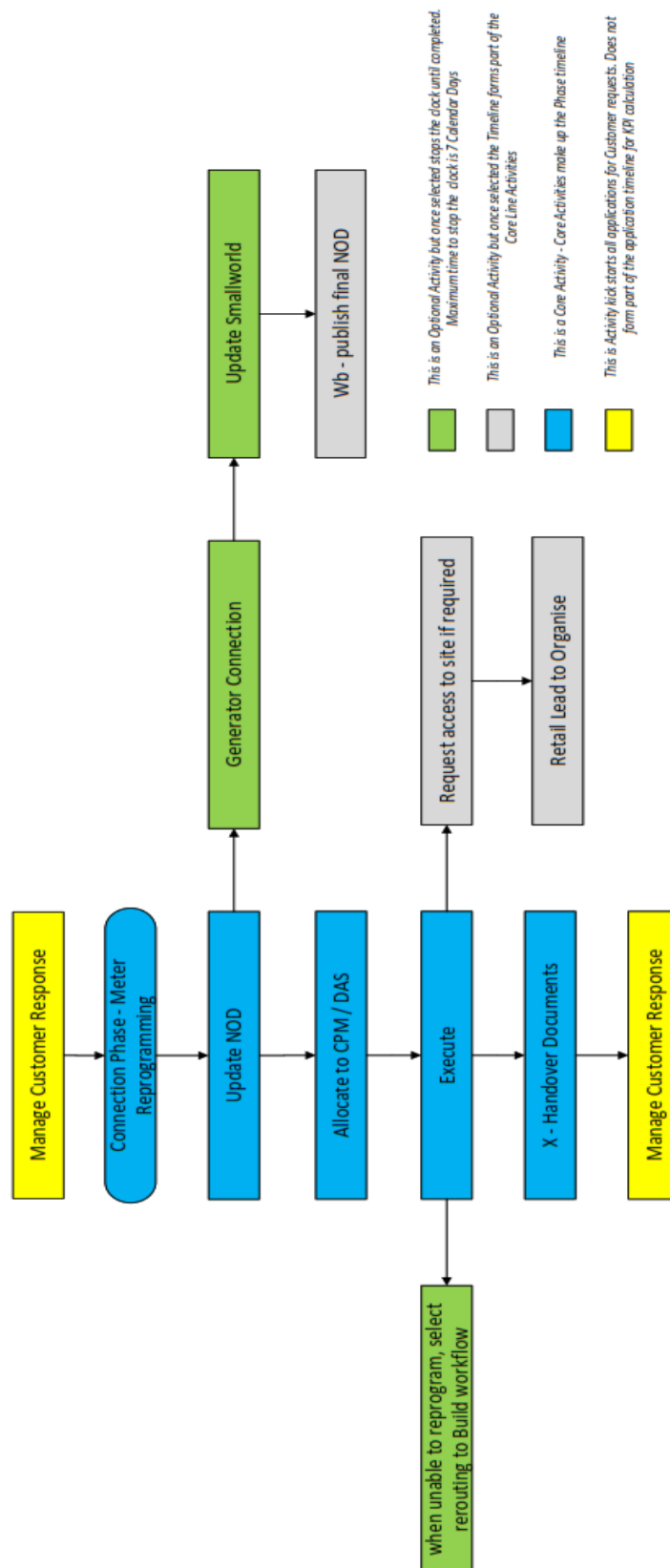


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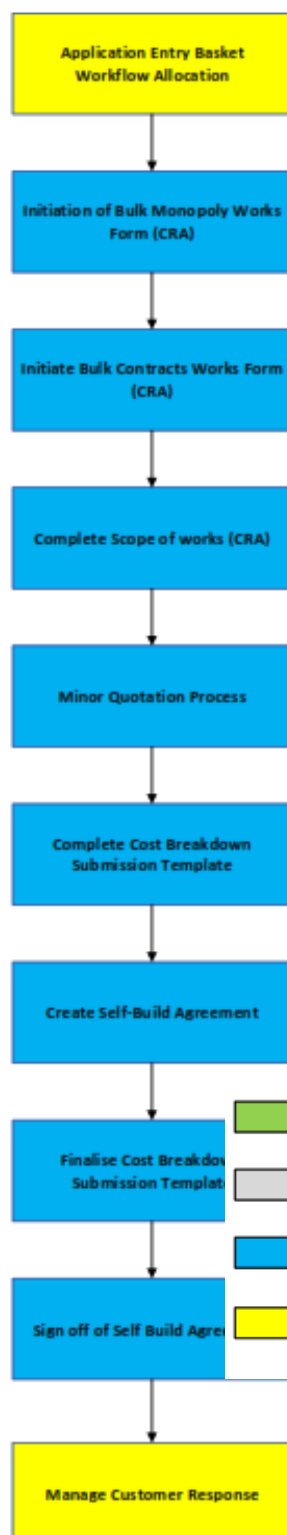


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Activity	Minor phase	Initiator	Asset Designer	PM/PC	Portfolio Manger	Asset Design Manager
Initiation of Bulk Monopoly works form	CRA	R	C	A	I	I
Initiation of Bulk Contract works form	CRA	R	C	A	I	I
Completion of scope of works	CRA	R	C	A	I	I
Initiation of Minor project	Quotation Phase	A/R	C	I	I	I
Completion of Cost Breakdown Submission template	Quotation Phase	I	C	A/R	I	I
Setting up of the Self-Build Agreement	Quotation Phase	I	C	A/R	I	I
Finalization of Cost Breakdown Submission template	Connection Phase	I	C	A/R	I	I
Signing of the Self-Build Agreement	Connection Phase	I	C	A/R	I	I

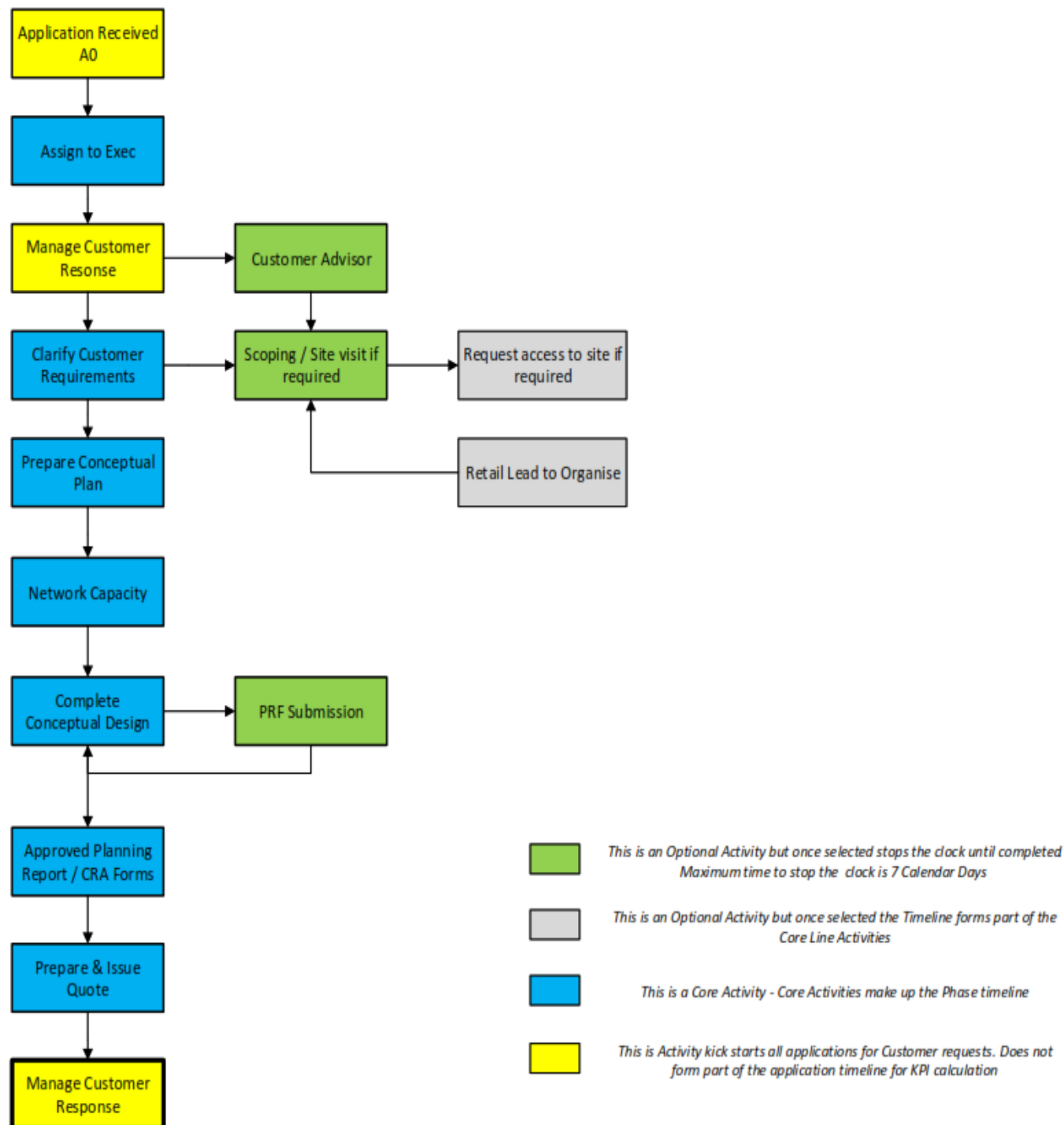
Self Build Projects should be linked to all jobs related to it - Contract Works and Monopoly Works

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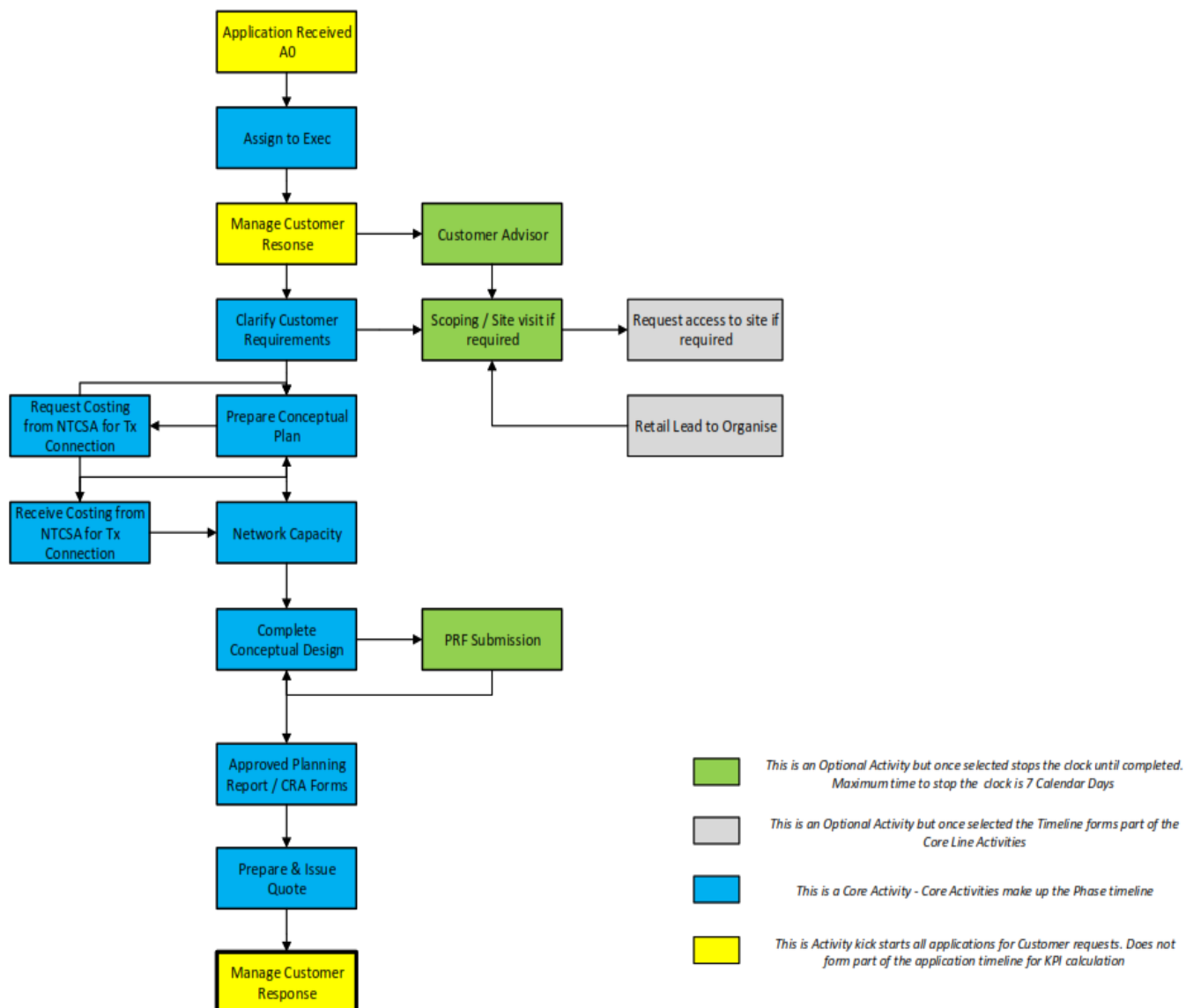


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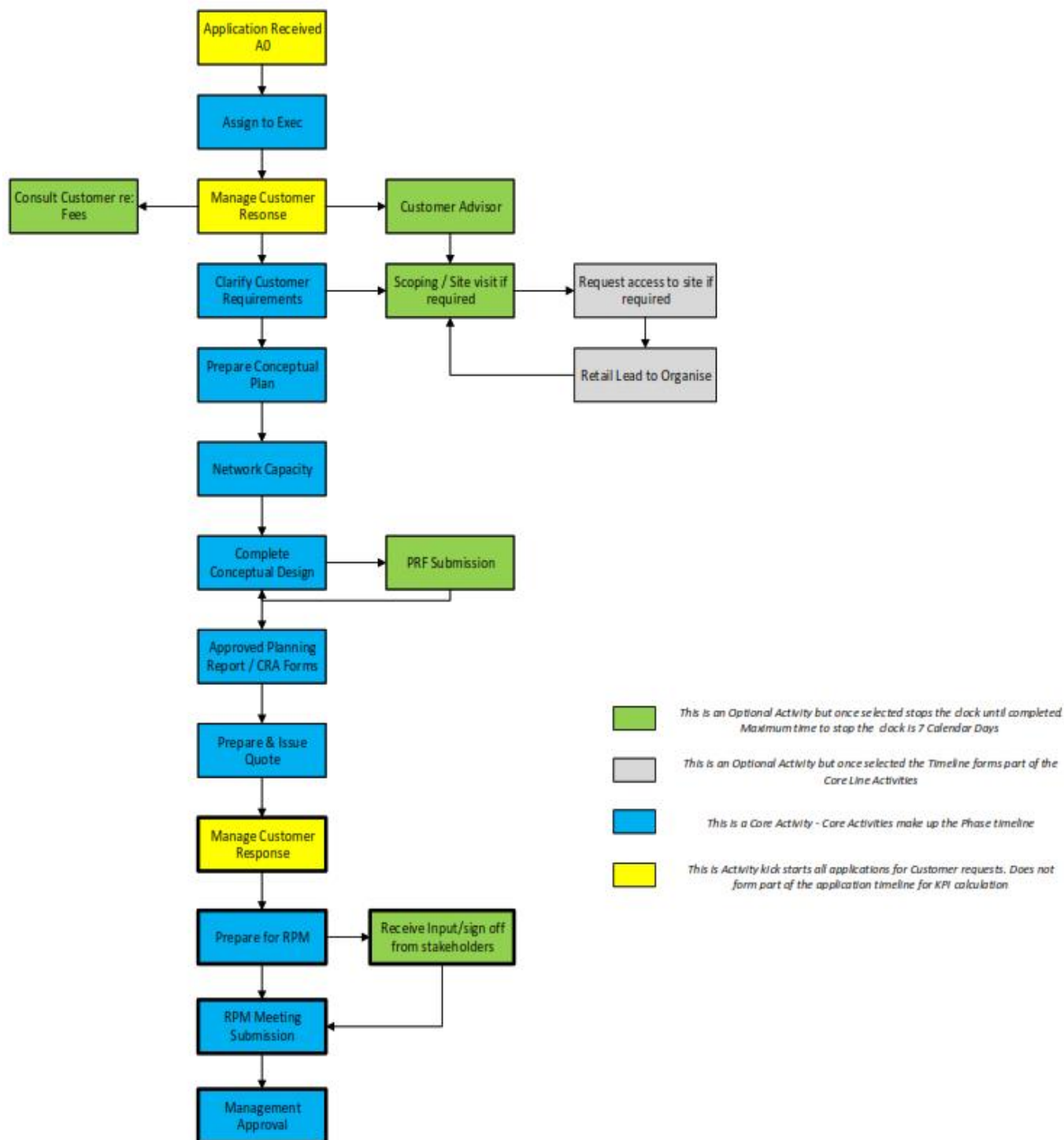


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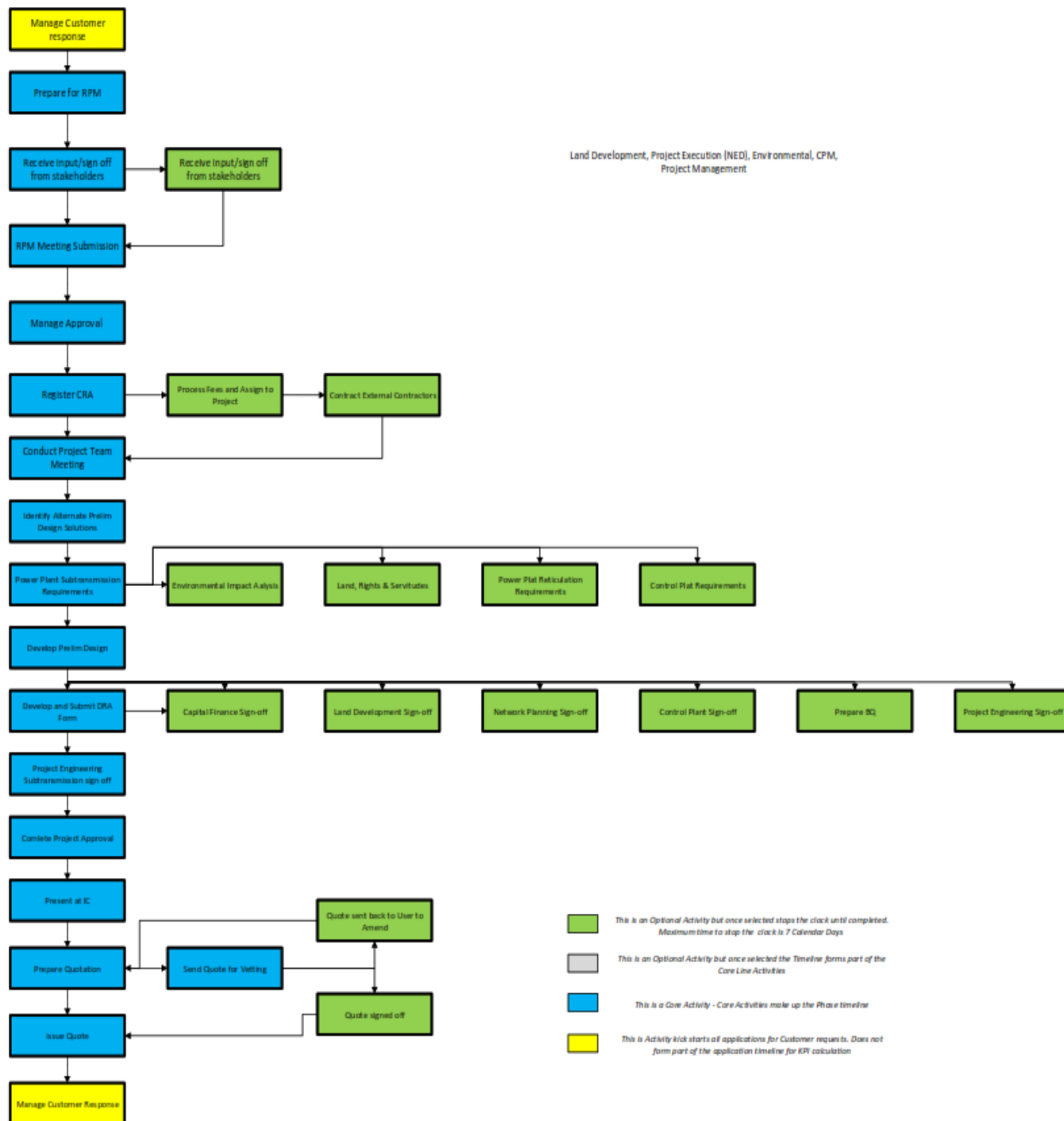


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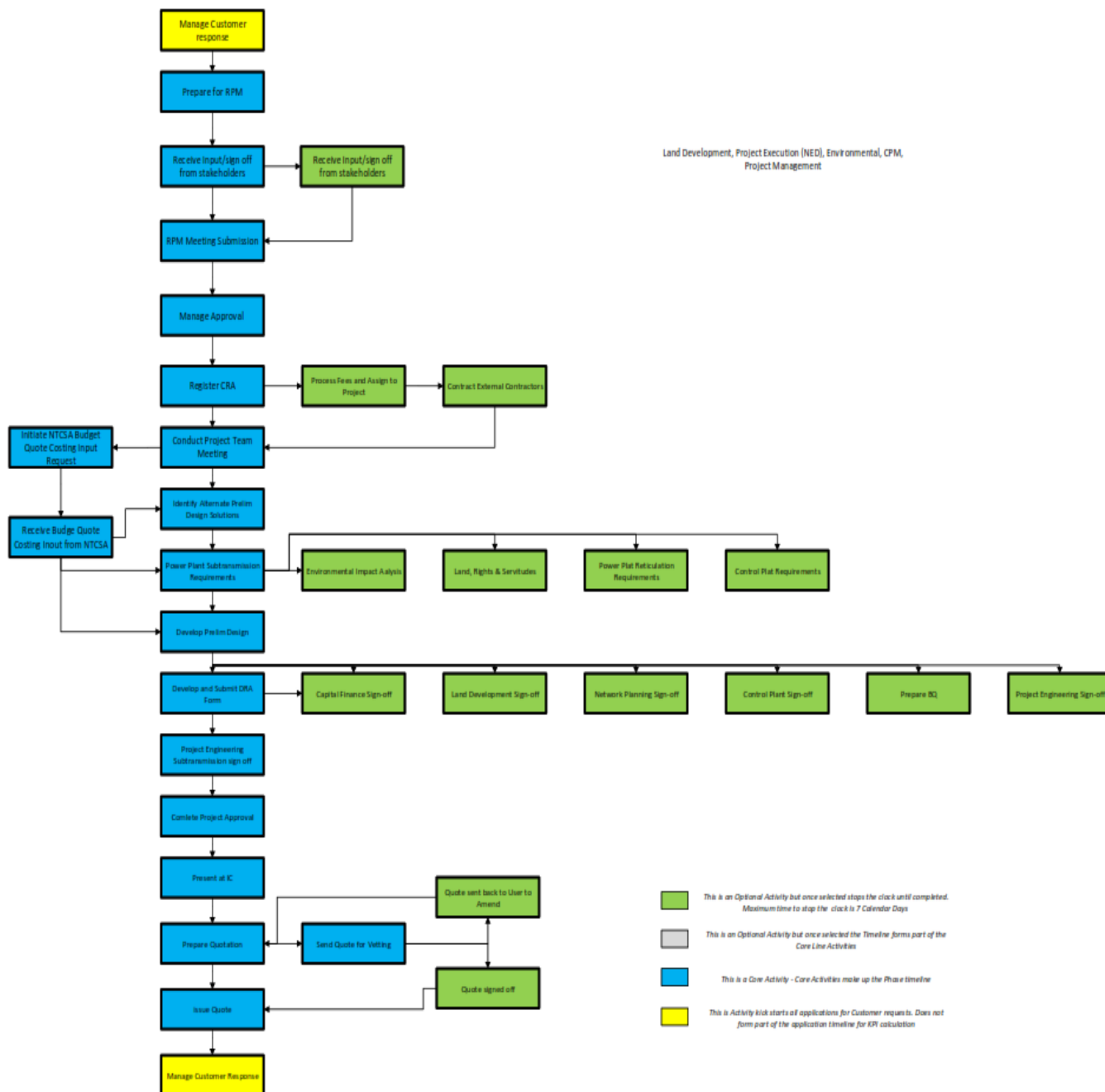


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Activity	PLCM phase	RACI				
		Initiator	Asset Designer	PC/PM	Portfolio Manager	Asset Design Manager
Initiation of Eskom Works form	Pre-project planning (CRA)	R	C	A	I	I
Initiation of Contract works form	CRA	R	C	A	I	I
Completion of scope of works	CRA	R	C	A	I	I
Setting up of the Self-Build Agreement	CRA	R	C	A	I	I
Setting up of Customer Supply Agreement	CRA	R	C	A	I	I
Updating of Eskom Works form and presenting to the IC	(Concept DRA)	I	R	A	I	I

Activity	PLCM phase	Initiator	Asset Designer	PC/PM	Portfolio Manager	Asset Design Manager
Updating of Contract Works form presenting to the IC	DRA	I	R	A	I	I
Completion of the Cost Breakdown Submission template	DRA	I	R	A	I	I
Acquisition of Bill of Quantities	DRA	I	R	A	I	I
Signing of the Self-Build Agreement	DRA	R	C	A	I	I
Signing up of the Supply Agreement	DRA	R	C	A	I	I
Finalization of Eskom Works form	Definition (ERA)	I	C	A/R	I	I

Activity	PLCM phase	Initiator	Asset Designer	PC/PM	Portfolio Manager	Asset Design Manager
Acquisition of final Bill of Quantities	ERA	I	C	A/R	I	I
Approval of Cost Breakdown Submission template	ERA	I	C	R	A	R

 This is an Optional Activity but once selected stops the clock until completed. Maximum time to stop the clock is 7 Calendar Days

 This is an Optional Activity but once selected the Timeline forms part of the Core Line Activities

 This is a Core Activity - Core Activities make up the Phase timeline

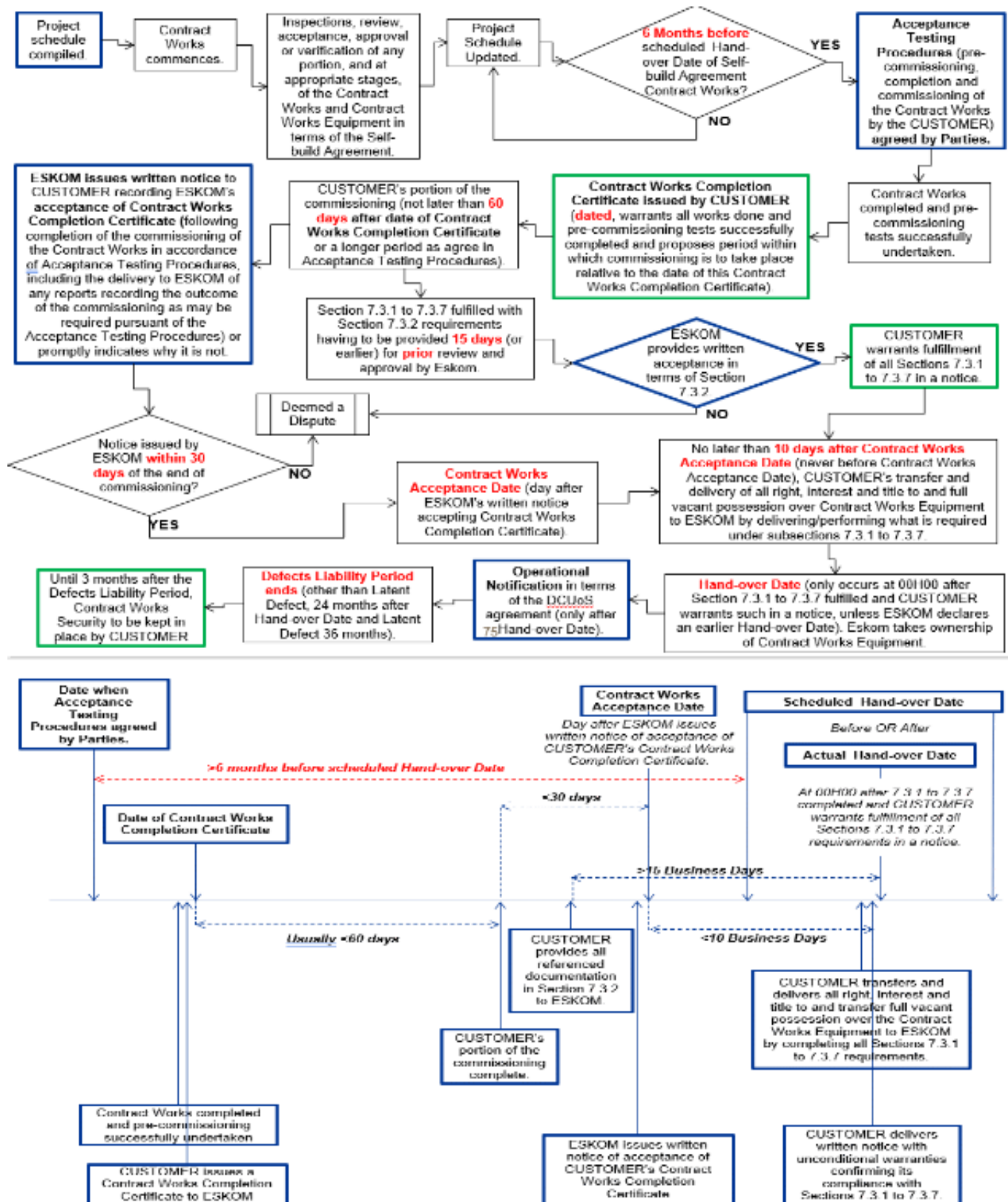
 This is Activity kick starts all applications for Customer requests. Does not form part of the application timeline for KPI calculation

 Approval of Cost Breakdown Submission Template (DBS)

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