Appendix J – Scope Inclusions and Exclusions
Appendix J - CIS Scope Inclusions and Exclusions

1. CIS Implementation Scope Inclusions

The goal of the design and development effort is to provide a customer centric and flexible system using the functionality SAP/CCS offers. Five key areas have been identified as the drivers for the scope of the project:

**Processes**

A list of 122 business processes have been identified:

- Customer Care – 23 processes including customer enquiries, interactions, movements and contracts.
- Billing – 29 processes including customer billing, exceptional billing, non-energy billing for energy customers, billing plans and billing follow-up and rate maintenance. Duplicate billing, reversals and re-billing as well as consolidated billing functionality are included.
- Account Management - 36 processes including payments, payment adjustments, credit management, credit management follow-up and a variety of financial transactions
- Device Management – 34 processes, including meter reading, meter reading follow-up, device management, customer projects and installations, and service order management.

**Systems**

The existing CIS will be replaced with the new CIS using the CIS Vision and Guiding Principles outlined in Appendix J. The new CIS will also perform the functionality of the following systems:

- Field Service Order System (FSOS)
- Complaint Management

**Interfaces**

A dedicated Interfaces team will ensure that communications between the new CIS and existing systems outside of CIS run smoothly and efficiently. Currently, 56 interfaces have been identified. These interfaces comprise:

- 4 impact external, third party systems, such as the Canadian Banking Association
- 52 interact with BC Hydro systems, such as the Electric Meter Record System
- 11 of the 56 interfaces have been added since the RFP process began

**Implementation and Data Conversion**

A great deal of data is stored in the current CIS. In order to balance the requirements of quality data with time and financial cost, the Implementation effort for the new CIS will take a “Long Bang” approach. Here, the information is brought into the new system in stages of static (e.g. postal codes), static/dynamic (e.g. mailing addresses) and dynamic
Data conversion – this major implementation activity refers to data cleansing and data migration areas.

Quality Assurance and Acceptance – this refers to the processes that will be put in place for testing and corrections.

Cutover – this major implementation activity entails provisions for the actual decommissioning of the current CIS and the commencement of SAP CIS.

Change Management & Communications

The implementation of a new system as comprehensive as SAP/CCS brings with it significant adjustments for the business and its employees. The Change Management effort for the implementation of the new CIS will include many activities encompassing the entire business:

- Impact Analysis – this activity entails readying the organization for the change effected by the implementation of the new CIS and includes investigating role and job alignment.
- Communication and Involvement – communication of key messages regarding the change to the end-user community through face-to-face sessions and involvement activities.
- Sponsorship – development of action plans so that ownership of the new system cascades from the executive level to the larger business organization.
- Training and Performance Support Strategy – this refers to the plan to train and educate end-users in the business processes and application changes, as well as the support tools which will help increase comfort with the change and provide information over the long-term to the business.
- Business Performance Metrics – this entails aligning key performance indicators with the new business process to ensure the metrics support the business strategy.
- Transition Plan – this refers to the change management activities during cutover which will further provide practice to the end-user community and create the training schedule.

2. Scope Exclusions

The scope of Project Northstar is defined in detail in the Blueprint Confirmation materials. (Dated Aug. 30, 2002) Below are indicative highlights of key scope items. As a general principle, new business requirements, which are not supported by the current CIS, will be considered a new scope item and require business sponsorship and additional funding (if approved). Contingency will be used, at the discretion of the Operating Sponsors and PMT, to fund unforeseen cost overruns (which may be the result of incorrect assumptions or estimates).

This project covers a comprehensive range of processes to meet today's business requirements. The SAP CCS solution is capable of a variety of other functionality, which BC Hydro may want to make use of later. For this reason, some systems...
currently utilized will remain in place but may be replaced in subsequent phases. These systems are:

- Electric Meter Records System (EMRS)
- Atlas system for agency management
- Sundry Accounts Receivable (expected to be subsumed by PeopleSoft Financials)
- Account Online (AOL) for electronic bill presentation and payment
- Sales and Marketing Information (SAMI) for customer management

Additional areas that are out of scope include:

- Redesign Service Bill - To avoid any unnecessary customer impact during go-live (which could result in operational impacts), we are adopting the current service invoice format. Our goal is to avoid any visible change in service, including the bill format, at go-live.

- Customer Data Warehouse - The present CDW will not be recreated with new data from the new CIS. Much of the data currently requested through the CDW will be supported via on-line and customer ABAP reports (see above reporting section). Strategically, we endorse the subsequent implementation of the SAP Business Warehouse (BW) which is included in the BCH SAP software agreement and responds to ad-hoc requests in the most efficient long-term manner.

- Customer Relationship Management - While we will place a significant amount of attention on developing a customer-centric solution, Northstar will not include the implementation of sales, marketing or advanced segmentation included in the CRM module.

- Industrial Billing - Complex billing for industrial customers will not be implemented in the new CIS. A separate project could enable this capability and replace BC Hydro's LodeStar system.

- Energy Data Manager - EDM for management of interval data will not be implemented by this project.

- Time of Use - TOU rates and offerings are not included in this project.

- Changes/updates to core SAP code are not in-scope. The technical developments identified by Northstar are all customizations required to satisfy business requirements. No changes to core SAP code are to be done by the development team.

- Changes in business requirements within in-scope developments that are identified after the blueprint phase are considered out-of-scope. These changes must flow through the change control process to assess impacts to the
development and other teams. Anything existing interface or other entity which the team missed during Blueprint and Blueprint Confirmation, will be assessed by the project team and escalated if necessary for approval via the Change Request process to be funded by the project contingency.

- Only historical data required for accurate meter reading estimation, validation and billing will be converted. Also, the minimum amount required by the regulatory commission will be converted. (See section 3.1 for details) All other historical data is out of scope.

- Closed and written-off customer account information are out of scope unless a debit/credit balance exists, which is in scope.

- Some data that exists in the legacy systems will not be converted based on age, relevance, etc. An archiving strategy will be required by BC Hydro to handle such data. The archival may be in the form of transferring the data to data files or printing and storing the hard copies of the data. The archiving strategy and archiving is not in scope, however the project will complete a Archiving White Paper.

- Changes as a result of a multi-company or multi-service configuration will require a new sizing exercise to define the hardware requirements and are not in scope.

- Business Continuity – Northstar will ensure complete recovery and restore capability for CCS. Current Customer Services BCP procedures will be updated where impacted by the CCS implementation. However, business continuity tasks for systems and infrastructure not directly related to CCS and its operations are outside the scope of Northstar. The project is, however, committed to supporting a Customer Services led initiative to resolve with broader business BCP requirements as outlined by the CIO office and will include a review of the 14 step CIO process (see Appendix I.)