

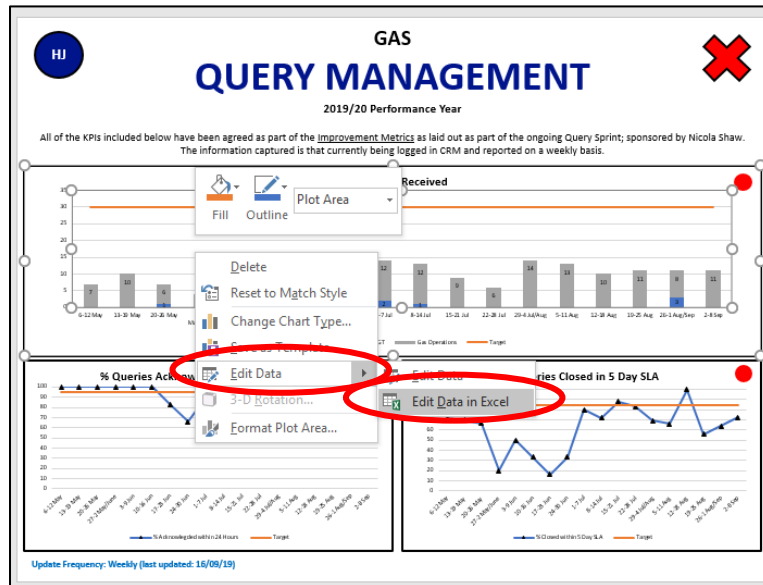
Query Management Process – SOP

Resources required:

- Query Management Data Input Spreadsheet
- NGG C&S Query Management KPI
- Access to CRM
 - [New Report for Updating Query \(all gas\)](#)

Process:

1. Open the **NGG C&S Query Management KPI** document
2. For key performance indicator that you are looking to update, right click and select:
 - **Edit Data > Edit Data in Excel**



This will open the **Query Management Data Input Spreadsheet** document.

3. Using the CRM **New Report for Updating Query** filter the data to show only the latest reporting weeks' data, then click **Apply**.

The reporting week runs from a Monday to a Sunday and is always taken a working week prior to the current day. E.g. If running the report on Monday 23rd September, the reporting week would be:

Monday 9th – Sunday 15th September.

The screenshot shows the SO CRM interface. At the top, there is a search bar with "new query" and a navigation menu with "SO CRM", "Home", "Accounts", "Contacts", "Cases", "Working Groups", "Key Events", and "Reports". The main content area displays a report titled "REPORT: CASES WITH OR WITHOUT ACTIVITIES" and "New Report for updating Query (all gas)". Below the title, there are statistics: "Total Records: 1,099" and "Total BI Value: 2,097.00". A table lists cases with columns for "Closed", "Case Number", "Case Owner", "Case Owner Value Stream", "Case Received", and "Case". A filter panel is open, showing "Filter by Case Received" with a date range from "02/09/2019" to "08/09/2019". The "Case Received" filter is set to "All Time". The "Apply" button is highlighted with a red circle.

- In order to obtain the number of queries that have been raised for that reporting week, add together the number of Case Numbers that appear in the far-left hand column under **Case Number**.

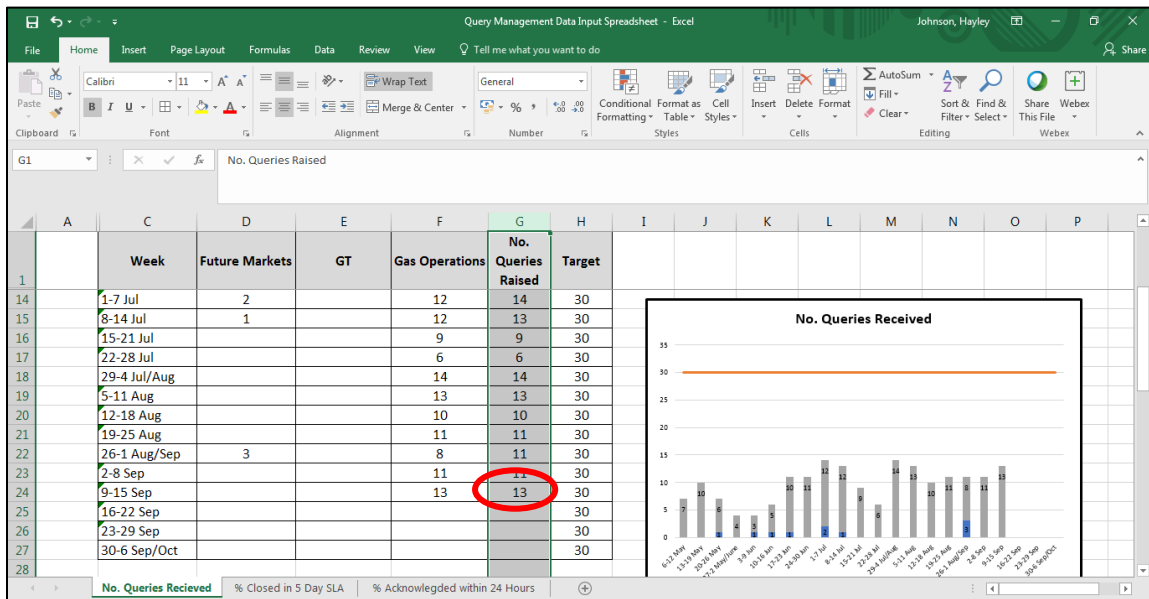
REPORT: CASES WITH OR WITHOUT ACTIVITIES
New Report for updating Query (all gas)
Original New Report for updating Query KPI but includes FM as well

Closed	Case Number	Case Owner: Full Name	Case Owner Value Stream	Case Received	Case Acknowledged	Case Closed	Account N
	00011660 (1)	Martin Cahill	Gas Operations	11/09/2019 12:00	11/09/2019 12:00	12/09/2019 09:20	National Gr
	00011669 (1)	Joanne Clamp	Gas Operations	12/09/2019 12:00	12/09/2019 12:00	12/09/2019 14:36	General Pul
	00011675 (3)	Hayley Johnson	Gas Operations	13/09/2019 10:00	13/09/2019 10:30	16/09/2019 11:06	ICIS

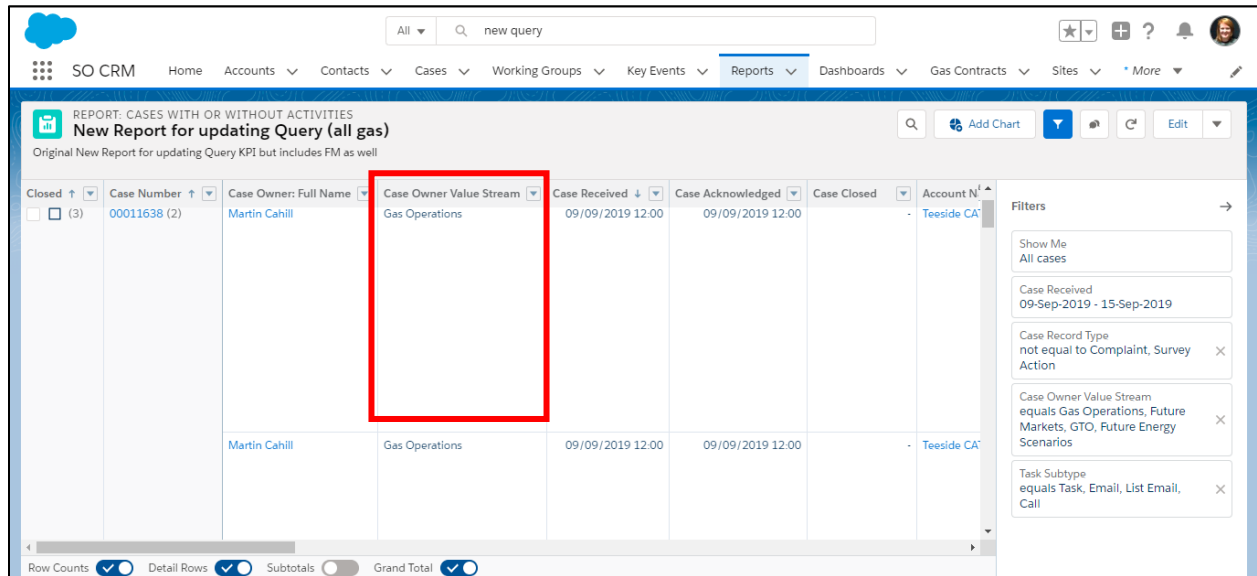
Closed	Case Number
(3)	00011675 (2)

Each case number represents an individual query entered in CRM. **Please Note:** Do not be fooled by the numbers in the brackets. These are not always representative of the numbers of queries, but the numbers of activities logged against those queries.

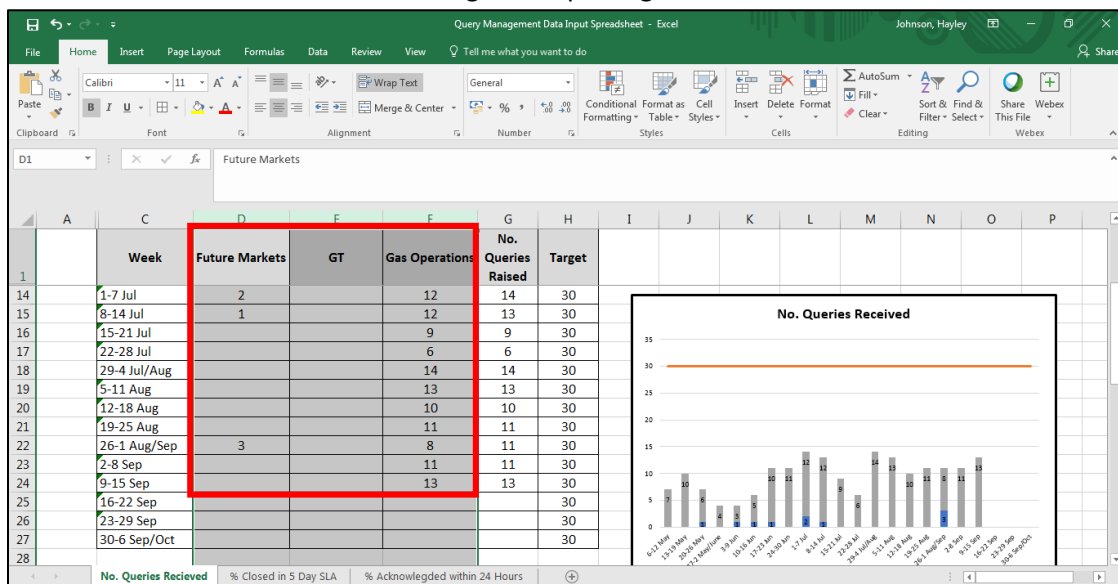
Once the number of queries has been established, this can then be entered into the **Query Management Data Input Spreadsheet**. The total number of queries should be added to the **No. Queries Raised** column, against the appropriate reporting week.



As part of this step, we must also enter the number of queries raised by each of the three business units (Future Markets, GT & Gas Operations). This information can be obtained by using the same CRM report and extracting the information from the **Case Owner – Value Stream** column.



Once this information has been obtained, it can also be used to populate the **Query Management Data Input Spreadsheet** and specifically, the value stream columns for No. Queries Raised. **Please Note:** It is worth at this point sense checking the data. If you have established that 10 queries have been raised during the reporting period and the number of queries across each of the 3 value streams equates to 9, there revisit the information. The sum of this number should match the total number of queries raised during that reporting week.



In turn, this information will automatically populate the stacked bar diagram on the right-hand side.

- The automatically populated diagram can then be copied and pasted into the **NGG C&S Query Management KPI**.

Now that you have updated the **No. Queries Received** diagram, you are now required to update the other parts of the NGG C&S Query Management KPI, including: **% Queries Acknowledged within 24 Hours**.

1. As before in step 2, right click the diagram and select **Edit Data > Edit in Excel**.
2. Before entering any data into the spreadsheet, we must first establish the number of queries that were acknowledged within 24 hours.
To do this, use the **Case Received** and **Case Acknowledged** columns.

Closed	Case Number	Case Owner: Full Name	Case Owner Value Stream	Case Received	Case Acknowledged	Case Closed	Account N
	00011659 (1)	Karen Thompson	Gas Operations	09/09/2019 12:00	09/09/2019 12:00		Interconne
<input checked="" type="checkbox"/>	(23) 00011637 (3)	Hayley Johnson	Gas Operations	09/09/2019 09:30	09/09/2019 12:30	09/09/2019 13:02	Macwell Pr
		Hayley Johnson	Gas Operations	09/09/2019 09:30	09/09/2019 12:30	09/09/2019 13:02	Macwell Pr

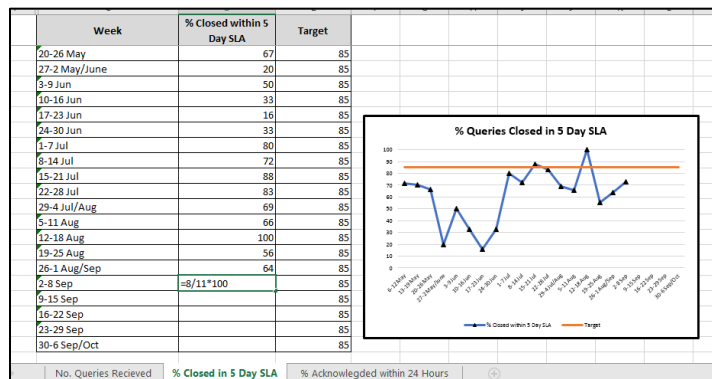
Compare the figures. If the query was received over the weekend, the clock should start at the same time of the first working day. For example, if received on Saturday @ 2.30pm, the clock will start at 2.30pm on Monday.

Total the number of queries that met the 24 hour acknowledgment SLA. The information can then be entered into the **Query Management Data Input Spreadsheet**.

3. Take the information from the latest reporting week and enter the following formula (shown as an example):

$$= 11 / 1 * 100$$

(Number of queries that met 24 Acknowledgement SLA / Total number of queries raised x 100)



This will calculate the % queries that met the 24hour acknowledgment SLA and populate the diagram in accordance.

4. Copy and paste the repopulated line chart, as shown above, onto the ***NGG C&S Query Management KPI***.

To update the % **Queries Closed in 5 Days SLA**, follow steps 1-4 (as above) but using the following information to establish how many queries met the 5 day SLA.

Closed	Case Number	Case Owner: Full Name	Case Owner Value Stream	Case Received	Case Acknowledged	Case Closed	Account N
	00011659 (1)	Karen Thompson	Gas Operations	09/09/2019 12:00	09/09/2019 12:00		Interconne
<input checked="" type="checkbox"/>	00011637 (3)	Hayley Johnson	Gas Operations	09/09/2019 09:30	09/09/2019 12:30	09/09/2019 13:02	Macwell Pr
		Hayley Johnson	Gas Operations	09/09/2019 09:30	09/09/2019 12:30	09/09/2019 13:02	Macwell Pr

If a case number does not have a date entered in the Case Closed column, then this means that the case/query has yet to be closed.

For the 5-day closure SLA, working days should only be counted. For example, if a query was received on a Saturday at 2:30pm, the 5 day SLA would run from the time it was received to 2:30pm on the following Friday.