# iconectiv®

# TruOps® Switching

## iconectiv® UK Limited

## Managed Access Gateway (MAG)

## Registration Guide for New Communications Provider Account

### Release 1.2.1

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## Registration Guide for New Communications Provider Account

Prepared by:

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# Executive Summary

This document provides the guidelines and procedures to be followed by Retail Communications Providers (RCP/CP) for enrolment in iconectiv's TruOps Switching services for communicating with The One Touch Switching Company's (TOTSCo) One Touch Switch (OTS) Hub, as introduced in the [OTS Industry Process].  As a Managed Access Provider (MAP) working with TOTSCo, iconectiv's TruOps Switching provides a Managed Access Gateway (MAG), enabling both gaining and losing CPs to seamlessly exchange (near real-time) messages via the OTS Hub during the OTS process.

Complete details of the OTS process, CP roles and responsibilities, best practice guidelines and technical and testing documents are available in the [TOTSCo Hub User Guide], available on the TOTSCo website.  This document provides the detailed procedures to be followed by the CP that wishes to utilise services provided by TruOps Switching for communicating with the TOTSCo Hub in the OTS process.

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# 1 Introduction

This document describes the process for the enrolment and approval of an RCP/CP in the iconectiv TruOps Switching services for communicating with the TOTSCo Hub.  The TOTSCo Hub is the centralised communication platform used by the Gaining Retail Communications Provider (GRCP) and Losing Retail Communications Provider (LRCP) for exchanging messages in the OTS process.

♦ The TOTSCo Hub is owned and operated by TOTSCo, an industry group under the auspices of the Office of Communications (Ofcom), which set the regulatory guidelines for the development of the OTS process.

♦ OTS is the UK telecoms industry's standard process for switching fixed voice and broadband services for residential customers.  The OTS process was developed by various industry representatives and the OTS Design Drafting Group (OTS-DDG).

The iconectiv TruOps Switching platform provides a choice of MAP services that are fully compliant with the OTS processing rules, allowing the CP to seamlessly communicate with the OTS Hub through the OTS process lifecycle.

## 1.1 MAP Service Options

TruOps Switching offers the MAP service options described below.  The CP will indicate the choice of service during the initial registration process.

1. **Technical MAP**

   • TruOps Switching hosts the solution.

   • The CP signs a user agreement first with TOTSCo, then with iconectiv.

   • The CP pays Hub charges directly to TOTSCo.

   • The CP pays TruOps Switching service charges directly to iconectiv.

2. **Full Management MAP**

   • TruOps Switching handles everything, including TOTSCo Retail Communications Provider ID (RCPID) registration.

   • The CP signs a contract only with iconectiv.

   • TruOps Switching takes care of paying TOTSCo for the use of the Hub.

   • The CP pays all service charges (including for Hub usage) directly to iconectiv.

## 1.2   Automated Switch Match Confirmation Service Options

For LRCPs that are unable to meet the timing requirement for performing subscriber validation and responding to Switch Match Request messages received in the Switch Match Request process flow, TruOps Switching offers participants the optional service of sending the Switch Match Response (confirmation or failure) to the GRCP on behalf of the LRCP, with or without data hosting by the Switching system.  Details of the two service types are described in the sections below.

❖ Note:  The CP can choose to add the Automated Switch Match Confirmation Service option following initial registration.

### 1.2.1   Automated Switch Match Response with Data Hosting Service

The data hosting service enables TruOps Switching to automatically perform the complete switch matching and response functions on behalf of the LRCP.

♦ Using the latest customer data uploaded by the CP and maintained in TruOps Switching, TruOps Switching performs the switch matching validation that follows the recommendations of the [OTS Matching Best Practice Guide].

♦ TruOps Switching sends the appropriate Switch Match Response message (confirmed or failed) to the GRCP (via the OTS Hub) and generates the necessary Switch Order Reference (SOR) number as needed.

♦ TruOps Switching sends the Impacts/Implications of Switching directly to the customer using contact information from the customer data and the Impacts/Implications of Switching text provided by the CP.

### 1.2.2   Automated Switch Match Response without Data Hosting Service

This option is available for LRCPs choosing to only utilise the Switch Match response messaging service.

♦ TruOps Switching forwards the Residential Switch Match Request to the LRCP.

♦ The LRCP performs the customer account search in their system.

♦ The LRCP sends the match result data required for the Switch Match Response message and the Impacts/Implications of Switching to TruOps Switching.

♦ Based on the data received from the LRCP, TruOps Switching creates and sends the appropriate Switch Match Response message (confirmed or failed) to the GRCP and sends the Impacts/Implications of Switching directly to the customer as described in section 1.2.1 above.

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# 2 Contact Information

**iconectiv TruOps Switching Administrator (Customer Support):**

| | |
|---|---|
| 4th Floor Portwall Place | Phone:  020 4552 2681 |
| Portwall Lane | E-mail:  productsupport@iconectiv.com |
| Bristol BS1 6NA | |

# 3  Onboarding Overview

The Onboarding Overview section summarises the end-to-end process of account registration, registration approval and user agreement acceptance, payment authorisation, and readiness testing for utilizing the iconectiv TruOps Switching in communicating with the OTS Hub.  Detailed procedures of the account registration and user agreement processes are provided in Section 5  of this document while the remaining onboarding procedures are available in the TruOps Switching MAG Methods and Procedures for New Communications Provider Accounts.  The latter document will be provided to the new CP Account prior to the start of the Billing Information process.

## 3.1  Communications Provider Registration

The CP must first complete and submit a registration form on the TruOps Switching website to use the TruOps Switching service for communicating with the OTS Hub.

The details for the account registration are in section 5.1  Registering for a TruOps Switching Communications Provider Account.  Section 3.1.1  Information Required for Registration below lists preliminary information needed to begin registering.

Once registration information is received, the CP will receive an email indicating the TruOps Switching Administrator (Switching Admin) has received the application and is currently reviewing it for completeness.  The Switching Admin will contact the CP for additional information required to complete the account registration.

❖ **IMPORTANT NOTE:**  CPs wishing to use the **Technical MAP** service option must separately obtain their **RCPID** by registering with TOTSCo here.  The RCPID will be used to verify the CP has been approved for participation in the TOTSCo OTS ecosystem and has permission to access the OTS Hub.

### 3.1.1  Information Required for Registration

Below is the information needed to gain access to the system.

1. General Company and Contact Information – Must be entered directly on the registration form.  Including the following:

   - Full Trading Name

   - Type of Entity

   - Access Communications Provider (ACP) Name

   - Primary contact individual for the account

   - Contact individual for legal notices

2. Company Registration – The following registration information may be entered directly on the registration form or provided to the Switching Admin.

   - Company Registration Number

   - VAT Registration Number – Only the numeric portion of the number is required.

     – Country of VAT Registration (if not UK)

3. RCPID

- The CP registering for the Technical MAP service must provide the **RCPID** issued to them by TOTSCo.

  - The CP enters the RCPID directly on the registration form or provides it to the Switching Admin.

  - While this field is not mandatory for initial registration, it is required by TruOps Switching for verification with TOTSCo.

- The CP registering for the Full Management MAP service can leave the field blank as TruOps Switching will register with TOTSCo on its behalf.

4. MAP Options

   a. MAP Type – Selection of Technical MAP or Full Management MAP service type is mandatory on the registration form.

   b. Automated Residential Switch Match Confirmation – This option determines whether TruOps Switching will send the Switch Match response on the CP's behalf when the CP is the LRCP.

      - Selecting "Yes" ("opt-in") will require the additional selection of *Source of Customer Data* (see letter d below).

      - ❖ NOTE:  The decision to "opt-in" can be communicated to the Switching Admin at a later time.

   c. MAP Interface Type – A selection of "UI" (User Interface or GUI) or "API" (Application Programming Interface), or both is mandatory.

   d. Source of Customer Data – When the CP selects "Yes" to the *Automated Residential Switch Match Confirmation* option above, the CP must identify the method of providing the customer data to TruOps Switching.

      - File Upload – This is the data hosting option described in 1.2.1  Automated Switch Match Response with Data Hosting Service.

      - API Call – This is the non-data hosting option described in 1.2.2  Automated Switch Match Response without Data Hosting Service.

      - ❖ Note:  Selecting the "UI" *MAP Interface Type* limits the *Source* selection to "File Upload" only, while selecting "API" limits the *Source* selection to "API Call" only.

   e. Number of Residential Customers as of 30 June of the last calendar year – This information helps to determine annual fees and is mandatory on the registration form.

## 3.2  CP Approval and User Agreement Acceptance

The Switching Admin is responsible for ensuring timely review of the CP's registration submission, and for contacting the CP to complete the registration process.

Once the account registration has been approved, the CP is notified via email to create a password in the TruOps Switching web application (a.k.a., the TruOps Switching Graphical User Interface, or "GUI") and accept the User Agreement and Pricing Information for the account.  Details of the procedures are provided in sections 5.2  Accepting the CP Account User Agreement.

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## 3.3   Set Up Payment Authorisation for Direct Debit Payments

Once the CP has accepted the account user agreement in the TruOps Switching GUI, the CP will automatically be directed to enter the account's billing information on the Billing Information page.  This information will be used by the iconectiv Billing Administrator to initiate the setup for direct debit payment.  Details are provided in the TruOps Switching MAG Methods and Procedures for New Communications Provider Accounts.

❖ **Note:**  *The CP account is considered fully registered and will be activated in TruOps Switching once the CP has paid the initial bill.*

## 3.4   Test for Readiness in the TruOps Switching Staging Environment

Following account activation, the CP will need to complete the Readiness Evaluation Test Plan within the TruOps Switching Staging environment prior to accessing the TruOps Switching Production environment.  Details of the procedures the CP Admin will follow to set up its account for usage in preparation for the test are provided in the TruOps Switching MAG Methods and Procedures for New Communications Provider Accounts.

❖ **Note:**  CPs that have selected the Automated Switch Match Confirmation with Data Hosting service will be required to load their customer data into TruOps Switching prior to the start of testing.

The CP must submit results from the completed Readiness Evaluation Test to the Switching Admin for readiness review.  Once deemed ready, the Switching Admin will notify the CP by email.

## 4   Procedures for Company Name Change, Business Termination, or Sale

Once a CP has been added to the TruOps Switching ecosystem the CP must notify TruOps Switching of any company name changes, including those related to sales.  The CP must also notify TruOps Switching if the company terminates business or the CP chooses to no longer be a part of the TruOps Switching ecosystem.

♦ In the case of a company name change, whether it be due to a sale or other legal or marketing reasons, the CP must notify the Switching Admin to have its account updated to reflect the name change.

♦ If a business terminates, the CP must notify TruOps Switching so that the account can be deactivated.

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# 5 Account Registration Procedures

## 5.1 Registering for a TruOps Switching Communications Provider Account

A onetime registration is required for a company to become a TruOps Switching CP user in the OTS ecosystem.

**Registering for a TruOps Switching Account is a 2-part process:**

1. Complete and submit the TruOps Switching Account Registration Form and verify the contact email address.

2. Provide additional information to the Switching Admin to complete the registration.

Once registration is complete and the company account is approved, the registrant will receive an email with instructions for accessing the initial login, establishing a password, and accepting the Account User Agreement. More information is provided in the next section, 5.2 Accepting the CP Account User Agreement.

**Instructions to register on the TruOps Switching website:**

1. Access the Account Registration Page (URL below).

    https://register.ukonetouchswitch.com/register/cp

2. Complete all mandatory (*) fields (Figure 1 below). Section 3.1.1 above describes the information needed to complete the registration form.

   ❖ **NOTES:**

   − An information [ⓘ] icon next to a field name displays useful tips for completing the field. Hover the cursor over an icon to view the tip(s).

   − In the MAP Options section at the bottom of the page, CPs that select "Yes" to the *Automated residential Switch Match Confirmation* option will also need to select a *Source of Customer Data*. The CP should first select a *MAP Interface Type* to enable the *Source of Customer Data* field as the selection of the former field determines the option(s) available for selection in the latter field.

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**REGISTER FOR A TRUOPS SWITCHING ACCOUNT**

Please complete the following form in order to register your company for a TruOps Switching account. Shortly after submission, Customer Support will contact you via email with further information to access the system. Required fields are marked with an asterisk (*) .

Contact Information

| First Name* ⓘ | Last Name* ⓘ | Position / Title* ⓘ | Email* ⓘ |
|---|---|---|---|
| | | | |

Phone Number* ⓘ

Company Information

| Full Trading Name* ⓘ | Type of Entity* | Type of Entity if Other | Company Registration Number |
|---|---|---|---|
| | ⌄ | | |

| VAT Registration Number | Country of VAT Registration  (if not UK) ⓘ | ACP Name* ⓘ | ACP Name if Other |
|---|---|---|---|
| | United Kingdom  ⌄ | | |

RCPID ⓘ

Company Address (Registered Office Address)

| Address Line 1* | Address Line 2 | Post Town / City* | County |
|---|---|---|---|
| | | | |

| Postcode / ZIP Code* | Country* |
|---|---|
| | United Kingdom  ⌄ |

Legal Notice Contact Information

| First Name* ⓘ | Last Name* ⓘ | Position / Title* ⓘ | Email* ⓘ |
|---|---|---|---|
| | | | |

MAP Options

| MAP Type* ⓘ | Automated Residential Switch Match Confirmation? ⓘ | MAP Interface Type* | Source of Customer Data ⓘ |
|---|---|---|---|
| ◯ Technical MAP | ◯ Yes | ⌄ | ⌄ |
| ◯ Full Management MAP | ◯ No | | |

Number of Residential Customers as of 30 June Last Year*

[ Submit ]

**Figure 1**   Account Registration Page

3. Click the **I'm not a robot** checkbox in the Verification field at the bottom of the registration page (and complete any additional prompt(s) that may display), then click the **Submit** button.

   Upon successful form validation, a ***Success*** message will display in a new browser page with information on the next step to completing the registration process.

4. Verify **Contact Email Address**.

   Check the mailbox of the Contact Email indicated in the success message for the email sent for an email from ***donotreply@ukonetouchswitch.com*** containing the email verification link**.**
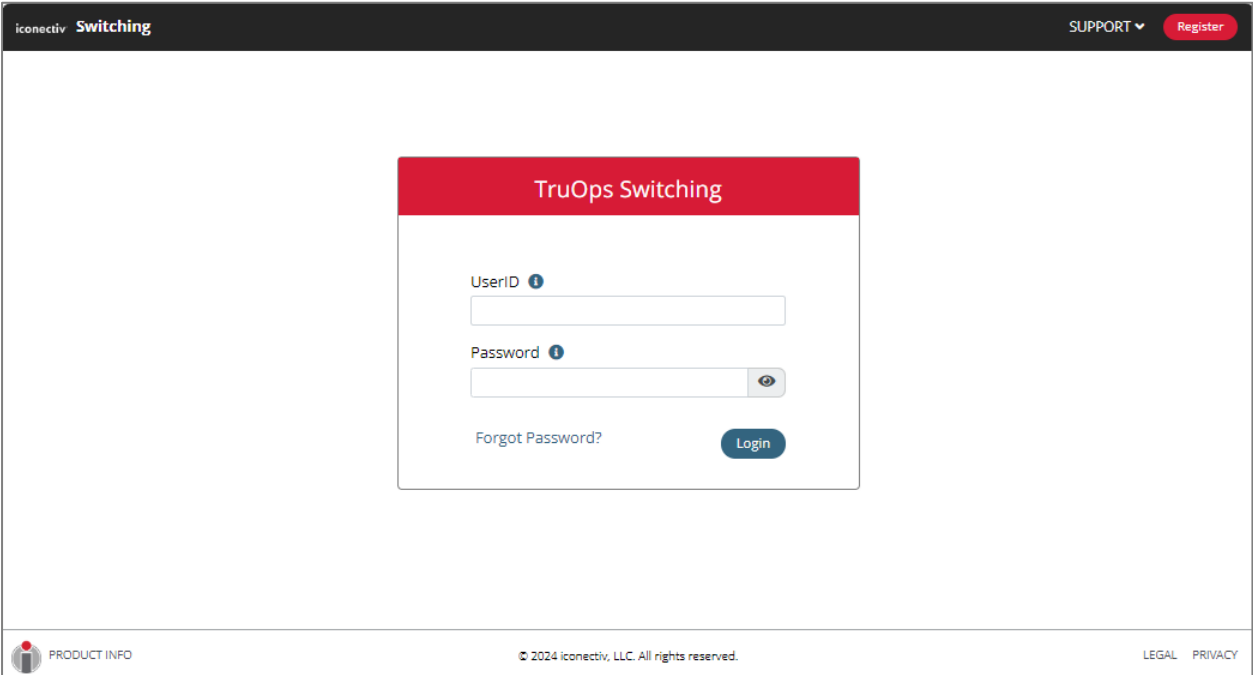
   ❖ **Note:**  It may be necessary to search for the email in the ***Junk*** mailbox.

   • Click on the link in the email prior to its expiry.

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- If the verification is not completed prior to code expiry, contact the Switching Admin as noted in section 2  [Contact Information] of this document to send a new verification email.

5. Complete the Email Verification by clicking the link in the email.

- A **Success** message will display in a new browser page if verification is completed prior to link expiry.

- An email will be sent explaining the review and registration completion process.

## 5.2  Accepting the CP Account User Agreement

Once registration is approved and pricing information provided (via email and phone call from the Switching Admin), the CP will receive an email containing the temporary password and link to the TruOps Switching GUI Login Page.

1. Click the link to access the Login Page in a web browser.



**Figure 2**  TruOps Switching Login Page

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2. Using the same email address as login ID and the temporary password provided in the email, fill in the login fields and click the **Log In** button.

   a. The CP will be prompted to change the password before logging in for the first time.



**Figure 3**  New Password Page

**Password Guidelines:**

- Must be length of at least 8 characters.
- Must include characters from at least 3 of the following categories:
- Lowercase alphabetic
- Uppercase alphabetic
- Numeric
- Unicode
- Special (e.g., " ! # $ % & ' ( ) # + , - / \ : ; < > ? @ [ ] ^ _ ` { | } ~)
- Must not be the same as the contact individual's personal data (name, phone, etc.).

   b. Type the new password and confirm by retyping the same password in the fields provided and click the **OK** button to complete.

      - If the new password conforms to the policy a success pop-up message will display.

3. Following password change, the CP will be required to log into the GUI (using the new password) and accept the **Account User Agreement**.

   a. The user agreement will display in a pop-up once the CP has logged in (Figure 4 below).  Scroll down to complete the review.

   b. When finished reviewing, check both the **MAP fee agreement** box and the **terms and conditions** box to enable the **Yes** button (see *Important Note* below).
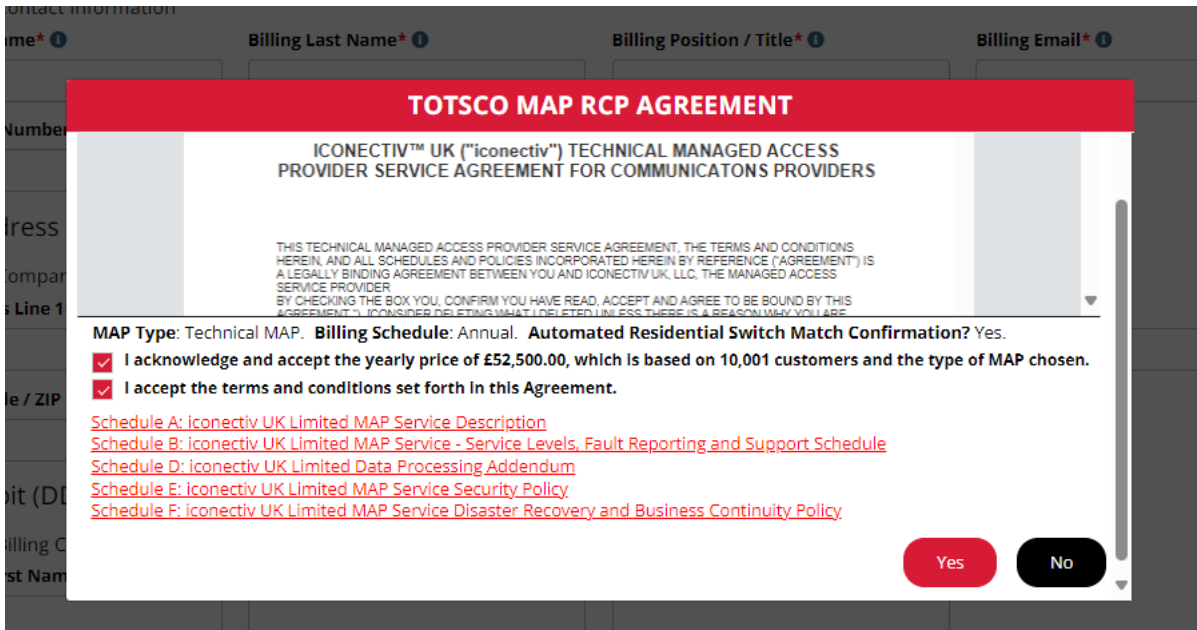
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**Figure 4**   Sample Account User Agreement

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❖  **Important Note:**  A list of links to MAP Service schedules/documents is listed below the fee acknowledgement and terms of use checkboxes.

  •  When *both boxes are checked*, links to the schedules become active, enabling access to the schedule PDFs.

  •  Checking the boxes also enables the **Yes** and **No** buttons.

  •  *Please click the links to review each PDF prior to clicking the* Yes *button.*

  •  Following account user agreement acceptance, these schedules (in addition to usage documentations) will be available from within the TruOps Switching GUI's Support Link located on the page header.

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  c.  Click the **Yes** button to accept the user agreement.

❖  **Notes:**

  –  *A CP will not be able to proceed to the next step until the user agreement review and acceptance is completed.*

  –  If the CP does not complete this step, the CP will be presented with the same user agreement pop-up the next time the CP logs into the GUI.

  –  If the CP clicks the **No** button, the CP will be logged out of the GUI and be presented with the same pop-up the next time the CP logs in.

4.  When the user agreement is accepted, the CP is directed to the Billing Information Page to provide the information required to set up automatic payment for the annual fee.

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# 6 Glossary

| Acronym | Meaning |
| --- | --- |
| ACP | Access Communications Provider |
| GRCP | Gaining Retail Communications Provider |
| LRCP | Losing Retail Communications Provider |
| MAP | Managed Access Provider |
| OTS | One Touch Switching |
| RCPID | Retail Communications Provider ID |
| TOTSCo | The One Touch Switching Company |

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# 7  References

♦ **OTS Industry Process** – Document describes the end-to-end detailed switching process for residential landline and broadband customers to be followed by Retail Communications Providers (RCP/CP) participating in the TOTSCo OTS process ecosystem.  (TOTSCo)

♦ **TOTSCo Hub User Guide** – The user guide helps the OTS participant (both new and existing) to quickly navigate the TOTSCo website and find the relevant resources needed to be a TOTSCo Hub user.  (TOTSCo)

♦ **OTS Matching Best Practice Guide** – Document provides recommendations for personnel automating the matching process in their implemented solutions.  (TOTSCo)

♦ **TruOps Switching MAG Methods and Procedures for New Communications Provider Accounts** – Document provides instructions for billing registration, making direct payment, account setup in the TruOps Switching Web application (GUI), and preparing for readiness testing in TruOps Switching.  This document is made available to the CP Account Administrator at the start of the Billing Information and Payment process (refer to section 3.3).  *The document is sent to the CP by the Switch Admin at the time of account user agreement acceptance*.

♦ **TruOps Switching MAG User Guide for the Communications Provider** - The user guide provides instructions for Retail Communications Providers (RCP/CP) that use the iconectiv TruOps Switching GUI to communicate with other CPs when switching subscriber services.  The guide also provides administrative instructions for the management of CP profile information and GUI users within each CP account.