

**DSC Change Proposal**

**Change Reference Number: XRN4738**

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Xoserve to fill out all of the information in this colour

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| **Section A1: General Details** |
| **Change Title** | Shipper portfolio update of proposed Formula Year AQ/SOQ |
| **Date Raised** | 06/08/2018 |
| **Sponsor Organisation** | npower |
| **Sponsor Name** | James Rigby |
| **Sponsor Contact Details** | James.rigby@npower.com |
| **Xoserve Contact Name** | Simon Harris |
| **Xoserve Contact Details**  | simon.harris@xoserve.com  |
| **Change Status** | Proposal/ **With DSG** / Out for Consultation / Voting / Approved or Rejected |
| **Section A2: Impacted Parties** |
| **Customer Class(es)** | [x]  Shipper[ ]  National Grid Transmission[x]  Distribution Network Operator[x]  IGT |
| **Section A3: Proposer Requirements / Final (redlined) Change** |
| As per the revised approach for XRN3667a Shippers have asked Xoserve to look into solution options to inform them of their proposed Formula Year AQ/SOQ values once they have been calculated (in December). XRN3667a was raised for *proposing* Shippers/Suppliers to have visibility of this via API to facilitate faster / more reliable switching. It has been identified that CoS transactions that take place between the delivery of the March NRL (that carries the new Formula Year AQ / SOQ) and the 1st April might increase the number of enquires via the API solution being proposed in XRN3667a, to the extent of decreased performance. As such, a separate mechanism is required to support the likely increase in bulk requests for FAQ/SOQ during that period. The indication of Formula Year quantities are also sent to distribution networks so proposing any solution include these in scope (unless stated otherwise by the GT/iGT’s) |
| **Proposed Release** | **RX / DD/MM/YYYY** |
| **Proposed Consultation Period**  | [x]  10 Working Days[ ]  20 Working Days[ ]  30 Working daysOther: |
| **Section A4: Benefits and Justification**  |
| **Benefit Description***What, if any, are the tangible benefits of introducing this change?* *What, if any, are the intangible benefits of introducing this change?* | The main benefit of this CP is to give the incoming shipper in CoS transactions occurring directly after the March NRL is produced an indication of the new formula year quantity values to enable more accurate quoting for the forthcoming financial year and the ability to accurately validate transportation costs.  |
| **Benefit Realisation** *When are the benefits of the change likely to be realised?* | First Formula AQ/SOQ calculation post implementation. |
| **Benefit Dependencies** *Please detail any dependencies that would be outside the scope of the change, this could be reliance on another delivery, reliance on some other event that the projects has not got direct control of.* | None identified at this time. |
| **Section A5: Final Delivery Sub Group Recommendations** |
| *Until a final decision is achieved, please refer to section C of the form.* |
| **Final DSG Recommendation** | Approve / Reject / Defer |
| **DSG Recommended Release** | Release X: Feb / Jun / Nov XX or Adhoc DD/MM/YYYY |
| **Section A6: Funding** |
| **Funding Classes**  | [x]  Shipper 100% [ ]  National Grid Transmission 0% [ ]  Distribution Network Operator 0% [ ]  IGT 0%  |
| **Service Line(s)** | Service Area 6 –Annual Quantity, DM Supply Point Capacity and offtake rate reviews. |
| **ROM or funding details**  | N/A |
| **Funding Comments**  |  |
| **Section A7: CHMC Recommendation**  |
| **Change Status** | [x]  Approve – Issue to DSG[ ]  Defer – Issue to Consultation[ ]  Reject |
| **Industry Consultation** | [ ]  10 Working Days[ ]  20 Working Days[ ]  30 Working daysOther: |
| **Expected date of receipt for responses (to Xoserve)** | XX/XX/XXXX |
| **DSC Consultation** |
| **Issued**  | [ ]  Yes[x]  No |
| **Date Issued** |  |
| **Comms Ref(s)** |  |
| **Number of Responses** |  |
| **Section A8: DSC Voting Outcome** |
| **Solution Voting**  | [x]  Shipper Approve [ ]  National Grid Transmission NA [x]  Distribution Network Operator Approve [x]  IGT Approve  |
| **Meeting Date**  | 12/09/2018 |
| **Release Date** | TBC |
| **Overall Outcome**  | Approved to proceed to DSG |

**Section C: DSC Change Proposal: DSG Discussion**

**(To be removed if no DSG Discussion is required; Xoserve to collate where DSG discussions occur)**

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| **Section C1: Delivery Sub-Group (DSG) Recommendations**  |
| **DSG Date** | 03/09/2018 |
| **DSG Summary** |
| Simon Harris (SH) presented slides 15 to 16 to DSG. SH summarised the purpose of the change: to allow the current users to be able to get an early indication of formula AQ/SOQ values before the end of March. SH explained that the requirements for this change were split away from XRN3667a.LW asked if this will be implemented in 2018. SH said it would be implemented next year, but mentioned that it could be included within a minor release. Capture is still in progress for this change so details of implementation are yet to be determined. |
| **Capture Document / Requirements** | INSERT |
| **DSG Recommendation** | Approve / Reject / Defer N/A was for information only |
| **DSG Recommended Release** | Release X: Feb / Jun / Nov XX or Adhoc DD/MM/YYYY |

**Section C: DSC Change Proposal: DSG Discussion**

**(To be removed if no DSG Discussion is required; Xoserve to collate where DSG discussions occur)**

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| **Section C2: Delivery Sub-Group (DSG) Recommendations**  |
| **DSG Date** | 17/09/2018 |
| **DSG Summary** |
| Simon Harris (SH) presented this section to DSG. SH said that this change is related to 3667a. SH explained that this Change is looking to introduce a new way of providing current Shippers with proposed Formula Year quantities prior to April. DSG did not put forward any additional requirements for this change; therefore, this Change will proceed for Capture.**Action 0853:- DSG to think of any solution options for XRN4738: Shipper Portfolio Update of Proposed Formula Year AQ/SOQ** |
| **Capture Document / Requirements** | N/A |
| **DSG Recommendation** | Approve / Reject / Defer N/A was for information only |
| **DSG Recommended Release** | TBC |

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| **Section C3: Delivery Sub-Group (DSG) Recommendations**  |
| **DSG Date** | 05/11/2018 |
| **DSG Summary** |
| SH mentioned that this change is linked to XRN3667a. Under 3667a, there was a risk that aShipper could use the API service to obtain FAQ/SOQ information on their entire portfolio; thiswould bear too much demand on the API service. Therefore, XRN4738 was raised toimplement a separate mechanism is to support the likely increase in bulk requests forFAQ/SOQ during that period, however this does not align to the requirements set out in theCP and discussions were had on the best approach to move forward. JB stated that a reportwould be sufficient, as an API solution would require changes to Shipper systems. SH to move this change through Capture and involve the requester to the propose solution options at a future DSG. |
| **Capture Document / Requirements** | N/A |
| **DSG Recommendation** | N/A |
| **DSG Recommended Release** | TBC |

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| **Section C4: Delivery Sub-Group (DSG) Recommendations**  |
| **DSG Date** | 18/02/2019 |
| **DSG Summary** |
| SH gave an overview of the change raised. API just gone live and this change looks at the Shipper transactions that are present post the issuing of the notification files in late March. SH went through the proposed solution on slide 49 and proposed API Data Items to be implemented on slide 50. SH needs to understand if DSG members require any additional/redundant data items. LW said may need daily report which is additional item that has not been picked up. Ikram Bashir (IB) wanted to understand how they could access the API, SH advised that you can look on Xoserve.com >> Services >> Gas API services; and fill out form accordingly.**Action: 19 – 0210 XRN4738 Review the slides presented at DSG (18th Feb) and provide input into proposed solution, include additional/redundant data items.** |
| **Capture Document / Requirements** | INSERT |
| **DSG Recommendation** | Approve / Reject / Defer N/A was for information only |
| **DSG Recommended Release** | Release X: Feb / Jun / Nov XX or Adhoc DD/MM/YYYY |

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| **Section C4: Delivery Sub-Group (DSG) Recommendations**  |
| **DSG Date** | 04/03/2019 |
| **DSG Summary** |
| SH requested to formalise the agreement of using solution option 3 and no other details needed adding. Regarding data items, we will add incoming/outgoing Shippers and consider any data on the API that may not be needed. SH confirmed with DSG members to take it forward as it is to get costing, bring back to DSG then and put into a solution Change Pack. |
| **Capture Document / Requirements** | INSERT |
| **DSG Recommendation** | Approve / Reject / Defer N/A was for information only |
| **DSG Recommended Release** | Release X: Feb / Jun / Nov XX or Adhoc DD/MM/YYYY |

**Please send the completed forms to:** **mailto:box.xoserve.portfoliooffice@xoserve.com**

**Document Version History**

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| **Version** | **Status** | **Date** | **Author(s)** | **Summary of Changes** |
| 1.0 | Draft | 07.08.2018 | Simon Harris | Draft CP form completed |
| 2.0 | Approved | 08.08.2018 | Simon Harris | Additional comments and wording changes from sponsor (James Rigby), version to be sent to PMO |
| 3.0 | Approved | 07/09/18 | Simon Harris | DSG comments added |
| 4.0 | Approved | 14/09/18 | Simon Harris | ChMC result added to sections A7 and A8 |
| 5.0 | Approved | 20/09/18 | Simon Harris | DSG notes added from meeting on 17/09 |
| 6.0 | Approved | 16/11/18 | Simon Harris | DSG notes added from meeting on 5/11 |
| 7.0 | Approved | 26/02/19 | Charan Singh | DSG notes added from meeting on 18/02/19 |
| 8.0 | Approved | 04/03/19 | Charan Singh | DSG notes added from meeting on 04/03/19 |

**Template Version History**

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| **Version** | **Status** | **Date** | **Author(s)** | **Summary of Changes** |
| 3.0 | Approved | 17/04/2018 | Emma Smith | Template approved at ChMC on 11th July |

**Appendix 1**

**Change Prioritisation Variables**

Xoserve uses the following variables set for each and every change within the Xoserve Change Register, to derive the indicative benefit prioritisation score, which will be used in conjunction with the perceived delivery effort to aid conversations at the DSC ChMC and DSC Delivery Sub Groups to prioritise changes into all future minor and major releases.

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| **Change Driver Type**  | [ ]  CMA Order [ ]  MOD / Ofgem [ ]  EU Legislation [ ]  License Condition [ ]  BEIS [x]  ChMC endorsed Change Proposal [ ]  SPAA Change Proposal [ ]  Additional or 3rd Party Service Request [ ]  Other*(please provide details below)*  |
| **Please select the customer group(s) who would be impacted if the change is not delivered** | [x] Shipper Impact [ ] iGT Impact [ ] Network Impact [ ] Xoserve Impact [ ] National Grid Transmission Impact  |
| **Associated Change reference Number(s)** | **XRN3667a** |
| **Associated MOD Number(s)** |  |
| **Perceived delivery effort** | [ ]  0 – 30 [x]  30 – 60 [ ]  60 – 100 [ ]  100+ days  |
| **Does the project involve the processing of personal data?** *‘Any information relating to an identifiable person who can be directly or indirectly identified in particular by reference to an identifier’ – includes MPRNS.* | [ ]  Yes *(If yes please answer the next question)* [x]  No  |
| **A Data Protection Impact Assessment (DPIA) will be required if the delivery of the change involves the processing of personal data in any of the following scenarios:**  | [ ]  New technology [ ]  Vulnerable customer data [ ]  Theft of Gas[ ]  Mass data [ ]  Xoserve employee data[ ]  Fundamental changes to Xoserve business[ ]  Other*(please provide details below)* *(If any of the above boxes have been selected then please contact The Data Protection Officer (Sally Hall) to complete the DPIA.*  |
| **Change Beneficiary** *How many market participant or segments stand to benefit from the introduction of the change?*  | [x]  Multiple Market Participants [ ]  Multiple Market Group [ ]  All industry UK Gas Market participants [ ]  Xoserve Only [ ]  One Market Group [ ]  One Market Participant  |
| **Primary Impacted DSC Service Area**  | Service Area 24: Additional Service Request or Third Party Request |
| **Number of Service Areas Impacted**  | [ ]  All [ ]  Five to Twenty [ ]  Two to Five [x]  One  |
| **Change Improvement Scale?** *How much work would be reduced for the customer if the change is implemented?* | [ ]  High [x]  Medium [ ]  Low  |
| **Are any of the following at risk if the change is not delivered?**  |
| [ ]  Safety of Supply at risk [ ] Customer(s) incurring financial loss [ ]  Customer Switching at risk |
| **Are any of the following required if the change is delivered?**  |
| [ ]  Customer System Changes Required [ ]  Customer Testing Likely Required [ ]  Customer Training Required  |
| **Known Impact to Systems / Processes** |
| **Primary Application impacted** | [ ] BW [ ]  ISU [ ]  CMS [ ]  AMT [ ]  EFT [ ]  IX [ ]  Gemini [ ]  Birst [x]  Other *(please provide details below)*SAP HANA (API Solution) |
| **Business Process Impact**  | [ ] AQ [ ] SPA [ ] RGMA[ ] Reads [ ] Portal [ ] Invoicing [x] Other *(please provide details below)* None affected   |
| **Are there any known impacts to external services and/or systems as a result of delivery of this change?** | [x]  Yes *(please provide details below)*API recipients will have to configure their system to request an API and receive the response to be processed accordingly. ***However this is supported as part of the On-boarding process.*** [ ]  No |
| **Please select customer group(s) who would be impacted if the change is not delivered.**  | [x]  Shipper impact [ ]  Network impact [ ]  iGT impact [ ]  Xoserve impact [ ]  National Grid Transmission Impact |
| **Workaround currently in operation?** |
| **Is there a Workaround in operation?**  | [ ]  Yes [x]  No |
| **If yes who is accountable for the workaround?**  | [ ] Xoserve[ ]  External Customer [ ]  Both Xoserve and External Customer |
| **What is the Frequency of the workaround?**  |   |
| **What is the lifespan for the workaround?**  |  |
| **What is the number of resource effort hours required to service workaround?**  |   |
| **What is the Complexity of the workaround?**  | [ ]  Low *(easy, repetitive, quick task, very little risk of human error)* [ ]  Medium *(moderate difficult, requires some form of offline calculation, possible risk of human error in determining outcome)* [ ]  High *(complicate task, time consuming, requires specialist resources, high risk of human error in determining outcome)*  |
| **Change Prioritisation Score** |  |

**Document Control**

**Version History**

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| --- | --- | --- | --- | --- |
| **Version** | **Status** | **Date** | **Author(s)** | **Summary of Changes** |
| 1  | Draft  | 27/04/18  | Anesu Chivenga  |  |