

**DSC Change Proposal**

**Change Reference Number: XRN3667a**

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| **Change Title** | **Provision of Formula Year AQ/SOQ to Proposing Users** |
| **Date Raised** | 4th April 2018 |
| **Sponsor Organisation** | npower |
| **Sponsor Name** | James Rigby |
| **Sponsor Contact Details** | James.Rigby@npower.com |
| **CDSP Contact Name** | Emma Lyndon |
| **CDSP Contact Details** | Emma.j.lyndon@xoserve.com |
| **Change Status** | ~~Proposal / With DSG / Out for Consultation / Voting / Approved or Rejected~~ **Implemented** |
| **Section 1: Impacted Parties** | |
| **Customer Class(es)** | **x Shipper**  ☐ National Grid Transmission  ☐ Distribution Network Operator  ☐ iGT |
| **Section 2: Proposed Change Solution / Final (redlined) Change** | |
| To make the prospective Formula Year AQ/SOQ information available to a Proposing User. At present the value is set based on the Rolling AQ/SOQ value as at 1st December each year and becomes effective on the 1st April each year. At present, unless you are the Registered User on 1st December or during December you will not know what the prospective formula year values will be. The information is required to quote customers. | |
| **Proposed Release** | **Information required to be available by December 2018** |
| **Proposed IA Period** | **15WD** |
| **Section 3: Benefits and Justification** | |
| The information is required to quote customers post April each year during December to March each year. Only the current live values are available on DES or via Supply Point Enquiry/Registration flows.  Correct validation of settlement charges. | |
| **Section 4: Delivery Sub-Group (DSG) Recommendations** | |
| **19th March 2018 DSG meeting:**  Solution options discussed at DSG:   1. Make the information available on DES 2. A new Web Service/API solution 3. Provide a Report   Additional option raised by DSG members   1. A new file record   The favoured option is option 2. API solution, this is being investigated further by Xoserve and will be taken back to next DSG meeting | |
| **DSG Recommendation** | **Approve** / Reject / Defer |
| **DSG Recommended Release** | Adhoc Nov 2018  If an API solution could be considered for a release outside of a major release as ideally required for December 2018 – consideration to a workaround for December 2018 to April 2019 if required to delivered in a major release |
| **Section 5: DSC Consultation** | |
| **Issued** | Yes / No |
| **Date(s) Issued** |  |
| **Comms Ref(s)** |  |
| **Number of Responses** |  |
| **Section 6: Funding** | |
| **Funding Classes** | **x Shipper**  XX% = £XXXX.XX  ☐ National Grid Transmission XX% = £XXXX.XX  ☐ Distribution Network Operator XX% = £XXXX.XX  ☐ iGT XX% = £XXXX.XX  TOTAL = £XXXX.XX |
| **Service Line(s)** |  |
| **ROM or funding details** |  |
| **Funding Comments** |  |
| **Section 7: DSC Voting Outcome** | |
| **Solution Voting** | Shipper Approve  National Grid Transmission NA  Distribution Network Operator NA  iGT NA |
| **Meeting Date** | 12/12/2018 |
| **Release Date** | February 2019 Minor Release |
| **Overall Outcome** | At ChMC, it was approved for the implementation date for this change to move from late December 2018 to Minor Release Drop 3. |

**Please send the completed forms to:** [**.box.xoserve.portfoliooffice@xoserve.com**](mailto:.box.xoserve.portfoliooffice@xoserve.com)

**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** | 06/08/2018 |
| [Click here](https://www.xoserve.com/index.php/dsc-delivery-sub-group/) to find the presentation pack  Simon Harris (SH) presented slides 67 to 71.  SH took away actions from the previous DSG meeting (16th July 2018).  Assumptions documented for this change haven’t significantly changed; however there is one new assumption: Solution is to be used by perspective users to identify proposed FY AQ/SOQ values to facilitate a more reliable switch.  SH raised two discussion points to run through for 3667a. Discussion point 1 suggests an amendment of scope previously agreed for AQ/SOQ history. The current API architecture does not support historical data, as it currently stands data items only consist of current snapshot at point of request. There is work ongoing to include historical data but this would put any deployment for Dec/Jan unachievable.  The proposal is to split the change into two phases:  • Phase 1: Delivery of API to show current/proposed Formula Year AQ/SOQ  • Phase 2: Enhancement or new API to include AQ/SOQ history data  BC (Centrica) asked when the phases would be delivered. SH said phase 1 is being aimed at a Dec-18/Jan-19 delivery. A caller on the phone asked if this implementation would be included in a release. SH stated that API has its own release cycle, which is independent of Xoserve’s traditional release cycles; therefore, delivery is more flexible.  Discussion point 2 is a proposal to mitigate the risk surrounding the number of proposed API requests from current shippers. SH reiterated that API services are built for high numbers of individual/small requests for data; it is not built for frequent/infrequent number of large/portfolio requests.  SH is proposing a new CP is raised to look at issuing notification of calculated Financial Year AQ/SOQ to current system users once calculation is complete  • Aim is to ensure the API service is not used in facilitating delivery of portfolio reporting and mitigate risk on the service  • Proposal will also reduce API usage banding costs for users    At the DSG meeting on 2nd July, several questions were raised regarding API which SH answered at the DSG meeting on 6th August.  • API limitations: One on One data requests only  • API service availability is 24/7 365 days however, Xoserve may from time to time require scheduled or unscheduled downtime when the API will be unavailable. Target availability within operational hours is 99.5%  • API support 08:30 – 17:30 Mon-Fri (excluding public and bank holidays)  BC (Centrica) asked SH a question about the operational hours. SH confirmed that API support is available from 08:30 to 17:30; the service is available 24/7.  Signed off costs will be provided for the next DSG; SH intends to submit this change to ChMC in September. | |
| **Capture Document / Requirements** | INSERT |
| **DSG Recommendation** | Approve / Reject / Defer |
| **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** | 20/08/2018 |
| [Click here](https://www.xoserve.com/index.php/dsc-delivery-sub-group/) to find the presentation pack.  SH presented slides 42 to 46. SH stated that the discussion around this change evolves at each DSG occurrence. At the previous DSG, it was agreed to deliver an API solution for the FY AQ/SOQ values and include AQ/SOQ history function within the API service at a later date. In addition, it was agreed to raise a new Change Proposal (4378) to look at issuing notification of financial year AQ/SOQ to current system users; this new change is currently going through governance.  The API solution for FY AQ/SOQ will be fed into the Joint MIS Development Group’s (JMDG) September meeting via a new use case.  SH stated that the ongoing assumptions, on slide 45, haven’t changed since the previous DSG meeting and are displayed for member’s information.  The main points of discussion, for this DSG occurrence is surrounding API support availability and funding arrangements for the API service. SH confirmed that the support period, for the API service, is from 08:30 to 17:30. Any identified issues would be addressed during this period; support would be unavailable outside of this period.  Regarding funding arrangements, the build, test and implementation of the API service will be funded by the Business Improvements budget. The API services is a chargeable, but not for profit service. The annual allowance for the quantity of API calls ranges from 60,000 to 18,000,000; a table on slide 46 indicates the annual allowance per band, and the respective cost for each band.  BC raised a question regarding API service availability. She asked how the availability can be classed as 99.5% if support is only available from 08:30 to 17:30. SH stated that the 99.5% refers to server availability.  Action 0820:- Simon Harris to speak to the Xoserve Data Office to understand more about API availability.  LW asked when the service is expected to be delivered. SH said it is expected to be implemented in early to late December 2018. SH explained that it wouldn’t be included in a minor or a major release due to API environment being outside of UKL systems.  Action 0821: - Simon Harris to present implementation timelines, for 3667a (Provision of Prospective Formula Year AQ/SOW to Proposing User). | |
| **Capture Document / Requirements** | N/A |
| **DSG Recommendation** | N/A |
| **DSG Recommended Release** | N/A |

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| **Section C3: Delivery Sub-Group (DSG) Recommendations** | |
| **DSG Date** | 05/11/2018 |
| SH presented a timeline (on slide 55) to outline the delivery stages for this change. In short, build is in progress; build started on 29th October 2018 and is expected to be completed on 16th November 2018. Testing is expected to last from 16th November 2018 to 7th December 2018 with a contingency period from 7th December 2018 to 10th December 2018. Implementation is from 10th December 2018 to 14th December 2018.  SH stated a communication plan will be sent out to understand pre-requisites and develop technical specifications. Xoserve is currently working Back Office Associates on the Build phase.  LW wanted to understand how this change would fit in with AQs. SH responded by stating this will be used after the FYAQ has been calculated. EL wanted 3667a to be added to the Change Index. | |
| **Capture Document / Requirements** | N/A |
| **DSG Recommendation** | N/A |
| **DSG Recommended Release** | N/A |

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| **Section C4: Delivery Sub-Group (DSG) Recommendations** | |
| **DSG Date** | 19/11/2018 |
| SH presented slide 53 to DSG. An action was raised in the previous DSG meeting to present the data items to be associated with the API service for this change. The data items can be found on slide 53. SH provided an overview of each data item.  SH explained that the Change is currently progressing through the Build stage. Technical specifications will be presented at future DSG meetings once the Build and Testing stages have been completed. | |
| **Capture Document / Requirements** | N/A |
| **DSG Recommendation** | N/A |
| **DSG Recommended Release** | N/A |

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| **Section G: DSC Change Proposal: Change Pack** | | | | | | |
| **Communication Detail** | | | | | | |
| **Comm Reference** | | 2140.6 – RJ – ES | | | | |
| **Comm Title** | | Provision of Prospective Formula Year AQ/SOQ and Historic RAQ to Proposing Users - Design Approval (DA) | | | | |
| **Comm Date** | | 09/11/2018 | | | | |
| **Change Representation** | | | | | | |
| **Action Required** | | For Representation | | | | |
| **Close Out Date** | | 23/11/2018 | | | | |
| **Change Detail** | | | | | | |
| **Xoserve Reference Number** | XRN3667a – Provision of FY Annual Quantity (AQ) to Shippers | | | | | |
| **Change Class** | Functional | | | | | |
| **ChMC Constituency Impacted** | Xoserve consider Shipper Users to be the only constituency impacted by this change. However, we ask the other constituencies to consider the potential impacts to their respective organisations. | | | | | |
| **Change Owner** | Charlie Haley – Data Platform Specialist  [Charlie.Haley@xoserve.com](mailto:Charlie.Haley@xoserve.com)  0121 623 2620 | | | | | |
| **Background and Context** | Xoserve calculates in SAP ISU the Formula Year AQ/SOQ values in December to become effective on 1st April the following year (as UNC states that the AQ effective on 1st December is to become the FY AQ/SOQ effective 1st April ). Shippers only get visibility of the FY values in late March (and only if they are the current Shipper at the point of files being issued out). The Formula Year Quantity values are used to calculate the billing rates that will be applied in the coming financial year and also used by the Shipper/Suppliers to quote customers. As the values are not notified to the industry until late March, existing and proposing users (in the case of a possible switching event) are unable to effectively quote end consumers for the coming financial year causing quote errors and possible failures of switches. | | | | | |
| **Change Impact Assessment Dashboard (UK Link)** | | | | | | |
| **Functional** | *None* | | | | | |
| **Non Functional** | *None* | | | | | |
| **Application** | *API* | | | | | |
| **User** | Shipper / Supplier | | | | | |
| **Documentation** | None | | | | | |
| **Other** | None | | | | | |
| **Files** | | | | | | |
| **File** | **Parent Record** | | | **Record** | **Data Attribute** | **Hierarchy or Format**  **Agreed** |
| *<File Id> <File Name>*  *e.g. CNF Confirmation Request* | *<Parent Record Id> <Parent Record Name>*  *e.g. S42 Confirmation Request* | | | *<Record Id> < Record Name>*  *e.g. S66 Contact Details* | *<Data Attribute Name>*  *e.g. CONTACT\_TITLE* | *<H> or*  *<F> or*  *<All>* |
| **Change Design Description** | | | | | | |
| This change aims to give early indication of Formula Year Quantity values to assist Shippers and Suppliers in providing more accurate quoting to reduce the amount of erroneous switching events, aiming to make the process more reliable for the end consumer.  Following the implementation of XRN3667a, Customers will be able to view the proposed Formula Year (Billing) AQ and SOQ value prior to the notification sent to the current Shipper in late March.  Input Parameters  The following input parameters need to match in order to provide a successful API response. If one or both of the below do not match then a rejection code/response will be displayed.   |  | | --- | | **Data Item** | | Meter Point Reference Number | | Post Code |   Output Parameters  Below table outlines the data items to be provided within the API response (order and formatting may change, technical documents to be provided as part of the onboarding process).   |  | | --- | | **Data Item** | | Meter Point Reference Number | | Post Code | | Local Distribution Zone | | Exit Zone | | Distribution Network Operator | | CSEP ID | | AMR Indicator | | Market Sector Code | | Current AQ Roll Value | | Current SOQ Roll Value | | Current Formula Year AQ Value | | Current Formula Year SOQ Value | | Perspective Formula Year AQ Value | | Perspective Formula Year SOQ Value | | Perspective Formula Year Effective Date |   Once implemented (scheduled for late December), Shippers will be able to take up the service by contacting the Xoserve commercial team (\*\*@\*\*\*\*\*) who will be able to support with the on boarding process. | | | | | | |
| **Associated Changes** | | | | | | |
| **Associated Change(s) and Title(s)** | | | *N/A* | | | |
| **DSG** | | | | | | |
| **Target DSG discussion date** | | | *N/A* | | | |
| **Any further information** | | | *N/A* | | | |
| **Implementation** | | | | | | |
| **Target Release** | | | End of December | | | |
| **Status** | | | i.e. baselining a solution, no release identified or baselined solution release proposed or individual change outside of release  (Change Management Committee to ratify) | | | |

**Section H: DSC Change Proposal: Representation response**

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| **Change Representation (to be completed by User and returned for response)** | |
| **User Name** | *Npower* |
| **User Contact** | [*Gas.Codes@npower.com*](mailto:Gas.Codes@npower.com) |
| **Representation Status** | *Approve* |
| **Representation Publication** | *Publish* |
| **Representation** |  |
| **Target Release Date** | Approve for end of December 18. |
| **Xoserve response** | Thank you for your comments. |

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| **Change Representation (to be completed by User and returned for response)** | |
| **User Name** | *SSE* |
| **User Contact** | [*mark.jones@sse.com*](mailto:mark.jones@sse.com) |
| **Representation Status** | *Approve* |
| **Representation Publication** | *Publish* |
| **Representation** | The likelihood of shippers interacting with an API from Xoserve needs to be explored further. The option to receive an earlier report may be more feasible for the April Formula Year changes. |
| **Target Release Date** | No response |
| **Xoserve response** | Thank you for your comments. |

**Document Control**

**Details**

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| --- | --- | --- | --- | --- |
| **Title** | **Version** | **Owner** | **Review Frequency** | **Next Review Date** |
| XRN Template |  | Emma Smith |  |  |

**Version History**

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| --- | --- | --- | --- |
| **Version** | **Date** | **Author(s)** | **Summary of Changes** |
| 1 | 29/03/18 |  |  |
| 2.0 | 10/08/18 | Xoserve | Change Proposal updated with DSG comments from 6th August meeting. |
| 3.0 | 24/08/18 | Xoserve | Change Proposal updated with DSG comments from 20th August meeting. |
| 4.0 | 16/11/18 | Xoserve | Change Proposal updated with DSG comments from 5th November meeting |
| 5.0 | 23/11/18 | Xoserve | Notes from DSG meeting |
| 6.0 | 30/11/18 | Xoserve | Change Pack and associated reps added (November’s Change Pack) |
| 7.0 | 15/02/19 | Xoserve | Change Implemented |