Contents

UKL FR - Release Management Principles

- Xoserve's proposed approach is to deliver multiple major releases of functionality a year, alongside a stream of minor enhancement work. The first major releases are anticipated to be R2 and R3, with target delivery dates in Q2 and Q4 2018 respectively (subject to ratification)

- **Release 1.1** is a minor release that is constructed of a small number of 'defects' and a new change that have near-term delivery needs. It is intentionally made up of changes that are low impact to Market Participants

- R1.1 will serve as an opportunity to:

    - Trial governance and development processes with a view to refining for R2 and beyond

    - Prove our ability to deliver change with the new architecture, with planned and managed impact on the industry

    - Build in further learnings into the following releases and inform the longer-term release strategy

- **Release 2** will be of a larger scale and focussed on changes to improve service provision (eg removal of manual processes) that have low consequential change to Market Participants' system and interfaces

- **Release 3** would include delivery of deeper industry changes based on market driven change demand

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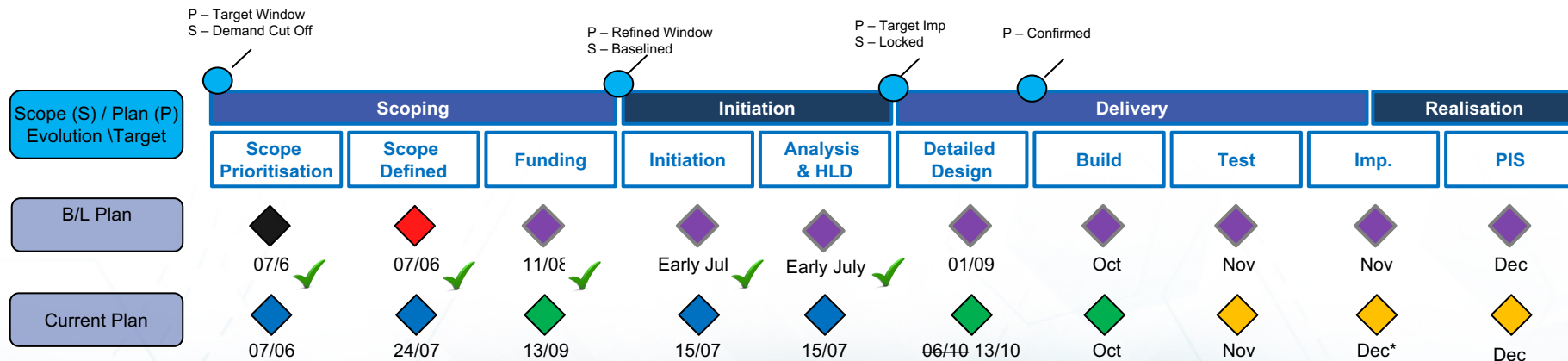# UK Link Future Releases - Lifecycle Logical View

- The diagram below provides an overview of the sequential phases of a standard UK Link Future Release Lifecycle
- This lifecycle is constructed with key points throughout it that enable greater control of scope and delivery plan which ultimately lead to the objective of **increased certainty for Market Participants and Xoserve**
- The evolution and refinement of both release scope and delivery plan is overlaid against the release lifecycle to illustrate the phases which are dependencies for locking both scope and plan

Plan Certainty

Target Window		Refined Window		Target Imp Date	Confirmed Imp Date

Scoping			Initiation		Delivery				Realisation
Scope Prioritisation	Scope Defined	Funding	Initiation	Analysis & HLD	Design	Build	Test	Imp.	PIS

Scope Certainty

Demand Cut Off	Baselined Scope	Locked Scope

Exceptions Process

Future Releases

New Change

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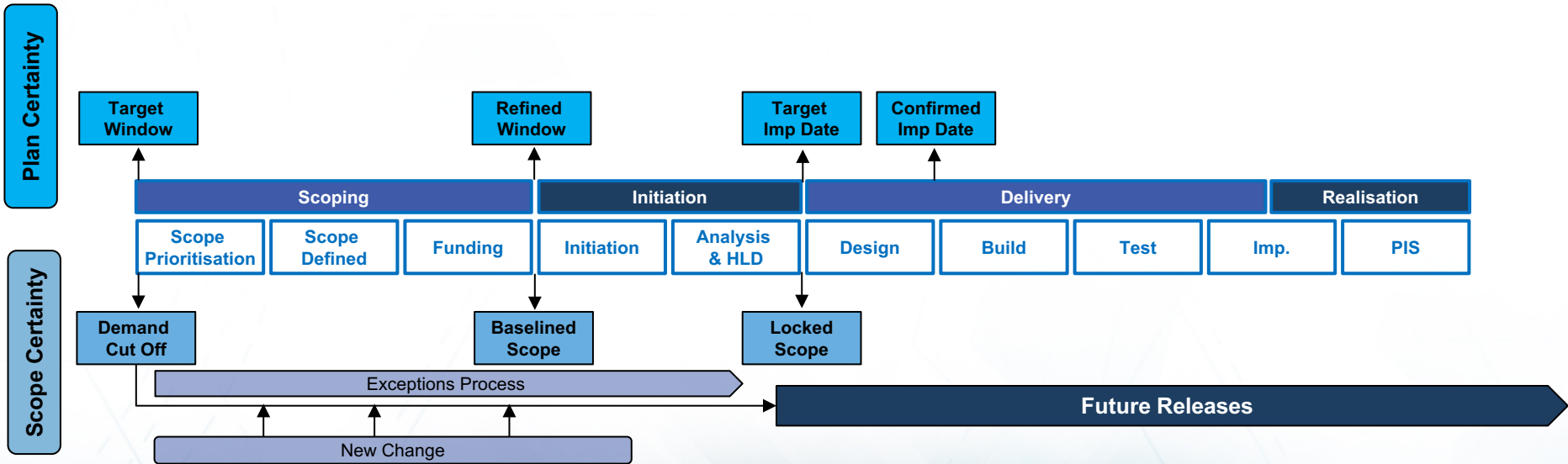
Release 1.1 Status - Summary

- Overall RAG Status is **AMBER** driven by the following factors:

  - SPAA governance dependency (CP370B) may revise scope / funding requirements. Ofgem decision due 13/10
  - Detailed Design in progress and tracking to plan. A change has been raised for CR249 following clarification on how the treatment of special need codes are validated, 1 week additional effort for DD to be completed but no impacts to plan or funding
  - SDG have been engaged on the technical design options for CR249 and Change Packs submitted for Customer Reps
  - Implementation date to be confirmed at Detailed Design exit currently forecast for 13/10, agreement required by ChMC via Change Pack
  - DRG have been engaged on delivery plan and to define customer testing requirements
  - Testing strategy recommendation plan is to present to DRG on 09/10

P – Target Window
S – Demand Cut Off

P – Refined Window
S – Baselined

P – Target Imp
S – Locked

P – Confirmed

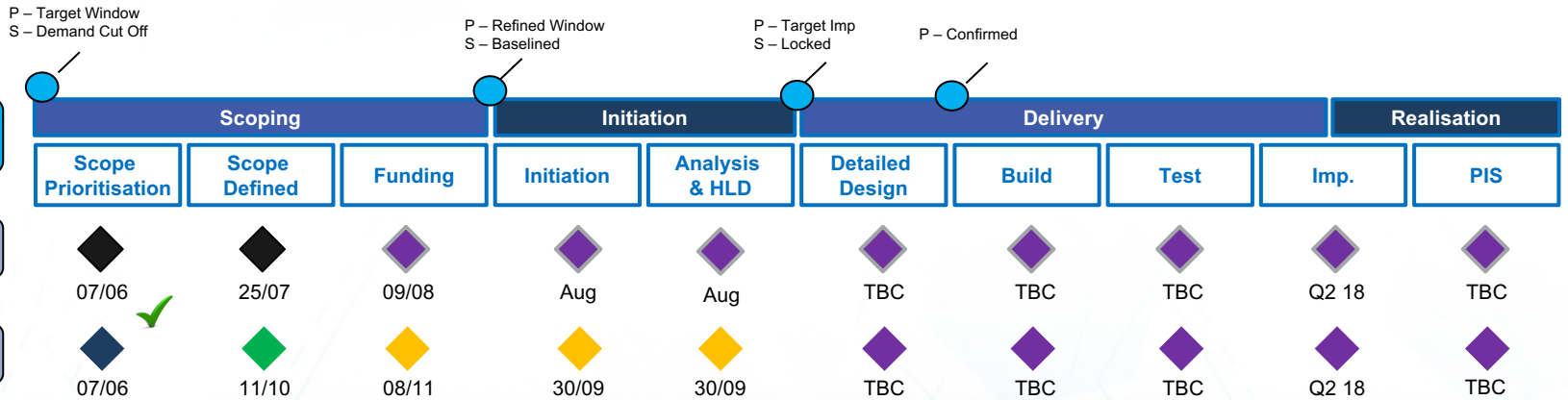| Scope (S) / Plan (P) Evolution \Target	Scoping			Initiation		Delivery				Realisation
	Scope Prioritisation	Scope Defined	Funding	Initiation	Analysis & HLD	Detailed Design	Build	Test	Imp.	PIS
B/L Plan	07/6 ✓	07/06 ✓	11/08 ✓	Early Jul ✓	Early July ✓	01/09	Oct	Nov	Nov	Dec
Current Plan	07/06	24/07	13/09	15/07	15/07	06/10 13/10	Oct	Nov	Dec*	Dec

RAG Key – Milestones are end dates

- Red – Milestone date forecast to be missed
- Amber – Milestone date forecast to be at risk
- Green – Milestone date forecast to be met
- Blue – Milestone completed
- Purple – Milestone date to be confirmed

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Release 2 Status - Summary

- Overall RAG Status is **AMBER** driven by the following factors:

  - Plan to agree the proposed R2 Scope at the14/09 ChMC was not fully agreed, the scope of 20 CRs was approved. ChMC asked if a further 4 CRs could be added to this scope
  - Webex completed on 28/10 to provide impact assessment for additional 4 CRs requested to be considered in R2 scope, 1 of the 20 CRs due to requirements not being agreed was proposed to be removed. Vote to add additional 3 CRs into R2 scope required at11/10 ChMC
  - Funding agreement dependent on baselining scope, target is to agree at the 11/10 ChMC
  - Detailed delivery plan definition will follow scope baselining. Requirement for Project Delivery Group to be in place for start of R2 project
  - The high level testing strategy to be agreed by all Stakeholders once scope is agreed
  - Programme Management for R2 may need to flex dependent on the agreed future Industry Governance arrangements and agreed by all Stakeholders

P – Target Window
S – Demand Cut Off

P – Refined Window
S – Baselined

P – Target Imp
S – Locked

P – Confirmed

Scope (S) / Plan (P) Evolution \Target	Scoping			Initiation		Delivery				Realisation
	Scope Prioritisation	Scope Defined	Funding	Initiation	Analysis & HLD	Detailed Design	Build	Test	Imp.	PIS
B/L Plan	07/06 ✔	25/07	09/08	Aug	Aug	TBC	TBC	TBC	Q2 18	TBC
Current Plan	07/06	11/10	08/11	30/09	30/09	TBC	TBC	TBC	Q2 18	TBC

RAG Key – Milestones are end dates

- Red – Milestone date forecast to be missed
- Amber – Milestone date forecast to be at risk
- Green – Milestone date forecast to be met
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