

Xoserve DSC Change Proposal



Change Reference Number: **XRN4833**

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Xoserve to fill out all of the information in this colour ■

Section A1: General Details	
Change Title	Roll Out of Business Intelligence and Data Discovery Capability
Date Raised	4 th January 2019
Sponsor Organisation	Xoserve
Sponsor Name	Steve Concannon
Sponsor Contact Details	Steve.concannon@xoserve.com
Xoserve Contact Name	Emma Smith
Xoserve Contact Details	Emma.smith@xoserve.com
Change Status	Proposal / With DSG / Out for Consultation / Voting / Approved or Rejected / Implemented
Section A2: Impacted Parties	
Customer Class(es)	<input checked="" type="checkbox"/> Shipper <input checked="" type="checkbox"/> National Grid Transmission <input checked="" type="checkbox"/> Distribution Network Operator <input checked="" type="checkbox"/> IGT
Section A3: Proposer Requirements / Final (redlined) Change	
<p>Since the go-live of UK Link the CDSP have been using a cloud based data discovery and Business Intelligence (BI) technology to monitor and analyse internal data. It is proposed that this capability is now rolled out to their customers to complement and enhance current Business Intelligence (BI) / analytical insight provisions.</p> <p>The opportunity to leverage this CDSP capability provides customers a new and more visual way to receive and interpret the data services we are able to provide. The data can be visualised in the form of charts, graphs and dashboards to easily identify key metrics, trends and outliers and then to drill down into the points of interest to focus on the key information. All data and visualisations will be secure, ensuring that users can only see information that they / they organisation has the right to see. Access to the data can be provision through an interactive dashboard (with options to download relevant data securely) or simply emailed to users if preferred (PDF).</p> <p>By offering this externalised flexible and scalable BI/MI solution our complete customer base would gain a much broader ability to obtain not only the market data they are looking for but to also be made aware of other information that may be of significance to them as an organisation. Making this data more readily available to the customers would accelerate their ability to react to changes in the market and increase their own agility to report on data that the CDSP hold on their behalf through self-service configuration upon the secure dashboards made available to them.</p>	
Proposed Release	RX / DD/MM/YYYY
Proposed Consultation Period	<input checked="" type="checkbox"/> 10 Working Days <input type="checkbox"/> 20 Working Days <input type="checkbox"/> 30 Working days Other:
Section A4: Benefits and Justification	
Benefit Description <i>What, if any, are the tangible benefits of introducing this change?</i>	<ul style="list-style-type: none"> Data discovery would enable customers to answer their own questions without the need for support from the CDSP

<p><i>What, if any, are the intangible benefits of introducing this change?</i></p>	<ul style="list-style-type: none"> • A BI portal that is synchronised daily would be much more up to date than existing solutions allowing customers to react quicker to changes in the market. • Visualisations help customers identify the data that needs attention, quicker to assist in making the important decisions • Data can be downloaded how the customer wants, when they want. • Email alerts can be set up by the customer themselves if required • By broadening the breadth of BI from the limited change requests customers will be further empowered with key metrics and trends 										
<p>Benefit Realisation <i>When are the benefits of the change likely to be realised?</i></p>	<p>Immediately after the roll out of the first requirement being delivered in Birst</p>										
<p>Benefit Dependencies <i>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.</i></p>	<p>The roll-out of Birst itself will deliver no value until it is actually being used to address a BI requirement. I.e. what will be in the first set of dashboards?</p>										
<p>Section A5: Final Delivery Sub Group Recommendations</p>											
<p><i>Until a final decision is achieved, please refer to section C of the form.</i></p>											
<p>Final DSG Recommendation</p>	<p>Approve / Reject / Defer</p>										
<p>DSG Recommended Release</p>	<p>Release X: Feb / Jun / Nov XX or Adhoc DD/MM/YYYY</p>										
<p>Section A6: Funding</p>											
<p>Funding Classes</p>	<table border="0"> <tr> <td><input type="checkbox"/> Shipper</td> <td>XX%</td> </tr> <tr> <td><input type="checkbox"/> National Grid Transmission</td> <td>XX%</td> </tr> <tr> <td><input type="checkbox"/> Distribution Network Operator</td> <td>XX%</td> </tr> <tr> <td><input type="checkbox"/> IGT</td> <td>XX%</td> </tr> <tr> <td><input checked="" type="checkbox"/> Other</td> <td>100%</td> </tr> </table>	<input type="checkbox"/> Shipper	XX%	<input type="checkbox"/> National Grid Transmission	XX%	<input type="checkbox"/> Distribution Network Operator	XX%	<input type="checkbox"/> IGT	XX%	<input checked="" type="checkbox"/> Other	100%
<input type="checkbox"/> Shipper	XX%										
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<input type="checkbox"/> Distribution Network Operator	XX%										
<input type="checkbox"/> IGT	XX%										
<input checked="" type="checkbox"/> Other	100%										
<p>Service Line(s)</p>	<p></p>										
<p>ROM or funding details</p>	<p></p>										
<p>Funding Comments</p>	<p>Xoserve business plan 18 approved funding (no further funding required)</p>										
<p>Section A7: CHMC Recommendation</p>											
<p>Change Status</p>	<p> <input checked="" type="checkbox"/> Approve – Issue to DSG <input type="checkbox"/> Defer – Issue to Consultation <input type="checkbox"/> Reject All Customer Classes within ChMC approved this change to proceed to DSG, and for the Data Office, the Xoserve team responsible for the delivery of the change, to set up webinar and education sessions for the benefit of customers. </p>										
<p>Industry Consultation</p>	<p> <input type="checkbox"/> 10 Working Days <input type="checkbox"/> 20 Working Days <input type="checkbox"/> 30 Working days Other: </p>										
<p>Expected date of receipt for responses (to Xoserve)</p>	<p>XX/XX/XXXX</p>										
<p>DSC Consultation</p>											
<p>Issued</p>	<p><input type="checkbox"/> Yes</p>										

	<input type="checkbox"/> No
Date Issued	
Comms Ref(s)	
Number of Responses	
Section A8: DSC Voting Outcome	
Solution Voting	<input type="checkbox"/> Shipper Approve / Reject / NA / Abstain <input type="checkbox"/> National Grid Transmission Approve / Reject / NA / Abstain <input type="checkbox"/> Distribution Network Operator Approve / Reject / NA / Abstain <input type="checkbox"/> IGT Approve / Reject / NA / Abstain
Meeting Date	XX/XX/XXXX
Release Date	Release X: Feb / Jun / Nov XX or Adhoc DD/MM/YYYY or NA
Overall Outcome	Approved for Release X / Rejected

Section C: DSG Discussion

DSG Date:	21/01/2019
DSG Summary:	<p>Emma Smith went through the ratification score of the Change Proposal. This change is to provide customers a new and more visual way to receive and interpret the data services we are able to provide. ES stated that this change should not impact the information received just the way you receive it.</p> <p>James Barlow asked if the Prioritisation score will need to be updated for Personal Data.</p> <p>Action: Emma Smith to look into the Prioritisation Score for XRN4833 to include Personal Data.</p> <p>Jonathan Heard (JH) stated that presently CDSP sent data out through various formats and that the vast majority of them are Excel files. They can have limitations, be slow and confusing with repeated data and timings of reports. Since the go-live of UK Link, the CDSP have been using a cloud based data discovery and Business Intelligence (BI) technology. It is proposed that this capability is now rolled out to customers to complement and enhance current Business Intelligence (BI). This will mean customers can extract and dice reports how they want. JH went through the slides 46-49. The information is Cloud based and can be viewed on phones and iPad as well as desk tops. It has broader business intelligence in a single source that has dashboards, alerts, trends and KPI's.</p> <p>Niall McPherson asked if this displays just published data. JH advised that will start with War Bands information and will evolve and get more powerful as the project continues. NP wanted to understand what data will be shown. LW will take this away and look into further. JH wants to work with customers collaterally to help with dashboards, how it looks and what reports need to be added</p> <p>Swetta Coopamah said it looks fantastic and would like to know a release date. ES explained that hoping to go to February Change Committee and proceed with logins, to get this available for War band report in April. ES also confirmed that we will publish reports in the usual way alongside this</p>

	<p>tool for a long time. SC would like a list of reports available. LW advised that there is a wider view on a change (XRN4789 - Updating Shipper Reporting Packs and glossary) to understand what is needed which will take time due to the scale of the change.</p> <p>There were concerns about security from Members as to the proposed single sign on Login for each company due to leavers and access permissions. JH stated there is one login for each company to start with and will look at expanding this to individual logins. JH went through the demonstration of the tool and advised that there will be training once it is rolled out.</p> <p>To answer EL's question on reports LW stated that we will set up a Capture session to gather requirements on what reports are needed, how they need to be broken down with access and what training requirements will be needed.</p> <p>Action - LW to gain more information as to what data will be shown. This may evolve into Capture.</p> <p>Action – JH to look at how feasible it is to have Individual login at the start. Also to look on how Individual logins can be allocated different access permissions.</p>		
Capture Document / Requirements:	<Insert where appropriate>		
DSG Recommendation:	<input type="checkbox"/> Approve	<input type="checkbox"/> Reject	<input type="checkbox"/> Defer
DSG Recommended Release:	Release X: Feb / Jun / Nov XX or Adhoc DD/MM/YYYY		

DSG Date:	18/02/2019		
DSG Summary:	<p>Jason McLeod gave a verbal update to understand where we are. Currently in the process of scoping out the activity to go out externally looking at:</p> <ul style="list-style-type: none"> • Security and additional licences. • Service model to support further request or incidents raised on the Platform. • Customer engagement for Training on how to use the tool. <p>A new service line to be included. Roll out timescales for the end of March. First capability will be WAR bands on a small scale and then plan to grow capability.</p> <p>Elly Laurence (EL) wanted more information on how user access with multiple access points will work. JM confirmed that this has been addressed and that each company will have 1 licence which can have multiple users with different access levels. EL asked if there would be any customer engagement to acquire users names and access. JM stated that currently going through planning as to what will be next steps in the plan.</p> <p>Action 19 – 0211 Confirm the licence arrangement in regards to the shipper short codes and how the access per individual works.</p>		

Capture Document / Requirements:	N/A
DSG Recommendation:	N/A
DSG Recommended Release:	N/A

DSG Date:	01/04/2019		
DSG Summary:	<p>Kully Sian (KS) gave an update on this change and the current status. WAR band reports will be used to roll out the Tool which will come with training material to support the roll out. There is a huge piece on Security controls and licencing access. Alongside this there is ongoing work on the Joiners, Movers and Leavers process and what is the capability to manage escalations, and people leaving organisations, to control security. KS stated that the change is currently in testing of the capability, user acceptance and performance. We have completed internal pilot with 2 Shippers navigating round the tool and how it works from logging in and how it drills down. Engagement from Customer Advocates should have been completed for roles and users to align the security model. KS has received a number of responses back from Shippers and still waiting for some. Looking to Roll the Tool out by the end of April/beginning of May.</p> <p>EL wanted to know what future releases on planned. KS advised Jason McLeod is looking at what can be rolled out and can bring more information on this at the next update.</p>		
Capture Document / Requirements:	<Insert where appropriate>		
DSG Recommendation:	<input type="checkbox"/> Approve	<input type="checkbox"/> Reject	<input type="checkbox"/> Defer
DSG Recommended Release:	Release X: Feb / Jun / Nov XX or Adhoc DD/MM/YYYY		

DSG Date:	15/04/2019		
DSG Summary:	<p>Jason McLeod (JM) updated DSG on the licence structure. From a license perspective, each organisation will have a single license which can have multiple associated users. Each user will have an individual username and password, this supports information security standards and will prevent the need to share usernames and passwords. To support User Access Management, recertification reports will be shared with the primary contact to validate all access is still required. Reports will contain details of those users that have not logged on for 30 days, 60 days and 90 days. Anyone not logging in for 90 days will automatically have access disabled by Xoserve.</p> <p>JM outlined that the current plan is to rollout the capability from 07/05, subject to all internal governance being completed and approved. Further communications will be sent out to customer's w/c 22/04 to provide guidance around the rollout and also links to training material.</p> <p>The rollout of the Data Discovery capability will be initially limited to WAR bands reporting. We have intentionally limited the rollout to allow us to safeguard the platform by assessing usage and ensure it can handle the</p>		

	<p>increased demand we are placing upon it. It will also allow Xoserve to identify and resolve any issues that may not have been picked up through test cycles. There will be further communications outlining plans for increasing the capability in the coming weeks.</p> <p>In regards to the questions asked JM has responded below Q: Is the LSO the same as the primary contact? Will this be different from the DES LSO? A: For the Data Discovery Platform (DDP) there will be a Primary contact rather than an LSO. This could be the same person as the DES LSO but does not need to be. The responsibility of the Primary Contact is to approve new and amendment access and notify Xoserve when any users leave their organisation.</p> <p>Q: Will there be a Deputy Primary Contact that can provide approvals in the Primary Contacts absence? A: Due to the limited initial rollout for 3 users across each organisation we have only requested a Primary Contact. As we increase the capability and user base, we will be sending out communications to identify deputies.</p>		
Capture Document / Requirements:	<Insert where appropriate>		
DSG Recommendation:	<input type="checkbox"/> Approve	<input type="checkbox"/> Reject	<input type="checkbox"/> Defer
DSG Recommended Release:	Release X: Feb / Jun / Nov XX or Adhoc DD/MM/YYYY		

Section D: High Level Solution Options

D1: Solution Options

Solution Option Summary:	<p>Only 1 solution option is to be considered for this change due to this being an Xoserve initiative to expose data to industry participants via a new more intuitive mechanism.</p> <p>Due to the nature of this change, no formal Change Management Committee (ChMC) approval is required for this XRN, funding is outlined in Business Plan 2018/19 and no solution option approval into delivery is needed. Information regarding this change has been displayed and discussed at multiple DSG's and Shipper participants engaged to set up access to Birst ready for implementation.</p>
Implementation Date for this Solution Option:	7 th May 2019
Xoserve preferred option: (including rationale)	N/A
DSG preferred solution option: (including rationale)	N/A
Consultation closeout:	N/A

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.

Change Driver Type	<input type="checkbox"/> CMA Order <input type="checkbox"/> MOD / Ofgem <input type="checkbox"/> EU Legislation <input type="checkbox"/> License Condition <input type="checkbox"/> BEIS <input checked="" type="checkbox"/> ChMC endorsed Change Proposal <input type="checkbox"/> SPAA Change Proposal <input type="checkbox"/> Additional or 3 rd Party Service Request <input type="checkbox"/> Other <i>(please provide details below)</i>
Please select the customer group(s) who would be impacted if the change is not delivered	<input checked="" type="checkbox"/> Shipper Impact <input checked="" type="checkbox"/> IGT Impact <input checked="" type="checkbox"/> Network Impact <input type="checkbox"/> Xoserve Impact <input type="checkbox"/> National Grid Transmission Impact <input checked="" type="checkbox"/> NTS Impact
Associated Change reference Number(s)	N/A
Associated MOD Number(s)	N/A
Perceived delivery effort	<input type="checkbox"/> 0 – 30 <input checked="" type="checkbox"/> 30 – 60 <input type="checkbox"/> 60 – 100 <input type="checkbox"/> 100+ days
Does the project involve the processing of personal data? <i>'Any information relating to an identifiable person who can be directly or indirectly identified in particular by reference to an identifier' – includes MPRNS.</i>	<input checked="" type="checkbox"/> Yes <i>(If yes please answer the next question)</i> <input type="checkbox"/> 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:	<input checked="" type="checkbox"/> New technology <input type="checkbox"/> Vulnerable customer data <input type="checkbox"/> Theft of Gas <input checked="" type="checkbox"/> Mass data <input type="checkbox"/> Xoserve employee data <input type="checkbox"/> Fundamental changes to Xoserve business <input type="checkbox"/> Other <i>(please provide details below)</i> <i>(If any of the above boxes have been selected then please contact The Data Protection Officer (Sally Hall) to complete the DPIA.</i>
Change Beneficiary <i>How many market participant or segments stand to benefit from the introduction of the change?</i>	<input type="checkbox"/> Multiple Market Participants <input checked="" type="checkbox"/> Multiple Market Group <input type="checkbox"/> All industry UK Gas Market participants <input type="checkbox"/> Xoserve Only <input type="checkbox"/> One Market Group <input type="checkbox"/> One Market Participant
Primary Impacted DSC Service Area	N/A
Number of Service Areas Impacted	<input type="checkbox"/> All <input type="checkbox"/> Five to Twenty <input type="checkbox"/> Two to Five <input type="checkbox"/> One <input checked="" type="checkbox"/> None (Xoserve Internal Initiative)
Change Improvement Scale? <i>How much work would be reduced for the customer if the change is implemented?</i>	<input type="checkbox"/> High <input type="checkbox"/> Medium <input checked="" type="checkbox"/> Low
Are any of the following at risk if the change is not delivered?	
<input type="checkbox"/> Safety of Supply at risk <input type="checkbox"/> Customer(s) incurring financial loss <input type="checkbox"/> Customer Switching at risk	
Are any of the following required if the change is delivered?	
<input type="checkbox"/> Customer System Changes Required <input type="checkbox"/> Customer Testing Likely Required <input checked="" type="checkbox"/> Customer Training Required	
Known Impact to Systems / Processes	

Primary Application impacted	<input type="checkbox"/> BW <input type="checkbox"/> ISU <input type="checkbox"/> CMS <input type="checkbox"/> AMT <input type="checkbox"/> EFT <input type="checkbox"/> IX <input type="checkbox"/> Gemini <input checked="" type="checkbox"/> Birst <input type="checkbox"/> Other <i>(please provide details below)</i>
Business Process Impact	<input type="checkbox"/> AQ <input type="checkbox"/> SPA <input type="checkbox"/> RGMA <input type="checkbox"/> Reads <input type="checkbox"/> Portal <input type="checkbox"/> Invoicing <input checked="" type="checkbox"/> Other <i>(please provide details below)</i> Reporting
Are there any known impacts to external services and/or systems as a result of delivery of this change?	<input type="checkbox"/> Yes <i>(please provide details below)</i> <input checked="" type="checkbox"/> No
Workaround currently in operation?	
Is there a Workaround in operation?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If yes who is accountable for the workaround?	<input type="checkbox"/> Xoserve <input type="checkbox"/> External Customer <input type="checkbox"/> 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?	<input type="checkbox"/> Low <i>(easy, repetitive, quick task, very little risk of human error)</i> <input type="checkbox"/> Medium <i>(moderate difficult, requires some form of offline calculation, possible risk of human error in determining outcome)</i> <input type="checkbox"/> High <i>(complicate task, time consuming, requires specialist resources, high risk of human error in determining outcome)</i>
Change Prioritisation Score	26%

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

Document Version History

Version	Status	Date	Author(s)	Summary of Changes
1	Proposal	04/01/19	Xoserve	CP Raised
2	Proposal	09/01/19	Xoserve	Appendix Added
3	With DSG	11/01/19	Xoserve	ChMC provided their approval for this change to proceed on 9 th January
4	With DSG	30/01/19	Xoserve	Ratification of Prioritisation score and an update on the change
5	With DSG	26/02/19	Xoserve	CP updated with DSG discussions from 18 th February 2019
6	With DSG	08/04/19	Xoserve	CP updated with DSG discussions from 1 st April 2019
7	With DSG	03/05/2019	Xoserve	CP updated with DSG discussions from 15 th April 2019

Template Version History

Version	Status	Date	Author(s)	Summary of Changes
3.0	Approved	17/07/18	Emma Smith	Template approved at ChMC on 11 th July
4.0	Approved	07/09/18	Emma Smith	Minor wording amendments and additional customer group impact within Appendix 1.
5.0	Approved	10/12/18	Heather Spensley	Now published on the new Xoserve branding template.