



**RECOMMENDATION TO NAESB WGQ EXECUTIVE COMMITTEE**

**Requester: TransCapacity Request No.: R96009**

**1. RECOMMENDED ACTION:**

- Accept as requested
- Accept as modified below
- Decline

**EFFECT OF EC VOTE TO ACCEPT RECOMMENDED ACTION:**

- Change to Existing Practice
- Status Quo

**2. TYPE OF MAINTENANCE**

**Per Request:**

- Initiation
- Modification
- Interpretation
- Withdrawal
  
- Principle (x.1.z)
- Definition (x.2.z)
- Business Practice Standard (x.3.z)
- Document (x.4.z)
- Data Element (x.4.z)
- Code Value (x.4.z)
- X12 Implementation Guide
- Business Process Documentation

**Per Recommendation:**

- Initiation
- Modification
- Interpretation
- Withdrawal
  
- Principle (x.1.z)
- Definition (x.2.z)
- Business Practice Standard (x.3.z)
- Document (x.4.z)
- Data Element (x.4.z)
- Code Value (x.4.z)
- X12 Implementation Guide
- Business Process Documentation

**3. RECOMMENDATION**

**SUMMARY:** (modifications dependent on R97058B)

- Delete NAESB WGQ Standards 2.3.36, 2.3.37, 2.3.38, and 2.3.39.
- Add proposed NAESB WGQ Standards 2.3.z1, 2.3.z2 and 2.3.z3.
- Modify definition for the data element "Information Requested Begin Date" in Request for Information (NAESB WGQ Standard 2.4.7).
- Modify definition and condition for the data element "Information Requested End Date" in Request for Information (NAESB WGQ Standard 2.4.7).
- Modify conditions for the following data elements in Request for Information (NAESB WGQ Standard 2.4.7):
  - Service Requester Data
  - Service Requester Contract
- Add the following code values for "Data Sets Requested" in the Code Values Dictionary for Request for Information (NAESB WGQ Standard 2.4.7):
  - Scheduled Quantities for a specified service requester's contract
  - Scheduled Quantities for all service requester's contracts
- Modify the Technical Implementation of Business Process for Request for Information (NAESB WGQ Standard 2.4.7)



## RECOMMENDATION TO NAESB WGQ EXECUTIVE COMMITTEE

Requester: TransCapacity Request No.: R96009

### STANDARDS LANGUAGE:

Delete the following NAESB WGQ Standards:

~~2.3.36~~ Transportation Service Providers (TSPs) which:

- ~~a) provide parties with the ability to request statement(s) of allocation via electronic bulletin board or web page; and,~~
- ~~b) provide parties with the ability to view such requested statements of allocation via electronic bulletin board or web page; and,~~
- ~~c) do not provide such parties with the ability to request a GISB Standard No. 2.4.3 Allocation via at least a fax, phone, or e-mail;~~

~~should support the ability of such party (or their agent) to request GISB Standard No. 2.4.3 Allocations via the Request for Information and to receive the Transportation Service Provider's response via a GISB Standard No. 2.4.3 document. Where the conditions in a) and b) above exist and the TSP does provide such parties with the ability to request a GISB Standard No. 2.4.3 Allocation via at least a fax, phone, or e-mail, then the Transportation Service Provider is not required to support Request for Information.~~

~~The period of time (how far back in time a request may specify) should be comparable as between the electronic request/view method and the upload request/receive response method, provided, however, the TSP would not be required to respond with information generated prior to its implementation of GISB Standard No. 2.4.3.~~

~~2.3.37~~ Transportation Service Providers which support the ability of a party (or its agent) to:

- ~~a) request GISB Standard No. 2.4.3 document(s) pursuant to GISB Standard No. 2.3.36 and~~
- ~~b) receive the GISB Standard No. 2.4.3 document in response to such request;~~

~~should provide the documents requested at the party's designated site by 9:00 a.m. CCT on a business day when the request is received prior to 3:00 p.m. CCT on the prior business day.~~

~~2.3.38~~ Transportation Service Providers (TSPs) which:

- ~~a) provide parties with the ability to request imbalance information via electronic bulletin board or web page; and,~~
- ~~b) provide parties with the ability to view such requested imbalance information via electronic bulletin board or web page; and,~~
- ~~c) do not provide such parties with the ability to request a GISB Standard No. 2.4.4 Shipper Imbalance via at least a fax, phone, or e-mail;~~

~~should support the ability of such party (or their agent) to request GISB Standard No. 2.4.4 Shipper Imbalances via the Request for Information and to receive the Transportation Service Provider's response via a GISB Standard No. 2.4.4 document. Where the conditions in a) and b) above exist and the TSP does provide such parties with the ability to request a GISB Standard No. 2.4.4 Shipper Imbalance via at least a fax, phone, or e-mail, then the Transportation Service Provider is not required to support Request for Information.~~



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~~The period of time (how far back in time a request may specify) should be comparable as between the electronic request/view method and the upload request/receive response method, provided, however, the TSP would not be required to respond with information generated prior to its implementation of GISB Standard No. 2.4.4.~~

~~2.3.39 Transportation Service Providers which support the ability of a party (or its agent) to:~~

- ~~a) request GISB Standard No. 2.4.4 document(s) pursuant to GISB Standard No. 2.3.38 and~~
- ~~b) receive the GISB Standard No. 2.4.4 document in response to such request;~~

~~should provide the documents requested at the party's designated site by 9:00 a.m. CCT on a business day when the request is received prior to 3:00 p.m. CCT on the prior business day.~~

**Add the following NAESB WGQ Standards:**

2.3.z1 NAESB WGQ Standards [2.3.z2] and [2.3.z3] apply to the following Statements:

NAESB WGQ Standard No. 1.4.5 Scheduled Quantity  
NAESB WGQ Standard No. 2.4.3 Allocation  
NAESB WGQ Standard No. 2.4.4 Shipper Imbalance

2.3.z2 For the Statements listed in NAESB WGQ Standard [2.3.z1], Transportation Service Providers (TSPs) which:

- a) provide parties with the ability to request Statement(s) via electronic bulletin board or web page; and,
- b) provide parties with the ability to view such requested Statement(s) via electronic bulletin board or web page; and,
- c) do not provide such parties with the ability to request a Statement via at least a fax, phone, or e-mail;

should support the ability of such party (or their agent) to request a Statement via the Request for Information and to receive the TSP's response via the appropriate Statement. Where the conditions in a) and b) above exist and the TSP does provide such parties with the ability to request a Statement via at least a fax, phone, or e-mail, then the TSP is not required to support the Request for Information.

The period of time (how far back in time a request may specify) should be comparable as between the electronic request/view method and the upload request/receive response method, provided, however, the TSP would not be required to respond with information generated prior to its implementation of the Statement.



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2.3.z3 Transportation Service Providers which support the ability of a party (or its agent) to:

- a) request Statement(s) reflected in NAESB WGQ Standard [2.3.z1] pursuant to GISB Standard No. [2.3.z2] and
- b) receive the Statement(s) in response to such request;

should provide the documents requested at the party's designated site by 9:00 a.m. CCT on a business day when the request is received prior to 3:00 p.m. CCT on the prior business day.

**DATA DICTIONARY** (for new documents and addition, modification or deletion of data elements)

**Document Name and No.:**

**NAESB WGQ Standard 2.4.7 – Request for Information**

<b>Business Name (Abbreviation)</b>	<b>Definition</b>	<b>EDI / FF Usage</b>	<b>Condition</b>
Information Requested Begin Date (Info Req Beg)	The requested beginning <u>month and year date</u> of the information. <u>For the request for allocation or request for shipper imbalance, this date should reflect a month and year. For the request for scheduled quantity, this date could reflect a day, month and year or a month and year.</u>	M	
Information Requested End Date (Info Req End)	The requested ending <u>month and year date</u> of the information. <u>For the request for allocation or request for shipper imbalance, this date should reflect a month and year. For the request for scheduled quantity, this date could reflect a day, month and year or a month and year.</u>	SO	Used when: <ul style="list-style-type: none"> <li>• <u>more than one month of allocation or shipper imbalance information is requested or</u></li> <li>• <u>more than one day -of scheduled quantity information is requested.</u></li> </ul>
Service Requester Data	Identifies the party -requesting the service, or their agent.		



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Requester: TransCapacity Request No.: R96009

Business Name (Abbreviation)	Definition	EDI / FF Usage	Condition
Service Requester * 4 (Svc Req)		C	Mandatory when Data Sets Requested is <u>one of the following</u> : <ul style="list-style-type: none"> <li>• <u>'Shipper Imbalance for a specified service requester's contract'</u> <del>or</del></li> <li>• <u>'Shipper Imbalance for all of the service requester's contracts'</u>;</li> <li>• <u>'Scheduled Quantity for a specified service requester's contract'</u>, or</li> <li>• <u>'Scheduled Quantity for all of the service requester's contracts'</u></li> </ul> -otherwise not used.
Service Requester Proprietary Code (Svc Req Prop)		C	Mandatory when the following conditions are met: <ul style="list-style-type: none"> <li>• <u>Data Sets Requested is one of the following</u>:               <ul style="list-style-type: none"> <li>• <u>'Shipper Imbalance for a specified service requester's contract'</u></li> <li>• <u>'Shipper Imbalance for all of the service requester's contracts'</u></li> <li>• <u>'Scheduled Quantity for a specified service requester's contract'</u>, or</li> <li>• <u>'Scheduled Quantity for all of the service requester's contracts'</u></li> </ul> </li> <li>• <del>Data Sets Requested is 'Shipper Imbalance for a specified service requester's contract' or 'Shipper Imbalance for all of the service requester's contracts'; and</del></li> <li>• <u>and</u> Service Requester is not present;</li> </ul> otherwise not used.



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<b>Business Name (Abbreviation)</b>	<b>Definition</b>	<b>EDI / FF Usage</b>	<b>Condition</b>
Service Requester Contract (Svc Req K)	This is the contract under which service is being requested.	C	Mandatory when Data Sets Requested is <u>one of the following</u> : <ul style="list-style-type: none"> <li>• <u>'Shipper Imbalance for a specified service requester's contract' or</u></li> <li>• <u>'Scheduled Quantity for a specified service requester's contract'.</u></li> </ul>

**CODE VALUES LOG** (for addition, modification or deletion of code values)

**Document Name and No.:**  
**NAESB WGQ Standard 2.4.7 – Request for Information**

**Data Sets Requested**

<b>Code Value Description</b>	<b>Code Value Definition</b>	<b>Code Value</b>
<u>Scheduled Quantities for a specified service requester's contract</u>	<u>[no definition necessary]</u>	<u>SQ1</u>
<u>Scheduled Quantities for all of the service requester's contracts</u>	<u>[no definition necessary]</u>	<u>SQA</u>



## RECOMMENDATION TO NAESB WGQ EXECUTIVE COMMITTEE

Requester: TransCapacity Request No.: R96009

**BUSINESS PROCESS DOCUMENTATION** (for addition, modification or deletion of business process documentation language)

**Standards Book:**

**NAESB WGQ Standard 2.4.7 – Request for Information**

**Language: Modify the Technical Implementation of Business Process as follows:**

### TECHNICAL IMPLEMENTATION OF BUSINESS PROCESS

The Request for Information document (Request) is sent from the data requester to the transportation service provider and is used to request a specific document from the transportation service provider. The Response to Request for Information document (Response) is sent in response to the Request.

The data requester assigns a **request ID**, which is used to delineate the Request from others sent by the data requester.

When specified in the Request, **service requester** and **statement recipient id** reflect their value as stated in the document being requested.

In the Request, the data requester indicates what-the one type of document that is being requested by providing the **data sets requested** as follows:

1. Allocation - - - > either all locations or a single location (one or more months)
2. Shipper Imbalance - - - > either all service requester contracts or a single service requester contract. (one or more months)
3. Scheduled Quantity - - - > either all service requester contracts or a single service requester contract. (one or more days)

It is intended that requesters shall submit requests for only one type of dataset per submission.

If the data requester is requesting a single month of information for Allocation or Shipper Imbalance, then only the **information requested begin date** is used. If the data requester is requesting more than one month of information for Allocation or Shipper Imbalance, then the information requested begin date and the **information requested end date** are used. These requested dates refer to the flow dates in the requested document.

If the data requester is requesting a single day or a single month of information for Scheduled Quantity, then only the information requested begin date is used. If the data requester enters a day, month and year, then the request is for a single day. If the data requester enters a month and year, then the request is for a single month. If the data requester is requesting more than one day or more than one month of information, then the information requested begin date and the information requested end date are used. These requested dates refer to the flow dates in the requested document.

Upon receiving and processing a Request, the transportation service provider sends a Response. Within the prescribed time period, the requested report, if available, is sent.

In the event that a common code is not available for a company, parties should mutually agree to use the Transportation Service Provider's proprietary entity code for that company.



RECOMMENDATION TO NAESB WGQ EXECUTIVE COMMITTEE

Requester: TransCapacity Request No.: R96009

TECHNICAL CHANGE LOG (all instructions to accomplish the recommendation)

Document Name and No.: Request for Information, 2.4.7

<b>Description of Change:</b>
<b>Request for Information</b>
<b>X12 Mapping</b>
Detail LIN segment (position 0100): LIN03: Insert the following code values and code value descriptions for the Data Sets Requested data element SQ1 Scheduled Quantities for a specified service requester's contract SQA Scheduled Quantities for all of the service requester's contracts

4. SUPPORTING DOCUMENTATION

a. Description of Request:

Note: Originally this was a request from Duke (withdrawn) and TransCapacity adopted sponsorship of it.

Request to develop a "Request for Scheduled Quantity transaction" document request that a service requester ("SR") goes to Transportation Service Provider ("TSP") for a date range, could be for a contract Duke's request states this request is needed regardless of the outcome of the others Duke's request states that it is a TSP determined option as to whether to utilize this mechanism and there is not an affirmative obligation by the TSP to do this the reason for the request is to allow EDI customers the same access to scheduled volumes as EBB customers

b. Description of Recommendation:

Business Practices Subcommittee

See minutes for the following Business Practices Subcommittee:

- August 20, 1997
- October 23, 1997
- November 20, 1997
- December 4, 1997
- May 8, 2002
- June 6, 2002

**Motion:**

A motion was made that the above red-lined work papers are to be used as instructions to the Information Requirements Subcommittee in development of the two documents.

(Note: refer to meeting minutes of December 4, 1997 for the referened red-lined workpaper)

**Sense of the Room:** 12/4/97      13 In Favor      0 Opposed  
**Segment Check** (if applicable):





RECOMMENDATION TO NAESB WGQ EXECUTIVE COMMITTEE

Requester: TransCapacity Request No.: R96009

In Favor: 1 End-Users LDCs 7 Pipelines Producers 5 Services
Opposed: End-Users LDCs Pipelines Producers Services

Motion passes

Motion:

Adopt the changes specified below:

Proposed Standard Deletion

2.3.36 Transportation Service Providers (TSPs) which:

- a) provide parties with the ability to request statement(s) of allocation via electronic bulletin board or web page; and,
b) provide parties with the ability to view such requested statements of allocation via electronic bulletin board or web page; and,
c) do not provide such parties with the ability to request a GISB Standard No. 2.4.3 Allocation via at least a fax, phone, or e-mail;

should support the ability of such party (or their agent) to request GISB Standard No. 2.4.3 Allocations via the Request for Information and to receive the Transportation Service Provider's response via a GISB Standard No. 2.4.3 document. Where the conditions in a) and b) above exist and the TSP does provide such parties with the ability to request a GISB Standard No. 2.4.3 Allocation via at least a fax, phone, or e-mail, then the Transportation Service Provider is not required to support Request for Information.

The period of time (how far back in time a request may specify) should be comparable as between the electronic request/view method and the upload request/receive response method, provided, however, the TSP would not be required to respond with information generated prior to its implementation of GISB Standard No. 2.4.3.

Proposed Standard Deletion

2.3.37 Transportation Service Providers which support the ability of a party (or its agent) to:

- a) request GISB Standard No. 2.4.3 document(s) pursuant to GISB Standard No. 2.3.36 and
b) receive the GISB Standard No. 2.4.3 document in response to such request;

should provide the documents requested at the party's designated site by 9:00 a.m. CCT on a business day when the request is received prior to 3:00 p.m. CCT on the prior business day.

Proposed Standard Deletion

2.3.38 Transportation Service Providers (TSPs) which:

- a) provide parties with the ability to request imbalance information via electronic bulletin board or web page; and,
b) provide parties with the ability to view such requested imbalance information via electronic bulletin board or web page; and,



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- ~~e) do not provide such parties with the ability to request a GISB Standard No. 2.4.4 Shipper Imbalance via at least a fax, phone, or e-mail;~~

~~should support the ability of such party (or their agent) to request GISB Standard No. 2.4.4 Shipper Imbalances via the Request for Information and to receive the Transportation Service Provider's response via a GISB Standard No. 2.4.4 document. Where the conditions in a) and b) above exist and the TSP does provide such parties with the ability to request a GISB Standard No. 2.4.4 Shipper Imbalance via at least a fax, phone, or e-mail, then the Transportation Service Provider is not required to support Request for Information.~~

~~The period of time (how far back in time a request may specify) should be comparable as between the electronic request/view method and the upload request/receive response method, provided, however, the TSP would not be required to respond with information generated prior to its implementation of GISB Standard No. 2.4.4.~~

### Proposed Standard Deletion

~~2.3.39 Transportation Service Providers which support the ability of a party (or its agent) to:~~

- ~~a) request GISB Standard No. 2.4.4 document(s) pursuant to GISB Standard No. 2.3.38 and  
b) receive the GISB Standard No. 2.4.4 document in response to such request;~~

~~should provide the documents requested at the party's designated site by 9:00 a.m. CCT on a business day when the request is received prior to 3:00 p.m. CCT on the prior business day.~~

### Proposed Standard

**2.3.z1** NAESB WGQ Standards [2.3.z2] and [2.3.z3] apply to the following Statements:  
NAESB WGQ Standard No. 1.4.5 Scheduled Quantity  
NAESB WGQ Standard No. 2.4.3 Allocation  
NAESB WGQ Standard No. 2.4.4 Shipper Imbalance

### Proposed Standard

**2.3.z2** For the Statements listed in NAESB WGQ Standard [2.3.z1], Transportation Service Providers (TSPs) which:

- a) provide parties with the ability to request Statement(s) via electronic bulletin board or web page; and,  
b) provide parties with the ability to view such requested Statement(s) via electronic bulletin board or web page; and,  
c) do not provide such parties with the ability to request a Statement via at least a fax, phone, or e-mail;

should support the ability of such party (or their agent) to request a Statement via the Request for Information and to receive the TSP's response via the appropriate Statement. Where the conditions in a) and b) above exist and the TSP does provide such parties with the ability to request a Statement via at least a fax, phone, or e-mail, then the TSP is not required to support the Request for Information.



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**Requester: TransCapacity Request No.: R96009**

The period of time (how far back in time a request may specify) should be comparable as between the electronic request/view method and the upload request/receive response method, provided, however, the TSP would not be required to respond with information generated prior to its implementation of the Statement.

**Proposed Standard**

**2.3.z3** Transportation Service Providers which support the ability of a party (or its agent) to:

- a) request Statement(s) reflected in NAESB WGQ Standard [2.3.z1] pursuant to GISB Standard No. [2.3.z2] and
- b) receive the Statement(s) in response to such request;

should provide the documents requested at the party's designated site by 9:00 a.m. CCT on a business day when the request is received prior to 3:00 p.m. CCT on the prior business day.

**Balanced Vote Results June 6, 2002:**

Segments	Vote For	Balanced For	Vote Against	Balanced Against
End Users	1	1	0	0
LDCs	1	1	0	0
Pipelines	10	2	0	0
Producers	0	0	0	0
Services	0	0	0	0
<b>Totals</b>	<b>12</b>	<b>4</b>	<b>0</b>	<b>0</b>

**Motion passes (balanced vote 4-0)**

**EBB Internet Implementation Task Force**

See minutes for the following EBB Internet Implementation Task Force:

- October 1, 1998

During the discussion of R99033B (Scheduled Quantity for Poolers), it was noted that R96009 is related. The following is an excerpt from the minutes:

NOTE: Related to Request No. R96009B and should address both Request Nos. R98033A and R6009B jointly. BPS chairs will be informed to determine their support for such action.

MOTION: The request (*R99033B*) was split into two parts: A and B. Part A is to be forwarded to the Business Practices Subcommittee to be addressed with Request No. R96009B. Part B is to be forwarded to the Information Requirements Subcommittee for completion. Information Requirements Subcommittee is asked to address the request through either an existing or new data set. Is expected that the usage for receipt rank and delivery rank would be Mutually Agreeable.

VOTE: The motion passed through a unanimous vote.

Request R98033B was withdrawn before it got to the Information Requirements Subcommittee.



**RECOMMENDATION TO NAESB WGQ EXECUTIVE COMMITTEE**

**Requester: TransCapacity Request No.: R96009**

**Information Requirements Subcommittee**

See minutes for the following Information Requirements Subcommittee:

- July 15, 1997
- January 7, 1998
- March 19, 2002
- June 11, 2002

**Motion:**

Adopt modifications to the Request for Information (NAESB WGQ Standard 2.4.7) per the attached.

(Note: For specifics of proposed modifications see the attachment to IR Meeting Minutes for June 11, 2002)

**Balanced Vote Results June 11, 2002:**

Segments	Vote For	Balanced For	Vote Against	Balanced Against
End Users	1	1	0	0
LDCs	0	0	0	0
Pipelines	6	2	0	0
Producers	0	0	0	0
Services	1	1	0	0
<b>Totals</b>	<b>8</b>	<b>4</b>	<b>0</b>	<b>0</b>

**Motion passes (balanced vote 4-0)**

**Technical Subcommittee**

**March 31, 2003**

Segments	Vote For	Balanced For	Vote Against	Balanced Against
End Users	0	0	0	0
LDCs	0	0	0	0
Services	1	1	0	0
Pipelines	3	2	0	0
Producers	0	0	0	0
<b>Totals</b>	<b>4</b>	<b>3</b>	<b>0</b>	<b>0</b>

**c. Business Purpose:**

**d. Commentary/Rationale of Subcommittee(s)/Task Force(s):**