HaaS: Date Horizon Aggregator

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See What's Changed

This Schedule outlines the functional requirements for the HaaS: Date Horizon Aggregator (DHA).

1. Definitions and Interpretations

1.1 This Schedule forms part of the Master Services Agreement between Biza and the Client (**MSA**) or the Consolidated Services Agreement (**CSA**), whichever applies. Terms defined in the MSA or the CSA have the same meaning when used in this Schedule.

1.2 This Schedule sets out the functional requirements of the HaaS: Date Horizon Aggregator (DHA) as provided to the Client under a Statement of Work or other ordering document issued under the MSA, or an Order Form issued under the CSA (**SOW**). The components, editions and add-ons of DHA that the Client receives are those set out in the applicable SOW.

1.3 If this Schedule is inconsistent with the MSA, the CSA or a SOW, the order of precedence set out in the MSA or the CSA, as applicable, applies.

1.4 The following additional definitions apply:

Biza Guides
: refers to the technical documentation hosted at https://guides.biza.io

CDR Rules
: refers to the Competition and Consumer (Consumer Data Right) Rules 2020, published and updated from time to time at https://www.legislation.gov.au/F2020L00094/latest/text

CSA
: has the meaning given in clause 1.1, being the Consolidated Services Agreement published in Biza Guides

Data Adapter
: refers to a set of endpoints that supplies Consumer Data to HaaS: Platform in accordance with the Data Adapter Specification

Data Adapter Specification
: refers to version 2.4.0 of the HaaS source system connectivity specification. The current version is published at https://guides.biza.io/haas/developer-resources/specifications/adapter

Data Standards
: refers to the Consumer Data Standards published at https://consumerdatastandardsaustralia.github.io/standards

Delegate
: refers to a Data Adapter that DHA calls to obtain the data it supplies to HaaS: Platform. DHA has exactly two Delegates: the Primary Delegate and the Historical Delegate

HaaS Connector for DB (HCDB)
: refers to Biza's Data Adapter that serves Consumer Data held in a Biza-hosted database, as described in HaaS Connector for DB

HaaS Minimum Requirements
: refers to the Data Adapter Minimum Requirements specified at https://guides.biza.io/haas/developer-resources/minimum-requirements

Historical Delegate
: refers to an instance of HCDB holding Consumer Data migrated from the Client's former source system. The Historical Delegate is read-only to DHA, and its records carry the identifiers the Primary Delegate uses

Historical Retrieval Window
: refers to the period that starts at the beginning of the same calendar date two years before the date of a request and ends at the time of the request, with dates taken in Coordinated Universal Time (UTC), as illustrated in Aggregation Rules

MSA
: has the meaning given in clause 1.1

Primary Delegate
: refers to the Client's Data Adapter for its current source system. The Primary Delegate is the authoritative source for which Principals, users and accounts exist and for whether an account is open, and the only source of customer, user, authentication and notification data

SOW
: has the meaning given in clause 1.2, and includes any other ordering document issued under the MSA, and any Order Form issued under the CSA, for DHA

2. Preamble

The Holder as a Service environment provides a turnkey solution for delivering the Consumer Data Right requirements for mandated Data Holders. To make this functionality available, Biza requires the Client to deliver a *Data Adapter*. HaaS: Platform delivers the CDR endpoints; the Data Adapter supplies the data that delivery needs.

DHA is a Data Adapter. It presents the Primary Delegate and the Historical Delegate to HaaS: Platform as one Data Adapter, so that a Client that has moved to a new source system can continue to supply the historical data it held in its former one. For each operation, DHA reads one or both Delegates and returns one combined response.

DHA holds no Consumer Data of its own and has no administration interface. The Historical Delegate is populated by a data migration delivered separately from DHA. Biza hosts and operates DHA.

3. Functional Requirements

The following requirements apply for DHA.

Requirement identifiers are stable and are not reused. Gaps in numbering are intentional.

3.1 Data Adapter API

DHA **MUST** supply the following data to HaaS: Platform, through the operations of the Data Adapter Specification, from the source shown, and maintained to at least the *HaaS Minimum Requirements*:

Functional Requirement	Sectors	Category	Data supplied to HaaS: Platform	Source	Data Adapter operation
DHA-DA1	Energy	Data Adapter API	The operations and versions DHA serves	DHA, from both Delegates	Get Endpoint Meta

Functional Requirement	Sectors	Category	Data supplied to HaaS: Platform	Source	Data Adapter operation
DHA-DA2	Energy	Data Adapter API	Whether DHA and both Delegates are available	DHA, from both Delegates	Get Service Health Status
DHA-DA3	Energy	Data Adapter API	The authentication attributes of a username	Primary Delegate	Get Username Attributes
DHA-DA4	Energy	Data Adapter API	The Principals a user may act for	Primary Delegate	Get User Principals
DHA-DA5	Energy	Data Adapter API	A user's details	Primary Delegate	Get User
DHA-DA6	Energy	Data Adapter API	A Principal's customer details	Primary Delegate	Get Customer
DHA-DA7	Energy	Data Adapter API	A user's notification contact details	Primary Delegate	Get User Notification Information
DHA-DA8	Energy	Data Adapter API	A Principal's energy accounts and their plans, for all accounts or the accounts requested	Both Delegates	List Energy Accounts
DHA-DA9	Energy	Data Adapter API	Current account balances	Primary Delegate	List Energy Account Balances
DHA-DA10	Energy	Data Adapter API	Invoices issued within a requested date range	Both Delegates	List Energy Account Invoices
DHA-DA11	Energy	Data Adapter API	Billing transactions within a requested time range	Both Delegates	List Energy Account Billing Transactions
DHA-DA12	Energy	Data Adapter API	An account's concessions	Primary Delegate	List Energy Account Concessions
DHA-DA13	Energy	Data Adapter API	An account's agreed payment schedule	Primary Delegate	Get Energy Account Agreed Payment Schedule
DHA-DA14	Energy	Data Adapter API	The FRMP details of an NMI from a requested date	Both Delegates	Retrieve FRMP Details
DHA-DA15	Energy	Data Adapter API	Delivery of a notification for sending	Primary Delegate	Send Notification

3.2 Data Adapter rules

The Data Adapter API **MUST** also apply the following rules. Aggregation Rules describes, with examples, how DHA applies them.

Functional Requirement	Sectors	Category	Requirement
DHA-R1	Energy	Combined data	Where the source is both Delegates, DHA **MUST** request the data from both and return one response, ordered as the Data Adapter Specification orders it and paginated across the combined records.
DHA-R2	Energy	Historical Retrieval Window	DHA **MUST** limit every date-bounded request it sends to the Historical Delegate to the Historical Retrieval Window, and **MUST NOT** return a record from the Historical Delegate that is dated before the start of that window. An invoice is dated by its issue date, a billing transaction by its execution time, and a plan or an FRMP detail by its end date; a record with no end date has not ended.
DHA-R3	Energy	Primary Delegate data	DHA **MUST** send the Primary Delegate the date range the caller requested, and **MUST NOT** apply the Historical Retrieval Window to data from the Primary Delegate.
DHA-R4	Energy	Default ranges	Where a caller sends no date range, DHA **MUST** apply the default range of the Data Adapter Specification before applying DHA-R2 and DHA-R3.
DHA-R5	Energy	Date ranges	DHA **MUST** refuse a request whose oldest date or time is later than its newest, with HTTP 400. A request whose range ends before the Historical Retrieval Window starts **MUST** receive no records from the Historical Delegate.
DHA-R6	Energy	Accounts	DHA **MUST** return only the accounts the Primary Delegate holds, with the Primary Delegate's account details and open or closed status. For an open account that both Delegates hold, DHA **MUST** add the Historical Delegate's plans that the Primary Delegate does not hold. A closed account **MUST** be returned as the Primary Delegate holds it.
DHA-R7	Energy	Unknown Principals and accounts	Where the Primary Delegate reports that a Principal is unknown, List Energy Accounts **MUST** return that answer. For the other operations whose source is both Delegates, DHA **MUST** return HTTP 404 only when both Delegates report the Principal or account unknown.
DHA-R8	Energy	Records unchanged	DHA **MUST NOT** change a record a Delegate returns, other than to combine, order and paginate the records and to translate them between versions of the Data Adapter Specification. FRMP details that both Delegates hold identically **MUST** be returned once.
DHA-R9	Energy	Versions	For each operation, DHA **MUST** advertise one version that it can serve from both Delegates, and **MUST** translate each Delegate's request and response to and from that version. DHA **MUST** fail a request with HTTP 500 rather than return a translation it cannot make exactly, and **MUST** refuse a requested version it does not serve.
DHA-R10	Energy	Availability	Get Service Health Status **MUST** report DOWN while either Delegate is down or unreachable, or while no common version joins the Delegates for an operation DHA serves, and UP otherwise. DHA **MUST** attempt every request whatever status it last reported.

Functional Requirement	Sectors	Category	Requirement
DHA-R11	Energy	Errors	A request whose source is both Delegates **MUST** fail when either Delegate fails other than by reporting the Principal or account unknown. DHA **MUST NOT** return a partial response.
DHA-R12	Energy	Dates and times	DHA **MUST** compare every date and time in Coordinated Universal Time (UTC), including a bound that a caller sends in another offset.

3.3 Integration Capabilities

Delivery of integration capabilities as follows:

Functional Requirement	Sectors	Category	Requirement
DHA-INT1	Energy	Integration	DHA **MUST** present exactly two Delegates, the Primary Delegate and the Historical Delegate, to HaaS: Platform as one Data Adapter.
DHA-INT2	Energy	Integration	DHA **MUST** authenticate to each Delegate separately, with OAuth 2.0 client credentials issued for that Delegate, and **MAY** reach a Delegate over a private network connection.
DHA-INT3	Energy	Integration	DHA **MUST** treat every identifier, such as a Principal or account identifier, as opaque, and **MUST NOT** translate identifiers between the Delegates.
DHA-INT4	Energy	Integration	DHA **MUST NOT** store Consumer Data, and **MUST NOT** provide an administration interface.
DHA-INT5	Energy	Integration	DHA **MUST** accept only requests carrying an OAuth 2.0 bearer token from the issuer configured for the Client's environment.
DHA-INT6	Energy	Integration	DHA **MUST** verify each Delegate's TLS certificate against the certificate authority configured for that Delegate.

4. Client Obligations

The Client **MUST** provide the following for the delivery of DHA:

Functional Requirement	Sectors	Category	Requirement
DHA-CP1	Energy	Primary Delegate	A Primary Delegate that meets the Data Adapter Specification and the HaaS Minimum Requirements, with its address and the OAuth 2.0 client credentials DHA uses to call it.
DHA-CP2	Energy	Primary Delegate data	The Primary Delegate's responses, including which data it returns for closed accounts and for any period, are the Client's responsibility.
DHA-CP3	Energy	Migration	For each migrated record, the identifiers the Primary Delegate uses, supplied for the data migration into the Historical Delegate.

5. Excluded Functionality

The following functionality is **not** delivered by the Date Horizon Aggregator (DHA):

5.1 Determination of required or voluntary consumer data: DHA does not determine whether any data is required or voluntary consumer data for the purposes of the CDR Rules. The Historical Retrieval Window is a fixed technical parameter and cannot be configured. The Client remains responsible for its own CDR obligations.

5.2 Source data quality: DHA does not cleanse, correct or re-map data held by either Delegate. An account's status in the Historical Delegate is not used.

5.3 Records without a Primary Delegate identifier: a record migrated without a Primary Delegate identifier cannot be requested through DHA. An account that only the Historical Delegate holds is not returned.

5.4 Consumer-managed authentication: *Init Login* and *Verify Login* are not served.

5.5 Get Closed Principals: this endpoint is not served.

5.6 Banking and Non-Bank Lending sectors: DHA serves Energy sector Data Adapter operations only.

5.7 More than two Delegates.