Change Management Committee (ChMC) Change Pack Summary

# Communication Detail

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| Comm Reference: | 2184 - RJ - ES |
| Comm Title: | XRN4665 Creation of New End User Categories |
| Comm Date: | 21/12/2018 |

**Change Representation**

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| Action Required: | For representation |
| Close Out Date: | 09/01/2019 |

# Change Detail

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| Xoserve Reference Number: | XRN4665 |
| Change Class: | System Validation Change |
| ChMC Constituency Impacted: | All Shipper Users, National Grid Transmission, Distribution Network Operator, iGT |
| Change Owner: | Simon Harris  [simon.harris@xoserve.com](mailto:simon.harris@xoserve.com)  0121 623 2455 |
| Background and Context: | The Demand Estimation Sub-Committee (DESC) have approved the creation of new End User Category (EUC) profile bands within current EUC bands 01 & 02 based on additional data items (Market Sector Code & EUC Meter Type). This should help make NDM Nomination & Allocations more accurate, by being closer to actual consumer consumption and therefore should result in less volatile UIG.  MOD0644 was originally raised to amend UNC code to facilitate the new EUC profile bands however, after discussions at Distribution Workgroup, it was agreed that DESC already had the authority to recommend the creation of new EUCs as part of their annual review, without the need for a UNC Modification. As a result of this agreement MOD0644 was formally withdrawn.  This change has been raised to make the necessary code and process changes to UK Link suite of systems and this change pack is being produced during detailed design.  Within this document we have outlined the code changes needed within UKL and the logic behind how the new EUC’s will be assigned for context and transparency. If you feel there are impacts to your systems that are missing that you wish to highlight please do so by responding using the Change Representation section of this document within the consultation window. |

# Change Impact Assessment Dashboard (UK Link)

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| Functional: | SPA, RGMA, Reads/Settlement, Invoicing, DES, Portal |
| Non-Functional: | None yet identified |
| Application: | SAP ISU |
| User: | All Shipper Users, Distribution Network Operator, iGT |
| Documentation: | None |
| Other: | None |

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| Files | | | | |
| File | Parent Record | Record | Data Attribute | Hierarchy or Format  Agreed |
| N/A | N/A | N/A | N/A | N/A |

# Change Design Description

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| **Overview of Change**  This change is looking to create new EUC profiles (at supply meter point level) within EUC Bands 01 & 02 to replace the existing “bucket” profile, the new EUC’s will be effective from 01.10.2019. Current EUC bands assigned to Supply Meter Points are based on Supply Meterpoint Annual Quantity (AQ), Local Distribution Zone (LDZ), Gas Year and Winter Consumption WAR (for 03-08 only) these new EUC profiles will be assigned to Supply Meter Points using additional criteria.  This additional criteria has been defined as, **Market Sector Code** (if a site is Domestic or Industrial) and **EUC Meter Type** (a derived value based on data stored within the *Meter Mechanism* and *Payment Method* of an installed device to determine it as either Prepayment or Non-Prepayment).  **High Level Solution**  The new EUC profiles will replace the existing “bucket” profiles for EUC01 & EUC02 effective from 01.10.2019 and are looking to be split based on 2 additional data items, the Market Sector Code & EUC Meter Type (Prepayment or Non-Prepayment).  The proposed naming conventions for the new EUC profiles conform to current file formats, are in line with the precedent set by WAR band EUCs and are outlined below, along with example values.  Current EUC: LDZ:EYY01B (e.g. *EA:E1901B*)  New EUCs:  LDZ:EYY01BND - Non-Prepayment/Domestic (e.g. *EA:E1901BND*)  LDZ:EYY01BPD - Prepayment/Domestic (e.g. *EA:E1901BPD*)  LDZ:EYY01BNI - Non-Prepayment I&C (e.g. *EA:E1901BNI*)  LDZ:EYY01BPI - Prepayment I&C (e.g. *EA:E1901BPI*)  Current EUC: LDZ:EYY02B (e.g. *EA:E1902B*)  New EUCs:  LDZ:EYY02BND - Non-Prepayment Domestic (e.g. *EA:E1902BND*)  LDZ:EYY02BPD - Prepayment Domestic (e.g. *EA:E1902BPD*)  LDZ:EYY02BNI - Non-Prepayment I&C (e.g. *EA:E1902BNI*)  LDZ:EYY02BPI - Prepayment I&C (e.g. *EA:E1902BPI*)  Note: The naming convention above is indicative and subject to change, approval of the EUC naming convention will be discussed at DSG on the 7th January 2019 and ChMC on the 9th January 2019.  The EUC assigning code (used by a number of processes to determine which EUC needs to be applied) is being amended to include Market Sector Code and EUC Meter Type (Meter Mechanism Code & Meter Payment Method) in the determination of which EUC to assign to a Supply Meter Point where it falls into EUC Band 01 or 02. EUC codes 03 to 09 are not affected by this change.  **Visibility of new EUC profile bands prior to 01.10.2019**  The first issuing of the new EUC profiles (including the End User Category numbers) will be provided to Shippers via the “Annual Notification of EUC Definitions” (.EUC) file / T67 record issued in August-19 in line with BAU process of notifying industry participants of the new EUC definitions.  The End User Category numbers associated with the new EUC profiles will also be sent out on the “AQ WC Notifications” (.NRL) file within records S91, T04 & T50 and the “AQ Notification” (.NNL) files within the A92 record, in late September-19 as part of the September Supply Meterpoint AQ process for AQ’s becoming effective on 01.10.2019.  New EUC profiles will also be sent out to Shippers in the “Supply Meter Point Ownership Notification file” (.TRF) within the S15 record prior to the 01.10.2019 but only if the Confirmation Effective Date is on or after the 01.10.2019.  **Detailed Solution/Scenarios**  **Market Sector Code**  The EUC assigning code within UKL will need to determine if a Supply Meter Point is Domestic or Industrial & Commercial. To do this, the system will use the Market Sector Code (MSC) which has 2 allowable values, [D] for Domestic and [I] for Industrial & Commercial. There will be no changes to the allowable values for this data item and no changes are being made to the way the Market Sector Code is currently updated as part of this change.  It is however, advised that for EUC’s to be assigned as accurately as possible post implementation, the Market Sector Code is reviewed by all Shipper parties and cleansed where appropriate. This can be done via the Market Sector Amendment Request (.MSI) file, as part of a confirmation (SPA) change or RGMA flow (.ONJOB/.ONUPD) update.  **EUC Meter Type**  The EUC assigning code within UKL will need to determine if a Supply Meter Point has a Prepayment Meter installed. To do this, a check will be carried out on the installed device Meter Mechanism Code and (in case of a SMART device) Meter Payment Method. The logic to be applied to determine this was approved at ChMC on the 12.12.2018 and is as outlined below…  if No Asset Present then  EUC Meter Type = Non-Prepayment  elseif [Meter Mechanism] = “PP” or “CM” or “ET” or “MT” or “TH” then  EUC Meter Type = Prepayment  elseif [Meter Mechanism] = “S1” or “S2” or “NS” and [Payment Method] = “PP” then  EUC Meter Type = Prepayment  else EUC Meter Type = Non-Prepayment  Please note that the **EUC Meter Type** will not be a standing data item stored in UKL, just a logical name for the purpose of determining if a Supply Meter Point is Prepayment or Non-Prepayment based on Meter Mechanism and Meter Payment Method.  It is advised that, for EUC’s to be assigned as accurately as possible post implementation, the Meter Mechanism and Meter Payment Type are reviewed by all Shipper parties and cleansed where appropriate. Changes to these data items can be made via RGMA flows (JOB or UPD) files.  **UIG Share Factor**  As per agreement at ChMC on the 11.07.2018, there will be no change in the UIG share factor for EUC bands 01 & 02. All sites within the new EUC profiles will have the UIG share Factor applied for the calculation of Unidentified Gas dependent on Class & EUC Band. This is due to the complexities surrounding having different UIG share factors and the subsequent impacts on Gemini, leading to the Gas Year 2019 implementation date being at risk.  **Business Processes**  As per agreement in ChMC on the 12.12.2018 it was decided that EUC’s will only be re-assigned, in the case of Market Sector Code, Meter Mechanism Code and/or Meter Payment Method changes, during BAU activities that would currently see the EUC amended. It was agreed that we would not re-assign the EUC’s straight away when changes to the data items are carried out, this is due to the potential complex code changes to UKL/Gemini and regression testing needed to facilitate this. The BAU processes that currently re-assign the EUC are listed below for reference…  - Supply Meterpoint AQ Calculation  - AQ Correction  - Confirmations as part of SPA  - Address Amendment (where LDZ/Exit Zone are changed)  - LDZ/Exit Zone change  - Site Takeovers process  - WAR Band Update  - Annual EUC updates (Gas Year)  - CSEP amendment via CAI file, i.e. address change and LDZ/Exit Zone change  Due to the above agreed approach, there will be some instances where a current EUC will not be reflective of current Market Sector Code, Meter Mechanism or Meter Payment Method, until such a point as one of the above specified processes triggers a EUC re-assignment. For clarity, if Market Sector Code is being updated as part of a Confirmation/Re-Confirmation then the new EUC will be assigned in line with these updates so will take affect from D (D being Confirmation Start Date).  **Gemini**  High level impact assessment stated that there would be no impact to Gemini as part of this change however Gemini would feature extensively in our regression testing to ensure the new EUC’s load and successfully flow to downstream processes. Detailed design has not yet completed for Gemini aspects, a more detailed impact assessment has been initiated, any potential external impacts resulting from this will be communicated as soon as available.  **Reconciliation Variance Code**  As per agreement in DSC Delivery Sub Group (DSG) on the 17.12.2018 and following a small representation period, it was agreed that any changes to EUC’s does not require a new Reconciliation Variance Code to highlight where an EUC has been amended due to BAU processes taking priority. Reconciliation Variances will continue as-is using existing codes and could occur mid-month (i.e. address change, LDZ, EZ change, site take over etc) or 1st of the month (Gas Year and AQ calculation etc). If a new EUC Reconciliation Variance Code was introduced then this would only be seen in very rare circumstances and DSG agreed that one would not add value and agreed that there will always be a monthly variance on the effective date. It was also noted that the End User Category Numbers will be clearly visible within the below Supporting Information Files so the current Reconciliation Variance Codes have been deemed sufficient.  - Amendment - “Amendment Invoice Supporting Information” file (.AML - K92)  - Amendment - “Core Amendments Invoice Supporting Information” file (.ASP - K88, K90, K91 & K93)  - Capacity - “Core Capacity Invoice Supporting Information” file (.ZCS - K81)  - Capacity - “Core Capacity Individual SMP Supporting Information” file (.CZI - K43 & K47)  - Commodity - “Core Commodity Invoice Supporting Information” file (.COM - K79)  - Commodity - “Core Commodity Individual SMP Supporting Information” file (.COI - K43 & K44)  **CSEP**  For CSEP creations/amendments, the EUC’s specified in the inbound “IGT/CSO CSEP Creation Request” (CIC) file, within the C80 (EUC Details) Record and the “IGT/CSO CSEP Amendment Request” (.CAI) file, within the C80 (EUC Details) Record will not change for bands 01 & 02 (EUC01B/EUC02B). However, to derive the max SOQ value at grid level (for creation, amendment and annual SOQ calculation) the system pulls aggregated Load factors that are maintained for each EUC profile. As a result, we are proposing that we do not keep and maintain the EUC01B & EUC02B bands (as we are replacing them with the new EUC profile bands), but instead assign a default EUC profile band in which to pull the required Load factors as per the below logic…  - EUC01B - system should refer to domestic, non-prepayment EUC (LDZ:EYY01BND) load factors for calculating the Max SOQ  - EUC02B - system should refer to industrial, non-prepayment EUC (LDZ:EYY02BNI) load factors for calculating the Max SOQ  Approval of the above rule for handling CSEP sites will be discussed at DSG on the 7th January 2019 and ChMC on the 9th January 2019.  **Additional Information**  **Historical Data**  Due to the AQ process using the current EUC to pick up the required Annual Load Profiles (ALPs) and Daily Adjustment Factors (DAFs) within the optimum/sub-optimum period, historical values would be needed for the new EUC profiles. As part of this change, we will be loading historical ALP & DAF information into UKL for the new EUC’s, however the new EUC description/numbers will still only be assigned to Supply Meter Points from 01.10.2019, no backdating of EUC’s will occur.  **Twin Stream**  Twin Stream Supply Meter Points, where multiple Meter Devices are present, would need additional rules to determine the EUC Meter Type (where they fall into EUC Band 01 or 02), the proposed rule for this is as follows…  If all meter devices are defined as Prepayment (using the logic specified above) then the EUC Meter Type will be set as Prepayment, if any of the Meter Devices are defined as Non-Prepayment (using the logic specified above) then the Prepayment Status will be set as Non-Prepayment.  Approval of the above rule for Twin Stream sites will be discussed at DSG on the 7th January 2019 and ChMC on the 9th January 2019.  **Telemetered**  Telemetered Supply Points on UKL are set up with dummy devices and as a result an additional rule will be needed to determine the EUC Meter Type (where they fall into EUC Band 01 or 02), the proposed rule for this is as follows…  For Telemetered Supply Points where a Dummy device is installed the EUC Meter Type will be set as Non-Prepayment.  Approval of the above rule for Telemetered sites will be discussed at DSG on the 7th January 2019 and ChMC on the 9th January 2019.    **Additional Considerations**  As mentioned above, consideration is needed into potential cleansing activities to standing data items that would feed into the EUC assigning process. Market Sector Code, Meter Mechanism Code & Meter Payment Method.  Please note that as part of the solution for this change and agreement to limit the impacts on Gemini, changes to UKL (SAP ISU) are only covering EUC Bands 01 & 02 (EUC bands 03-09 are out of scope). If future requirements dictate the need for additional EUCs within EUC AQ Bands 03-09 or even new EUC AQ Bands then similar code changes will be needed plus potential impacts to Gemini. If flexibility was to be introduced for out of scope EUC bands as part of this change then there would be a high risk of not meeting the agreed delivery timescales. Work to look into how UKL Suite of systems can be configured to build in flexibility relating to all EUC’s is underway but will not be covered in this change. |

# Associated Changes

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| Associated Change(s) and Title(s): | - MOD0644 - Improvements to nomination and reconciliation through the introduction of new EUC bands and improvements for the ALP and DAF  - XRN4616 - ROM relating to MOD0644 |

# DSG

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| Target DSG discussion date: | N/A - XRN4665 has previously been to DSG for development and design rule ratification. |
| Any further information: | N/A |

# Implementation

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| Target Release: | July 2019 |
| Status: | Approved |

Please see the following page for representation comments template; responses to [uklink@xoserve.com](mailto:uklink@xoserve.com)

# Change Representation

(To be completed by User and returned for response)

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| --- | --- | --- | --- | --- | --- |
| User Contact Details: | Organisation: | | ESP Utilities Group | | |
| Name: | | Katy Binch | | |
| Email: | | [katy.binch@espug.com](mailto:katy.binch@espug.com) | | |
| Telephone: | | 01372587550 | | |
| Representation Status: | ~~Qualified Support~~  Support (see comments below) | | | | |
| Representation Publication: | Publish | | | | Private |
| Representation Comments: | In its current form, ESP does not support this change.  Regarding the CSEP changes we believe that further thinking is required to evidence how the solution can accurately map eight EUC combinations to the two default EUCs proposed within the C80 record.  In the current CIC and CAI files, the EUC split is by AQ only. However the proposed solution would advise IGTs to allocate low usage industrial properties to the EUC02 banding e.g. corner shops, and high usage domestic properties to the EUC01 banding e.g. Large houses with outbuildings fed from a single supply. We do not believe this would better enable Xoserve to derive the max SOQ value at grid level.  ESP agrees with the principle of the change, and if the above is resolved then we would support the progression of the change into UK Link. | | | | |
| Confirm Target Release Date? | Yes | No | | ESP requires 6 months for system changes. This would require a change to our CSEP creation and amendments files, and also downstream processes such as the bulk confirmation process (EUC is mandated in the PSA file). | |
| Xoserve Response to Organisation’s Comments | Thank you for your representation comments.  Regarding the CSEP logic outlined in the Change Pack, this has been proposed to limit the impacts on the creation/amendment process.  Current logic for EUC’s are split per AQ only however, EUC band 01 has a domestic profile for allocation and EUC band 02 has an industrial profile for allocation to be used in the load factors that feed the MAX SOQ calculation, so the proposed rule to default EUC 01 to domestic/non-prepayment and EUC 02 to industrial/non-prepayment will in effect be leaving the process for CSEPS creation/amendments to be ‘as is’.  As a result of the conversations between Xoserve and Katy Binch on 14th January 2019, the status of this response has changed from ‘Qualified Support’ to ‘Support’. | | | | |

# Change Representation

(To be completed by User and returned for response)

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| --- | --- | --- | --- | --- | --- |
| User Contact Details: | Organisation: | | E.ON | | |
| Name: | | Kirsty Dudley | | |
| Email: | | [Kirsty.Dudley@eonenergy.com](mailto:Kirsty.Dudley@eonenergy.com) | | |
| Telephone: | | 07816 172 645 | | |
| Representation Status: |  | | | | |
| Representation Publication: | Publish | | | | Private |
| Representation Comments: | We support the introduction of the new EUCs which have been approved by DESC for October 2019.  We are however concerned that the scope of the delivery has increased from that originally proposed by us. The ability to amend EUCs is something DESC could already do, but, due to Nexus system design has been hard coded which has caused a far more detailed solution to be deployed.  Although we understand why the scope has increased to the degree it has, it has not been a smooth road to develop this change, we therefore request that the CDSP ensures that as part of the ‘capture process’ it asks standard questions to understand the implications of changes so that extraordinary change packs are not needed. | | | | |
| Confirm Target Release Date? | Yes | No | | If [No] please specify alternative | |
| Xoserve Response to Organisation’s Comments | Thank you for your comments; we do appreciate that this is a complex change.  We are not increasing the scope; we are ensuring the new EUC code logic is successfully applied for particular sites while taking into consideration the mitigation of impacts to downstream processes.  We continuously review the effectiveness of the Capture process, and we are very interested in your feedback.  It is also important to note that this was one of the first Changes to go through the Capture process. | | | | |

Please send the completed representation response to [uklink@xoserve.com](mailto:uklink@xoserve.com)

Change Representation

(To be completed by User and returned for response)

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| --- | --- | --- | --- | --- | --- |
| User Contact Details: | Organisation: | | npower | | |
| Name: | | Amie Charalambous | | |
| Email: | | Gas.Codes@npower.com | | |
| Telephone: | | 07917271763 | | |
| Representation Status: | Support | | | | |
| Representation Publication: | Publish | | | | Private |
| Representation Comments: |  | | | | |
| Confirm Target Release Date? | Yes | No | | If [No] please specify alternative | |
| Xoserve Response to Organisation’s Comments | Thank you for your comments. | | | | |

Please send the completed representation response to [uklink@xoserve.com](mailto:uklink@xoserve.com)

# Template Version Control

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| --- | --- | --- | --- | --- |
| Version | Status | Date | Action Owner | Remarks |
| 1.0 | Superseded | 10/09/2018 | Richard Johnson | Original Change Pack Summary template created |
| 2.0 | Live | 23/11/2018 | Simon Harris | Moved template on new Xoserve corporate identity word template |