

MHHS Testing and Migration Advisory Group (TMAG) Minutes and Actions

Issue date: 26/07/2023

Meeting number	TMAG 021	Venue	Virtual – MS Teams
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Date and time	19 July 2023 1000-1130	Classification	Public
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Attendees

Chair

Smitha Pichrikat (SP)	MHHS Client Delivery Manager
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Industry Representatives

Dave Jones (DJ)	Retail Energy Code Representative
Ian Garrison (IG)	Large Supplier Representative
Ian Hall (IHaI)	Supplier Agent Representative
Lee Northall (LN)	Large Supplier Representative (co-representative, Testing)
Naomi Walker (NW)	E.ON Next Representative
Nickie Bernsmeier-Rulow (NBR)	DCC Representative
Riccardo Lampini (RL)	Elexon Representative
Shaun Brundett (SBr)	ESG Global Representative
Stacey Buck (SBu)	iDNO Representative

MHHS IM Members

Amy Clayton (AC)	PMO Governance Support
Cesar Lopes (CL)	Test Data Lead
Dominic Mooney (DM)	SIT Delivery Manager
John Wiggins (JW)	Migration lead
Keith Clark (KC)	Programme Manager
Kevin Davis (KD)	Testing Lead
Matthew Breen (MB)	Migration Analyst
Mayur Depala (MD)	SIT Delivery Lead
Simon Berry (SBe)	Environments Lead
Warren Fulton (WF)	Design Project Manager

Other Attendees

Anna Millar (AM)	Elexon Qualification Lead
Bhoopal Bereddy (BB)	IPA
Saima Sabir (SS)	IPA
Sajwal Dash (SD)	IPA
Sinead Quinn (SQ)	Ofgem

Actions

Area	Ref	Action	Owner	Due	Update
Top 5 Risks Relevant to TMAG	TMAG21-01	Elexon Qualification Lead to provide update on R525 at the next TMAG.	Elexon (Anna Millar)	16/08/23	
Top 5 Risks Relevant to TMAG	TMAG21-02	Programme to include a verbal update for each of the top risks relevant to TMAG at the next meeting.	Programme	16/08/23	
Data Cleanse Plan	TMAG21-03	Programme to raise a dependency in the Programme Plan around the SDEP requirements in the Data Cleanse Plan.	Programme (John Wiggins)	16/08/23	
Milestone Changes for Approval	TMAG21-04	Programme to consider how they best reflect the due date for the Environment Approach and Plan document.	Programme (Simon Berry / Dominic Mooney)	16/08/23	
Migration, Cutover & Data Strategy	TMAG19-02	Programme to produce a plan-on-a-page for the Migration deliverables (including lower-level artefacts).	Programme (John Wiggins)	19/07/23	Action remains ongoing.
Testing Integration Strategy	TMAG20-02	Programme to discuss End-to-end Testing Integration Strategy, and provide a plan to socialise when industry will see this document.	Programme (Lee Cox)	16/08/2023	Action remains ongoing.

Decisions

Area	Ref	Description
Minutes and Actions	TMAG-DEC32	Approval of minutes and actions from the meeting 21 June 2023.
Data Cleanse Plan	TMAG-DEC33	Approval of version 0.3 of the Data Cleanse Plan.
Data Cleanse Plan	TMAG-DEC34	Approval of the establishment of a new Working Group for the management of the Data Cleanse Plan and the activities that it sets out.
Milestone Changes for Approval	TMAG-DEC35	Approval of three milestone changes (Environment Approach and Plan, CIT Scenarios, SIT Functional Test Scenarios), with the caveat of the Environments Approach and Plan to include when the latter two iterative drops will be at the August TMAG.
Overarching Test Data Approach and Plan	TMAG-DEC36	Approval of version 0.8 of the Overarching Test Data Approach and Plan.

CIT Test and Test Data Approaches & Plans	TMAG-DEC37	Approval of version 0.4 of the CIT Test Approach and Plan.
CIT Test and Test Data Approaches & Plans	TMAG-DEC38	Approval of version 0.4 of the CIT Test Approach and Plan.

Minutes

1. Welcome

The Chair welcomed all to the meeting and ran over the meeting agenda.

2. Minutes and Actions

DECISION TMAG-DEC32: Approval of minutes and actions from the meeting 21 June 2023.

The Chair approved the minutes of the previous TMAG. AC walked through the actions, as per the slide.

The Programme noted comments against the following actions:

- **TMAG20-02** – DM shared that the plan is to bring the updated document to October TMAG and will have no impact on M9.

3. Top 5 Risks Relevant to TMAG

AC highlighted the top 5 risks relevant to TMAG, as per the slide. LN, the Large Supplier Constituency (LSC) Representative, shared that it would be useful to have a forward-looking view and to proactively discuss these risks and the mitigation actions during the meeting. For example, what are the key root causes driving risk R272. SP responded that there is a strong focus on R272. AP shared that the design and delivery assurance for this risk had taken place and they had received the PIT assurance approach and plan. It was recognised by the Programme that further commentary could be added to the slide to provide updates on the mitigation actions.

AM the provided an update on R525. AM noted that the request to participants to share their tranche preferences had sent out and responses on indicative tranches had come back from Suppliers. It was shared that AM is in the process of pulling the view on this together to provide an early view of how Suppliers could be spread across the tranches. AM reiterated that these are indicative and not the official request for tranche allocation. LN asked how many Programme participants had responded to the request. AM responded that they had received around 40 responses which they need to track against. An action was taken for AM to provide an update on this risk at the August TMAG.

ACTION TMAG21-01: Elexon Qualification Lead to provide update on R525 at the next TMAG.

The Programme took an action to include a verbal update for each of the top risks relevant to TMAG at the next meeting.

ACTION TMAG21-02: Programme to include a verbal update for each of the top risks relevant to TMAG at the next meeting.

The Chair highlighted that if representatives had any key risks, they would like to discuss then they could email these to pmo@mhhsprogramme.co.uk.

4. Data Cleanse Plan

JW provided an overview of the work that had been undertaken on the Data Cleanse Plan. JW noted that the Programme had been working on the data cleanse since January 2023, They had started with the Data Assessment Report and then had 10 to 15 workshops with industry between February and June of 2023 to develop the plan in more detail. JW shared that the plan is in a good place and the consensus from industry is that the Programme is focused on the correct risks. JW went through the key issue sections of the plan, specifically issues with MTDs, Advanced Meters and Registration Data. The aim is to resolve the majority of issues highlighted in the plan by M10.

JW shared that the consultation period of the Migration, Cutover & Data Strategy lasted for 2 weeks from 9 June – 23 June 2023. In that time, the Programme received 297 comments from 21 organisations and 24 participants. JW noted

that the comments on Advanced Meters have been incorporated into the document and that many parties have started cleansing activities in support of the plan. Participants had fed back that the planned dates would be challenging, based on this feedback and the subsequent Assurance meeting the Programme had refined the dates with the consensus that the plan is now achievable.

JW highlighted the timeline for activities of the Data Cleanse Plan, as per the slide. JW summarised the key changes between version 0.2 and 0.3 of the plan. Specifically, that they have re-worked the planned dates to accommodate Programme participant capacity and feedback; clarified which activities will be automated and which will be manual; clarified the structure of data when sent between parties; clarified the approach to managing the clock change; provided further additional clarity throughout the plan.

JW shared that they would also be recommending that a new Working Group is established for the management of the Data Cleanse Plan and the activities that it sets out. The nature of the working group will be to gain learnings and share learnings with Programme participants for revisions in the plan. JW highlighted that it will also allow for the Data Cleanse Plan to be kept separate from the Migration Working Group (MWG) and ensure that the appropriate focus can be given to the activities set out in the plan. The working group would be held monthly and report into TMAG.

DJ, from Retail Energy Code Representative, noted that a minor comment on the plan had been sent in from BUUK last week and asked if this had been responded to. JW responded that this had been incorporated and the Programme had responded to the participant.

SB, the iDNO Representative, shared that they thought the document was well written and thought out. SB also noted that they supported the established of a Data Cleanse Working Group. JW thanked SB and added that the plan had been well engaged by participants which helped with the learnings. JW shared that the aim is for the reporting on the data cleanse to start in October with an executive summary to come to TMAG.

LN, the Large Supplier Constituency (LSC) Representative, stated his support of the approval of the document and asked when the new Data Cleanse Working Group would likely start. JW responded that the aim would be to start this in September.

LN queried the SDEP dependency on the Data Cleanse Plan, highlighting that this requires improvement and recommended to formally raise a dependency on this to execute the plan. JW agreed and said the Programme would raise a dependency on the Programme plan. JW shared that discussions with RECCo have taken place on this and they are currently looking at the viability of this. It was further noted that the Programme had agreed with RECCo that if they need any information from the Data Cleanse Plan then the Programme will support on this.

ACTION TMAG21-03: Programme to raise a dependency in the Programme Plan around the SDEP requirements in the Data Cleanse Plan.

The Chair asked if there were any objections to the approval of the Data Cleanse Plan and the establishment of a new Data Cleanse Working Group. No objections.

DECISION TMAG-DEC33: Approval of version 0.3 of the Data Cleanse Plan.

DECISION TMAGDEC34: Approval of the establishment of a new Working Group for the management of the Data Cleanse Plan and the activities that it sets out.

5. Milestone changes for approval

DM highlighted that TMAG members were being asked to decide whether to approve changes in dates to the Programme Plan milestones, and once approved these changes will be incorporated into the Programme Plan through a housekeeping change. Milestone changes for approval: Environment Approach & Plan, SIT CIT Test Scenarios, SIT Functional Test Scenarios.

It was noted that the Environment Approach & Plan would be approved in phases, with the first date the 17 August 2023. DM shared that the first iteration of the document will contain updates for CIT, the second for CIT Functional Test and third is SIT Non-Functional Testing and Qualification.

DM shared that SIT CIT Test Scenarios went out for consultation with comments from this addressed and changes aligned. There will be an assurance review on the test scenarios on Friday 21 July 2023 with approval coming to August TMAG.

DM also shared that the SIT Functional Test Scenarios are in the process of being uplifted.

NBR, the DCC Representative, queried if the latter dates moved would the Environment Approach and Plan come back to TMAG. The Programme took an action to consider how they best reflect the due date for the Environment Approach and Plan document and bring this to the August TMAG.

ACTION TMAG21-04: Programme to consider how they best reflect the due date for the Environment Approach and Plan document.

LN expressed concerns on the proximity in dates of the SIT CIT Test Scenarios and SIT Functional Test Scenarios and asked if there could be further visibility on additional scenarios. DM responded that the degree of change will not be large, however there is an assurance review for the CIT Test Scenarios this Friday, with the plan for comments to be addressed on this before the August TMAG.

RL, the Elexon Representative queried if the scenarios would change according to the Interim Releases. DM shared the assumptions is that the scenarios should not impact any of the Interim Releases and if they are this will be brought back to TMAG. RL asked if the final version of SIT Functional Testing will be brought to September TMAG. DM responded that this was the target.

The milestone changes were approved with the caveat to the Environment Approach & Plan.

DECISION TMAG-DEC35: Approval of three milestone changes (Environment Approach and Plan, CIT Scenarios, SIT Functional Test Scenarios), with the caveat of the Environments Approach and Plan to include when the latter two iterative drops will be at the August TMAG.

6. Overarching Test Data Approach and Plan

CL provided a summary of the changes to the Overarching Test Data Approach & Plan from version 0.7 to 0.8, as per the slide. It was noted that the main change was to utilise multiple data cuts, one for SIT (19 August 2023) and additional data cuts in support of Programme Qualification Testing and LDSO Non-SIT Qualification Testing. CL shared that summary of changes to version 0.7 were listed on the slide. CL highlighted that the biggest change was the approach to data cut. It was noted that subsequent minor changes have been made in response to a Programme participant where they had requested further clarification on the difference between SIT and Qualification stages. This updated version was presented to DWG on 6 July 2023. The latest document, red-lined version and comments log are on the Collaboration Base.

LN asked if changes in approach in activities and dependencies from a previous bilateral had been reflected in the plan. LN also asked when there would be further clarity on sequencing and dependencies around the data cut. JW responded that there would be communications coming by the end of this week (21 July 2023) to confirm which roles need to take a data cut. There will also be a guidance document released on the 26 July 2023 which will show the data augmented by the Programme and how this will be presented back to each role. The Programme further noted that if there were concerns from participants around the 19 August data cut then they should contact ppc@mmhsprogramme.co.uk to set up a meeting to discuss this.

The Chair asked if there were any objections to the approval of the Overarching Test Data Approach & Plan. No objections. The Chair noted LNs comments.

DECISION TMAG-DEC36: Approval of version 0.8 of the Overarching Test Data Approach and Plan.

7. CIT Test and Test Data Approaches & Plan

DM shared that the CIT Test Approach & Plan assurance review on version 0.3 red-line changes ended on 7 July. There were 23 comments received from 6 participants. DM noted that the 6 comments have resulted in minor changes in v0.4 and that a full list of comments and responses have been published on the Collaboration Base. DM highlighted that there had been agreement at the Extraordinary SITWG for TMAG approval of this plan. The Chair asked if there were any objections to the approval of the CIT Test Approach & Plan. No objections.

DECISION TMAG-DEC37: Approval of version 0.4 of the CIT Test Approach and Plan.

CL shared that the CIT Test Data Approach & Plan assurance review on version 0.4 red-line changes ended on 7 July. CL noted that the Programme had responded to all comments and a full list was published on the Collaboration Base.

It was highlighted that a subsequent change had been made in response to an outstanding comment from SB which required a design team confirmation. CL noted that the latest version (0.5) has the amendment to include the LDSO as a sender of the IF-020 message. This version is published on the Collaboration Base and no other changes have been made.

SB thanked the Programme for sorting out the query and stated her support of the approval. It was noted that the Programme participants most affected by this would be those going through SIT and CIT.

The Chair asked if there were any objections to the approval of the CIT Test Data Approach & Plan version 0.5. No objections.

DECISION TMAG-DEC38: Approval of version 0.4 of the CIT Test Approach and Plan.

8. Working group progress update

AM provided an update from the Qualification and E2E Sandbox Working Group (QWG), as per the slide.

LN queried whether parties would need to provide their PIT exit two months before their Qualification tranche. AM responded that they would only be expecting a percentage completion two months before so that they are confident the party is ready to join the allocation tranche. AM re-emphasised there was no need to complete two-months ahead of the tranche.

9. IPA Test Assurance update

SD from the IPA provided an update on the findings from the Test Assurance for P1 and the plan for P2, as per the slides.

SD noted that P1 Test Assurance is now complete, and they are finalising the report for this. The report will be presented at August PSG and TMAG. The five key themes from P1 were shared. They observed that there was a further level of clarity requested from Programme participants on the PIT phasing approach, design and baseline of test activities, design and DIM log processes; test data and timelines for participants.

SD shared that P2 Test Assurance is currently in the planning and mobilisation phase, with the aim to have this completed by the end of July. The draft report for P1 will be going to PSG in November.

LN asked when parties will know if they have been selected for the P2 Test Assurance. SD responded that the PPC Team will be reaching out to the sample participants within the week and then the IPA will be setting up a briefing call towards the end of the month.

LN highlighted that there is high demand from Programme participants to review documents, consultations, and assurance meetings, and wanted to note the extra demand the Test Assurance review brings. SD took this on board and said the IPA will be aiming to align with assurance reviews and minimise overhead.

10. Summary and next steps

AC went over the meeting actions and next steps.

11. AOB

JW raised that they wanted to push back the approval of the Migration Thresholds and Profiling to September TMAG (previously August). This was due to large amounts of feedback at the July MWG on exception volumes and process requirements, and the need to have separate sessions with LDSOs on this. JW asked for verbal approval today from TMAG members on this. No concerns raised.

Date of next TMAG: 16 August 2023