Minutes – CuS project meeting, September 2nd and 3rd, 2014

Date: Tuesday and Wednesday, September 2nd and 3rd, 2014
Time: 09:00 – 17:30 and 9:00 – 16:00
Place: Atrias offices in Brussels, see **Error! Reference source not found.** for **Error! Reference source not found.**
Participants: Christian Odgaard, Energinet.dk
Gerrit Fokkema (Convenor), EDSN, NL
Grazyna Hańderek, Tauron Dystrybucja, PL
Joachim (Joe) Schlegel, RWE, DE
Kees Sparreboom, TenneT, NL
Ove Nesvik (Secretary), EdiSys, NO
Thibaut Hellin, Atrias, BE
Torleif Korneliussen, Hafslund, NO
Waldemar Lonczak, Energa-Operator SA, PL

Enclosure: ebIX BRS for Request Meter Char, see item 5, Distribute and request change of master data Meter

Appendixes: **Appendix A** CuS Work plan
Appendix B Member list

1 Approval of agenda

The agenda was approved with the following additions:

- Update of Atrias' published model, see 14.1 under AOB
- Preparation of Polish kick-off meeting, see 14.2 under AOB

2 Minutes from previous meeting

The minutes were approved without comments

3 Review of CuS Work plan (Appendix A) and potentially new areas

The proposals for new projects, raised at the ebIX® Forum strategy "summer conferences", were reviewed:

Proposed item	Comments	Conclusion
Additional processes for communication with the producers (Proposed by PL)	The issue is solved and the proposal was withdrawn (at least for the moment)	No action
New (enhanced) processes for labelling (indicating the source of the energy, such as renewables) (Proposed by NL)	The item will put on the next CuS agenda. ***Action:*** **Gerrit** will prepare a justification for the item	Will be put on next CuS agenda

Proposed item	Comments	Conclusion
New metering processes	The proposal regards new processes caused by the introduction of smart meters, such as: • In Belgium the BSs can send information to the smart meters of remaining amounts on prepaid MPs • Belgium and Germany noted a need for exchange of Meter and Register characteristics. However, this is already on the agenda for today, see item 5	No actions
Addition of gas to the ebIX® models	Done in a separate ebIX® project	No action
Parent/Child MP (Proposed by DK)	The request concerns installations where there are extra "technical meters" (registers) measuring such as solar production, wind production or other special production or consumption characteristics. These Meters (registers) will have a separate MP ID that need to be linked to the "parent MP". A supplier change can only take place in a parent MP. Master data for a child MP will always include the parent MP. Kees/Gerrit noted that they think the need for a child MP should be solved by using a Field (for the meters).	Will be discussed under the Master Data Meter item (item 5)
Request for services (maybe part of Ordering of chargeable services) (Proposed by DK)	The item concerns requests from the BS to the DSO for changes to a MP or a Meter, such as: • Closing and Reopening MPs; • Change of Metering Method; • Change of time frames.	Moved to CuS Work plan Appendix A
Change of BRP in Metering Grid Area, "Price Area" or country (not at MP level) (Proposed by DK)	This is a "bulk change of BRP (and BS?)".	Moved to CuS Work plan Appendix A
Cancellation of moves (Proposed by DK)	Part of the cancellation process, se item 4	Moved to CuS Work plan Appendix A
The possible role of a datahub in the processes (Proposed by DK) • Seen from the supplier side • Seen from the DSO side • Seen from the metering side	When adding a datahub to a market the datahub will replace the DSOs, to a large extend, i.e. the MPA will be the datahub. Among others, the proposal include processes between the GAP and the MPA.	Moved to CuS Work plan Appendix A
Combined grid and supply billing (invoicing)	The item is supported by Denmark, Germany, Norway and Poland.	Moved to CuS Work plan Appendix A
Interfering processes	A matrix of processes with priorities, when a given process is interfered by another, such as when a customer move comes in the middle	Moved to CuS Work plan Appendix A

Proposed item	Comments	Conclusion
	of a change of supplier process.	

The proposals for new projects, raised at the ebIX® Forum strategy "summer conferences" were thereafter merged with the CuS work items in Appendix A and given priorities:

		Priorities						
#	**Activity**	**BE**	**DE**	**DK**	**NL**	**NO**	**PL**	**Agreed**
A)	How to handle the different attributes related to the Consumer	1	1	3		1	1	1st
B)	Request change of attributes connected to a MP	2	2		1	4	3	2nd
C)	Combined grid and supply billing (invoicing)			1		2	2	3rd
D)	Interfering processes			2		3	4	4th
E)	Change of BRP in Metering Grid Area, "Price Area" or country			4	2			5th
F)	Efficient data alignment	3						6th
G)	Request for services.							TDB
H)	The possible role of a datahub in the processes							TDB
I)	QA of the CuS model and consistency of the CuS and EMD models							TDB

During review of the work items, Kees mentioned that we should try to get a "support partner" for the new processes, such as Eurelectric or a regulator organisation, e.g. CEER.

Action:

- The priorities will be presented at the next ebIX® Forum meeting, with a proposal for having four CuS meetings in 2015.
- CuS will bring up the question in ebIX® Forum, if we should require a "support partner" for the new processes, such as Eurelectric or a regulator organisation, e.g. CEER.

4 Cancellations

Emma had as homework to review the ebIX® Cancellation document. Emma has reviewed the document and she thinks overall the content is still ok although she has a couple of questions:

A. *General:* Who, other than MPA can be the Administrating role?
B. *3.1.2 under Performance goals*: is it really true that any involved role can cancel the hole or part of a business process? Even a part that the party is not directly involved in?
C. *3.2.1:* an arrow from MPA to Initiating role of business process for notification of cancelation is missing
D. We have done changes in the other documents that have not been done here. The question is, does that alone warrant an update or should we just put it on the To do-list for the next version or revision of the document?

   For example:

   1. Administrating role, Initiating role and Affected role I think we need to update
   2. UseCase diagrams should be updated to the "new" standard
   3. UseCase descriptions should be updated to the "new" standard
   4. Class diagrams should be reviewed and updated to the "new" standard
   5. Activity diagrams should be reviewed and updated to the "new" standard
   6. Sequence diagrams should be reviewed and updated to the "new" standard

The Cancellation document and the questions from Emma was reviewed and discussed:

- The most used cancellation principle today is cancelling a single business document, i.e. resending the original document with addition of a Status or Function element saying that this is a cancellation.
- Belgium explained that they in addition have a "Rectification process", i.e. retroactive error correction. The rectification process cancels the whole business process (rollback).
- Gerrit questioned the terms used in the ebIX® cancellation document, which describe two cancellation principles:

    - using a specialised set of business documents (Request/Response) for cancellation of business process;
    - by resending the original business document with a code stating that this is a cancellation.

  Both principles cancels the process and not only a document
- Gerrit and Kees stressed that rectifications (e.g. correction of the BS connected to a MP back in time) not should be corrected in the MPA db:
    - In the MPA database there should only registered future corrections;
    - However, the BSs contract databases must be corrected.
- Belgium, Demark and Norway informed that rectifications can be done retroactively in the respective datahubs, i.e. a correction to an incorrect change of supplier will be backdated.
- Example of Belgian rectification process - undo-redo during the Belgian rectification process.

  It does not mean that we always have to undo and redo everything (move + metering + grid fee + settlement) but following the rectification, we might have to undo-redo some of these. In this case, we follow always the following way of working. First we do the « Undo » of messages and this will be done in the following order :
    1. Grid fee and settlement messages from the latest to the oldest;
    2. Metering messages from the latest to the oldest;
    3. Technical Master data messages from the latest to the oldest.

  Then we do the "redo" of messages and this will be done in the following order:
    1. Technical Master Data from the oldest to the latest;
    2. Metering messages from the oldest to the latest;
    3. Grid fee and settlement messages from the oldest to the latest.

Conclusions:

- The ebIX® cancellation process can be run up to the effective date (can not be run retroactive).
- We remove the first of the two principles in the ebIX® Cancellation document, i.e. we only describe cancellation of processes by cancellation of one or more documents.
- After the time of no return (effective date) a separate rectification process must be run, if corrections are needed.
- A rectification process can use the same principle as a normal cancellation, i.e. resending one or more documents with a Status or Function element saying this is a cancellation/rectification. In addition, the requirements for the rectification process, such as the sequence of cancelled documents and parties to send and receive the cancellation, must be specified in the relevant BRS.

Action:

- **Grazyna** will try to rewrite the ebIX® Cancellation document before next meeting, with input from the Harmonised Nordic Retail market BRS (chapter 9).

5 Distribute and request change of master data Meter

All had as homework from previous meeting to check (for electricity):

- In which way the Field is used when switching Meter Operator.
  Conclusion: Field information is needed by the Meter Operator, i.e. for proper installation of meter(s).

- Who is the responsible role for the Field?
  Conclusion: The DSO, in the role of Grid Operator.

- Who is the responsible role for installing the Meter?
  Conclusion: The Meter Operator.

- Different usage/need for master data Meter for small (household) and large (industry) MPs?
  Conclusion: The information of the Field is only needed for larger and/or complex installations, where multiple fields are needed. Field information is not used for household customer (defacto one field).

From previous ETC meeting:

The extended definition of the Grid Operator below will be forwarded to the ebIX®, EFET and ENTSO-E Harmonisation Group (HG):

> A party that operates one or more grids **and is responsible for installing, maintaining, testing, certifying and decommissioning of Field(s), including Primary Metering installations and excluding Secondary Metering Installations.**

CuS is asked to come up with definitions for Field and Primary/secondary Meter Installations that can be shown to the HG.

CuS proposed the following definitions:

Field:	Reference point (strip or bar) on the power system where the user's electrical facility is connected.
Primary Metering installation:	Assembly of associated electric equipment, such as Voltage- and Current Transformers, and Fuses. The responsible role for the Primary Metering installation is the Grid Operator.
Secondary Metering Installations:	Assembly of associated electric equipment connected to the Secondary Side of Voltage- and Current Transformers, such as one or more Meters. The responsible role for the Secondary Metering installation is the Meter Operator.

Action:

- ETC will be asked to find a common way of specifying conditions in State diagrams (use of Signals - similar to usage of Guards in activity diagrams).

Homework:

- **Ove** will update the MD Structure module:
  - Change all states to having one word, such as Exchanged, Rejected,
- **All** will review the BRS and send COMMENTS BY MAIL, before the next CuS meeting (see attached document at the top of the minutes)

- A special focus should be on the responding Meter characteristics, for electricity and gas, which is split into a simple and a complex version

6 New Metering Point Characteristics elements

The item was postponed until next meeting in Maribor.

7 Review of notify and request MP master data documents

Ove had as homework from previous meeting to update the notify and request MP master data documents, send them on circulation for comments to ebIX® Forum for four weeks and thereafter publish them. However, the updates includes addition of Header and Context elements, which need a review before circulation for comments to ebIX® Forum.

The BRSs was reviewed, which resulted in a longer discussion on how to specify the "Header and Context information" in the BRSs.

It was also a longer discussion related to which Business Reason Code(s) to use in the MP characteristics document:

- Always E0G = Alignment of master data MP;
- E0G only for responding MP characteristics and the relevant process (reason) for notifications, such as Change of Supplier, End of supply.

Conclusions:

- The Request and Notify MP characteristics BRSs will be merged into one BRS called "Alignment of MP characteristics".
- We will use E0G = Alignment of master data MP in both responses and notifications.

Homework:

- After discussion in ETC, Ove will update the BRSs and send it to CuS for reconfirmation of the conclusions.
  - The "Header and Context information" should be placed close to "…Additions" and "…Async Additions" classes;
  - There should be a Dependency between the "Root class" and the "Header and Context information";
  - The merged Request and Notify MP characteristics document will be called "Alignment of MP characteristics";
  - Addition of definitions of "Header and Context information" related to all class diagrams.

Action:

- ETC will be asked to:
  - Discuss the content and usage of "Header and Context information" in the BRSs
    - Can we model only for XML, i.e. skip the Document Name Code?
  - The use of the Business Document Name Code "**ERR**", if still relevant.

8 Different resolutions for different purposes in a MP

The item was postponed until next meeting.

9 Alignment of BRSs from CuS and EMD

- The ebIX® Business Information Model for Measure for Reconciliation 2014.A consist of two parts:
  - "Exchange Validated Data for Reconciliation", chapter 2.1 – 2.3
  - "Request Validated Data for Reconciliation", chapter 2.4 – 2.6
- In CuS we have split similar BRSs/BIMs into two, e.g.:
  - Notify MP characteristics
  - Request MP characteristics

Conclusions:

- The Request and Notify MP characteristics BRSs will be merged into one BRS called "Alignment of MP characteristics" (see also item 7 above).

10 Status for ebIX® project for alignment with the gas sector

Kees reported:

- The focus on the first meeting was on "Aggregated Reception Station" (ARS), Caloric Value and BRP/TRC (Shipper).
- The focus on the second was on the CuS models:
  - BRS for Change of Supplier seems to be OK for gas without changes (however with a few unsolved questions);
  - CuS was asked to add an ARS at all places where CuS uses a MGA;
  - There are no code list related to the Metering Reading Characteristics (only specified in the Business Requirement View;
  - There are also a set of questions for ETC.
- The project will submit a document with changes to the CuS documents when ready.
- The project is expected finalised within the end of the year.

11 Status (follow up) for cooperation with Eurelectric and CEDEC

Gerrit informed that Eurelectric does not seem to be interested in a cooperation with ebIX®. Eurelectric is more focused on political issues and ebIX® is probably too technical.

Gerrit has also contacted CEDEC, but without any positive responses.

The item will be removed from future CuS agendas.

12 Update of the ebIX® web-site

The CuS items on the ebIX® web site was reviewed:

- It was agreed to remove Thilo, Kristian and Leif from the member and mailing lists.
  - The removed persons will be informed and invited to take up participation.
- There are missing minutes.

Actions:

- **Ove** will inform Thilo, Kristian and Leif of the removal from the member and mailing lists.
- **Ove** will add missing minutes to the ebIX® web site.

13 Meeting schedule

Tuesday 18th and Wednesday 19th of November in Maribor;

Tuesday 3rd and Wednesday 4th of February in Poland;
Tuesday 8th and Wednesday 9th of April in Sweden.

14 AOB

14.1 Update of Atrias' published model

For information, Atrias has updated the published model and the related URL: https://model.atrias.be/umig6/

14.2 Preparation of Polish kick-off meeting

There will be a kick-off meeting regarding the start of the consulting process for the Polish business requirements Thursday September 4th. As a preparation for the kick-off meeting, Grazyna wanted some information of the organisation of the energy market in different countries:

- In Demark all communication is going via the datahub:
  - The TSO is the responsible party;
  - Using asynchronous WS as means of communication;
  - All costs are covered by the TSO.
- Germany, Norway and Sweden are using many-to-many communication (SMTP).
  - From October 2016 a datahub (Elhub) will be launched in Norway:
    - The TSO is the responsible party;
    - Probably using MADES as means of communication;
    - Payment structure is under discussion – maybe as a combination of fees per MP, per document exchanged and a fixed fee.
- The datahub in the Netherlands is similar to the Danish:
  - Using asynchronous and synchronous WS;
  - EDSN (owned by the market) is the responsible organisation.
- The datahub in the Belgium is also similar to the Danish:
  - Using asynchronous WS;
  - ATRIAS (owned by the market) is the responsible organisation;
  - The Belgian link to B2B communication document (in English): http://www.atrias.be/FR/Publications_UMIG60/01%20Market%20Processes%20(Implementation%20Guide)/05%20Interchange%20Agreement/F_NF_R_PP-EN-Market_B2B_Communication_v1.3.pdf.

Appendix A CuS Work plan

#	Activity	Priority	Start	End
A)	How to handle the different attributes related to the Consumer, such as consumer contact information (e.g. address and invoice address).	1st	Q4/2014	Q2/2015
B)	Request change of attributes connected to a MP, such as Closing and Reopening MPs, Change of Metering Method and Change of Time Frames	2nd	Q1/2015	Q3/2015
C)	Combined grid and supply billing (invoicing), including MD for products, such as; grid fees, grid subscriptions, …	3rd	Q2/2015	Q1/2016
D)	Interfering processes – a matrix of processes with priorities, when a given process is interfered by another, such as when a customer move comes in the middle of a change of supplier process.	4th	Q4/2015	Q3/2016
E)	Change of BRP in Metering Grid Area, ”Price Area” or country (not at MP level) (Proposed by DK), i.e. a “bulk change of BRP (and/or BS?)”	5th	TBD	TBD
F)	Efficient data alignment, including the possibility to request historical and/or future master data.	6th	TBD	TBD
G)	Request for services. The item concerns chargeable requests from the BS to the DSO for changes to a MP or a Meter, such as Request for Metered Data	TBD	TBD	TBD
H)	The possible role of a datahub in the processes (Proposed by DK) • Seen from the supplier side • Seen from the DSO side • Seen from the metering side When adding a datahub to a market the datahub will replace the DSOs, to a large extend, i.e. the MPA will be the datahub. Among others, the proposal include processes between the GAP and the MPA.	TBD	TBD	TBD
I)	QA of the CuS model and consistency of the CuS and EMD models	TBD	TBD	TBD

Appendix B Member list

Members:

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It is expected that cc receivers are reading the CuS minutes and actively respond to these when they have comments to them. It is further expected that the CuS information is actively used in the national data exchange standardisation work.