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# Testing and Migration Advisory Group #10

19 October 2022

Version 1.0

MHHS-DEL674

Agenda

#	Item	Objective	Type	Lead	Time	Page
1	**Welcome**			Chair	10:00-10:05 *5 mins*	
2	**Minutes and actions**	Approve September TMAG minutes. Update on open actions, closing where appropriate	Decision	Chair and Secretariat	10:05-10:10 *5 mins*	3
3	**Programme updates**	Provide updates from L2/3 governance groups and wider Programme activity	Information	Programme (PMO)	10:10-10:15 *5 mins*	5
4	**Migration options**	Update on progress of the migration options from the MWG and agree the role of TMAG in next steps	Discussion	Programme (Carly Ward / Kate Goodman)	10:15-10:40 *25 mins*	7
5	**Programme replan**	• Update on the responses to Round 2 consultation, highlighting relevant elements for test and migration • Discuss the approach to participant involvement in SIT	Information/ Discussion	Programme (Kate Goodman)	10:40-11:00 *20 mins*	11
6	**Environments Approach and Plan**	Present a synopsis of the plan	Information	Programme (Adrian Samlal)	11:00-11:10 *10 mins*	15
7	**Working group updates**	Provide updates from the DWG, MWG, QWG and EWG	Information	Programme (working group leads as required)	11:10-11:20 *10 mins*	18
8	**Summary and next steps**	Summarise actions and look ahead to November TMAG	Information	Chair and Secretariat	11:20-11:25 *5 mins*	20

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Document Classification: Public

Minutes and actions

DECISION/INFORMATION: Approve September TMAG minutes. Update on open actions, closing where appropriate

Chair and Secretariat

5 mins
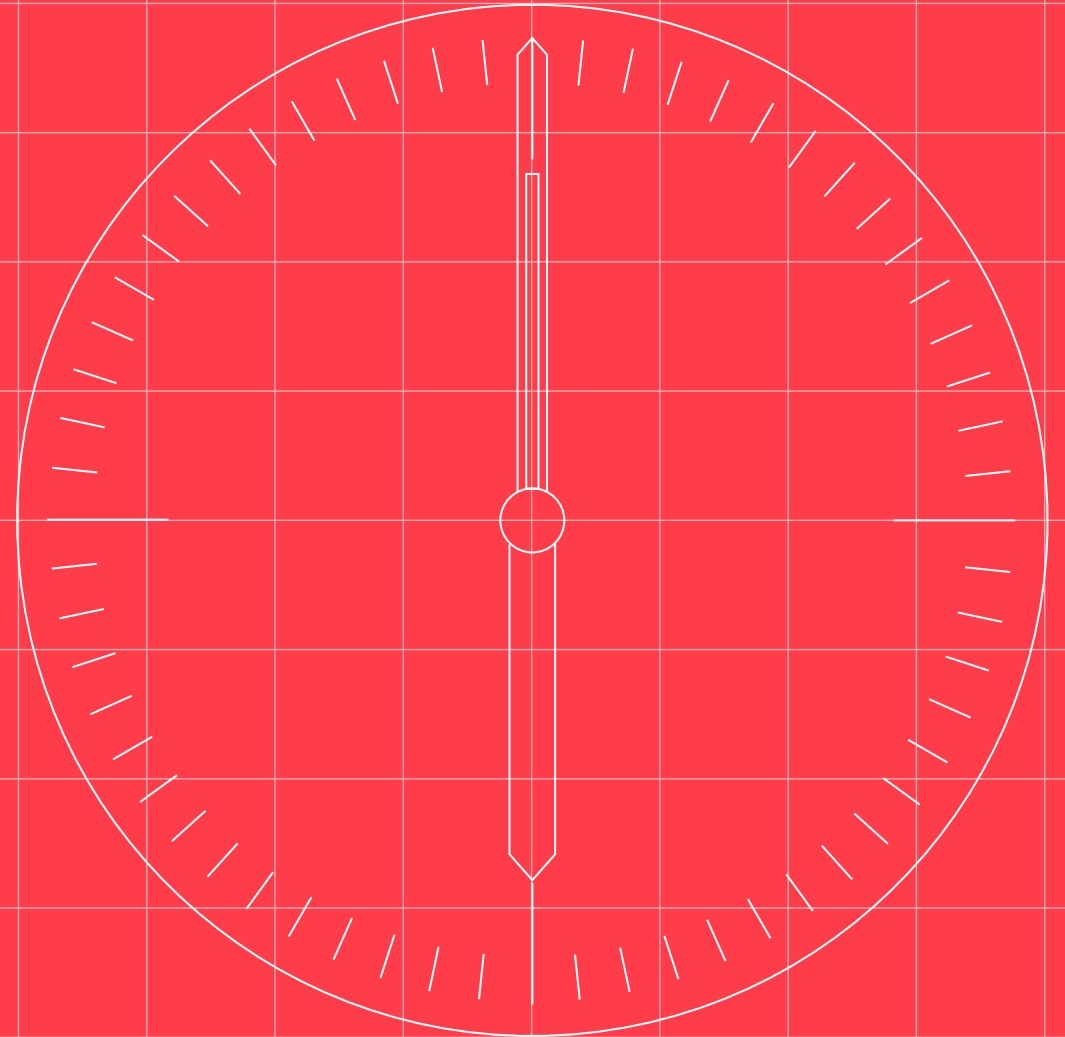
Minutes and Actions Review

1. **Approval of Minutes** from TMAG 22 September 2022 ([TMAG Meeting Minutes – 22 September 2022](#))
2. **Open Actions and Actions from TMAG 22 September 2022** (actions will be discussed by exception. Please review the action updates ahead of the meeting)

Ref	Date	Action	Owner	Due Date	Status	Latest Update
TMAG07-03	20/07/2022	Consider combining working groups to into a more efficient structure with fewer groups. Consider splitting sub-groups by relevant industry groupings to target discussion to most relevant parties	Programme	17/08/2022	Recommend closed – to be revisited after the replan	To be explored further by the Programme and reviewed on an ongoing basis. We will assess how the four working groups are working as a whole, given QWG and EWG have only recently been established
TMAG08-02	17/08/2022	Respond to Programme replan consultation. Encourage constituents to respond to the consultation	TMAG members	26/08/2022	Open - ongoing	Round 2 consultation closed at the end of September. TMAG members are encouraged to review the Round 3 consultation when released

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Programme updates

INFORMATION: Provide updates from L2/3 governance groups and wider Programme activity

PMO

5 mins

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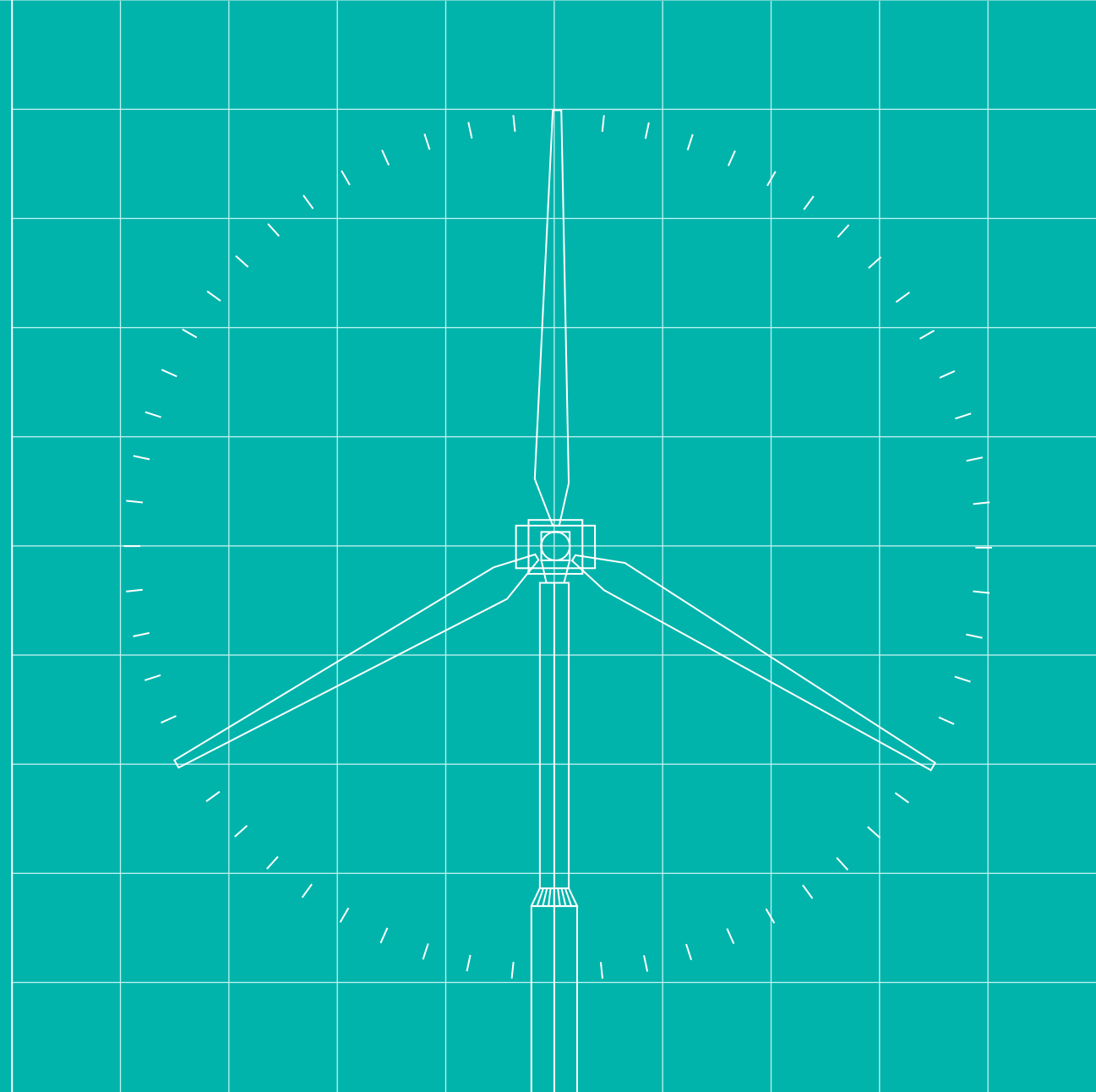
Programme Updates

Governance group updates

Programme Steering Group (PSG)

Updates from PSG 05 October 2022

1. **Readiness for M3 and DBT –** constituency reps provided a view of readiness for DBT in their constituency. Most feedback was positive. The PPC gave an overview of Readiness Assessment 2. The PSG discussed the approach to making the M3 decision at November PSG
2. **Programme replan progress –** the Programme presented the approach to the replan following Round 2 consultation. The PSG agreed to make the decision to move to Round 3 conditional on PSG decision
3. **Delivery of Core Capabilities –** the Programme intends to hold monthly delivery meetings with providers of core capabilities. RECCo presented their plan.
4. **Key Programme Issues** – DCC and the Programme updated on MP162 & migration
5. **Commercial impacts of settlement** – The Programme will explore how commercial impacts of settlement are considered

The PSG Headline Report is available here

Cross-Code Advisory Group (CCAG)

Update from CCAG 28 September 2022

1. **Horizon scanning log** – the CCAG heard updates from Code Bodies on the content of the Horizon Scanning log and agreed next steps
2. **Code Drafting Plan update** – the Programme provided an update on the code drafting plan. Code bodies updated on the approach to legal review
3. **Replan activity for M7/M8** – the Programme updated on M7/M8 timelines as part of the Round 2 replan consultation. The CCAG discussed appropriate delivery dates for these milestones
4. **Code draft prototyping** – BSC and REC provided an update on recent code draft prototyping activity, including the use of iServer
5. **CDWG update** – the CCAG decided to stand down the October CDWG

The CCAG Headline Report will be available here

Design Advisory Group (DAG)

Update from DAG 14 September 2022

1. **Code Changes Review** – An overview was provided of how the Programme manage regulatory changes from the external environment. This will become very important post-M5.
2. **CCIAG Progress Update** – The DAG reviewed metrics on the operation of CCIAG. Topics under discussion included removal of Estimate Annual Consumption (EAC), and the definition CSS user roles. A Consequential Change Log will be published detailing all CCIAG items
3. **MHHS Design Status Update** – The DAG were advised over 1500 comments had already been received in response to the design consultation. Comment resolution and dissensus sessions would be held in October.

The DAG Headline Report is available here

Wider Programme updates

Design Progress

- Following the Design Artefact review progress, a **full list of consolidated comments** has been published.
- **89% of the comments were clarifications or minor changes**. No significant issues were identified
- **Four Design Issues were raised**. **Discussion sessions have been held** over the first week of October with industry paeties.
- **The dissensus phase will take place in the second week of October**, to make decisions on the design issues

Programme re-plan

- **Round 2 of consultation** of the Programme replan closed on 30 September 2022
- The Programme is now **analysing the responses and engaging with relevant stakeholder groups**, including the Independent Programme Assurer (IPA).
- **Round 3 of consultation will take place in the first two weeks of November,** subject to stakeholder alignment , IPA opinion and decision at November PSG

Readiness Assessment 2 (RA2)

- The **deadline for RA2 was Friday 07 October 2022**
- The Programme are now analysing responses with **a summary report going to November PSG** to inform the M3 decision**.**
- A **full report as well as individual reports** for each Programme Particiapnt will be provided.

Migration options

DISCUSSION: Update on progress of the migration options from the MWG and agree the role of TMAG in next steps

Programme (Carly Ward, Kate Goodman)

25 mins

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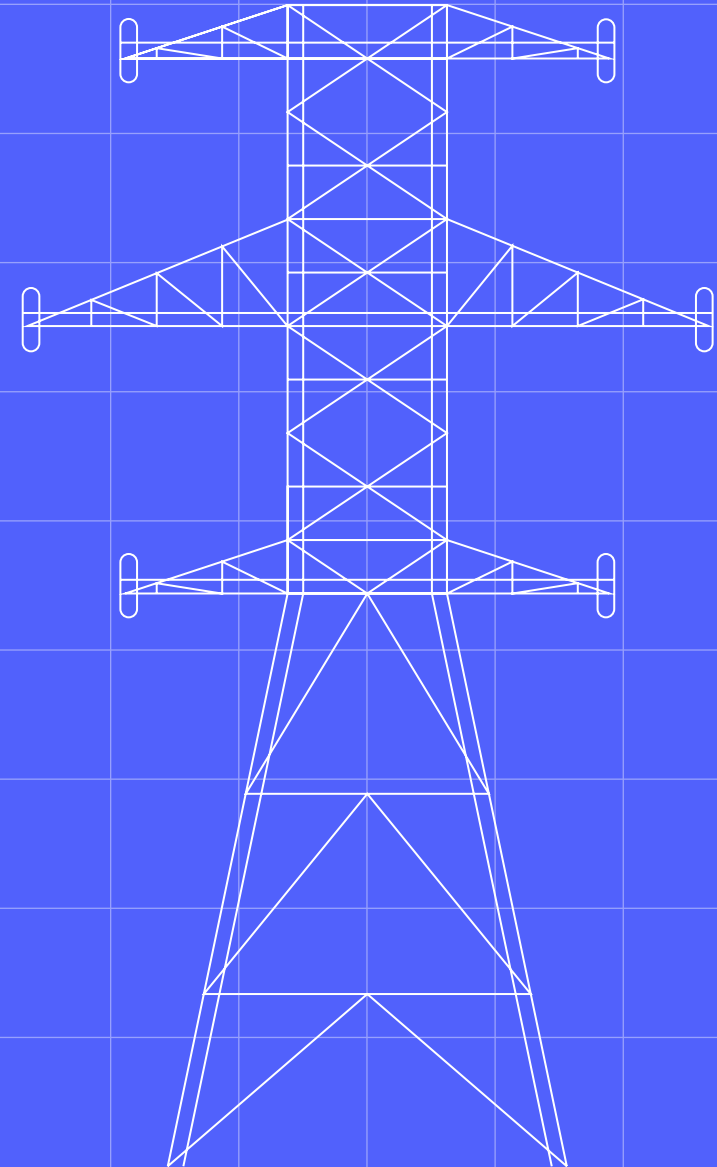
Migration Options Overview

The MHHS Programme has evaluated the four following migration options to determine which option would be most suitable to take forward:

1

Migration Starts at M14 Deadline Date – start migration at the M14 deadline date (i.e., when all programme participants are obligated to be ready to accept MPANs under the new MHHS arrangements), noting that migration will go ahead at that date even if not *all* participants are ready

2

Early Adoption with No Reversal of Migration – allowing programme participants to start migrating MPANs to the new MHHS arrangements earlier than M14 (i.e. early adoption), with an MPAN <u>unable</u> to move back to current arrangements once it has been switched over to new MHHS arrangements

3

Early Adoption with Reversal of Migration – allowing programme participants to start migrating MPANs to the new MHHS arrangements earlier than M14 (i.e. early adoption), with an MPAN <u>able</u> to move back to current arrangements once it has been switched over to new MHHS arrangements

4

Early Adoption with No Reversal of Migration but Mitigation in place – allowing programme participants to start migrating MPANs to the new MHHS arrangements earlier than M14 (i.e. early adoption), with customers <u>able</u> to move back to a supplier on current arrangements via operational workarounds

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Options Analysis Summary

The following options analysis was presented to the Migration Working Group on 13 October 2022. At TMAG, the Programme will provide an update on the outputs from the MWG.

The following summarises the key takeaways from the option assessment and analysis completed to date, as further expanded upon in the Evaluation Framework. It is understood that further development of the MHHSP Design will support more granular analysis, and a refined understanding of impact and DBT, as the team moves forward.
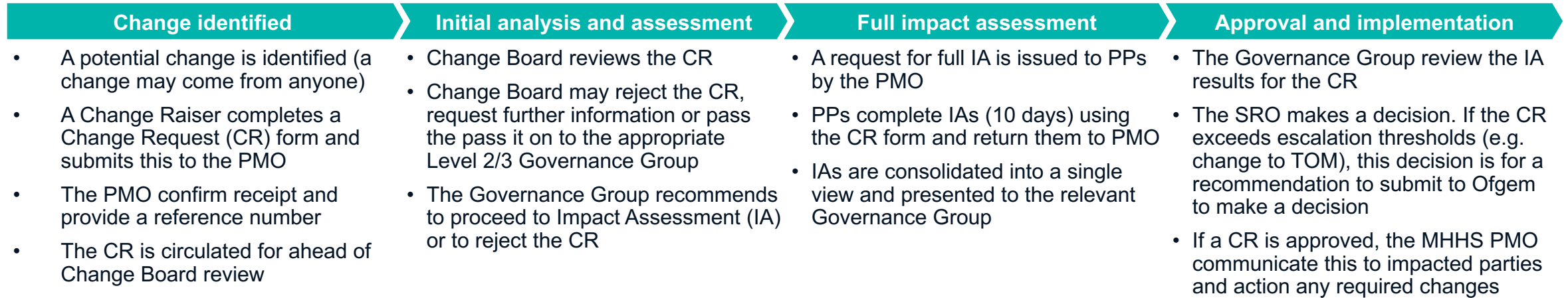
	Qualitative	Quantitative	DBT
Option 1	• Does not involve restriction on consumer choice, but would delay benefits in absence of early adoption • Lack of early adoption impacts SIT incentives and increases impact of potential issues in production	• Likely to have minimal impact on costs and timescales in consideration of solution complexity • Adds hard dependency to qualification, with timescales likely informed by pace of slowest	• Represents baseline solution and technical requirements required across all migration options • Other options to be assessed as a delta in effort in comparison to the foundations of Option 1
Option 2	• Consumers would have access to new arrangements earlier, but supplier choice likely to be limited • Permits early adoption, with associated commercial rewards for adopters; incentivises participation in SIT	• Negative impact to timescales and cost anticipated in consideration of additional solution complexity • Participants able to proceed as soon as they are qualified, with testing anticipated to be simplified	• Additional solution complexity anticipated to impact MHHSP Transition Design timescales • Anticipated that additional time may be required from a supplier and/or PCW perspective
Option 3	• Does not restrict consumer choice and permits early adoption for those who are ready to proceed • The consumer benefit may not be significant in the case it is only required for a short period of time	• Anticipated to have negative impact to timescales and cost in consideration of solution complexity • Participants able to proceed as soon as they are qualified, but testing anticipated to be more complex	• Likely to add time to participant DBT and the length of the overall migration period • Higher system capacity and testing anticipated to be required due to additional solution complexity[1]
Option 4	• Does not restrict consumer choice and permits early adoption for those who are ready to proceed • Workarounds may decrease consumer experience and decrease incentives for early adoption	• Anticipated to have negative impact to timescales and cost in consideration of operational complexity • Participants able to proceed as soon as they are qualified, but testing anticipated to be more complex	• Likely to add time to participant DBT and the length of the overall migration period • Higher level of testing anticipated to be required in regard to additional operational complexity

[1]Note: Also noted to potentially have a higher impact on other segments than others (e.g. UMS), with discussion around whether particular segments would or would not be in scope, to be helpful

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Change control process for migration

Why may a Change Request be needed for migration?
Change Requests (CRs) are required for changes to Programme success factors, the Programme plan, or baselined artefacts. This means if the outputs of MWG propose a change to the MHHS Target Operating Model (TOM), a CR must be raised. CRs that propose changes to Level 1 milestones or the TOM are escalated to Ofgem for final decision.

What is the Change Control process?

Change identified	Initial analysis and assessment	Full impact assessment	Approval and implementation
• A potential change is identified (a change may come from anyone) • A Change Raiser completes a Change Request (CR) form and submits this to the PMO • The PMO confirm receipt and provide a reference number • The CR is circulated for ahead of Change Board review	• Change Board reviews the CR • Change Board may reject the CR, request further information or pass the pass it on to the appropriate Level 2/3 Governance Group • The Governance Group recommends to proceed to Impact Assessment (IA) or to reject the CR	• A request for full IA is issued to PPs by the PMO • PPs complete IAs (10 days) using the CR form and return them to PMO • IAs are consolidated into a single view and presented to the relevant Governance Group	• The Governance Group review the IA results for the CR • The SRO makes a decision. If the CR exceeds escalation thresholds (e.g. change to TOM), this decision is for a recommendation to submit to Ofgem to make a decision • If a CR is approved, the MHHS PMO communicate this to impacted parties and action any required changes

What does this mean for TMAG?
TMAG would be the originating advisory group for any CR relating to Migration. This means TMAG would:
1. Agree to raise any CR to impact assessment
2. Review the outputs of Impact Assessment for any CR and for the SRO TMAG Chair to make a decision on a recommendation to submit to Ofgem. Ofgem would then make the final decision

What is the implication for Migration Options under Analysis?
Migration Options 3 and 4 would require a Change Request to be implemented in order for them to take effect, therefore if either or both of these options are under consideration, a CR will be raised via TMAG. We will need an extraordinary TMAG to approve it be sent to IA and for TMAG to subsequently to review IA responses

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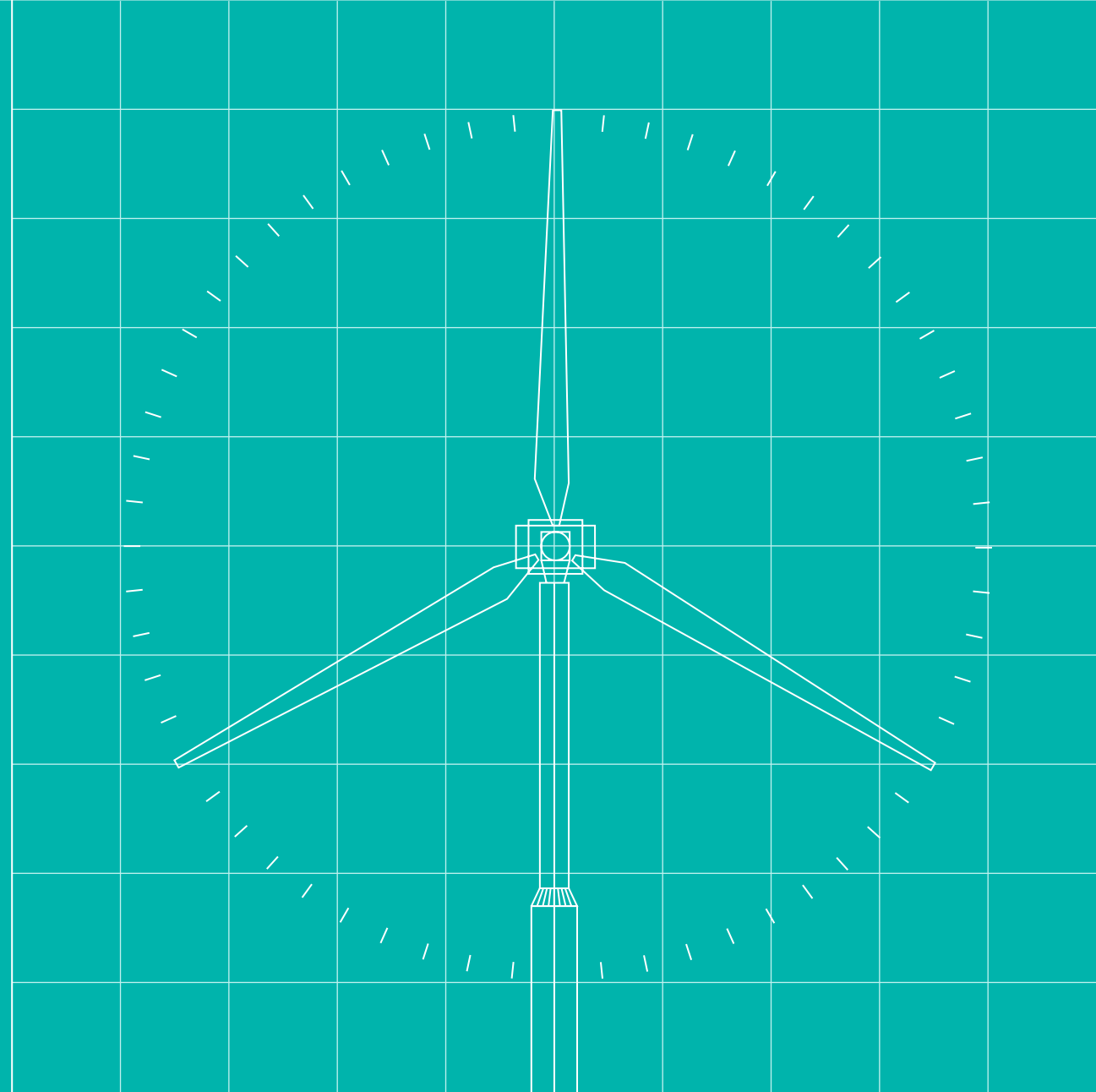Industry-led, Elexon facilitated

Programme replan

INFORMATION/DISCUSSION:
- Update on the responses to Round 2 consultation, highlighting relevant elements for test and migration
- Discuss the approach to participant involvement in SIT

Programme (Kate Goodman)

20 mins

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Length of Migration Period: Key Takeaways

Round 2 Replan highlighted variations in participant thoughts around migration period as shown in the table below:

Round 2 Replan Summary					
Is the Round 2 Consultation migration period long enough to migrate your portfolio?	Yes	No	Possibly	Do Not Know	**Total**
Suppliers	3	0	1	5	**9**
Agents	4	1	0	1	**6**
Total	**7**	**1**	**1**	**6**	**15**

The bilateral participant sessions uncovered significant variations in resource requirements and time required for MHHSP migration. Key takeaways highlighted that:

- Important to consider the potential for **significant migration tail-ends** of difficult to migrate MPANs (can take as long to process the 10% tail-end as it did to process the more straightforward 90%)

- There are **segment-specific considerations** - UMS could be started early and completed quickly, Advanced has particular complexities and should not be tackled first

- **Planning and trialling** are crucial to the success of a migration (and **automation is crucial in large-scale migrations**)

- The length of time to migrate has a **number of dependencies** (e.g. qualification, system capacity, customer behaviour, data cleansing)

- Suppliers who have done large exercises like this recently may find **MHHSP migration less time consuming / complex** because their data is cleaner

- Suppliers likely to need a **core team** (PM, SMEs, Analysts) to plan and execute the migration process, with a separate team(s) focused on data cleansing and exceptions processing

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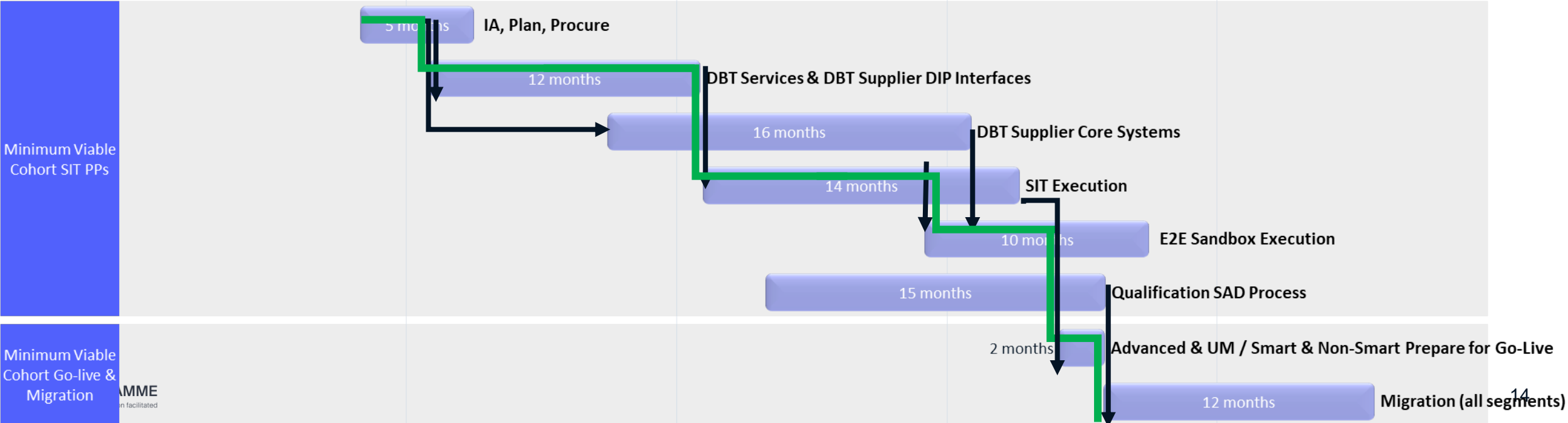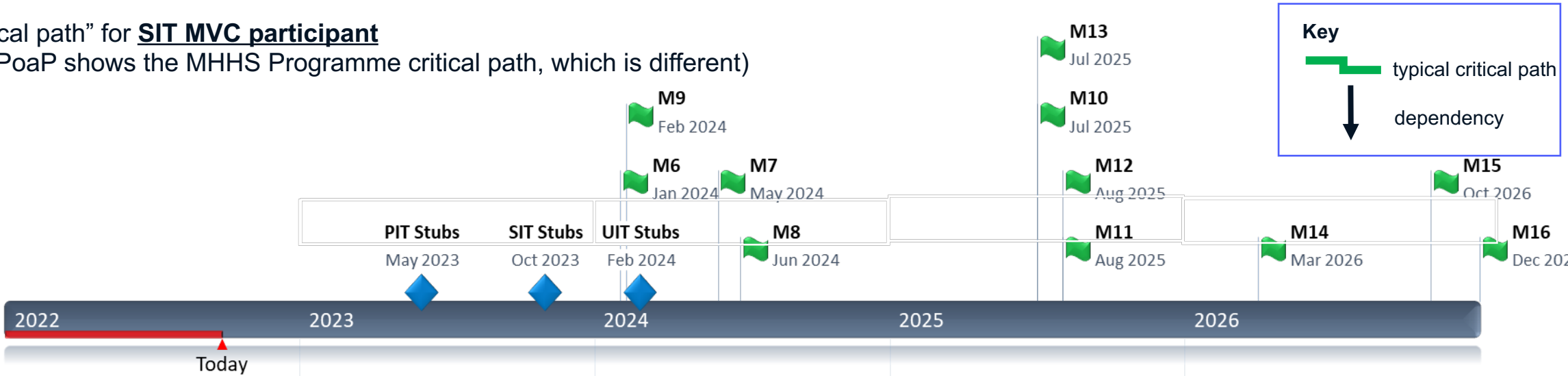
PoaP 1: Overall Programme (Illustrative)
(aligned to .mpp file provided)
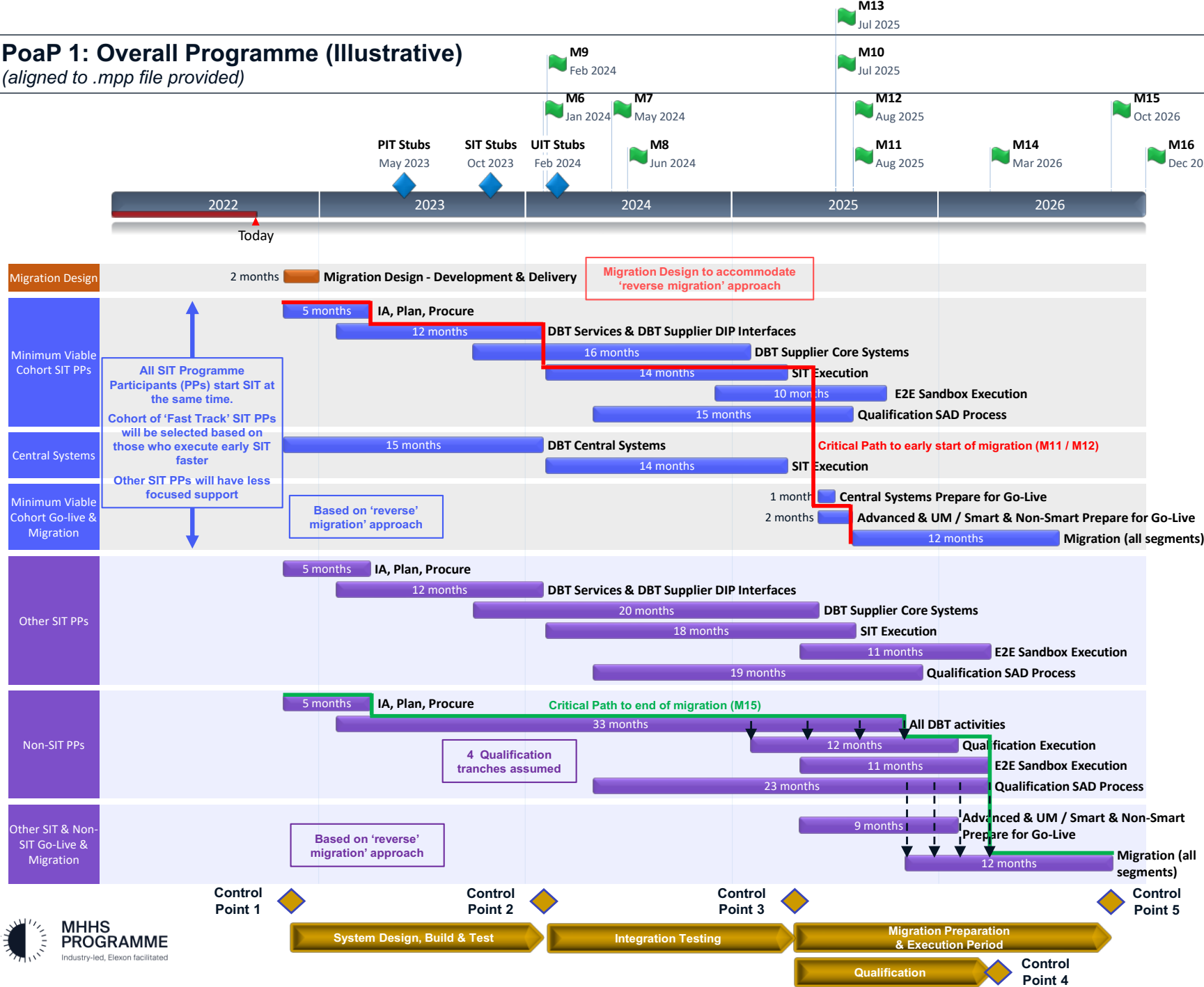
This draft is a working plan based on information available to MHHSP at the time of drafting. It has not been approved by Ofgem. It is an imperative to challenge and validate all assumptions in the draft with the aim of securing the earliest possible robust implementation date.

The plan review process is designed to arrive at a credible, robust, and achievable plan that sees MHHS implemented as early as possible and preferably no later than the date set out in the existing Transition Timetable, which all programme parties are currently required to operate in accordance with.

The programme looks forward to working with parties to challenge and identify opportunities to shorten the overall timelines in this plan in order to secure a swift introduction of MHHS and to allow the generation of the benefits that MHHS will bring, in particular for customers and in supporting broader activity to drive towards net zero.

Milestones:
- M13 — Jul 2025
- M9 — Feb 2024
- M10 — Jul 2025
- M6 — Jan 2024
- M7 — May 2024
- M12 — Aug 2025
- M15 — Oct 2026
- PIT Stubs — May 2023
- SIT Stubs — Oct 2023
- UIT Stubs — Feb 2024
- M8 — Jun 2024
- M11 — Aug 2025
- M14 — Mar 2026
- M16 — Dec 2026

Timeline years: 2022 | 2023 | 2024 | 2025 | 2026
Today

Migration Design
- 2 months — Migration Design - Development & Delivery
- Migration Design to accommodate 'reverse migration' approach

Minimum Viable Cohort SIT PPs
- All SIT Programme Participants (PPs) start SIT at the same time.
- Cohort of 'Fast Track' SIT PPs will be selected based on those who execute early SIT faster
- Other SIT PPs will have less focused support
- 5 months — IA, Plan, Procure
- 12 months — DBT Services & DBT Supplier DIP Interfaces
- 16 months — DBT Supplier Core Systems
- 14 months — SIT Execution
- 10 months — E2E Sandbox Execution
- 15 months — Qualification SAD Process

Central Systems
- 15 months — DBT Central Systems
- 14 months — SIT Execution
- Critical Path to early start of migration (M11 / M12)

Minimum Viable Cohort Go-live & Migration
- Based on 'reverse migration' approach
- 1 month — Central Systems Prepare for Go-Live
- 2 months — Advanced & UM / Smart & Non-Smart Prepare for Go-Live
- 12 months — Migration (all segments)

Other SIT PPs
- 5 months — IA, Plan, Procure
- 12 months — DBT Services & DBT Supplier DIP Interfaces
- 20 months — DBT Supplier Core Systems
- 18 months — SIT Execution
- 11 months — E2E Sandbox Execution
- 19 months — Qualification SAD Process

Non-SIT PPs
- 5 months — IA, Plan, Procure
- Critical Path to end of migration (M15)
- 33 months — All DBT activities
- 4 Qualification tranches assumed
- 12 months — Qualification Execution
- 11 months — E2E Sandbox Execution
- 23 months — Qualification SAD Process

Other SIT & Non-SIT Go-Live & Migration
- Based on 'reverse migration' approach
- 9 months — Advanced & UM / Smart & Non-Smart Prepare for Go-Live
- 12 months — Migration (all segments)

Control Points:
- Control Point 1
- Control Point 2
- Control Point 3
- Control Point 5
- Control Point 4

Phases:
- System Design, Build & Test
- Integration Testing
- Migration Preparation & Execution Period
- Qualification

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Participant involvement in SIT

"Typical critical path" for **SIT MVC participant**
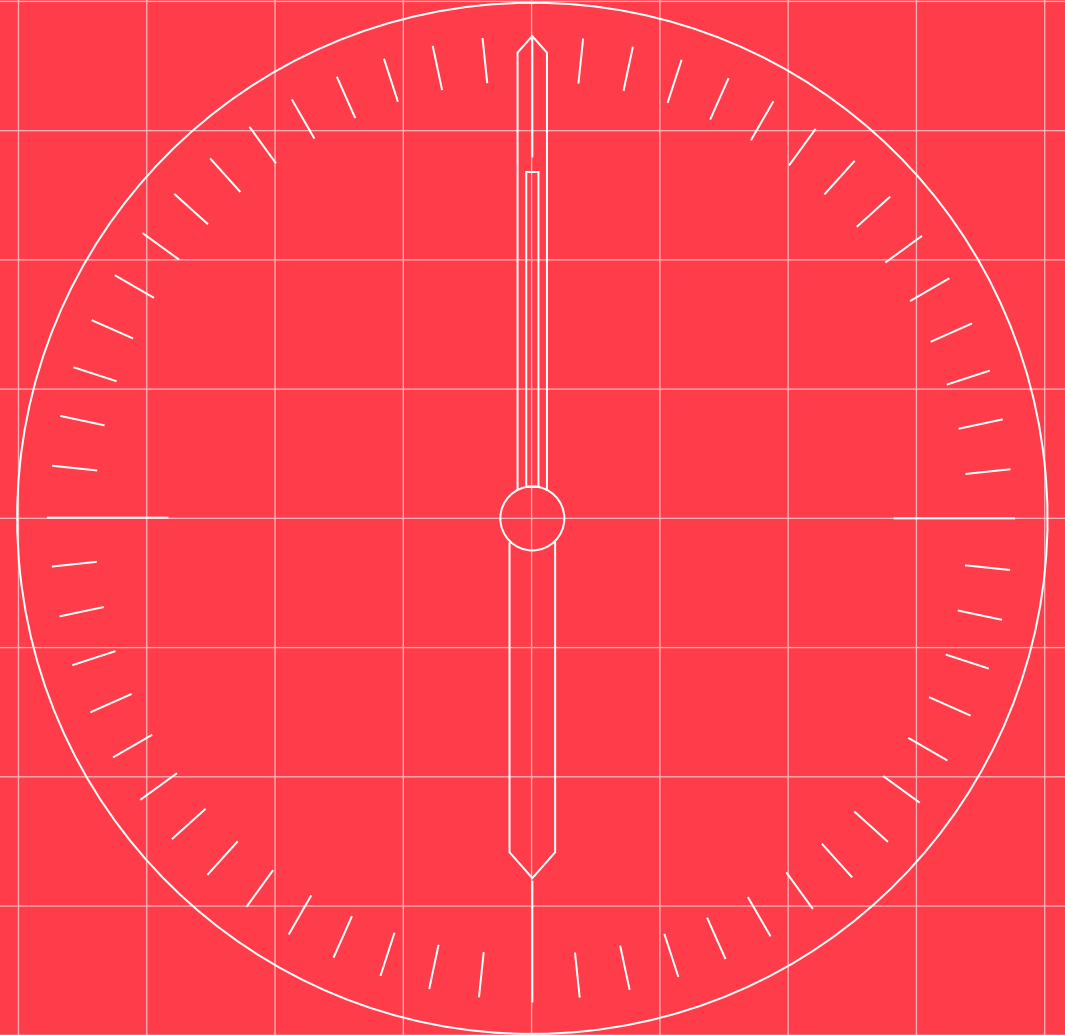(the overall PoaP shows the MHHS Programme critical path, which is different)

Key
— typical critical path
↓ dependency

M13 — Jul 2025
M9 — Feb 2024
M10 — Jul 2025
M6 — Jan 2024
M7 — May 2024
M12 — Aug 2025
M15 — Oct 2026
PIT Stubs — May 2023
SIT Stubs — Oct 2023
UIT Stubs — Feb 2024
M8 — Jun 2024
M11 — Aug 2025
M14 — Mar 2026
M16 — Dec 202

2022 | 2023 | 2024 | 2025 | 2026

Today

Minimum Viable Cohort SIT PPs

5 months — IA, Plan, Procure
12 months — DBT Services & DBT Supplier DIP Interfaces
16 months — DBT Supplier Core Systems
14 months — SIT Execution
10 months — E2E Sandbox Execution
15 months — Qualification SAD Process

Minimum Viable Cohort Go-live & Migration

2 months — Advanced & UM / Smart & Non-Smart Prepare for Go-Live
12 months — Migration (all segments)

14

Environments Approach and Plan

INFORMATION: Present a synopsis of the plan

Programme (Adrian Samlal)

10 mins

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Participants review – *3rd-17th Oct*
- Initial Environment Approach & Plan draft completed internal review
- Document distributed on Oct 3rd inviting all test participants to provide feedback and recommendations via the portal.
- EWG 4th Oct – communication and document overview presented inviting any comments from the working group before conducting reviews.
- Approximately 30-40 comments and recommendations received (as of 11/10/2022)
- Review and resolving feedback ongoing.

Participants review updates – *18th-21st Oct*
- Final reviews to accept, reject or provide more information.
- Participants will be given a chance to assess the review.

EWG recommendation for TMAG approval – *31st Oct*

TMAG Approval – *16th Nov*

The current version of the document is dependent on the following, prior to further version updates being made:

- Programme plan is under consultation and when baselined, will drive scheduling
- When baselined (M5), design may effect environment requirements
- Technical requirements on the DIP design (including monitoring).

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Environment	Phase	Testing stage	Purpose of environment
SIT Staging	SIT	-	Readiness for SIT such as regression for changes, defect re-testing, etc. This will ensure that the actual SIT environments are not broken when new code is deployed
SIT A	SIT	• SIT Component Integration • SIT Functional	Component integration tests will be conducted as individual components are integrated. Then full end-to-end testing can start.
SIT B	SIT	• SIT Migration • SIT Non-Functional • SIT Operational	It is assumed these three stages can be executed on one environment, but not in parallel to avoid conflicts. TP's can decide if to have their own environment for each stage or re-purpose their environments for each stage
UIT	SIT	• Qualification • E2E Sandbox	Central systems and some (I)DNOs' environments will be provided as a testing service to allow PPs to conduct Qualification Testing and E2ESandbox Testing. Each TP will need to complete either SIT or Qualification Testing before starting E2E Sandbox Testing.

Working group updates

INFORMATION: Provide updates from discussion at the DWG, MWG, QWG and EWG

Programme (working group leads as required)

10 mins

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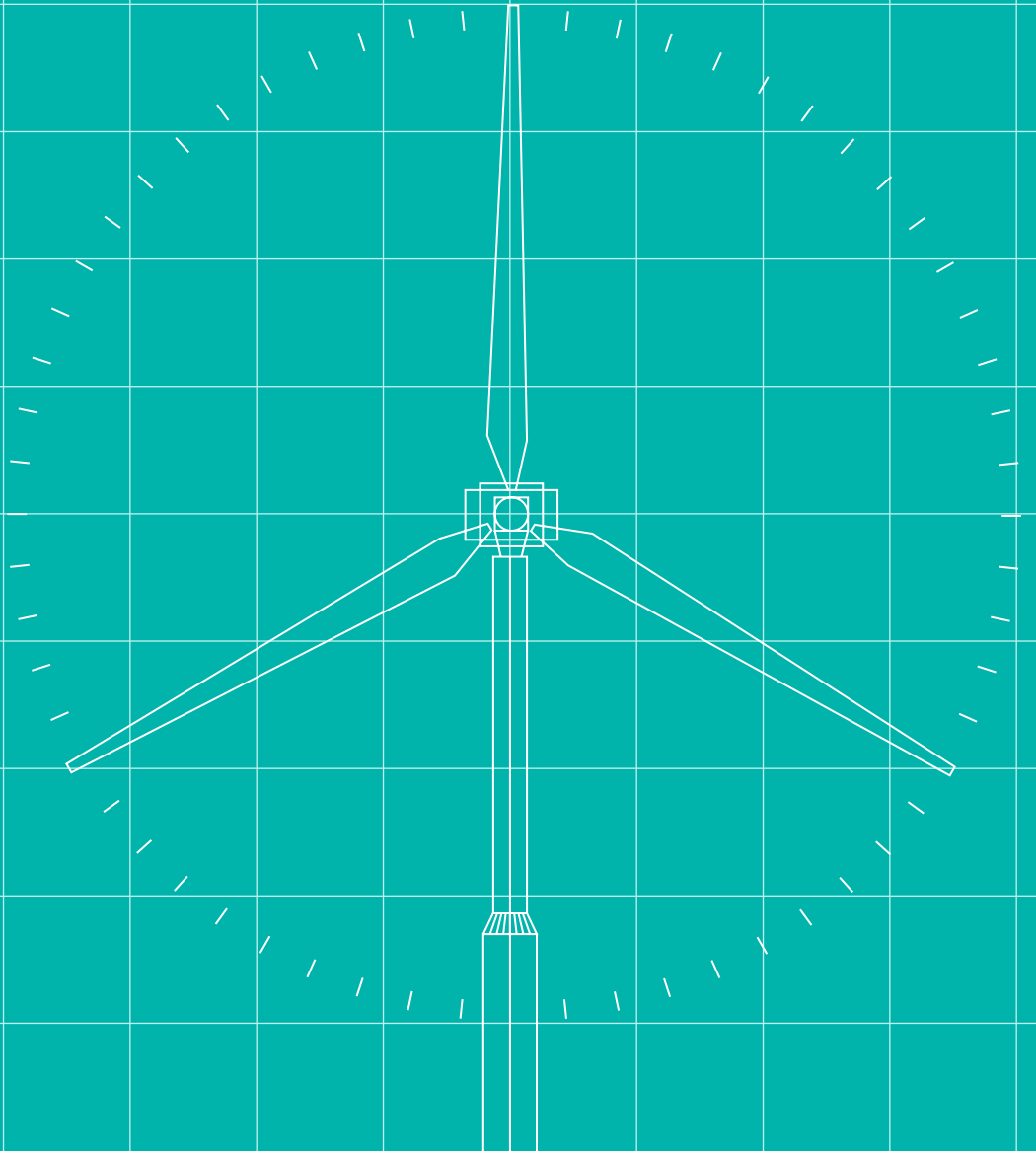
TMAG Working Group Progress Report – September 2022

	Data Working Group (DWG)	Migration Working Group (MWG)	Environments and Configuration Management Working Group (EWG)	Qualification and E2E Sandbox Working Group (QWG)
Upcoming deliverables	• Overall Test Data Approach and Plan (planned 31 Jan 2023, to come to January TMAG)	• Migration options (October TMAG) • Migration, Cutover and Data Strategy (planned 31 Jan 2023, to come to January TMAG)	• Environments Approach and Plan (planned 31 Oct 2022, to come to November TMAG for decision)	• Qualification Test Approach and Plan (planned 28 Feb 2023, to come to February TMAG)
Next month's agenda items	03 November 2022 1. Planning for Data Cuts and associated activities	10 November 2022 1. Migration options 2. Migration design	01 November 2022 1. Update on Programme Participant Environment manager nominees	08 November 2022 1. Defining qualification approach for the programme
Summary of discussion from last month	06 October 2022 • An overview was provided of data cleansing as envisaged by the CCDG. • The group discussed data quality and cleansing, noting the Programme deliverable to review the quality of data • The group discussed data cuts and noted the Programme plans to give 3-months notice of any data cuts.	13 October 2022 The group will discuss: • An update on the Plan on a Pagefor the migration options • The next iteration of migration options analysis • The length of migration period as informed by sessions with participants and the Round 2 Replan	04 October 2022 • The group noted the Environment Approach and Plan was distributed to Programme Participants on 03 October and invited feedback by 17 October 2022. • The Programme asked for PPs to share details of any planned system availability to assist with Environments planning.	11 October 2022 • This meeting was cancelled due to a number of bilateral meetings being required to be held to develop material for QWG.
TMAG escalations	None	Migration options	None	None

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Summary and next steps

INFORMATION: Summarise actions and look ahead to November TMAG

Chair and Secretariat

5 mins

Next Steps

Next steps:

1. Confirm actions and decisions from meeting
2. Date of next TMAG: 16 November 2022

TMAG Agenda Roadmap – a rolling view of upcoming TMAG agenda items:

Meeting dates	19-Oct	16-Nov	21-Dec	Jan 2023	Feb 2023
Relevant milestones or activities	Readiness Assessment 2	M5, M3	Plan rebaseline, Control Point 1		
Agenda items	• Migration options update & approach • Programme re-plan review • SIT participants	• Programme re-plan • SIT participants • Qualification/pre-qualification • Environment Approach and Plan approval • Migration options next steps	• Programme re-plan • Migration, Cutover & Data Strategy update • Qualification update • Propose changes to E2E Testing & Integration Strategy	• Test Data Approach and Plan approval	• Data Assessment Report approval • Migration, Cutover & Data Strategy approval
Standing items	• Minutes and actions review • Programme updates • Working group report • Next steps and agenda roadmap	• Minutes and actions review • Programme updates • Working group report • Next steps and agenda roadmap	• Minutes and actions review • Programme updates • Working group report • Next steps and agenda roadmap	• Minutes and actions review • Programme updates • Working group report • Next steps and agenda roadmap	• Minutes and actions review • Programme updates • Working group report • Next steps and agenda roadmap

If you would like to propose an agenda item for TMAG, please contact the PMO (PMO@mhhsprogramme.co.uk)

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