

: To get started, please contact

: [EDISupport@pge.com](mailto:EDISupport@pge.com)



## EDI 867 Checklist for Inbound Meter Usage Data

*Following is a list of step by step instructions that are to be used by Meter Data Management Agents (MDMAs) who want to be approved by PG&E to become eligible to use Electronic Data Interchange (EDI) 867 (inbound MDMA to PG&E).*

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This testing process is for ESP's /MDMA's who will be posting/sending meter usage data to PG&E.

Your primary contact person at PG&E as you move through the EDI 867 testing (inbound) process will be:

### **EDI Structure and Format issues:**

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### **Interval meter usage data and data quality:**

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**Please allow a minimum of 45 business days to go through the EDI 867 inbound testing process**

**High Level Steps:**

**A. Preparation for Testing**

<b>Step#</b>	<b>Description</b>	<b>Responsibility</b>
1	Download PG&E's EDI 867 Implementation Guide and Tutorials from PG&E's Web site.	MDMA

**B. Phase 1 Testing**

<b>Step #</b>	<b>Description</b>	<b>Responsibility</b>
2	Create an EDI 867 phase 1 test file.	MDMA
3	Send the EDI 867 test file as an E-Mail attachment to PG&E.	MDMA
4	Check that the test file complies with the requirements outlined in PG&E's EDI 867 Implementation Guide and Tutorials.	PG&E
5	Notify the MDMA within 5 business days of the test results. Once the test file passes this test, the MDMA can start phase 2 testing.	PG&E

**C. Phase 2 Testing & Approval**

<b>Step#</b>	<b>Description</b>	<b>Responsibility</b>
6	Place EDI 867 production ready test files on the MDMA server.	MDMA
7	Process the test file to verify that it complies with the requirements for accuracy of data format and content.	PG&E
8	Notify the MDMA <u>within 2 weeks</u> of the phase 2 test results. Once the MDMA is notified it has passed the phase 2 test, the MDMA will be considered approved for EDI 867	PG&E
9	Agree on a date to move to production.	MDMA/PG&E



## Detailed Steps:

### A. Preparation for Testing

<b>Step #</b>	<b>Description</b>	<b>Details</b>
1	Download PG&E's EDI 867 Implementation Guide and Tutorials from PG&E's Web site.	<p>Both the Implementation guide and Tutorials can be downloaded from PG&amp;E's web site.</p> <p>The Implementation guide and tutorials will provide you with information needed to understand PG&amp;E's EDI 867 requirements.</p>

### B. Phase 1 Testing

<b>Step</b>	<b>Description</b>	<b>Details</b>
1	Create an EDI 867 phase 1 test file.	<p>The primary purpose of Phase 1 testing is to verify the compliance of MDMA 867 files with EDI requirements as outlined in PG&amp;E's EDI 867 Implementation guide and tutorials.</p> <p>What should be in your phase 1 test file?</p> <p>Your test file should contain a subset of information that you plan to send when you move to production. At a minimum, your test file should include examples of transaction sets that contain:</p> <ul style="list-style-type: none"><li>• Appropriate 867 file headers and trailers</li><li>• KWH and KVARH measured for a customer account and,</li><li>• One day of interval data for a customer account</li></ul>
2	Send the EDI 867 test file as an E-mail attachment to PG&E.	Your phase 1 test file should be sent to PG&E as an E-Mail attachment to: Barbara Lawrence at, <a href="mailto:BXS2@PGE.com">BXS2@PGE.com</a>
3	Check that the test file complies with the requirements outlined in PG&E's EDI 867	PG&E will evaluate your file against the requirements outlined in PG&E's EDI 867

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<b>Step</b>	<b>Description</b>	<b>Details</b>
	Implementation Guide and Tutorials.	Implementation guide. PG&E will then check your file for proper EDI format and perform a preliminary visual check of the data content.
4	Notify the MDMA within 5 business days of the test results. Once the test file passes this test, the MDMA can start phase 2 testing.	PG&E will respond to you via E-Mail the status on the test within 5 business days of receiving your phase 1 test file. PG&E will let you know if your test file passed: <ul style="list-style-type: none"> <li>• EDI ANSI X.12 format standards</li> <li>• Requirements in PG&amp;E's EDI 867 Implementation Guide</li> <li>• A preliminary visual data content check</li> </ul> Passed phase 1 requirements: If your file passed this phase 1 test, you will be notified to send a production ready test file to begin phase 2 testing. Did not pass phase 1 requirements: If your file did not pass this phase 1 test, you will be notified of the errors and asked to send another phase 1 test file.

### C. Phase 2 Testing & Approval

<b>Step #</b>	<b>Description</b>	<b>Details</b>
5	Place EDI 867 production ready test files on the MDMA server.	The primary purpose of phase 2 testing is to verify that the MDMA's EDI files are ready for production processing. At least 5 "production ready" test files will be needed for phase 2 testing. <u>What should be in your phase 2 test files?</u> <ul style="list-style-type: none"> <li>• Your test files should contain information that you plan to send when you move to production.</li> </ul>



		<ul style="list-style-type: none"> <li>Your test files should include transaction sets that correspond to the data in a recently generated production CMEP data file.</li> </ul> <p><u>Where should you put your phase 2 test files?</u></p> <ul style="list-style-type: none"> <li>Your test files should be placed on your server under a <b>test</b> directory that PG&amp;E can access. This test directory should be separate from your production directory.</li> <li>PG&amp;E recommends that this test directory have a name similar to a production directory, with the exception that the high level node be prefixed with "test." For example, TEST-PGE.</li> <li>For test files placed on the test directory, PG&amp;E recommends the file name be prefixed by the node "test." For example, TEST.PGE.19990901231500</li> </ul> <p><u>How do you begin phase 2 testing?</u></p> <ul style="list-style-type: none"> <li>Let PG&amp;E know you are ready to begin testing.</li> <li>Provide the name of your test directory and its password.</li> </ul>
6	Process the test file to verify that it complies with the requirements for accuracy of data format and content.	PG&E will process your phase 2 test files through PG&E's EDI translator and test systems. For this testing, PG&E will be running your EDI test data in parallel with your production CMEP data and comparing the results.
7	<p>Notify the MDMA within 2 weeks of the phase 2 test results.</p> <p>Once the MDMA is notified it has passed the phase 2 test, the MDMA will be considered approved for EDI 867.</p>	<p>PG&amp;E will notify you via E-Mail within 2 weeks of the results of this phase 2 testing.</p> <p><u>Passed phase 2 testing:</u></p> <p>You will be notified that you are EDI approved and can arrange to begin sending production meter usage data using EDI protocols.</p> <p><u>Did not pass phase 2 testing:</u></p> <p>If your test file did not pass this phase 2 test, you will be notified of the errors and asked to send</p>



		additional phase 2 test files.
8	Agree on a date to move to production.	Once the MDMA is approved, the MDMA can start generating EDI 867 files in full production.

**Go to PG&E's web site to review our guides and tutorials on line:**

[http://www.pge.com/customer\\_service/edi/](http://www.pge.com/customer_service/edi/)

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