

• To get started, please contact

• 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).

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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You may also contact : EDISupport@pge.com



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

High Level Steps:

A. Preparation for Testing

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

B. Phase 1 Testing

Step #	Description	Responsibility
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

Step#	Description	Responsibility
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

Step #	Description	Details
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&E's web site.</p> <p>The Implementation guide and tutorials will provide you with information needed to understand PG&E's EDI 867 requirements.</p>

B. Phase 1 Testing

Step	Description	Details
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&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"> • Appropriate 867 file headers and trailers • KWH and KVARH measured for a customer account and, • One day of interval data for a customer account
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, BXS2@PGE.com
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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Step	Description	Details
	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"> • EDI ANSI X.12 format standards • Requirements in PG&E's EDI 867 Implementation Guide • A preliminary visual data content check 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

Step #	Description	Details
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"> • Your test files should contain information that you plan to send when you move to production.



		<ul style="list-style-type: none"> Your test files should include transaction sets that correspond to the data in a recently generated production CMEP data file. <p><u>Where should you put your phase 2 test files?</u></p> <ul style="list-style-type: none"> Your test files should be placed on your server under a test directory that PG&E can access. This test directory should be separate from your production directory. PG&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. For test files placed on the test directory, PG&E recommends the file name be prefixed by the node "test." For example, TEST.PGE.19990901231500 <p><u>How do you begin phase 2 testing?</u></p> <ul style="list-style-type: none"> Let PG&E know you are ready to begin testing. Provide the name of your test directory and its password.
6	Process the test file to verify that it complies with the requirements for accuracy of data format and content.	<p>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.</p>
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&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/

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