

**GISB EXPEDITED DATA DEVELOPMENT SUBCOMMITTEE
ISSUE TO EDD SUBCOMMITTEE FROM BPS SUBCOMMITTEE
WORKPAPER FOR MAY 9 – 10, 2000**

The following issue was raised during BPS' discussion and vote on an issue from the Information Requirements Subcommittee. Therefore, the following excerpt from the BPS minutes includes the entire section on the IR issue.

• **Excerpt from April 6, 2000 BPS Minutes:**

Text of IR Question Follows:

To: Business Practices Subcommittee Chairs
From: Jim Keisler, Co-Chair—Information Requirements Subcommittee
Subject: Issue Regarding Shipper Imbalance—Zone Identifier
Date: March 31, 2000

At its meeting on March 28-29, 2000, the Information Requirements (IR) subcommittee discussed request R98064 relating to the Shipper Imbalance (2.4.4). In response to that request, the EBB-to-Internet Task Force (EII) told us to add the data elements Delivery Zone and Receipt Zone to the Shipper Imbalance. After adding these data elements, we found that the definition of the existing data element Zone Identifier was in need of review.

Specifically, IR recommends that the definition of the data element Zone Identifier be changed as follows:

The ~~transporter's~~ transportation service provider's identifier for the geographic zone identification in which the imbalance is reported.

Please affirm IR's proposed revision to the definition of the Zone Identifier.

Discussion:

The issues here are: Is this the same ID as that which is about to be used in the Imbalance Trading group. What should there be between the two groups to identify that this report is at the same level as that which has the imbalance traded?

Motion: BPS instructs IR to change the definition of the Data Element "Zone Identifier" to "The ~~transporter's~~ transportation service provider's identifier for the geographic zone identification in which the imbalance is reported." as redlined.

Moved by Mark Gracey, seconded by Dale Davis
Passed unanimously

Motion: BPS requests that EDD inform BPS as to how the Shipper Imbalance Statement and the datasets under development in EDD, having to do with

Imbalance Netting and Trading, will enable users of the respective data sets to tie together information with respect to the zone where the imbalance is reported in the respective documents.

Moved by Mark Gracey, seconded by Dale Davis
Passed unanimously

• **Relevant Minutes:**

The excerpt below reflects the adoption of the proposed data dictionaries by the Imbalances Subcommittee. During this process, the Zone Identifier data element was removed from the following data sets:

- Request for Imbalance Trade
- Request for Confirmation of Imbalance Trade
- Posted Imbalances Download
- Imbalance Trade Notification

Excerpt from May 19, 1999 Imbalances Subcommittee Minutes:

II. Adoption of data sets & Resolution of Contentious Data Elements

Request For Imbalance Trade

Ms. Scott made the motion to adopt the Request For Imbalance Trade data dictionary with the modifications to remove Rate Schedule and Zone Identifier data elements. It was seconded by Mr. Scheel. Ms. Scott noted that the contract data element could provide enough specificity for the trade. Mr. Gracey disagreed and supported the inclusion of the zone identifier data elements because there are no other data elements in the dictionary that could provide the needed information. Others noted that operational impact areas, which are physical, do not equate to zone areas, which are rate determined. Additionally, it was explained that zones are easily understood by traders and should not be removed. For traders to make economic decisions, zone information is needed. Mr. Scheel responded that it is premature to add zone identifier data elements because compliance filings have not yet been made which specify the need for the information in effecting a trade. He added that this mechanism should be debated at the FERC before GISB determines whether zone identifiers should be present in the standards. Mr. Young responded that timing may be critical should the element be needed, and adding it now, rather than waiting to review compliance filings, is prudent. Mr. Gracey noted that he needed this data element to effect a trade.

Several attendees asked that the motions be split to which Ms. Scott agreed. The motion was revised to remove the Rate Schedule data elements from the Request For

Imbalance Trade data dictionary, which passed unanimously. The motion was made to remove the Zone Identifier data elements from the proposed Request For Imbalance Trade data dictionary, which passed through the following vote:

Segment	For	Balanced For	Against	Balanced Against
End User	2.00	2.00	0.00	0.00
LDCs	1.00	1.00	1.00	1.00
Services	2.00	2.00	0.00	0.00
Producers	2.00	2.00	0.00	0.00
Pipelines	0.00	0.00	11.00	2.00
TOTAL	7.00	7.00	12.00	3.00

The motion was made to adopt the proposed Request For Imbalance Trade data dictionary as amended, which passed unanimously.

Request For Confirmation of Imbalance Trade

The motion was made to remove the Rate Schedule data elements from the mutually agreeable proposed Request For Confirmation of Imbalance Trade data dictionary. The motion passed unanimously. The motion was made to remove the Zone Identifier data elements from the proposed mutually agreeable Request For Confirmation Imbalance Trade data dictionary, which passed through the following vote (see the discussion on the Request For Imbalance Trade):

Segment	For	Balanced For	Against	Balanced Against
End User	2.00	2.00	0.00	0.00
LDCs	1.00	1.00	1.00	1.00
Services	2.00	2.00	0.00	0.00
Producers	2.00	2.00	0.00	0.00
Pipelines	0.00	0.00	9.00	2.00
TOTAL	7.00	7.00	10.00	3.00

The motion was made to adopt the proposed mutually agreeable. Request For Confirmation of Imbalance Trade data dictionary as amended, which passed unanimously.

Imbalance Trade Confirmation

In conversation, it was noted that for all data dictionaries, the Information Requirements Subcommittee will review and make the needed changes to make the definitions consistent across data dictionaries, and this point was specifically addressed to the Imbalance Trade Tracking ID data element description. The motion was made by

Ms. Scott to adopt the proposed data dictionary for the Imbalance Trade Confirmation which was seconded by Ms. Gussow. Mr. Scheel asked that quantity be added to the data dictionary. Several noted that this was additional information that could be confusing. Ms. Davis added that the notification includes the quantity. The motion was not amended to add to quantity. The motion passed unanimously.

Authorization to Post Imbalances

The motion was made to adopt the proposed Authorization to Post Imbalances data dictionary with no changes from the May 13 version of the data dictionary. The motion passed unanimously. [The data dictionary was changed later -- see Posted Imbalances Download discussion below.]

Posted Imbalances Download

The motion was made to remove the Rate Schedule data element from the proposed Posted Imbalances Download data dictionary. The motion passed unanimously. There was confusion on who would be identified in the contact person data element. Several attendees agreed that the contact is the party that authorized the posting. Ms. Scott made a motion that the data element be mandatory and the name be changed to Contact Person (Service Requester) in both the Posted Imbalances Download and the Authorization to Post Imbalances data dictionaries. Information Requirements Subcommittee will review the definition to ensure that it reflects the intent that the contact is the party that authorized the posting. The motion passed unanimously.

The motion was made to remove the Zone Identifier data elements from the proposed Posted Imbalances Download data dictionary, which passed through the following vote (see the discussion on the Request For Imbalance Trade):

Segment	For	Balanced For	Against	Balanced Against
End User	1.00	1.00	0.00	0.00
LDCs	1.00	1.00	1.00	1.00
Services	2.00	2.00	0.00	0.00
Producers	2.00	2.00	0.00	0.00
Pipelines	0.00	0.00	9.00	2.00
TOTAL	6.00	6.00	10.00	3.00

Ms. Scott then made the motion to adopt the proposed Posted Imbalances Download data dictionary as amended. The motion passed unanimously. Ms. Hess requested further changes to the data dictionary, and made a motion that the data elements with a business conditional (BC) usage be changed to a usage of SO with the deletion of the conditions specified. As such, the motion was made to modify the Service Requester Contract and

Imbalance Type data elements to a usage of SO with a deletion of the defined conditions for the Posted Imbalances Download dictionary. The motion carried unanimously.

Imbalance Trade Notification

The motion was made to remove the Rate Schedule data elements from the proposed Imbalance Trade Notification data dictionary. The motion passed unanimously. The motion was made to remove the Zone Identifier data elements from the proposed Imbalance Trade Notification data dictionary, which passed through the following vote:

Segment	For	Balanced For	Against	Balanced Against
End User	2.00	2.00	0.00	0.00
LDCs	1.00	1.00	1.00	1.00
Services	2.00	2.00	0.00	0.00
Producers	2.00	2.00	0.00	0.00
Pipelines	0.00	0.00	8.00	2.00
TOTAL	7.00	7.00	9.00	3.00

The motion was made to adopt the proposed amended Imbalance Trade Notification data dictionary which passed unanimously.

Withdrawal for Request of Imbalance Trade

The motion was made to adopt the proposed Withdrawal of Request for Imbalance Trade data dictionary with no changes from the May 13 version of the data dictionary. The motion passed unanimously.