ENERGY REPORTING MIGRATION PLAN / ILLUSTRATIVE CASE

When is an energy report ready to move?

The management decision

Use a site-level comparison to approve the new report. A match at group level alone can hide errors in the numbers each site manager is accountable for.

A new platform can produce a group total that looks right while two site totals move in opposite directions. That matters when local managers are using those figures to explain spending or set budgets. Migration planning sets out what to carry over and how you will know that people can trust the new reports.

Worked example

During a parallel test, one site moves up 40 units and another down 40. The group total matches even though the two local differences add up to 80 units in absolute terms. A local budget owner would reasonably want an explanation.

Example figure	What it represents
+40	Site A
−40	Site B
80	Total size of the differences

What changes the answer

Repeat the test for a period containing a credit note. Opposite timing differences can cancel at group level and still put a cost against the wrong site or month.

Energy reporting migration plan

What to commission

Plan the move of a month-end report and compare one ordinary close and one containing a late adjustment.

We identify the reports needed on day one, map them to their replacements and recommend checks at useful levels, such as site or reporting period. Report owners can agree acceptable differences and decide which discrepancies must be resolved before the switch.

How to judge the result

The owners can reconcile old and new figures by site and sign off any agreed differences before switching.

Count remaining differences by cause and by affected budget. Set a tolerance with the report owners before using the new platform for a formal close.

Decision worksheet

Project detail	Starting point for your team
Decision owner	Finance transformation or reporting lead. Name the person who will approve the next step.
Records to gather	The reports you use today, sample outputs and the planned new platform.
Agreed output	A report-by-report migration plan, proposed comparison limits and a switch checklist.
Decision date	Record the deadline, any unresolved assumption and who will confirm it.

Discuss this case

Name the two or three reports you cannot afford to lose or get wrong. Tell us who signs them off and whether there is a planned switch date. If there is a disputed report already, explain whether that issue needs to be resolved as part of the migration.

Email info@oxetc.co.uk and mention IT-05. All figures in the worked example are illustrative.