

# *Deski to Webi Report Conversion*

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**Business Intelligence Task Force**

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# *Agenda*

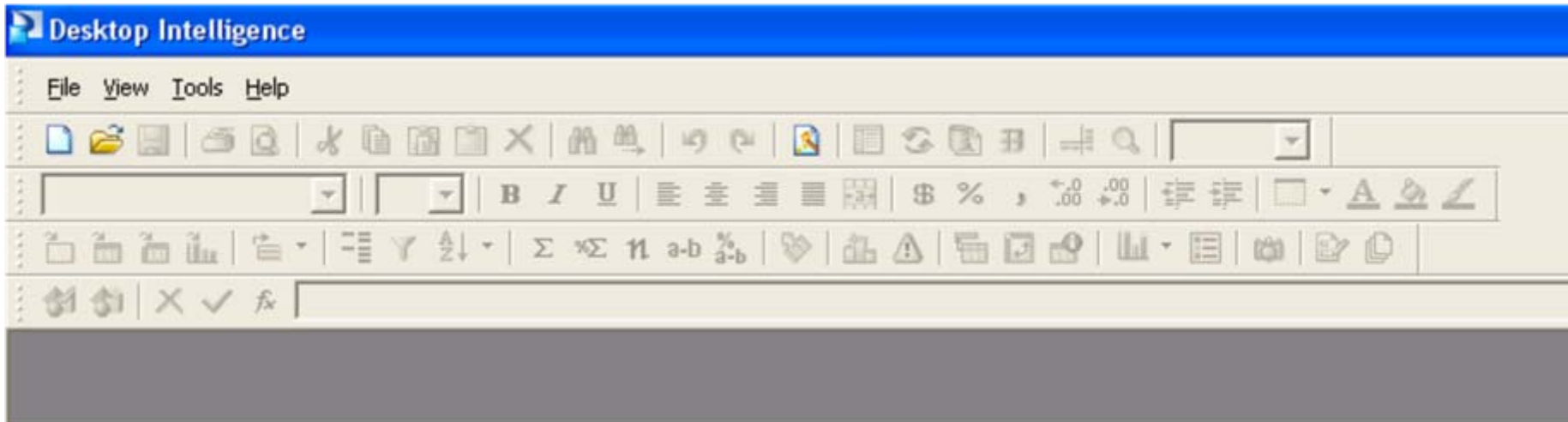
- ◆ Desktop Intelligence vs. Web Intelligence Overview
- ◆ Why Desktop Intelligence reports are being converted to Web Intelligence
- ◆ Are you using Deski now?
- ◆ What the conversion means to you
- ◆ Proposed timeline for conversion

# Desktop Intelligence vs. Web Intelligence Overview

## ◆ BusinessObjects Desktop Intelligence

A full client query and analysis tool that enables users to create their own queries and reports to better understand and manage their data, using a desktop application as their interface.

- *Desktop Intelligence, aka Deski*
- *Installed on a user's computer*
- *Allows Deski reports to be saved locally to a user's computer.*

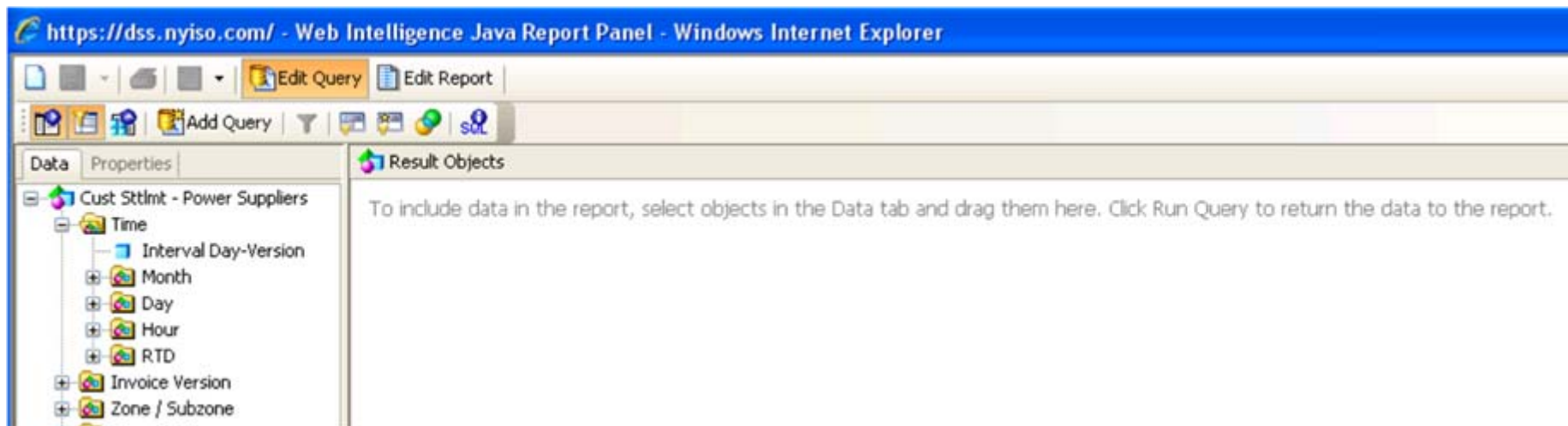


# Desktop Intelligence vs. Web Intelligence Overview

## ◆ BusinessObjects Web Intelligence

A web-based query and analysis tool that enables users to create their own queries and reports to better understand and manage their data, using an internet browser as their interface.

- *Web Intelligence, aka Webi*
- *Reports are stored in a repository on the NYISO server*
- *Webi reports can not be saved locally to a user's computer*
- *Webi reports can be sent to other users, using BusinessObjects Infoview*



# Desktop Intelligence vs. Web Intelligence Overview

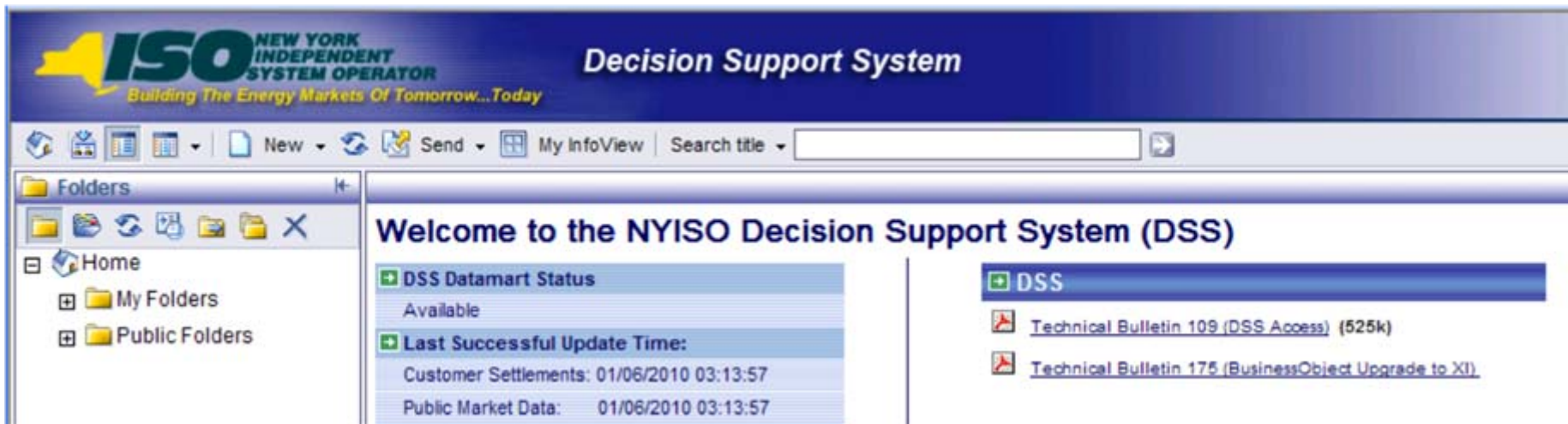
## ◆ BusinessObjects InfoView

A web-based interface that users access to view, schedule, and keep track of published reports.

- *Log-in to InfoView through internet browser*
- *Access corporate reports and store personal documents*
- *Retrieve documents created and sent by other users*

Deski Icon: 

Webi Icon: 

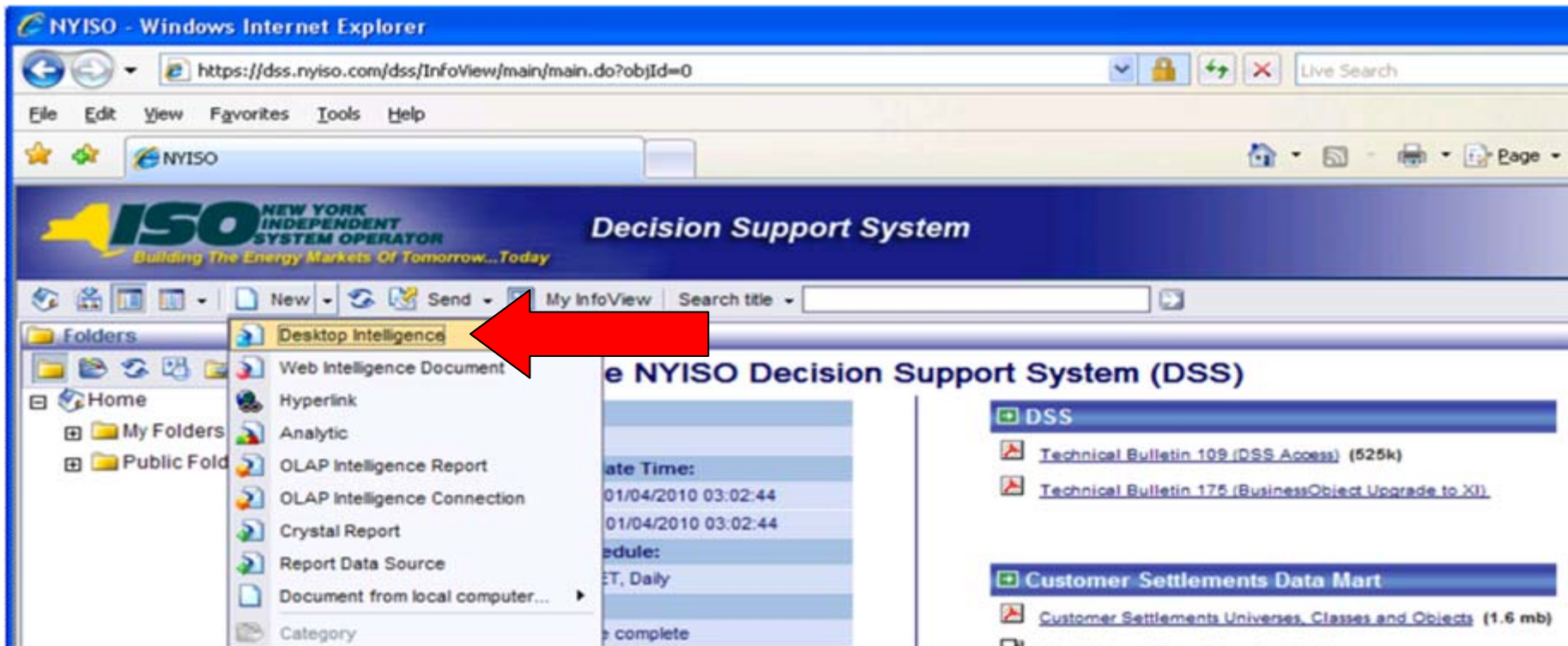


## *Why Desktop Intelligence reports are being converted to Web Intelligence*

- ◆ BusinessObjects announced Deski will be retired in the future and has already started phasing Deski out.
- ◆ To remain on supported tools, NYISO has begun a migration process to convert all Deski corporate documents to Webi.

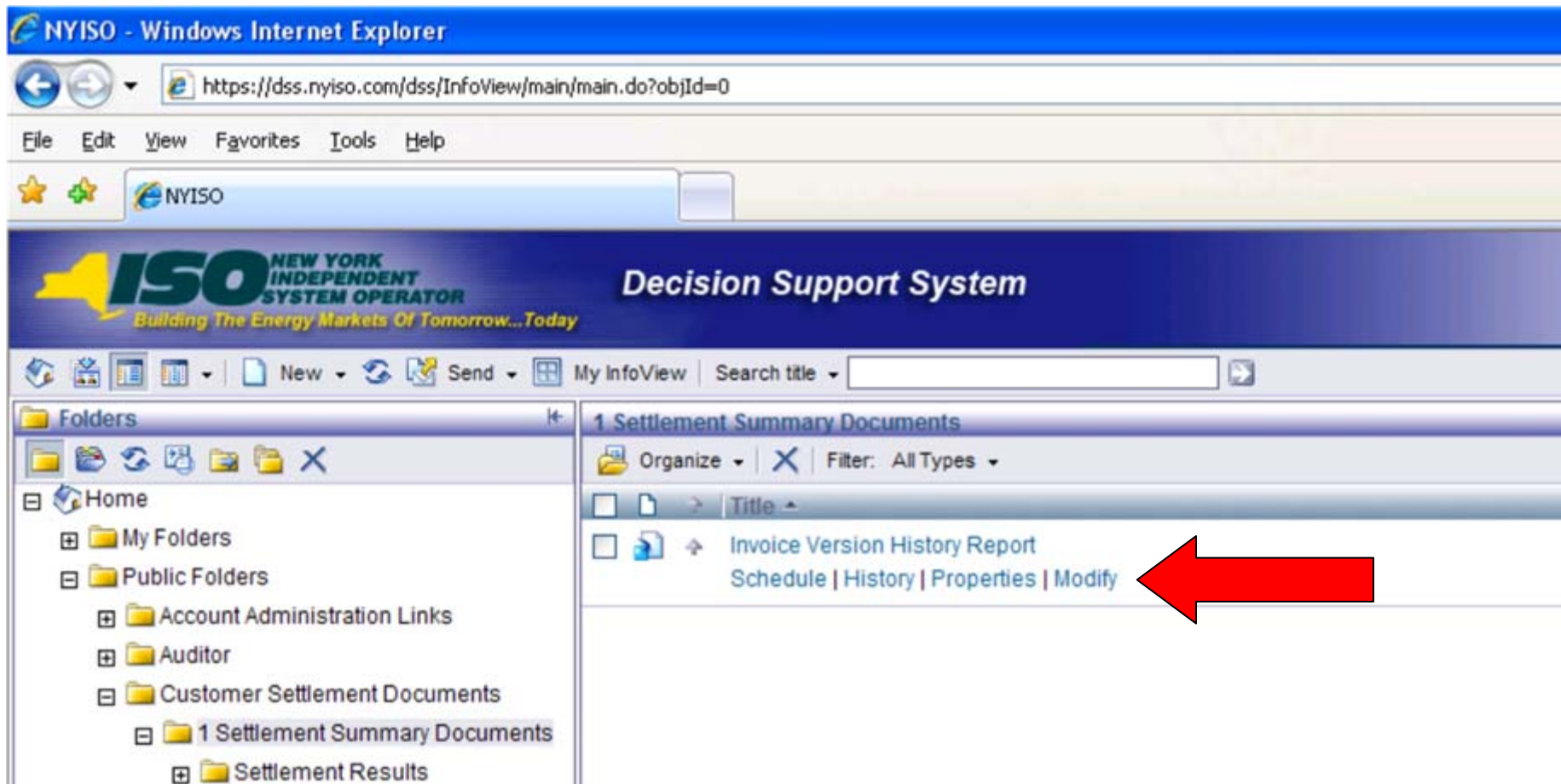
# Are you using Deski now?

- ◆ There are several ways you may be launching and using Deski.
  - *Creating a New Deski document in InfoView*



# Are you using Deski now?

- *Modify a Deski document from InfoView*



NYISO - Windows Internet Explorer

https://dss.nyiso.com/dss/InfoView/main/main.do?objId=0

File Edit View Favorites Tools Help

NYISO

**ISO** NEW YORK  
INDEPENDENT  
SYSTEM OPERATOR  
Building The Energy Markets Of Tomorrow...Today

Decision Support System

My InfoView | Search title

Folders

- Home
  - My Folders
  - Public Folders
    - Account Administration Links
    - Auditor
    - Customer Settlement Documents
      - 1 Settlement Summary Documents
      - Settlement Results

1 Settlement Summary Documents

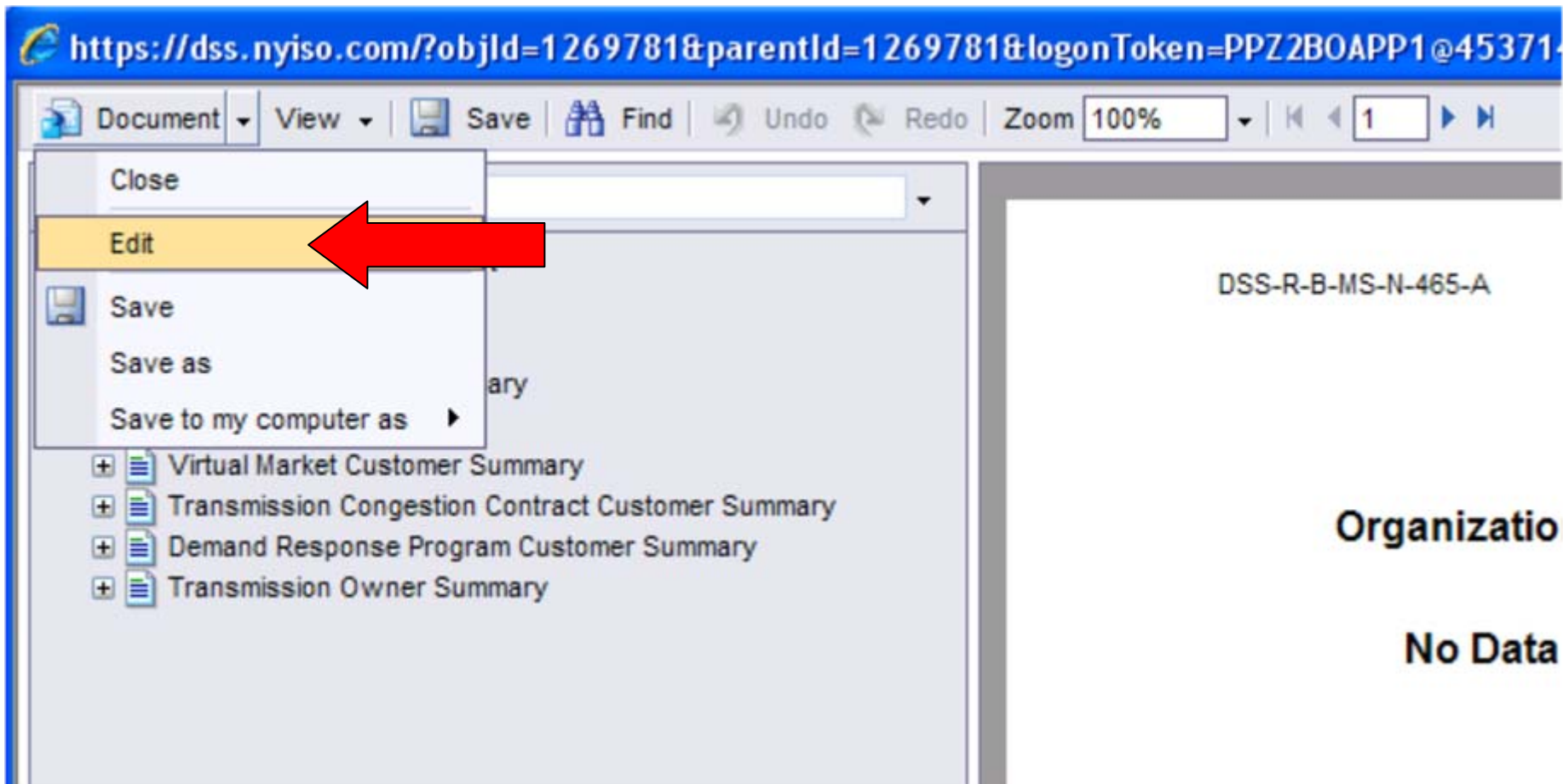
Organize | Filter: All Types

Title

Invoice Version History Report  
Schedule | History | Properties | **Modify**

# Are you using Deski now?

- *Run a Deski document in InfoView and then Edit it*



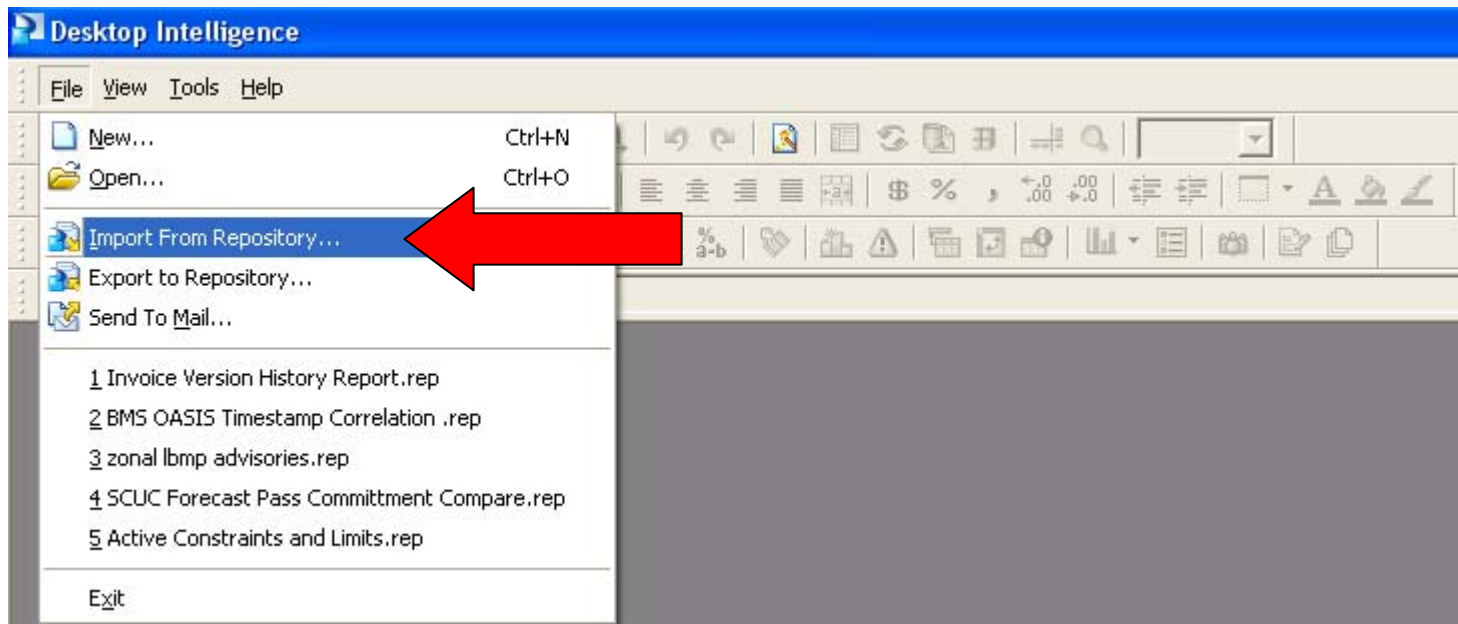
# Are you using Deski now?

- *Launch Deski from start menu or desktop icon*

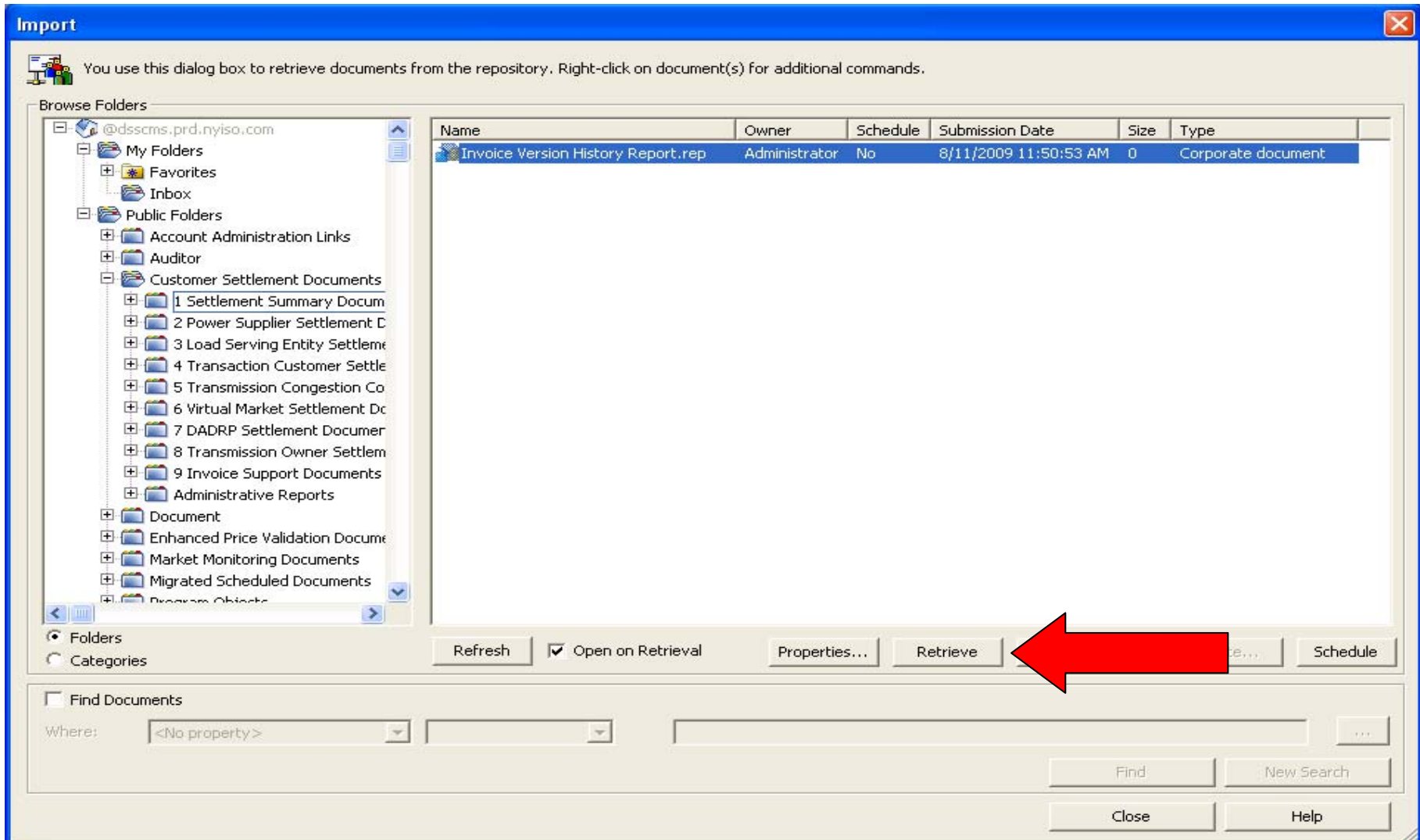


# Are you using Deski now?

- ◆ From Deski you may be retrieving NYISO corporate documents by importing from the repository.



# Are you using Deski now?



## *What the conversion means to you*

- ◆ There are 111 Deski corporate documents that need to be converted to Webi.
  - *104 Customer Settlement documents*
  - *7 Public Market documents.*
  
- ◆ Please note that personal Deski reports need to be re-written in Webi by the end users.
  
- ◆ NYISO cannot convert personal reports.



## *What the conversion means to you*

- ◆ At the end of the corporate document conversion, each Deski report will be replaced by a Webi version of the same name.
- ◆ All users will now go to the DSS log-in page at <https://dss.nyiso.com> to view corporate documents.

## *What the conversion means to you (proposed conversion process)*

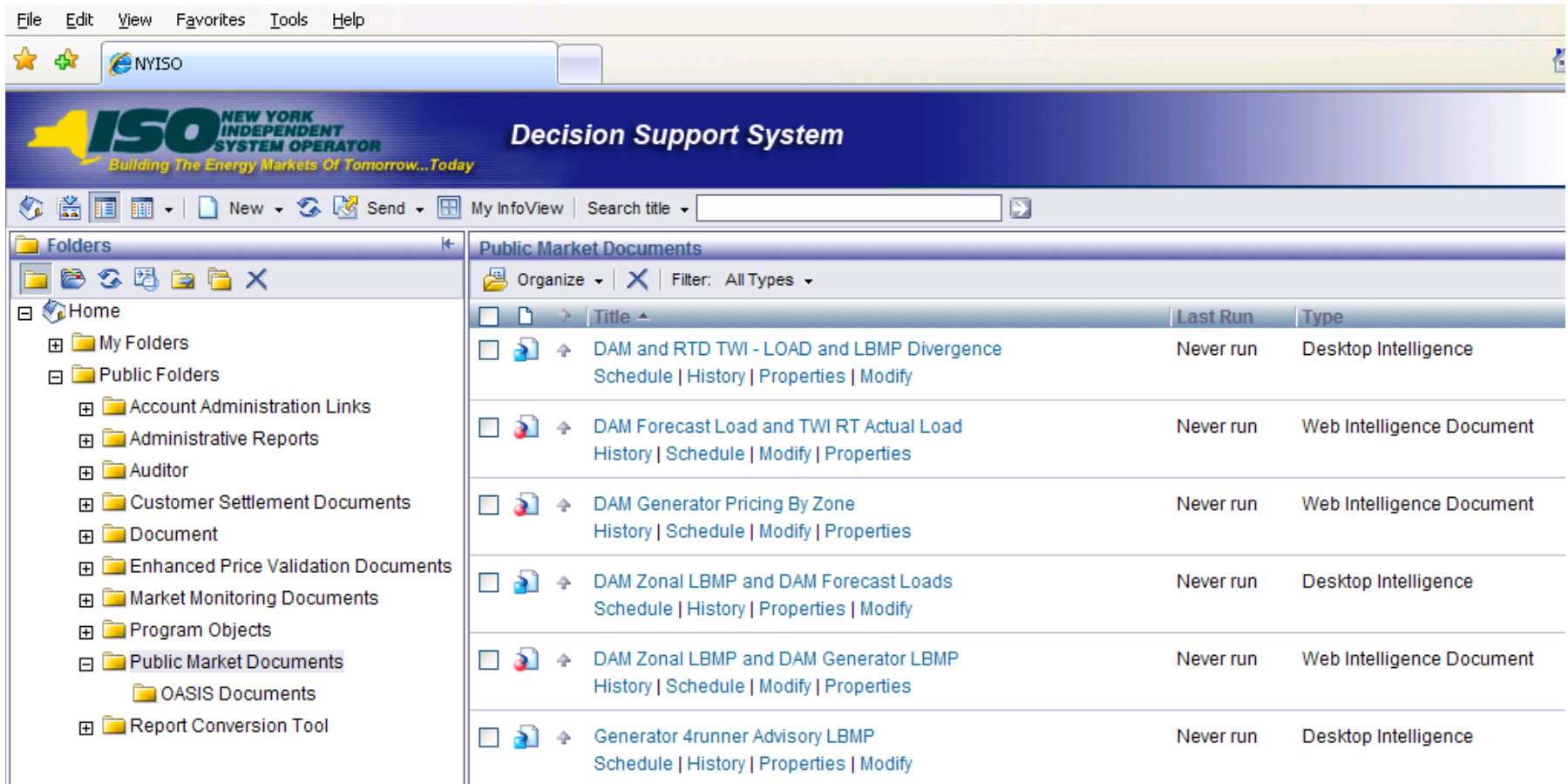
- ◆ The converted reports would be deployed in phases.
- ◆ The Deski and Webi versions of the report would exist in parallel for a time period (proposed 1 month) after a phase has been deployed.
- ◆ At the end of that time, the Deski reports would be removed.

## *What the conversion means to you (proposed conversion process)*

- ◆ The Webi version would be found in the same folder location as the original Deski report.
- ◆ The icon in front of the report name would change from Deski  to Webi  .

# What the conversion means to you

## Before Conversion:

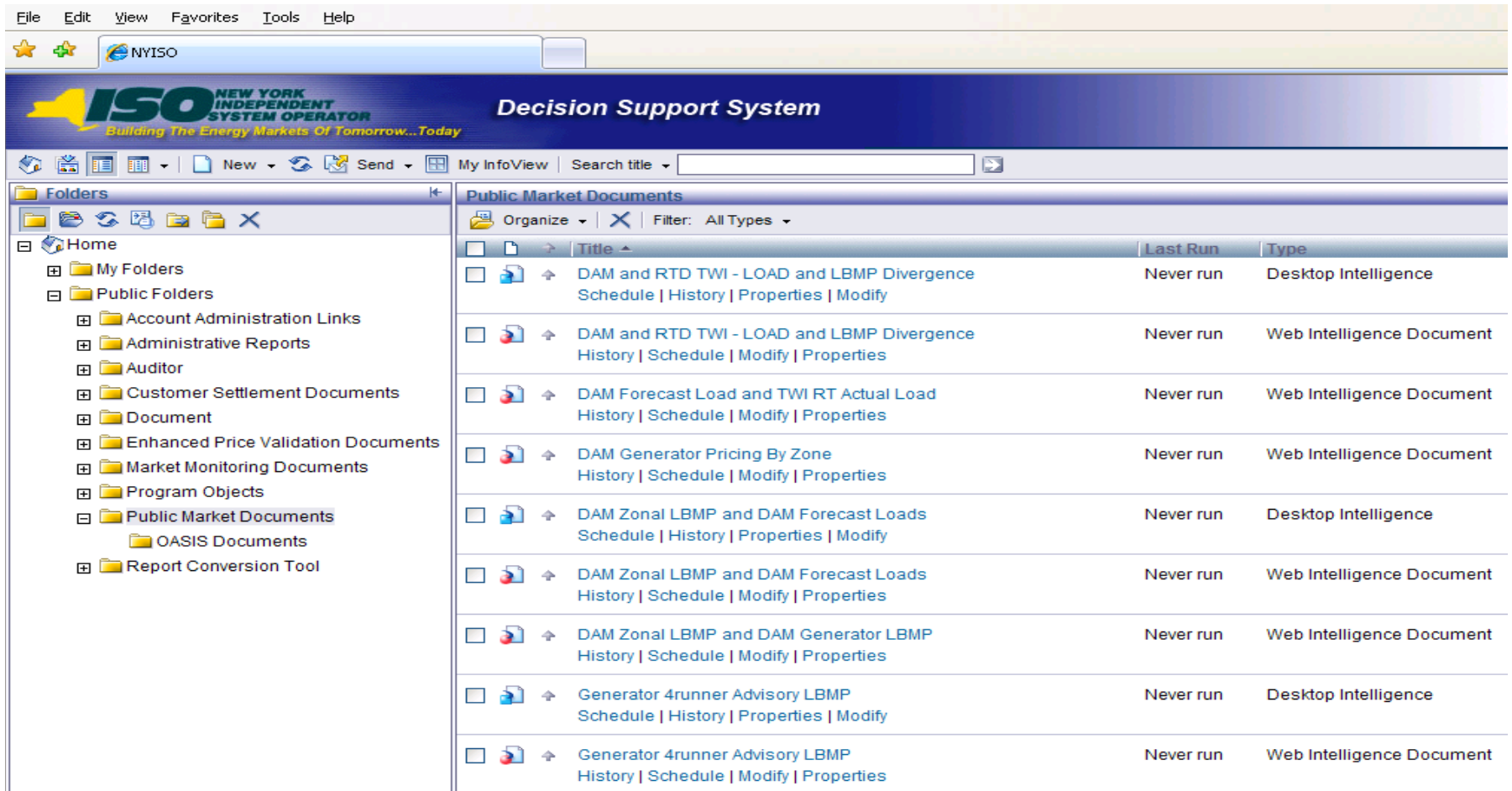


The screenshot shows the NYISO Decision Support System interface. The left pane displays a folder tree under 'Home' with 'Public Market Documents' selected. The right pane shows a table of reports within this folder.

Title	Last Run	Type
DAM and RTD TWI - LOAD and LBMP Divergence Schedule   History   Properties   Modify	Never run	Desktop Intelligence
DAM Forecast Load and TWI RT Actual Load History   Schedule   Modify   Properties	Never run	Web Intelligence Document
DAM Generator Pricing By Zone History   Schedule   Modify   Properties	Never run	Web Intelligence Document
DAM Zonal LBMP and DAM Forecast Loads Schedule   History   Properties   Modify	Never run	Desktop Intelligence
DAM Zonal LBMP and DAM Generator LBMP History   Schedule   Modify   Properties	Never run	Web Intelligence Document
Generator 4runner Advisory LBMP Schedule   History   Properties   Modify	Never run	Desktop Intelligence

# What the conversion means to you

## During Conversion Phase:



The screenshot shows the NYISO Decision Support System interface. On the left is a 'Folders' pane with a tree view. On the right is a 'Public Market Documents' table.

**Folders**

- Home
  - My Folders
  - Public Folders
    - Account Administration Links
    - Administrative Reports
    - Auditor
    - Customer Settlement Documents
    - Document
    - Enhanced Price Validation Documents
    - Market Monitoring Documents
    - Program Objects
    - Public Market Documents
      - OASIS Documents
    - Report Conversion Tool

**Public Market Documents**

	Title	Last Run	Type
<input type="checkbox"/>	DAM and RTD TWI - LOAD and LBMP Divergence Schedule   History   Properties   Modify	Never run	Desktop Intelligence
<input type="checkbox"/>	DAM and RTD TWI - LOAD and LBMP Divergence History   Schedule   Modify   Properties	Never run	Web Intelligence Document
<input type="checkbox"/>	DAM Forecast Load and TWI RT Actual Load History   Schedule   Modify   Properties	Never run	Web Intelligence Document
<input type="checkbox"/>	DAM Generator Pricing By Zone History   Schedule   Modify   Properties	Never run	Web Intelligence Document
<input type="checkbox"/>	DAM Zonal LBMP and DAM Forecast Loads Schedule   History   Properties   Modify	Never run	Desktop Intelligence
<input type="checkbox"/>	DAM Zonal LBMP and DAM Forecast Loads History   Schedule   Modify   Properties	Never run	Web Intelligence Document
<input type="checkbox"/>	DAM Zonal LBMP and DAM Generator LBMP History   Schedule   Modify   Properties	Never run	Web Intelligence Document
<input type="checkbox"/>	Generator 4runner Advisory LBMP Schedule   History   Properties   Modify	Never run	Desktop Intelligence
<input type="checkbox"/>	Generator 4runner Advisory LBMP History   Schedule   Modify   Properties	Never run	Web Intelligence Document

# What the conversion means to you

## After Conversion:



The screenshot shows the NYISO Decision Support System web interface. The browser address bar shows 'NYISO'. The page title is 'Decision Support System'. The left sidebar shows a folder tree with 'Public Market Documents' selected. The main content area displays a table of documents.

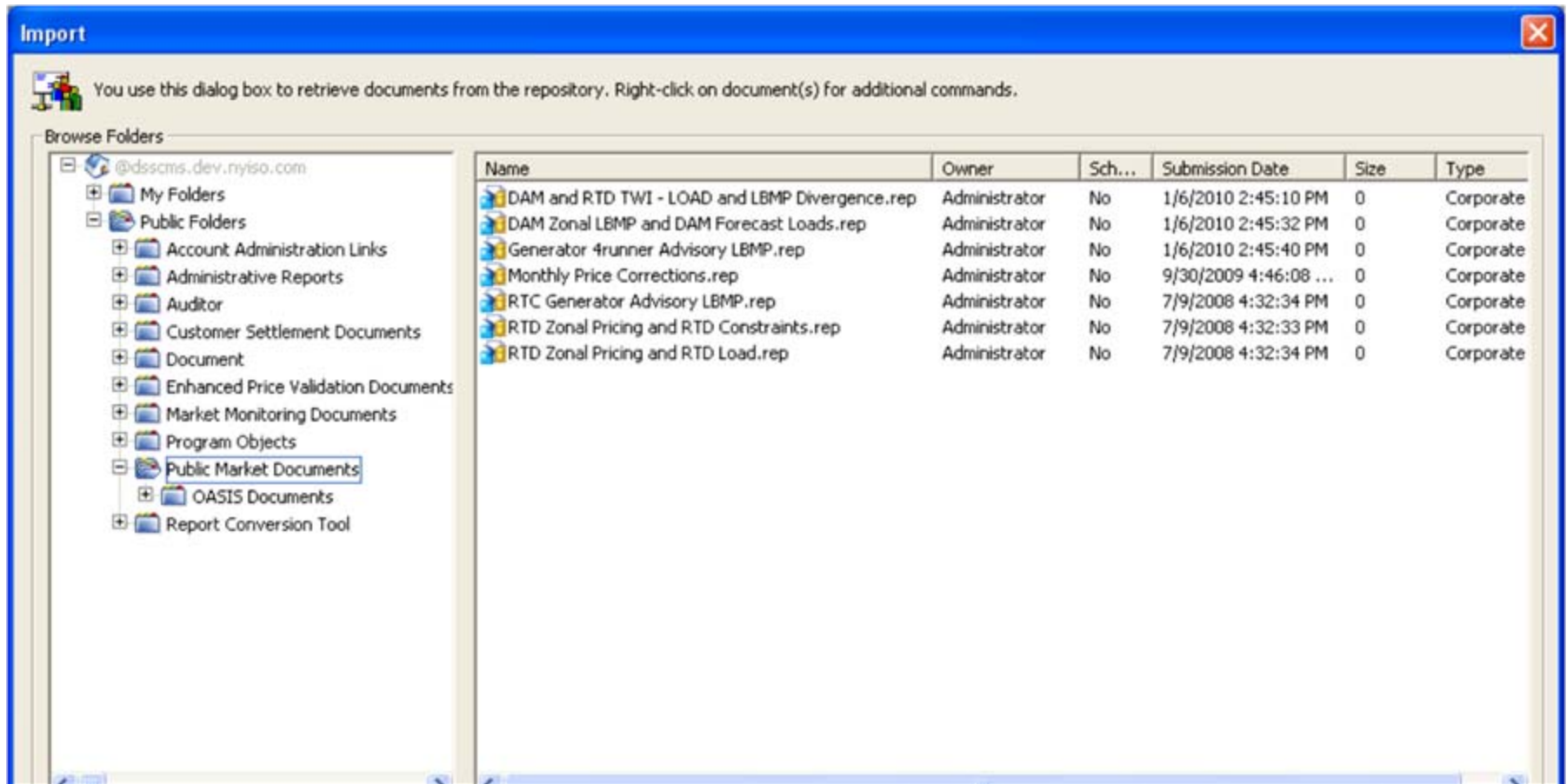
Title	Last Run	Type
DAM and RTD TWI - LOAD and LBMP Divergence <a href="#">History</a>   <a href="#">Schedule</a>   <a href="#">Modify</a>   <a href="#">Properties</a>	Never run	Web Intelligence Document
DAM Forecast Load and TWI RT Actual Load <a href="#">History</a>   <a href="#">Schedule</a>   <a href="#">Modify</a>   <a href="#">Properties</a>	Never run	Web Intelligence Document
DAM Generator Pricing By Zone <a href="#">History</a>   <a href="#">Schedule</a>   <a href="#">Modify</a>   <a href="#">Properties</a>	Never run	Web Intelligence Document
DAM Zonal LBMP and DAM Forecast Loads <a href="#">History</a>   <a href="#">Schedule</a>   <a href="#">Modify</a>   <a href="#">Properties</a>	Never run	Web Intelligence Document
DAM Zonal LBMP and DAM Generator LBMP <a href="#">History</a>   <a href="#">Schedule</a>   <a href="#">Modify</a>   <a href="#">Properties</a>	Never run	Web Intelligence Document
Generator 4runner Advisory LBMP <a href="#">History</a>   <a href="#">Schedule</a>   <a href="#">Modify</a>   <a href="#">Properties</a>	Never run	Web Intelligence Document

## *What the conversion means to you*

- ◆ If you have been importing Deski corporate documents from the repository in Deski:
  - *As the Deski versions of the reports are retired, you will no longer see the reports listed in the folders on the Import screen.*
  - *To view the Webi versions of the reports, you must log-in to InfoView and access the reports there.*
  - <https://dss.nyiso.com>

# What the conversion means to you

## Before Conversion:

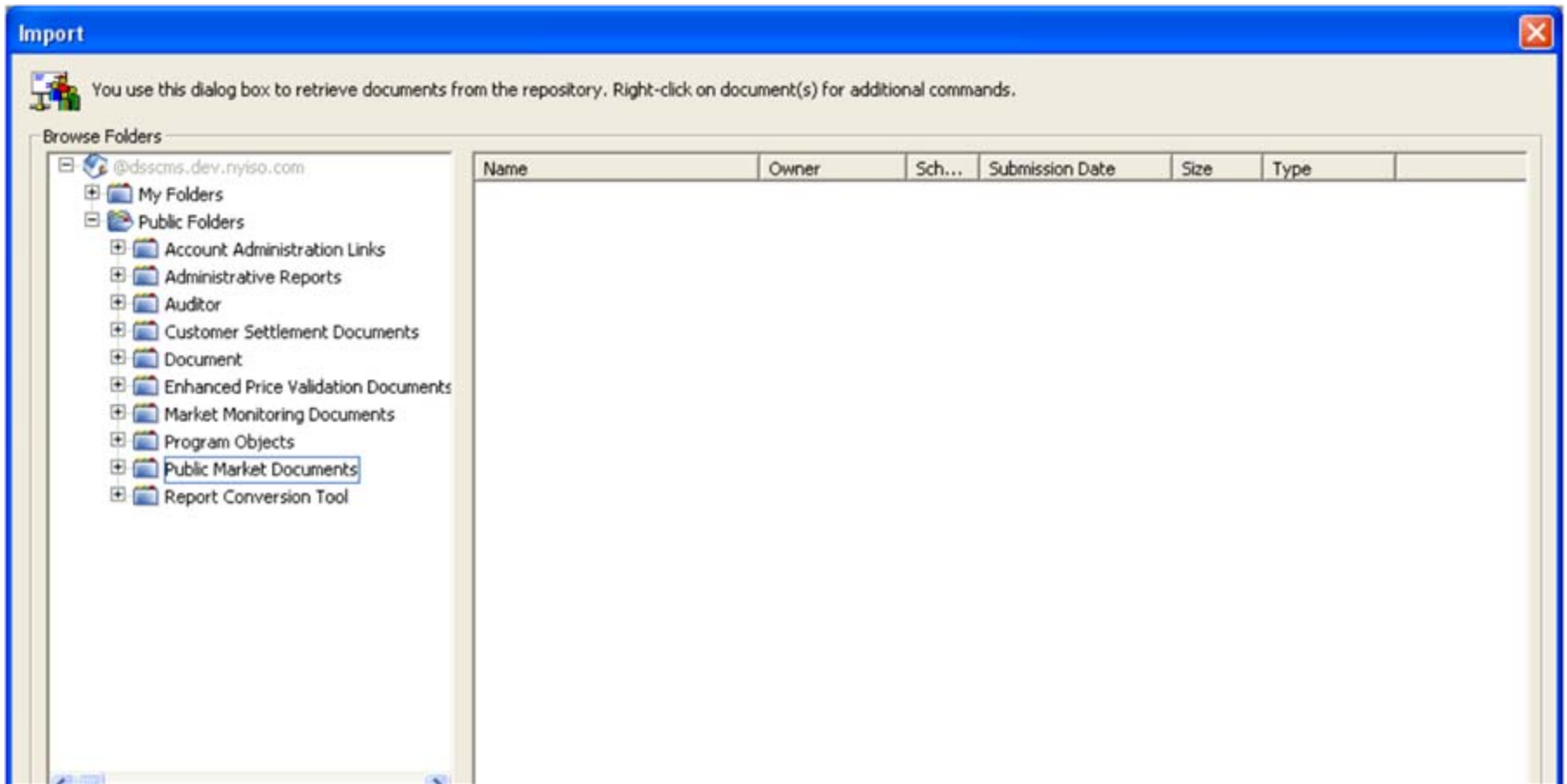


The screenshot shows an 'Import' dialog box with a blue title bar. Below the title bar is a message: 'You use this dialog box to retrieve documents from the repository. Right-click on document(s) for additional commands.' Below this is a 'Browse Folders' section on the left, showing a tree view of folders under '@dsscms.dev.nyiso.com'. The main area on the right is a table listing documents.

Name	Owner	Sch...	Submission Date	Size	Type
DAM and RTD TWI - LOAD and LBMP Divergence.rep	Administrator	No	1/6/2010 2:45:10 PM	0	Corporate
DAM Zonal LBMP and DAM Forecast Loads.rep	Administrator	No	1/6/2010 2:45:32 PM	0	Corporate
Generator 4runner Advisory LBMP.rep	Administrator	No	1/6/2010 2:45:40 PM	0	Corporate
Monthly Price Corrections.rep	Administrator	No	9/30/2009 4:46:08 ...	0	Corporate
RTC Generator Advisory LBMP.rep	Administrator	No	7/9/2008 4:32:34 PM	0	Corporate
RTD Zonal Pricing and RTD Constraints.rep	Administrator	No	7/9/2008 4:32:33 PM	0	Corporate
RTD Zonal Pricing and RTD Load.rep	Administrator	No	7/9/2008 4:32:34 PM	0	Corporate

# *What the conversion means to you*

After Conversion:



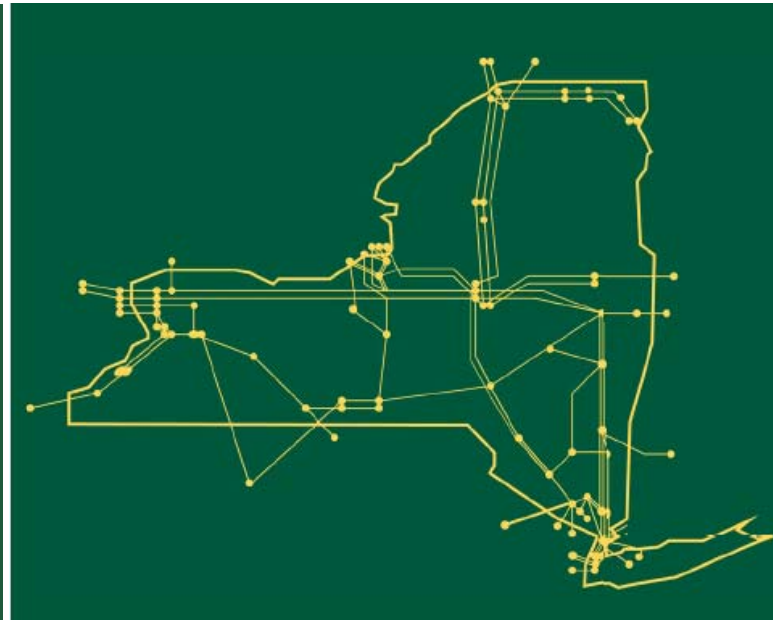
## *Proposed timeline for conversion*

- ◆ XI R3 upgrade – Q3 2010
- ◆ Begin Deski to Webi Conversion of NYISO corporate reports – Q3 2010
- ◆ Complete Conversion by – Q4 2011
- ◆ Phase out use of Deski – Early 2012
  - *(These are projected dates and subject to change)*
  
- ◆ This would mean that end users would need to have their Deski reports converted to Webi prior to Deski retirement which this timeline is projecting to be as early as Q1 2012

## *Proposed timeline for conversion*

- ◆ Users would receive 90 days notice before a Conversion Phase (a particular set of Corporate Reports) would begin.
- ◆ Proposed Phases based on Corporate Report Categories:
  - *LSE, TCC, Virtual, DADRP, TO, Invoice Support, and Administrative Documents*
  - *Power Supplier – Ancillary Documents*
  - *Power Supplier – Energy Documents*
  - *Transaction Customer Documents*
  - *Settlement Summary Documents*
  - *Public Market Documents*

The New York Independent System Operator (NYISO) is a not-for-profit corporation that began operations in 1999. The NYISO operates New York's bulk electricity grid, administers the state's wholesale electricity markets, and conducts comprehensive planning for the state's bulk electricity system.



[www.nyiso.com](http://www.nyiso.com)