DSS Task Force
February 11, 2003

For Discussion of:

NYISO Decision Support System

Customer Settlements Data Mart

Today's Agenda

- Release 1 Pilot Re-cap

  - *Review 01/22/2003 Pilot and Feedback*

  - *Discussion of future web-based DSS training*

  - *DHall conversation with Art Storey*

- Business Objects Universe Proposals - Discussion and Finalization

- Discussion of Strategy for addressing Intermediate BAS Data/Calculations not currently available for capture by DSS

- User Access and Administration/Control of DSS

- 2003 Goals/Deliverables and Plan for Historical Data Requirements

Release 1 Pilot Workshop

➢ Agenda

- ***Introduction and General Background***

- ***Business Case Scenarios***

  ▸ **Release 1 Data Scope**

  ▸ **Corporate Reports concepts**

  ▸ **Creating Queries / Personal Reports concepts**

- ***Hands-On Scenarios***

- ***Captured Feedback and MP Input***

➢ MP Comments regarding the 01/22 DSS Pilot

- ***What did you think?***

Summary of Feedback Surveys

➢ **Comments from the 01/22 Pilot Surveys**

Rating Scale:

1	**Unacceptable**
2	**Did Not Meet Expectations**
3	**Consistently Met Expectations**
4	**Exceeded Expectations**
5	**Dramatically Exceeded Expectations**

- *Average feedback rating = 3.81*
  - ▸ Pilot achieve desired objectives = 4.00
  - ▸ DSS progress to-date (data and functionality) = 3.80
  - ▸ Level of MP involvement and market communication = 3.60
  - ▸ Pilot facilitation and content = 3.80

- *General Comments*
  - ▸ The Task Force always asks market participants for input and has held timely meetings to provide feedback.
  - ▸ The program is more user friendly than I expected. Once a person masters the basic ideas of this program, I don't think it would be difficult to self-teach to adapt the program to custom needs.
  - ▸ A challenge may be with maintaining the DSS with code changes, new settlements. Also, creating tables in BAS that store intermediate calcs that can be refreshed into DSS.
  - ▸ Meeting 2nd Quarter deadline is also aggressive but will be a challenge.
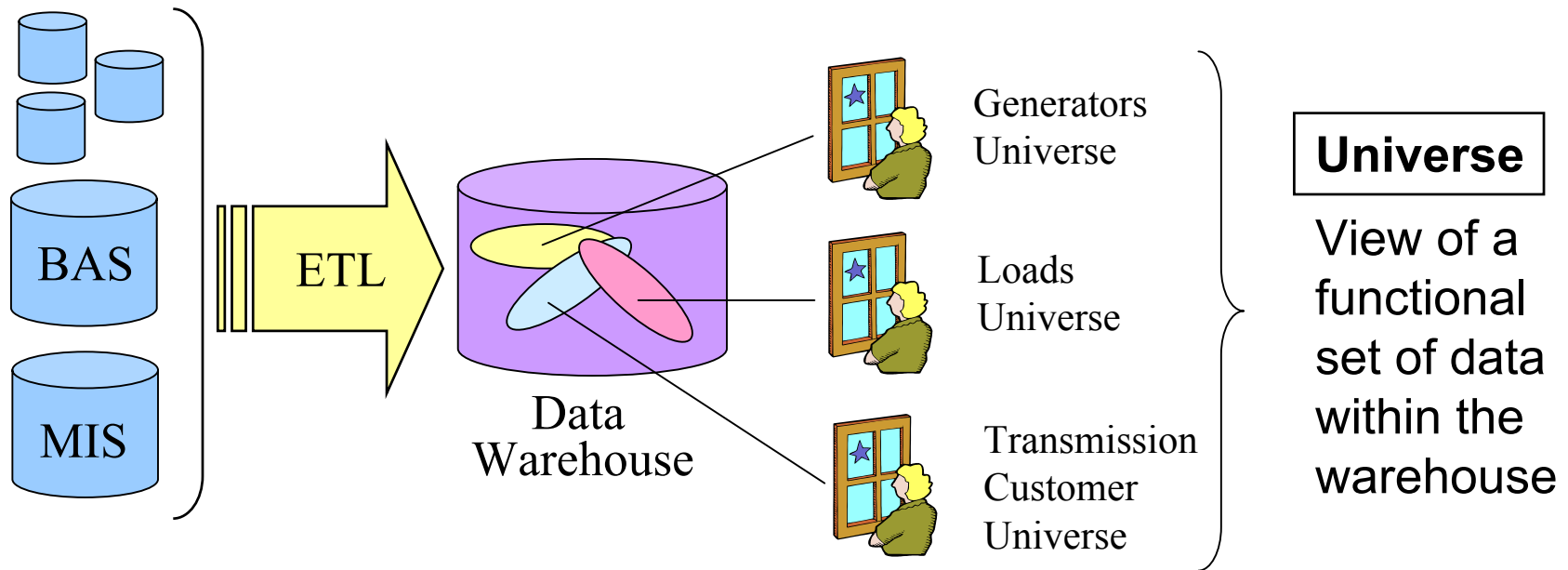
➢ **Final Average over both sessions = 3.85**

Additional Pilot Discussions re: Training
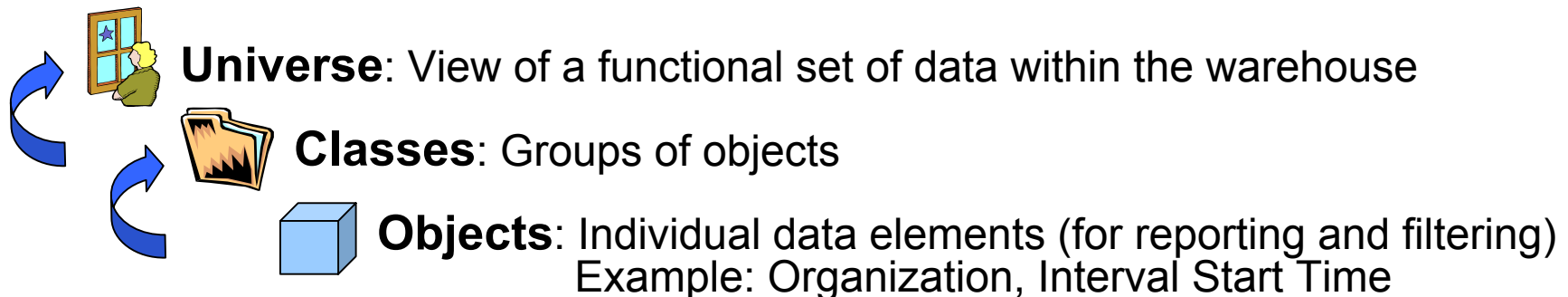
➢ **Discussion (Dave)**

BO Universe Review

➢ **A Business Objects Universe is a logical way of organizing related data elements in order to facilitate custom query/report creation**

➢ **The DSS currently has defined 3 Universes for Release 1**

   ▪ *Customer Settlements for Load Serving Entities*

   ▪ *Customer Settlements for Power Suppliers*

   ▪ *Customer Settlements for Transaction Customers*

➢ **We're looking to make sure we organize data elements in the most efficient way given commonly developed custom queries and reports**

Business Objects Overview

Universe

View of a functional set of data within the warehouse

Hierarchy

Universe: View of a functional set of data within the warehouse

Classes: Groups of objects

Objects: Individual data elements (for reporting and filtering)
Example: Organization, Interval Start Time

MP Input on BO Universes

➢ **What do you think of the proposed designs?**

➢ **Any ideas on other ways to organize the data elements that would make query development easier?**

➢ **Can you find the data elements you are looking for?**

Unavailable Intermediate Data Discussion

➢ **Discussion (Dave)**

User Administration Process

- ## **User Signup Process**
    - *From DSS Homepage*
        - ▶ Go to User Access Request Form
        - ▶ Complete User Access Request Form
            - – Information Required (First/Last Name, Organization, Phone#, Email, Requested Subject Areas, etc.)
        - ▶ Submit User Access Request Form to NYISO
    - *Confirmation Email will be sent by NYISO to email address provided*
        - ▶ Contains an unsuccessful response, or a successful message with logon and password

User Administration Process

➢ **NYISO Administrative Process**

- *Receive User Access Request Form via email (from user requesting access)*

- *Go to internal webpage to view pending User Access Requests*

- *Approve / reject user application for user access*

- *Submit approval/rejection to generate User Confirmation Email*

User Administration Questions

➢ **So, what do I need to do?**

  ▪ *Who would you want to be your organization's DSS Administrator?*

  ▪ *Who would be your organization's list of users?*

➢ **Open Questions / Issues:**

  ▪ *# Users/Organization Limit*

Current Goals/Deliverables

➢ **Release 1 Data Elements**

   ▪ *Targeted for delivery during 2nd Quarter 2003*

➢ **Additional Releases (2-4) of Customer Settlements / Invoicing Data Elements**

   ▪ *NYISO Board is considering a 2003 corporate goal*

➢ **Historical Data**

   ▪ *Determine approach & scope post-Release 1*