DSS Task Force
May 20, 2004

For Discussion of:

NYISO Decision Support System

Customer Settlements Data Mart

Today's Agenda

- ➢ DSS Operational Update
  - ▪ *Market Participant DSS Experience / Comments To-Date*
  - ▪ *ADD Technical Bulletin Questions?*
  - ▪ *More Marketing (Insider Article, brochure, etc.)*
  - ▪ *2004 Training Schedule*
- ➢ DSS Project Update
  - ▪ *Track & Team Reports / Status*
  - ▪ *New Version History Mapping Report Design (update)*
  - ▪ *Cash Reconciliation Reports ($ & MW) in DSS (update)*
- ➢ Alternate Data Delivery Efforts
  - ▪ *Review and Update*
  - ▪ *ADD Training Plan*
- ➢ DSS Did You Know?
  - ▪ *NYISO Employees Are Using DSS*

DSS Operational Update

- Market Participant DSS Experience / Comments To-Date
  - *What are you doing with the DSS?*
  - *What issues are you experiencing?*
- Do you have any questions regarding the ADD Technical Bulletin?
- Did you see the latest DSS marketing effort?
  - *NYISO Insider Article*
- Coming Soon…
  - *The DSS Team is awaiting approval on a DSS Product Brochure.*

2004 DSS Training Schedule

- ➢ **Tentative Dates**
  - ■ *Introduction Course*
    - ▸ 05/20/2004 (full)
    - ▸ 05/26/2004 (full)
    - ▸ 06/16/2004 (full)
    - ▸ 08/17/2004
    - ▸ 11/03/2004
  - ■ *Intermediate Course*
    - ▸ 06/16/2004 (posted soon)
    - ▸ 08/24/2004
    - ▸ 11/10/2004

Notes:

- If demand exceeds availability, additional courses will be added.
- Course dates are subject to cancellation if demand is low.
- See plans for DSS Training for ADD.

Project Update / Status – Team Reports

- ➢ **Team Reports**
  - ▪ *Requirements Team*
  - ▪ *Application Team*
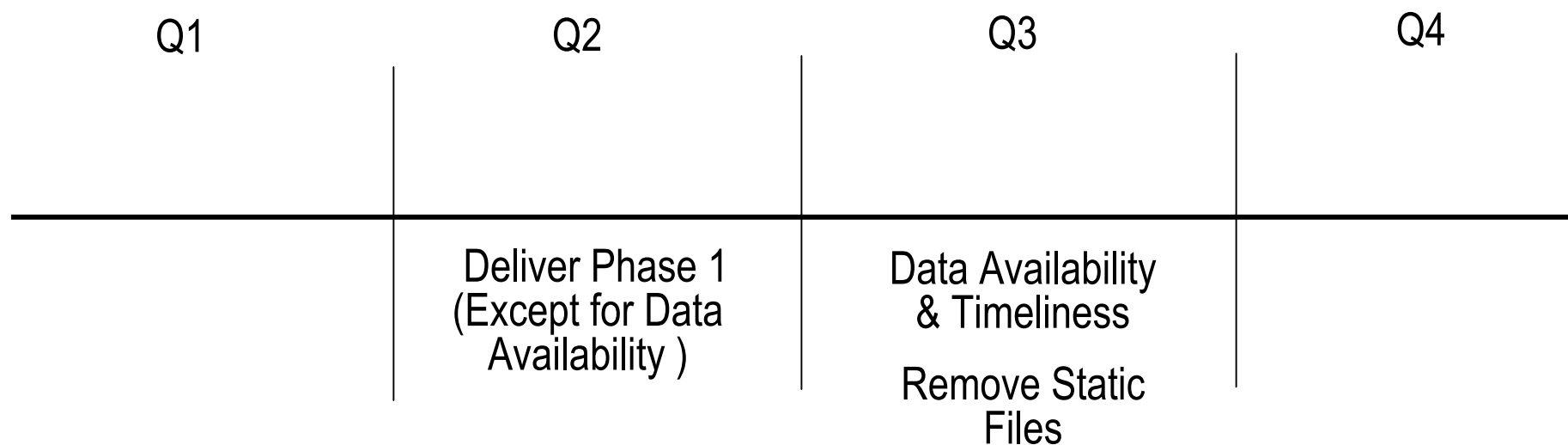 - ▪ *ETL Team*
  - ▪ *QA Team*
- ➢ **New Invoice Version History Report Design**
  - ▪ *See separate design example (PDF)…*
- ➢ **Cash Reconciliation Reports ($ & MW) in DSS**
  - ▪ *Open to any changes?*

Tentative ADD Timeline - 2004

Q1	Q2	Q3	Q4
	Deliver Phase 1 (Except for Data Availability)	Data Availability & Timeliness Remove Static Files	

05/12/2004 – ADD Technical Specification published (complete)

06/30/2004 – ADD Delivery / Implementation

08/31/2004 – Static & Dynamic Advisory process removed

10/01/2004 – Removal of website / CD distribution of existing historical files

ADD – Design Considerations

➢ This interface will be limited to retrieving Settlement Days / Versions that are stored in the DSS.

➢ This interface will be limited to retrieving individual data elements that are stored in the DSS.

➢ Once settlement days are re-spun for un-invoiced days and versions, the prior version of data is over-written. The DSS only retains one un-invoiced version of the data at any time (version 0).

➢ The DSS is only loaded once per day, so requesting the same day and version of data within the same day is redundant. Polling the system for changes more than once per day is unnecessary.

ADD – Known Issues

➢ **Due to the Differences in Versioning Strategies:**

  ▪ *Update vs. Insert*

    ▸ DSS keeps all un-invoiced versions of settlements data as V0. Therefore, as un-invoiced data is re-settled in BAS, we will re-issue V0.

  ▪ *Un-Invoiced Data vs. Invoiced Data*

    ▸ There will have to be specific consideration of how to publish reports via ADD for invoiced data sets. Proposal is to automatically publish un-invoiced data, and allow users to request invoiced sets manually, if desired.

➢ **Filename Change**

  ▪ *The advisory file names will need to include Organization Name.*

➢ **Error Corrections**

  ▪ *Alignment of Virtual Market Prices ($/MW) on daylight savings day*

DSS ADD Training Plan

> ## **What is the ADD Training Plan?**

  - ### *DSS ADD Training Course*

    - ▸ A temporary training course targeted towards people who have already attended the DSS Introduction Course and want to learn how to use DSS ADD.

    - ▸ Conducted during the transition period (3QTR 2004) only

    - ▸ 1/2hour-1hour, conducted via WebEx

  - ### *Inclusion into the DSS Introduction Course*

    - ▸ Additional topic to the existing Introduction Course to support long term training requirements

DSS – Did You Know?

- ➢ **NYISO Employees are Using DSS!**
  - ▪ *Today's Example: NYISO Customer Relations*
    - ▸ Responding to a Common CRD Billing Question from Market Participants
  - ▪ *Example:*
    - ▸ Reconciling Curtailed in Hour Transactions
  - ▪ *Business Scenario:*
    - ▸ MPs call NYISO CRD to assist in reconciliation.
    - ▸ Prior to DSS:
      - – MPs had limited access to the data required to reconcile the energy (MWh) and settlements ($) associated with these Transactions
      - – CRD would gather data from MIS, capture it into a MS Excel file, manually re-calculate the MWhs and related settlement ($), tie it out to the invoice, then send out the data to MP (~2-3 hours work).
    - ▸ With DSS:
      - – CRD has improved the process… CRD created a custom report so they just open the report, refresh it, customize further if desired, tie it out to the invoice, then send out the data to MP (~minutes).
      - – The custom report organizes the required data into a single report, that allows an MP to easily reconcile.

Import Transaction

Organization 2030727

09/20/2003 V0

Interval Start Date/Time (Eastern)	Interval Start Hour (Eastern)	TransCnt ID	TransCnt Transaction Category	TransCnt Gen Name	SCD Cut Transaction Flag	SCD Trans Cut By Desc	Hr HAM Trans Bid Fixed Energy (MW)	SCD RT Sched Trans (MW) - Trans	SCD BalMkt LBMP Energy (MWh) RT Flow per SCD Interval BC 516	SCD BalMkt Total LBMP Stlmnt ($) RT LBMP$ Billing code 520	SCD RT Total Price - Src ($/MW)	Calc - SCD BalMkt Total LBMP Stlmnt ($)
09/20/2003 12:00:00 PM	12	9308045	Import	GenBilling 18293	N	non-NYISO	120.0	120.0	-1.3667	-111.74	81.76	-111.74
09/20/2003 12:00:41 PM		9308045	Import	GenBilling 18293	N	non-NYISO	120.0	120.0	-9.0000	-510.66	56.74	-510.66
09/20/2003 12:05:11 PM		9308045	Import	GenBilling 18293	N	non-NYISO	120.0	120.0	-3.0000	-180.78	60.26	-180.78
09/20/2003 12:06:41 PM		9308045	Import	GenBilling 18293	N	non-NYISO	120.0	120.0	-10.0000	-635.80	63.58	-635.80
09/20/2003 12:11:41 PM		9308045	Import	GenBilling 18293	Y	non-NYISO	120.0	120.0	-18.0000	-1,116.18	62.01	-1,116.18
09/20/2003 12:20:41 PM		9308045	Import	GenBilling 18293	N	non-NYISO	120.0	60.0	-2.0000	-118.78	59.39	-118.78
09/20/2003 12:22:41 PM		9308045	Import	GenBilling 18293	N	non-NYISO	120.0	60.0	-5.0000	-313.50	62.70	-313.50
09/20/2003 12:27:41 PM		9308045	Import	GenBilling 18293	N	non-NYISO	120.0	60.0	-5.0000	-384.75	76.95	-384.75
09/20/2003 12:32:41 PM		9308045	Import	GenBilling 18293	N	non-NYISO	120.0	60.0	-1.5000	-90.25	60.17	-90.26
09/20/2003 12:34:11 PM		9308045	Import	GenBilling 18293	N	non-NYISO	120.0	60.0	-3.5000	-211.58	60.45	-211.58
09/20/2003 12:37:41 PM		9308045	Import	GenBilling 18293	N	non-NYISO	120.0	60.0	-5.0000	-316.60	63.32	-316.60
09/20/2003 12:42:41 PM		9308045	Import	GenBilling 18293	N	non-NYISO	120.0	60.0	-5.0000	-324.60	64.92	-324.60
09/20/2003 12:47:41 PM		9308045	Import	GenBilling 18293	N	non-NYISO	120.0	60.0	-5.0000	-323.40	64.68	-323.40
09/20/2003 12:52:41 PM		9308045	Import	GenBilling 18293	N	non-NYISO	120.0	60.0	-2.5000	-157.15	62.86	-157.15
09/20/2003 12:55:11 PM		9308045	Import	GenBilling 18293	N	non-NYISO	120.0	60.0	-4.8167	-369.72	76.76	-369.73
	12											
						Sum:			-80.6834	-5,165.49		-5,165.50
						Maximum:						

						Sum:			-80.6834	-5,165.49		-5,165.50
						Maximum:	120.0					