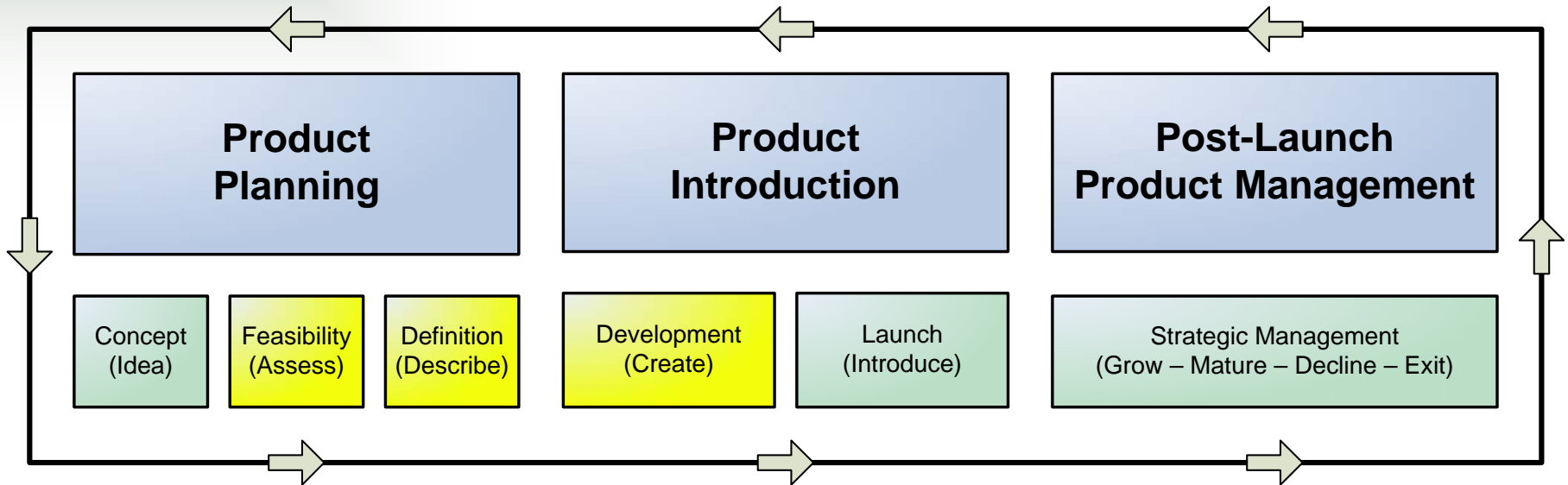# Web-Based Reconciliation Replacement (WBRR)

## Technical Conference
## February 23, 2007

Draft – For Discussion Purposes

# Product Management Life Cycle

| Product Planning | Product Introduction | Post-Launch Product Management |
|---|---|---|
| Concept (Idea) · Feasibility (Assess) · Definition (Describe) | Development (Create) · Launch (Introduce) | Strategic Management (Grow – Mature – Decline – Exit) |

- ◆ Iterative Process
- ◆ Interactive Dialogue
- ◆ Interdependent Solutions

# WBRR Priorities

- ◆ TOL Upload Redesign
- ◆ Verification of upload receipt by NYISO (echo back or acceptable replacement)
- ◆ Redesign of remaining upload and download templates
- ◆ Querying and Reporting

# Project Guidelines

◆ Maintain all existing WBR functionality or provide equivalent replacement feature

◆ Conduct additional MP discussions of requirements for all changes and replacements

◆ Provide an open test environment for MPs to test changes and replacements for WBR, prior to each production deployment

◆ Notify MPs prior to the deployment of any changes to the test environment and production

◆ Obtain MP feedback following testing periods and production deployments

◆ Communicate progress on a monthly basis to BAWG

# 2007 Deliverables

| | |
|---|---|
| February | ◆ Deploy querying fix to enable results across multiple days |
| March | ◆ Deploy TOL upload redesign to MP test environment |
| May | ◆ Deploy TOL upload redesign to production |
| September | ◆ Deploy remaining upload and download redesigns to MP test environment |
| October | ◆ Deploy remaining upload and download redesigns to production |

# 2007 Schedule

| Jan | Feb | Mar | April | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|---|---|---|---|---|---|---|---|---|---|---|---|
| NYISO Release | NYISO Release | | | NYISO Release | | | | NYISO Release | NYISO Release | | |
| | | Data Center Move | Data Center Move | | System Load | System Load | System Load | | | SAS 70 SarBox | SAS 70 SarBox |
| | WBRR Release | WBRR Test | | WBRR Release | | | | WBRR Test | WBRR Release | | |
| WBRR Discuss | WBRR Discuss | Test Discuss | | | Release Discuss | | | Test Discuss | | Release Discuss | |
| BAWG Report | BAWG Report | BAWG Report | BAWG Report | BAWG Report | BAWG Report | BAWG Report | BAWG Report | BAWG Report | BAWG Report | BAWG Report | BAWG Report |

Draft – For Discussion Purposes

# WBRR Overview

# WBRR Overview

- Transmission Owner Load (TOL) Upload
  - *Market Participant (MP) Requirements*
  - *Current Functionality*
  - *Proposed Functionality*
  - *Questions*
- TOL Download
  - *MP Requirements*
  - *Current Functionality*
  - *Proposed Functionality*
  - *Questions*
- NYISO Architectural Updates
- MP Testing
- Remaining Upload and Download Templates

# Phase 1 Deliverables

◆ Current Issues:

- *Performance issues with the TOL upload and the response back*

- *Performance issues with the TOL download*

◆ With these proposed enhancements:

- *Migration to NYISOs New Architectural Framework for Upload and Download*

- *Improved performance for TOL Upload*

- *Load Verification for TOL Download*

- *New checks and balances on data delivery with NYISO*
  - MW data checks and balances on load data
    - Row count
    - Summation
    - Verification

# WBRR
# TOL Upload

## Phase 1

Draft – For Discussion Purposes

# TOL Upload: MP Requirements

Specific MP Requests:

1. *Provide improved response time for upload requests, as defined by the WBR requirements effort*

2. *Reduce the occurrence of timeout errors received during the transmission of a Transmission Owner Load (TOL) file via the load_bus_hour_data upload request*

3. *Reduce the occurrence of security errors received during the transmission of a TOL file via the load_bus_hour_data upload request*

# TOL Upload: MP Requests (Cont.)

Specific MP Requests (Cont.):

4. *Improve performance to enable the upload and NYISO-generated verification of an entire monthly TOL file without having to split the file into smaller pieces*

   - Note: NYISO MPs submit monthly data sets which range from 3,700 to 173,000 data rows, therefore NYISO will support a TOL upload data set which is in compliance with all other upload/download templates; 50,000 rows per submit

5. *Provide the MPs with auditable, traceable and verifiable data controls to support compliance verification and testing*

6. *Provide a detailed response message indicating the success or failure of the WBR upload requests, essentially verifying the data has been transmitted from the MP's machine to the NYISO's machine*

# TOL Upload: Template Description

- Upload Name: Load_bus_hour_data
- Description: Enables a Metering Authority to submit their load bus data to NYISO

# TOL Upload: Request Parameters – Current

## Current Request Parameters Supported

- *BID_TYPE – required*

- *USERID – required*

- *PASSWORD – required*

- *DATA_ROWS - required*

- *UPLOAD_RESPONSE – optional; defaults to N*

- *Data Elements Submitted for each Row of Data:*

  - Date_hour - required

  - Bus PTID - required

  - Hourly MW Value - required

# Example: Current TOL Upload Request

Request File Example of Current TOL Upload….

*BID_TYPE=LOAD_BUS_HOUR_DATA&*

*USERID=youruser&*

*PASSWORD=yourpassword&*

*DATA_ROWS=8&*

*UPLOAD_RESPONSE=Y&*

*12/1/2005 0:00,999999,53*

*12/1/2005 1:00,999999,48*

*12/1/2005 2:00,999999,46*

*12/1/2005 3:00,999999,44*

*12/1/2005 4:00,999999,44*

*12/1/2005 5:00,999999,46*

*12/1/2005 6:00,999999,53*

*12/1/2005 7:00,999999,59*

# TOL Upload: Proposed Request Parameter – New

## New Request Parameter

*DATA_SUM – optional parameter*

- *Represents the sum of MWs in the file*

- *Provides validation that the value specified matches the sum of all MW values included in file*

  - If the values do not match, the entire file will be rejected with an appropriate error message
  - If the values match, the file will continue to be processed

# Example: TOL Upload Request with Data_sum

Request File Example of TOL Upload with Proposed Field:

*BID_TYPE=LOAD_BUS_HOUR_DATA&*

*USERID=youruser&*

*PASSWORD=yourpassword&*

*DATA_ROWS=8&*

*DATA_SUM=800&*

*UPLOAD_RESPONSE=N&*

*12/1/2005 0:00,999999,100*

*12/1/2005 1:00,999999,100*

*12/1/2005 2:00,999999,100*

*12/1/2005 3:00,999999,100*

*12/1/2005 0:00,999991,100*

*12/1/2005 1:00,999991,100*

*12/1/2005 2:00,999991,100*

*12/1/2005 3:00,999991,100*

# TOL Upload: Response Parameters – Current

Current Response Parameters:

- *TIME_STAMP – processing time of file*

- *BID_TYPE - confirmation of 'Load_bus_hour_data' bid type*

- *DATA_ROWS - Number of Data Rows Processed*

# Example: Current TOL Upload - Response

Response Example of Current TOL Upload with
Upload_response=N:

*TIME_STAMP*=*07/1/2006 10:34&*

*BID_TYPE*=*LOAD_BUS_HOUR_DATA&*

*DATA_ROWS*=*8&*

# New Response Parameter

- *DATA_SUM*
  - Represents the total sum of MWs processed in the request
  - Provided in every response for TOL Upload; independent of the DATA_SUM of the Request File
  - 4th Header in Response
    - TIME_STAMP
    - BID_TYPE
    - DATA_ROWS
    - **DATA_SUM**

# TOL Upload: Proposed Request and Response - Change

Change to Parameter

- UPLOAD_RESPONSE

*Request File*

- Valid Entries: Y or N
- Optional Field

*Response*

- Response Currently Includes:
  - N: 3 header rows
  - Y: 3 header rows and each data row submitted is echoed back
- Proposed Change to Response:
  - N: 4 header rows
  - Y: 4 header rows and sum of all MW values sent, listed by PTID

# Example 1: Proposed TOL Upload

**Request with upload_response=Y:**

*BID_TYPE=LOAD_BUS_HOUR_DATA&*
*USERID=youruser&*
*PASSWORD=yourpassword&*
*DATA_ROWS=8&*
*DATA_SUM=800&*
*UPLOAD_RESPONSE=Y&*
*12/1/2005 0:00,999999,100*
*12/1/2005 1:00,999999,100*
*12/1/2005 2:00,999999,100*
*12/1/2005 3:00,999999,100*
*12/1/2005 0:00,999991,100*
*12/1/2005 1:00,999991,100*
*12/1/2005 2:00,999991,100*
*12/1/2005 3:00,999991,100*

**Response:**

*TIME_STAMP=07/1/2006 10:34&*
*BID_TYPE=LOAD_BUS_HOUR_DATA&*
*DATA_ROWS=8&*
*DATA_SUM=800&*
*999999,400*
*999991,400*

# Example 2: Proposed TOL Upload

**Request with upload_response=N:**

*BID_TYPE=LOAD_BUS_HOUR_DATA&*
*USERID=youruser&*
*PASSWORD=yourpassword&*
*DATA_ROWS=8&*
*DATA_SUM=800&*
*UPLOAD_RESPONSE=N&*
*12/1/2005 0:00,999999,100*
*12/1/2005 1:00,999999,100*
*12/1/2005 2:00,999999,100*
*12/1/2005 3:00,999999,100*
*12/1/2005 0:00,999991,100*
*12/1/2005 1:00,999991,100*
*12/1/2005 2:00,999991,100*
*12/1/2005 3:00,999991,100*

**Response:**

*TIME_STAMP=07/1/2006 10:34&*
*BID_TYPE=LOAD_BUS_HOUR_DATA&*
*DATA_ROWS=8&*
*DATA_SUM=800&*

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# TOL Upload Summary: Request File

- ◆ New Optional Field: DATA_SUM

  - ▪ *MP indicates the total sum of MWs sent in the file*

  - ▪ *File processed if DATA_SUM value matches*

  - ▪ *File rejected if DATA_SUM value does not match*

- ◆ Change to Optional Field: UPLOAD_RESPONSE

  *Meaning of Y and N values have been changed*

  - ▪ *N: to provide 4 record header*

  - ▪ *Y: to provide 4 record header and NYISO calculated sum of hourly MW values by PTID*

# TOL Upload Summary: Response

- ◆ New Field: DATA_SUM
  - ▪ *NYISO indicates the total sum of MWs processed from the upload*
  - ▪ *4th field added to the header of the response*
  - ▪ *Always returned as part of the response – independent of the DATA_ROWS field in the request file*

# TOL Upload Questions to MPs

1. Are there any questions regarding these changes to the TOL Upload?

2. Do the changes meet your requirements for the TOL Upload?

3. Will the changes impact your ability to participate in the March testing?

# WBRR
# TOL Download

## Phase 1

Draft – For Discussion Purposes

# TOL Download: MP Requirements

Specific MP Requests :

1. *Provide improved response time for download requests, as defined by the WBR requirements effort*

2. *Improve WBR's downloading capabilities by providing the ability to retrieve large quantities of data at one time without encountering errors*

   - Note: NYISO will support a TOL download which is in compliance with all other upload/download templates; 50,000 rows per request

# TOL Download: Template Description

- ◆ Upload Name: Load_bus_hour_detail

- ◆ Description: Enables Metering Authorities and Load Serving Entities (LSEs) to verify their load bus data from NYISO

# TOL Download: Request Parameters – Current

Current Request Parameters Supported

- *USERID – required*
- *PASSWORD – required*
- *QUERY_TYPE – required*
- *BILLING_MONTH – required*

- *PTID – optional, supports up to 10 load bus entries*
- *START_DATE – optional*
- *END_DATE – optional*
- *VERSION – optional*
- *ADVISORY_DATA – optional*
- *UPDATE_TIME_START – optional*
- *UPDATE_TIME_END - optional*

# TOL Download: Template Updates to Optional Fields

- The START_DATE and END_DATE fields must be within the month specified in the BILLING_MONTH field; otherwise request is rejected

# Example: Current TOL Download

Request File Example of Current TOL Download:

*USERID=youruser&*

*PASSWORD=yourpassword&*

*QUERY_TYPE=LOAD_BUS_HOUR_DETAIL&*

*BILLING_MONTH=10/2005&*

# TOL Download: Proposed Request Parameters – New

## New Request Parameters

*1. SUBZONE_PTID – optional parameter*

- Value submitted represents a single subzone
- Provides simplified method of obtaining all user eligible load bus values within a subzone
- Provides 'echo back' functionality – row by row output of data previously submitted to NYISO

# Example: TOL Request with SUBZONE_PTID

Request File Example of TOL Download:

**USERID**=youruser&

**PASSWORD**=yourpassword&

**QUERY_TYPE**=LOAD_BUS_HOUR_DETAIL&

**BILLING_MONTH**=10/2005&

**SUBZONE_PTID**=11111&

# TOL Download: Proposed Request Parameters – New

## New Request Parameters (continued)

### *2. LOAD_VERIFICATION – optional parameter*

- Provides comparison between the TO submitted load and the NYISO calculated subzone load
  - Provides summary and detailed data analysis
- Used in lieu of ALL other optional parameters
  - Other optional parameters ignored
- Valid Entries: Summary or Detail

# Examples: TOL Request with LOAD_VERIFICATION

Request File Examples of TOL Download:

**USERID**=youruser&

**PASSWORD**=yourpassword&

**QUERY_TYPE**=LOAD_BUS_HOUR_DETAIL&

**BILLING_MONTH**=10/2005&

**LOAD_VERIFICATION=SUMMARY&**


**USERID**=youruser&

**PASSWORD**=yourpassword&

**QUERY_TYPE**=LOAD_BUS_HOUR_DETAIL&

**BILLING_MONTH**=10/2005&

**LOAD_VERIFICATION=DETAIL&**

# TOL Download: Response Parameters – Current

## Current Response Parameters

- *TIME_STAMP – processing time of file*

- *BID_TYPE - confirmation of 'Load_bus_hour_data' bid type*

- *DATA_ROWS - Number of Data Rows Processed*

# Example: Current TOL Download Response

- ◆ Response Example of Current TOL Download with request for PTID=11111:

  *TIME_STAMP=02/07/2007 17:12*

  *BID_TYPE=LOAD_BUS_HOUR_DETAIL*

  *DATA_ROWS=744*

  *"05/01/2006 00:00","05/01/2006",0,11111,"CITY1",1100,"09/18/2006 15:40","USER1","N"*

  *"05/01/2006 01:00","05/01/2006",0, 11111,"CITY1",1100,"09/18/2006 15:40","USER1","N"*

  *"05/01/2006 02:00","05/01/2006",0,11111,"CITY1",1100,"09/18/2006 15:40","USER1","N"*

  *"05/01/2006 03:00","05/01/2006",0,11111,"CITY1",1100,"09/18/2006 15:40","USER1","N "*

  *.*

  *.*

  *.*

  *.*

  *Up to 744 rows*

# TOL Download: Proposed Response Fields – Overview

## Additional Response Fields:

- *Only returned when LOAD_VERIFICATION (optional field) is included in the Request File*

- *Includes standard header fields plus two new header fields*

- *Includes one or more sets of 6 additional data fields*

- *Includes new data detail at the monthly load bus level*

# TOL Download: Proposed Response Parameters - New

Header Field:

- ***BILLING_MONTH*** *– Month being Verified*
- ***SUBZONE_NUM*** *– Number of subzones returned in the data section*

Data Fields – Repeats for each subzone

- ***SUBZONE_PTID*** *– PTID for subzone*
- ***MLOAD*** *– Monthly total subzone load; NYISO calculated*
- ***BUS_SUM*** *– Monthly total of meter supplied load busses within the subzone*
- ***DELTA*** *– Difference between MLOAD and BUS_SUM*
- ***HOURS_MATCH*** *– indicates whether each hour of the month matches between Hourly LOAD and Hourly BUS_SUM; returns Y or Error Message of 1st hour found in error*
- ***BUS_PTIDS*** *– Number of load busses included in the BUS_SUM*

Data Detail (only when LOAD_VERIFICATION=DETAIL):

- ***Each row includes****: Load Bus PTID, Load Bus Name, Monthly MW Sum*

# Example 1: Proposed MA TOL Download – Summary

- ❖ **Request where MA user authorized to view 1 subzone (all bus's)**
- ❖ **Request:**
  *USERID=youruser&*
  *PASSWORD=yourpassword&*
  *QUERY_TYPE=LOAD_BUS_HOUR_DETAIL&*
  *BILLING_MONTH=10/2005&*
  *LOAD_VERIFICATION=SUMMARY&*
- ❖ **Response:**
  *TIME_STAMP=12/21/2006 09:09*
  *BID_TYPE=LOAD_BUS_HOUR_DETAIL*
  *DATA_ROWS=8*
  *BILLING_MONTH=10/2005*
  *SUBZONE_NUM=1*
  *SUBZONE_PTID=11111*
  *MLOAD=2000.000*
  *BUS_SUM=2000.000*
  *DELTA=0*
  *HOURS_MATCH=Y*
  *BUS_PTIDS=2*

# Example 2: Proposed MA TOL Download – Detail

- ◆ **Request where MA user authorized to view 1 subzone (all bus's)**
- ◆ **Request:**
  *USERID=youruser&*
  *PASSWORD=yourpassword&*
  *QUERY_TYPE=LOAD_BUS_HOUR_DETAIL&*
  *BILLING_MONTH=10/2005&*
  *LOAD_VERIFICATION=DETAIL&*
- ◆ **Response:**
  *TIME_STAMP=12/21/2006 09:09*
  *BID_TYPE=LOAD_BUS_HOUR_DETAIL*
  *DATA_ROWS=10*
  *BILLING_MONTH=10/2005*
  *SUBZONE_NUM=1*
  *SUBZONE_PTID=11111*
  *MLOAD=2000.000*
  *BUS_SUM=2000.000*
  *DELTA=0*
  *HOURS_MATCH=Y*
  *BUS_PTIDS=2*
  *999992, BUS_A1,1000.000*
  *999993,BUS_A2,1000.000*

# Example 3: Proposed MA TOL Download – Detail with Multiple Subzones

- ◆ **Request where MA user authorized to view 7 subzones (LOAD_VERIFICATION=DETAIL)**
- ◆ **Response:**

  *TIME_STAMP=12/21/2006 09:09*
  *BID_TYPE=LOAD_BUS_HOUR_DETAIL*
  *DATA_ROWS=58*
  *BILLING_MONTH=10/2005*
  *SUBZONE_NUM=7*
  *SUBZONE_PTID=11111*
  *MLOAD=2000.000*
  *BUS_SUM=2000.000*
  *DELTA=0.000*
  *HOURS_MATCH=Y*
  *BUS_PTIDS=2*
  *100101,BUS_A1,1000.000*
  *100102,BUS_B1,1000.000*
  *SUBZONE_PTID=22222*
  *MLOAD=2000.000*
  *BUS_SUM=2000.000*
  *DELTA=0.000*
  *HOURS_MATCH=Y*
  *BUS_PTIDS=2*
  *100999,BUS_A2,1000.000*
  *100991,BUS_B2,1000.000*
  *...*

# Example 4: Proposed MA TOL Download – Summary with Error

- ◆ Error shows difference at the hourly level between Load Bus Sum and Subzone Load Calculation; MA user is authorized to see all bus values
- ◆ Response: (SUMMARY)

*TIME_STAMP=12/21/2006 09:09*
*BID_TYPE=LOAD_BUS_HOUR_DETAIL*
*DATA_ROWS=14*
*BILLING_MONTH=10/2005*
*SUBZONE_NUM=2*
*SUBZONE_PTID=10001*
*MLOAD=2000.000*
*BUS_SUM=2000.000*
*DELTA=0.000*
*HOURS_MATCH=Y*
*SUBZONE_PTID=10002*
*MLOAD=2000.000*
*BUS_SUM=1800.000*
*DELTA=200.000*
*HOURS_MATCH=N*
*WBR-001*
*Hourly mismatch for 10/01/2005 00:00, Hourly Mload <200.000> vs Bus Sum <0.000>*

# Example 5: Proposed MA TOL Download – Detail with Error

- Error shows difference at the hourly level between Load Bus Sum and Subzone Load Calculation; MA user is authorized to see all bus values
- Response: (DETAIL)

  *TIME_STAMP=12/21/2006 09:09*
  *BID_TYPE=LOAD_BUS_HOUR_DETAIL*
  *DATA_ROWS=16*
  *BILLING_MONTH=10/2005*
  *SUBZONE_NUM=2*
  *SUBZONE_PTID=10001*
  *MLOAD=2000.000*
  *BUS_SUM=2000.000*
  *DELTA=0.000*
  *HOURS_MATCH=Y*
  *100999,BUS_A1,1000.000*
  *100991,BUS_B1,1000.000*
  *SUBZONE_PTID=10002*
  *MLOAD=2000.000*
  *BUS_SUM=1800.000*
  *DELTA=200.000*
  *HOURS_MATCH=N*
  *WBR-001*
  *Hourly mismatch for 10/01/2005 00:00, Hourly Mload <200.000> vs Bus Sum <0.000>*

# Example 6: Proposed LSE TOL Download – Summary

- ❖ **Request where LSE user authorized to view their own busses** (3 across 3 Subzones) (LOAD_VERIFICATION=SUMMARY)
- ❖ **Response:**

    *TIME_STAMP=12/21/2006 09:09*
    *BID_TYPE=LOAD_BUS_HOUR_DETAIL*
    *DATA_ROWS=11*
    *BILLING_MONTH=10/2005*
    *SUBZONE_NUM=3*
    *SUBZONE_PTID=11111*
    *HOURS_MATCH=Y*
    *BUS_PTIDS=1*
    *SUBZONE_PTID=22222*
    *HOURS_MATCH=Y*
    *BUS_PTIDS=1*
    *SUBZONE_PTID=33333*
    *HOURS_MATCH=Y*
    *BUS_PTIDS=1*

# Example 7: Proposed LSE TOL Download – Summary with Error

- ◆ **Error shows difference at the hourly level between Load Bus Sum and Subzone Load Calculation; LSE user is only authorized to see LSE's bus values**

- ◆ **Response: (SUMMARY)**
  *TIME_STAMP=12/21/2006 09:09*
  *BID_TYPE=LOAD_BUS_HOUR_DETAIL*
  *DATA_ROWS=8*
  *BILLING_MONTH=10/2005*
  *SUBZONE_NUM=2*
  *SUBZONE_PTID=10001*
  *HOURS_MATCH=Y*
  *SUBZONE_PTID=10002*
  *HOURS_MATCH=N*
  *WBR-001*
  *Hourly mismatch for 10/01/2005 00:00*

# Example 8: Proposed LSE TOL Download – Detail with Error

- ❖ **Error shows difference at the hourly level between Load Bus Sum and Subzone Load Calculation; LSE user is only authorized to see LSE's bus values**

- ❖ **Response: (DETAIL)**

  *TIME_STAMP=12/21/2006 09:09*

  *BID_TYPE=LOAD_BUS_HOUR_DETAIL*

  *DATA_ROWS=9*

  *BILLING_MONTH=10/2005*

  *SUBZONE_NUM=2*

  *SUBZONE_PTID=10001*

  *HOURS_MATCH=Y*

  *100999,BUS_A1,1000.000*

  *SUBZONE_PTID=10002*

  *HOURS_MATCH=N*

  *WBR-001*

  *Hourly mismatch for 10/01/2005 00:00*

# TOL Download Summary: Request File

- ◆ New Optional Fields:
    - ▪ ***SUBZONE_PTID*** *– provides load data for one subzone*
    - ▪ ***LOAD_VERIFICATION*** *– provides load analysis by subzone*

- ◆ Updated Optional Fields:
    - ▪ *START_DATE*
    - ▪ *END_DATE*

# TOL Download Summary: Response

Expanded response for LOAD_VERIFICATION only

- ***New Header Fields:***
  - BILLING_MONTH
  - SUBZONE_NUM

- ***New Repeatable Fields (for each subzone in file):***
  1. SUBZONE_PTID
  2. MLOAD
  3. BUS_SUM
  4. DELTA
  5. HOURS_MATCH
  6. BUS_PTIDS

- ***New Detail Format (for LOAD_VERIFICATION=DETAIL only):***
  - Load Bus PTID
  - Load Bus Name
  - Monthly MW Sum

# TOL Download Question to MPs

1. Are there any questions regarding these changes to the TOL Download?

2. Do the changes meet your requirements for the TOL Download?

3. Will the changes impact your ability to participate in the March testing?

# WBRR
# Architectural Changes

## Phase 1 and  Phase 2

# NYISO Architectural Changes: Delivery

◆ Architectural Changes to be introduced in conjunction with each Web Based Reconciliation Replacement Delivery

- *Phase 1:*
  - TOL Upload
  - TOL Download
- *Phase 2:*
  - Remaining Templates

# NYISO Architectural Changes: Timeout Parameter

TIMEOUT parameter in request files:

- Current Usage
  - *Optional parameter for all uploads and downloads*
  - *Allows user to set a time limit for subsequent uploads or downloads to wait, when a subsequent template of the same type and userid is submitted*

- Issue with Current Usage
  - *Has the potential to produce system instability and unreliability*
  - *Has the potential to result in poor performance for other system users*

- Proposed Solution
  - *Remove functionality which supports queuing of the same template for the same user*
  - *2nd request must not be submitted until 1st request completes*

# NYISO Architectural Changes: Data Rows

DATA_ROWS Parameter in Request Files:

- Proposed Functionality
  - *Request file will not be processed when value of row count in header does not match number of data rows submitted*
  - *File will not be processed and an error message will be returned*

Error Messages:

- Improved Error Messages and Meaning

- Example of Current Error Message

  - *ORACLE error--*
    *At data row 1.*
    *ORA-20998: Error: User XXXXXX is not authorized to submit meter data for Bus with PT ID:999999.  In INSERT_HRLY_BUS_LOAD_DATA from INSERT_HOURLY_BUS_LOAD_UP_DN.*
    *ORA-06512: at "BIDBOX.RAISE_ERROR", line 260*
    *ORA-06512: at line 1.*

- Example of Proposed Error Message

  - *Upload/Download Error--*
    *WBR-01006: User XXXXXX not authorized for PTID 999999.*
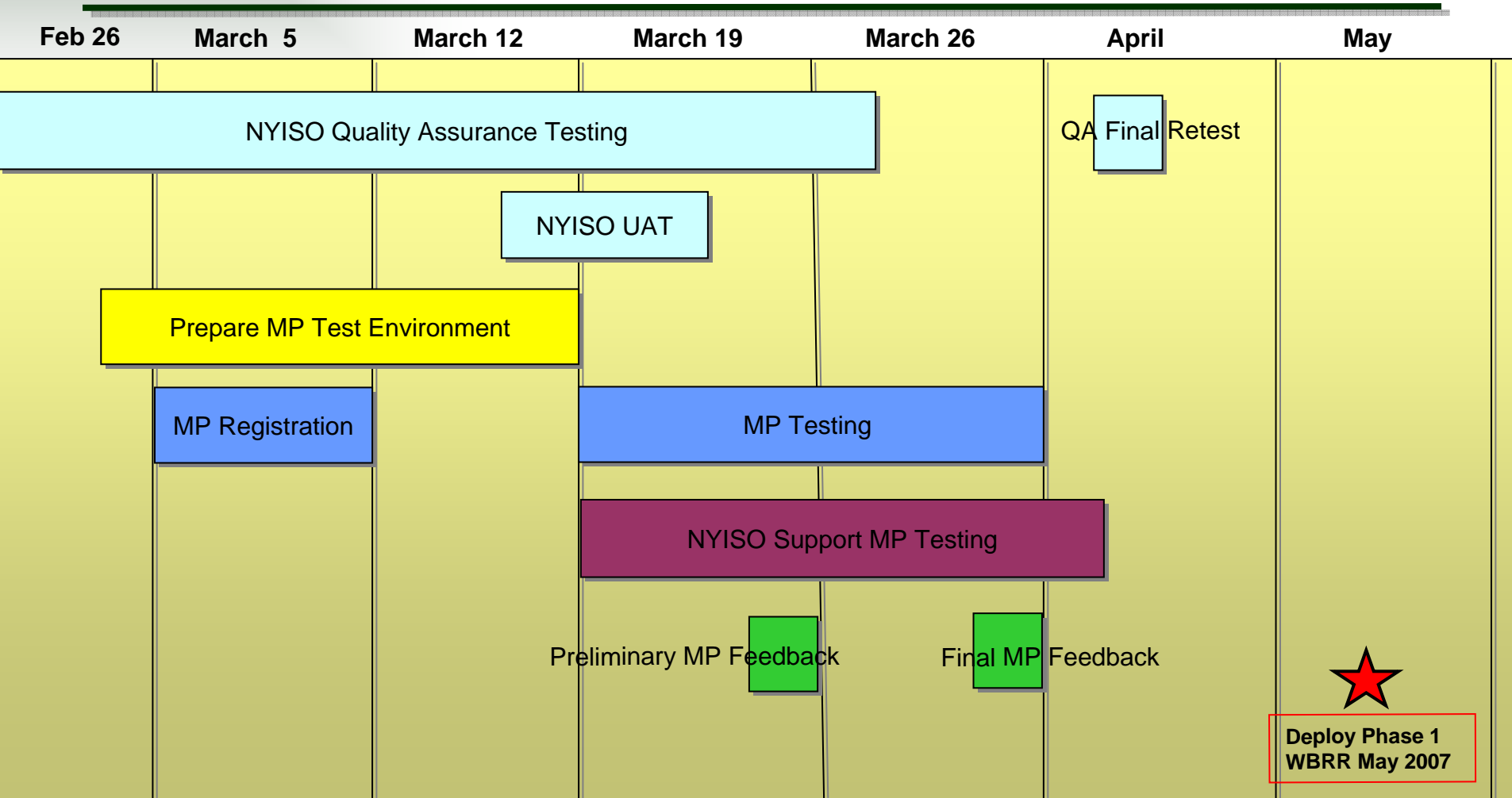
# WBRR
# Market Participant Testing

## Phase 1: March 2007

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# Market Participant Phase 1 Testing

- **MP Testing Requirement:**
  - *To provide a test environment for WBR users, to verify the quality and performance of NYISO WBR system enhancements and MP connectivity with NYISO, prior to deployments to production.*
- **Upload/Download Templates available to test:**
  - *Upload: Load_bus_hour_data*
  - *Download: Load_bus_hour_detail*
- **Marketplace will not be available during this phase of MP testing**

# Phase 1 WBRR Testing Schedule

| Feb 26 | March 5 | March 12 | March 19 | March 26 | April | May |
|--------|---------|----------|----------|----------|-------|-----|

NYISO Quality Assurance Testing

QA Final Retest

NYISO UAT

Prepare MP Test Environment

MP Registration

MP Testing

NYISO Support MP Testing

Preliminary MP Feedback

Final MP Feedback

Deploy Phase 1 WBRR May 2007

**NYISO Internal Test Activity**

**NYISO MP Test Environment Setup**

**MP Test Activity**

**NYISO MP Test Support**

**MP Feedback Sessions**

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# Phase 1 MP Test Schedule

- **MP Testing Time Frame**
  - *March 19, 2007 through March 30,2007*

- **MP Test Environment Availability**
  - *10AM to 2PM Monday through Friday during this test period*

- **Week 1 Testing Feedback Conference Call**
  - *9AM Friday March 23, 2007*

- **Week 2 Testing Feedback Conference Call**
  - *9AM Friday March 30, 2007*

# Phase 1 MP Testing Registration

- In order to obtain access to the MP test environment during the March test period all users must register

- To register for testing:
  - *Send an email request identifying the User Name(s) currently used in NYISO's current production WBR system to:*
    - SJacon@nyiso.com and MMcLaughlin@nyiso.com

- NYISO will provide each registered user with password information prior to the beginning of the test period

# Phase 1 MP Test Participation

- Registered MP users will be able to access the test environment using a special link on NYISO's website: www.NYISO.com

    - *Data from NYISO's production system will be used to create the test environment*

    - *MPs will be able to use the TOL upload/download templates to exchange data for the following months:*

        - April 2006
        - August 2006
        - October 2006

# Phase 1 MP Test Communication

- ## MP Test Support
  - *NYISO to provide an individual contact to support each registered tester during the testing period*
  - *All critical issues will be listed as high priority and will be resolved as quickly as possible*
  - *All other questions and issues will be prioritized and responded to no later than the next business day*

- ## MP Testing Closeout
  - *NYISO will hold two feedback sessions at the end of each week of testing to review all MP test questions and open issues. At that time NYISO will evaluate the need for any additional access to test environment*

# WBRR
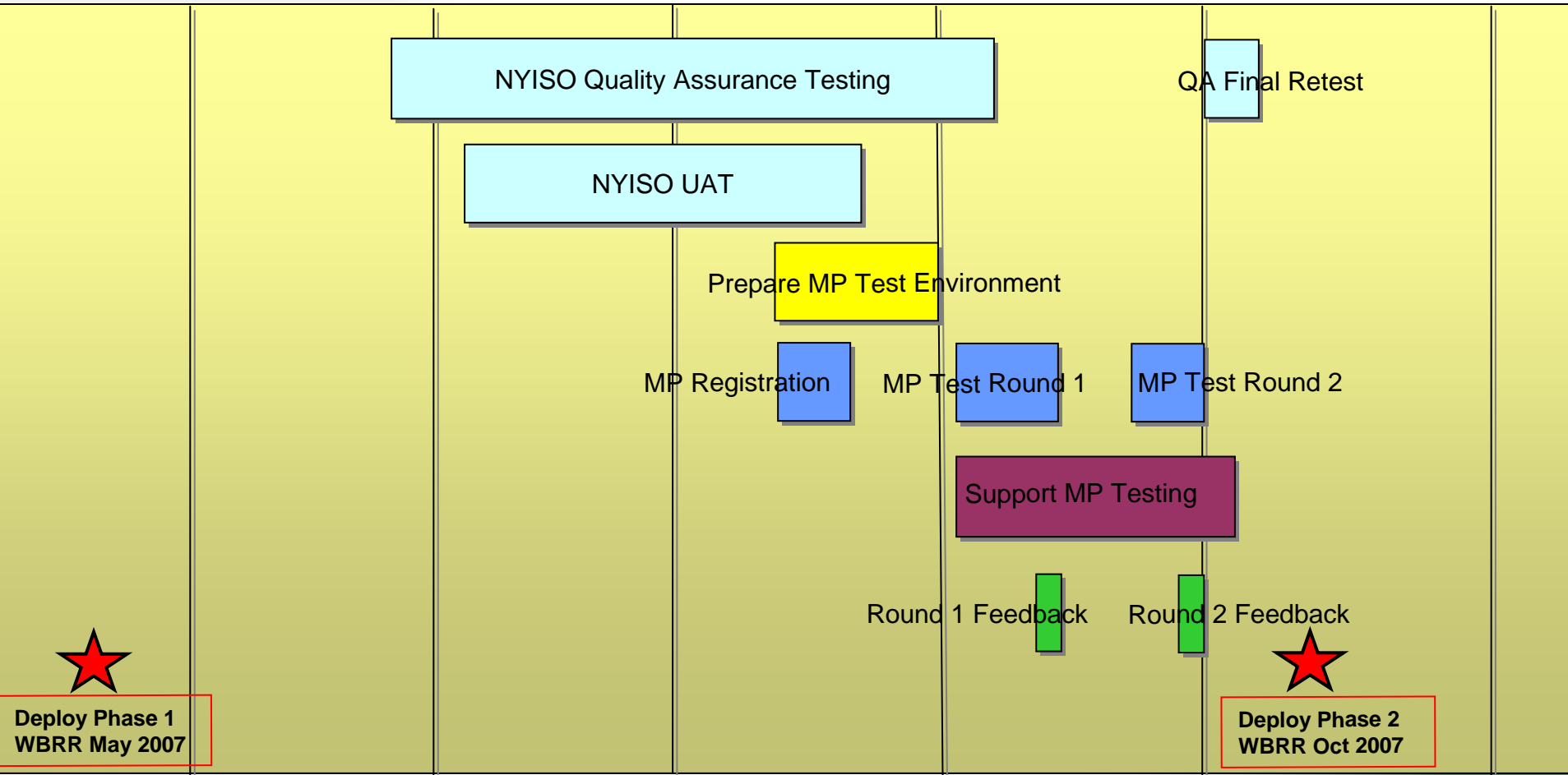# Market Participant Testing

## Phase 2 – September 2007

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# Phase 2 MP Testing

- **Upload/Download Templates available to test:**
  - *Uploads:*
    - TIE_GEN_SUBZONE_DATA
    - METER_AUTHORITY_AGREEMENT
    - SUBZONE_LOAD
    - INVOICE_HIST
  - *Downloads:*
    - TIE_GEN_SUBZONE_DETAIL
    - WHOLESALE_VERIFICATION

# Phase 2 Proposed MP Testing Schedule

| May 07 | June 07 | July 07 | August 07 | September 07 | October 07 |
|--------|---------|---------|-----------|--------------|------------|

NYISO Quality Assurance Testing

QA Final Retest

NYISO UAT

Prepare MP Test Environment

MP Registration

MP Test Round 1

MP Test Round 2

Support MP Testing

Round 1 Feedback

Round 2 Feedback

**Deploy Phase 1 WBRR May 2007**

**Deploy Phase 2 WBRR Oct 2007**

| NYISO Internal Test Activity | NYISO MP Test Environment Setup | MP Test Activity | NYISO MP Test Support | MP Feedback Sessions |
|---|---|---|---|---|

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# Market Participant Testing

- ◆ Questions?

# WBRR
# Remaining Templates

## Phase 2

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# WBRR: Phase 2 Overview

- ◆ WBRR: Remaining Templates

  - *MP Requirements*

  - *Tie Gen Subzone: Upload and Download*

  - *Metering Authority Agreement*

  - *Subzone Load Download*

  - *Invoice History*

  - *Wholesale Verification*

# Remaining Templates: MP Requirements

Specific MP Requests :

1. *Provide improved response time for upload requests, as defined by the WBR requirements effort*

2. *Provide the MPs with auditable, traceable and verifiable data controls to support compliance verification and testing*

3. *Provide a detailed response message indicating the success or failure of the WBR upload requests, essentially verifying the data has been transmitted from the MP's machine to the NYISO's machine*

# Remaining Templates: MP Requirements (Cont.)

Specific MP Requests (Cont.):

4. *Provide improved response time for download requests, as defined by the WBR requirements effort*

5. *Improve WBR's downloading capabilities by providing the ability to retrieve large quantities of data at one time without encountering errors*

   ◆ Note: NYISO will support a TOL download which is in compliance with all other upload/download templates; 50,000 rows per request

6. *Provide authorized parties the ability to download individual Gen/Tie data regardless of the MA designation.*

# Tie Gen Subzone Data: Upload Template

- **Upload Name:** TIE_GEN_SUBZONE_DATA

- **Description:** Enables a meter authority to upload tie line, generator, and subzone hourly MW values to the NYISO.

# Tie Gen Subzone Data - Questions

- ◆ Are there any issues or concerns with this template?

- ◆ Would your company like to recommend any changes?

# Tie Gen Subzone Detail: Download Template

- **Download Name:** TIE_GEN_SUBZONE_DETAIL

- **Description:** Enables a generator or meter authority to download their tie line, generator and subzone hourly MW data for a specified time within a month.

# Tie Gen Subzone Detail - Questions

- Are there any issues or concerns with this template?

- Would your company like to recommend any changes?

# Meter Authority Agreement: Upload Template

- **Upload Name:** METER_AUTHORITY_AGREEMENT

- **Description:** Enables the metering authority to indicate agreement with the subzone load calculation for a given subzone

# Meter Authority Agreement - Questions

- NYISO data shows that one Metering Authority is currently using this template

- Are there any issues or concerns with this template?

- Would your company like to recommend any changes?

- With the Shortened Settlement Cycle process changes, is this template still necessary?

# Subzone Load: Download Template

- ◆ **Download Name:** SUBZONE_LOAD
- ◆ **Description:** Enables a metering authority to download its Subzone Load data

# Subzone Load – Download Information

- NYISO has provided an additional template for obtaining data
  - *New template: STATIC_SUBZONE_LOAD*
  - *Both templates currently supported*
- STATIC_SUBZONE_LOAD provides significant performance improvements

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# Subzone Load – Questions

- SUBZONE_LOAD

  - *Are there any issues or concerns with this template?*


- STATIC_SUBZONE_LOAD

  - *Are there any issues or concerns with this template?*

  - *Would your company like to recommend any changes?*

# Invoice History: Download Template

- ◆ **Upload Name:** INVOICE_HIST

- ◆ **Description:** Enables a user to download invoice history data for a specified date range

# Invoice History - Questions

- Are there any issues or concerns with this template?

- Would your company like to recommend any changes?

# Wholesale Load Verification: Download Template

◆ **Download Name:** WHOLESALE_VERIFICATION

◆ **Description:** Enables a meter authority to download wholesale load data for each specified subzone if their wholesale loads match their calculated subzone load value

# Wholesale Load Verification - Information

◆ NYISO data shows that this template has not been used since September 2005

◆ With TOL Download Verification, additional detail on loads will be available

◆ NYISO Proposes to remove this template, pending MP feedback on the TOL download enhancements