

Decision Support System

Custom ADD

ADD Phase II Working Group

July 12, 2005

Kirk Merriam

Jill Gerry

Agenda

- Recap: Why Custom ADD Is Necessary
- What Custom ADD Is
- What Custom ADD Is Not
- Anticipated User Process
- Next Steps
- Questions

Why Custom ADD Is Necessary

- Today, only able to automatically pull Hourly/Daily Customer Statement CSV files & FERC EQR Reports from the DSS
- Users have been asking for more columns in the Customer Statement CSV files (want more data delivered via a machine-to-machine interface)
- If we modify Customer Statement CSV files, it affects all users who have automated procedures to download/process the files
- Need to provide users with ability to pull DSS data that they choose from DSS via a machine-to-machine process – Custom ADD!
- Will serve as foundation for machine-to-machine delivery of other data from the DSS in the future (i.e. Bidding/Scheduling/Pricing/etc.)

What Custom ADD Is

- Will provide users with ability to custom define their own files and schedule them to be delivered via ADD-like interface
- All Universes in the DSS will be available
- All Objects in the Universes will be available

What Custom ADD Is

- Limits – same as DSS Universes/Corporate Reports
 - ***Rows – 1.2 mm resultant rows***
 - ***Time – 40 minutes query execution time***
 - ***Limits may need to be lowered if hardware limits are exceeded***
- Data will be delivered via CSV file format or XML file format

What Custom ADD Is Not

- Scope of data available in the DSS will not change for Custom ADD
- Frequency of data refreshes in DSS will not change for Custom ADD – updates still once per day
- Scope of data refreshes in DSS will not change for Custom ADD – only data that supports bills spun on a given day is updated

What Custom ADD Is Not (Continued)

- Data contained in files will be limited to data only (no graphics, special formatting, etc)
- Users will not be able to split custom reports defined in WebIntelligence into multiple files in ADD (i.e. 1 custom report will yield 1 file per execution in Custom ADD)

Anticipated User Process

- User Creates a New Document In WebIntelligence (Custom File):
 - ***MUST use a date / version filter, MUST NOT use a prompt that asks them for the date / version***
 - ***User schedules the document in InfoView to run daily, weekly, monthly, etc. (currently, not more than once per day)***

- Custom ADD files will generate after completion of Hourly/Daily Customer Statement CSV files

Anticipated User Process (Continued)

- User's automated process will download the files on the schedule of their choosing... daily, weekly, monthly, etc. (currently, not more than once per day)
- When user's automated process extracts files, can choose file format (CSV, XML, any others requested?).
- Can elect to download the same file in two different file formats at same time (i.e. report 1 in CSV, then XML)

Steps In Process

- DSS Team currently finishing proof of concept for Custom ADD download interface.
- DSS Team fine-tuning design of interface, continuing design of date filters required.
- DSS Team will continue to present status on development and to solicit feedback from users via DSS Task Force calls
- Targeting Deployment in September 2005

Next Steps

➤ DSS Team:

- *Complete development of Custom ADD download interface.*
- *Finish design of date / version filters.*
- *Develop ETL logic required for date / version filters.*
- *Add new filters to all Settlement Universes.*

Next Steps

➤ End Users:

- ***Ensure your pc's are setup to create WebIntelligence queries***
- ***Create sample queries: What file layouts do you want?***
- ***Schedule those documents to refresh using BroadCast Agent: pay attention to date & version filters and what you get for results; how about at end of month?***
- ***Manually download these files: is this what you expect? Check results at EOM / beginning of next month.***
- ***Have IT staff prepared to duplicate your current ADD automated process. New process should be the same – but with different url's.***

Questions ...

➤ Date / Version Filters:

- *What is “month to date”; when does it change to the next month? Invoiced month? Calendar month?; what days are included on July 5th?*

➤ XML tags:

- *What should be used for the tags?*
- *Who should specify them?*
- *Issues:*
 - ▶ **Object names can change, if these are used for xml tags, user processes will break.**