



Building The Energy Markets of Tomorrow . . . Today

ICAP Automated Market ICAP Administrator and User Roles

Technical Conference #3

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ICAP Administrator and User Roles

- **Detailed information on Administrator Roles can be found in the Market Participant User's Guide**
- **Detailed information on User Roles can be found in the ICAP Automated User's Guide**

ICAP Administrator and User Roles

Two Types of ICAP System Accounts

- **Administrator and User**

- ✓ *NYISO will create Market Participant Administrator Accounts*
- ✓ *NYISO will assign Organizational Privileges*
- ✓ NYISO cannot administer User Accounts

ICAP Administrator and User Roles

Administrators vs. Users

- If authorized, **Administrator Accounts** can perform “setup” functions such as:
 - ✓ Creating User accounts
 - ✓ Assignment of bidding and qualified-to-bid privileges
 - ✓ Defining and maintaining individual user accounts
 - ✓ Controlling access through password control
 - ✓ *Note: Administrator Accounts **cannot** participate in Auction Activities or Functions – those Admins who are also involved in auction activities must create themselves a separate User Account*

ICAP Administrator and User Roles

Administrators vs. Users

- If authorized, **User Accounts** can perform Auction functions such as:
 - ✓ Submit Bids/Offer
 - ✓ Insert Bilateral Agreements
 - ✓ Certification
 - ✓ Record Load Forecasts
 - ✓ Record DMNC Test Results
 - ✓ View Seasonal EFORd's
 - ✓ View Auction Results

ICAP Administrator and User Roles

Administrators

- **Go - Live Activities**
 - ✓ Administrators will log in to the ICAP Admin pages to create User Accounts
 - ✓ Assignment of privileges to User Accounts
 - ✓ Assignment of passwords for User Accounts

ICAP Administrator and User Roles

Administrators

- **Go - Live Activities**

- ✓ Digital Certificate will be required for Administrators and Users – Contact NYISO Customer representative for Digital Certificate
- ✓ *URL for Digital Certificate: <https://cert.nyiso.com>*
- ✓ Companies without ICAP Administrators will need to contact their NYISO Customer representative to acquire this account
- ✓ Administrators who need their password reset must contact Customer Relations
- ✓ *URL for Admin login: <https://marketplace2.nyiso.com>*

ICAP Administrator and User Roles

Administrators

- Authenticate using Digital Certificates and Supplied Credentials



Page Ref: G-0

User Login

User Name:

Password:

Each Market Participant is responsible for entering bid information into the Market Information System accurately, completely, and in a timely fashion. Each Market Participant is responsible for the results, intended or otherwise, of its individual bidding strategies. The NYISO's liability for damages to any Market Participant or other party that may result from its administration of the wholesale energy markets in New York is strictly limited under Section 12.3 of the NYISO Market Administration and Control Area Services Tariff to direct damages resulting from gross negligence or intentional misconduct.

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ICAP Administrator and User Roles

Administrators

■ Go – Live Activities

- ✓ Administrators will log in to the ICAP Admin pages to create User Accounts

- **Log In (cont'd)**

- After Login, perform Administrator Tasks by choosing appropriate Menu Item in Frame Set



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Bidding and Scheduling

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ICAP Administrator and User Roles

Administrators

■ Administrator Tasks

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See who the Administrators are for your company

Create a New ICAP user

See who the ICAP users are, modify account privileges, and change passwords

See what Organization(s) your Administrator Account is allowed to Administer

ICAP Administrator and User Roles

Administrators

Create New User →

Company Newsroom Products Market Data Services Documents Committees

Administrators - Log Out - New User - Organization Users - Organizations - Sub-Zone Parameters - Zone Parameters -

New User

Organization: Active:

Name: *

Primary Phone: *

Secondary Phone:

FAX:

E-Mail:

Pager:

Oracle User Name: *

Address:

Privileges

DAM Generators	HAM Generators	Physical Load	Virtual Load	Virtual Supply	DAM Transactions
<input type="checkbox"/>					
HAM Transactions	Non-Firm Transactions	TCC	ICAP	Update UC Data Access	Settlement Statements
<input type="checkbox"/>					

ICAP-related Privileges

Bid To Purchase	Offer To Sell	Certify	DMNC	Maintain T.O. Data
<input type="checkbox"/>				

Metering-related Privileges

Metering

Memo

ICAP Administrator and User Roles

Administrators

- Go – Live Activities
 - ✓ Modify User Account Privileges

The screenshot shows the ISO New York Independent System Operator website. The header includes the ISO logo and the text "NEW YORK INDEPENDENT SYSTEM OPERATOR Building The Energy Markets Of Tomorrow...Today" and "Welcome To The Bidding & Scheduling System". The navigation menu includes "Company", "Newsroom", "Products", "Market Data", and "Services". Below the menu, there is a list of links: "Administrators - Log Out - New User - Organization Users - Organizations - Sub-Zone Parameters - Zone Parameters -". An arrow points from the text "Select Organization Users" to the "Organization Users" link in the navigation menu.

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Bidding and Scheduling

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Select Organization Users

ICAP Administrator and User Roles

Administrators

■ Go – Live Activities

✓ Modify User Privileges

- Select Organization, and click “Display”
- Double click on User’s name to modify privileges

The screenshot displays the NYISO Bidding & Scheduling System interface. At the top, the NYISO logo is visible with the tagline "Building The Energy Markets Of Tomorrow...Today". The page title is "Welcome To The Bidding & Scheduling System". Below the title, there is a navigation menu with options: Company, Newsroom, Products, Market Data, and Services. The main content area shows a breadcrumb trail: Administrators - Log Out - New User - Organization Users - Organizations - Sub-Zone Parameters - Zone Parameters -. The page reference is "Page Ref: M-1". The section is titled "Organization Users". There is a form with a "Select Organization:" dropdown menu and a "Display" button. Below this, the "Organization:" is listed as "NYISO CUSTOMER". Under the "Users" section, the name "Test User" is displayed. The footer contains the copyright notice: "© 1999-2006 New York Independent System Operator. All rights reserved."

ICAP Administrator and User Roles

Administrators

- ✓ **Modify User Privileges**
 - Apply or Remove Appropriate Privileges

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Administrators - Log Out - New User - Organization Users - Organizations - Sub-Zone Parameters - Zone Parameters -

Page Ref: M-3

User Detail

Organization: Enron Power Marketing Type: NYISO CUSTOMER Updated By: 1001002 Update Time: 09/09/2004
Active:

Contact Information

Name: * Address:
Primary Phone: *
Secondary Phone:
FAX:
E-Mail:
Pager:
Oracle User Name:

Privileges

DAM Generators	HAM Generators	Physical Load	Virtual Load	Virtual Supply	DAM Transactions
<input type="checkbox"/>					
HAM Transactions	Non-Firm Transactions	TCC	ICAP	Update UC Data	Billing
<input type="checkbox"/>	<input checked="" type="checkbox"/>				

ICAP-related Privileges

Bid To Purchase	Offer To Sell	Certify	DMNC
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Memo

ICAP Administrator and User Roles

Administrators

✓ Modify User Privileges

- Assign / Change User Password



Select Organization Users

ICAP Administrator and User Roles

Administrators

- ✓ **Modify User Privileges**
 - Assign / Change User Password

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Page Ref: M-3

User Detail

Organization: Type: NYISO CUSTOMER Updated By: Update Time: 05/21/2003 Active:

Contact Information

Name: * Address:

Primary Phone: *

Secondary Phone:

FAX:

E-Mail:

Pager:

Oracle User Name: TCC

Privileges

DAM Generators	HAM Generators	Physical Load	Virtual Load	Virtual Supply	DAM Transactions
<input type="checkbox"/>					
HAM Transactions	Non-Firm Transactions	TCC	ICAP	Update UC Data	Billing
<input type="checkbox"/>					

ICAP-related Privileges

Bid To Purchase	Offer To Sell	Certify	DMNC
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Memo

[Change Password](#) [Authorized Generators](#) [Authorized Loads](#)

ICAP Administrator and User Roles

Users

✓ Authenticate using Digital Certificates and Supplied Credentials from your Company's MIS Administrator

- Log-in and navigate web screens
- Insert bids using Upload/Download application
- Bidding will start with Summer 2006 auctions
 - *if applicable:*
- Insert Load Forecast Data
- Insert DMNC data
- Refer to ICAP Automation Users Guide for detailed instructions



Login Required

You are attempting to access a protected resource

Please identify by entering your user ID and password.

User ID:

Password:

Go 

Support

- **Go - Live**
 - ✓ **Upload/Download**

Customer Relations has set up a pre-screening service for Upload-Download templates. Send your “final” template to your NYISO Customer Representative, who will review your template for errors in format before we go live with the application.

Support

- **Go - Live**

- ✓ **Reporting problems encountered or error messages**

- If any problems or errors are encountered using the application, record (copy/paste or screenshots) them and forward them to your NYISO Customer Representative via fax or email
- Your NYISO Customer Representative will log your issue into a tracking system to ensure proper resolution
- Subject Matter Experts will be available to diagnose the reported problems for accurate and timely resolution

Questions?

- **Thank you for participating!**