Demand Response Information System (DRIS) Training for September 2010 Deployment

Part 5 – Manage Organization Contacts

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New York Independent System Operator

August 26, 2010 1:00 pm – 4:00 pm

August 31, 2010 9:00 am – 12:00 pm

Rensselaer, NY

Training Topics

- Part 1: Introduction to DRIS
  - *DRIS User Requirements*
  - *User Privileges*
  - *Access to DRIS*
  - *Additional Tools*
- Part 2: Updates to Existing DRIS Functionality
- Part 3: SCR Auction Sales
  - *View Aggregation and Resource Sales*
  - *Allocate Partial Sales to Resources*
- Part 4: Market Participant Program Data
  - *Program Summary*
  - *Program Details*
  - *Program Enrollment*
- Part 5: Manage Organization Contacts
  - *Add and Maintain*
  - *Assign to Programs and Contact Types*
- Part 6: Deployment
  - *Additional Training Sessions*
  - *Deployment Activities*

Market Participant Organization Contacts

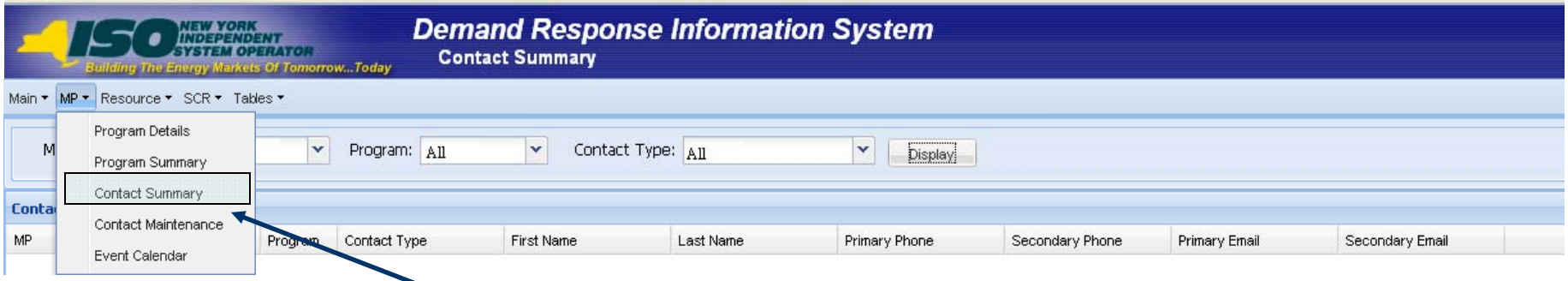
- The MP organization will be responsible for the management of their organization contacts in DRIS
- Auxiliary Market Operations will no longer accept or maintain MP contact information

- **The MP Contact List created from DRIS will be the only list used for Demand Response Event Notifications**

Market Participant Organization Contacts

- View Contacts
- Maintain Contacts
- Associate Contacts with a DR Program
- Associate Contacts with a Contact Type
- Add and Delete Contacts
  - *Contact Requirements*

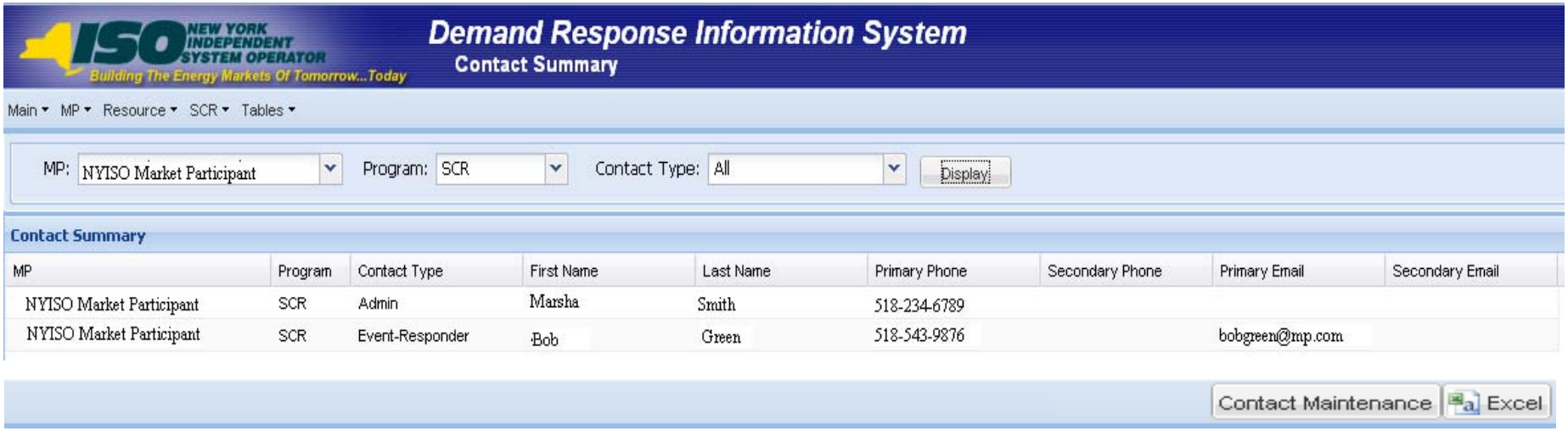
Viewing Organization Contacts



- Select Contact Summary from the MP menu
- Select a Program and/or Contact Type from the selection criteria
- Click “Display” to view Summary of Contacts selected

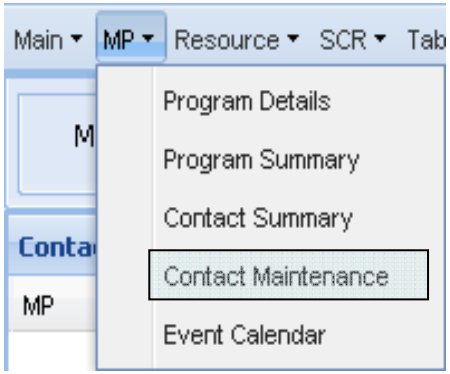
Contact Summary

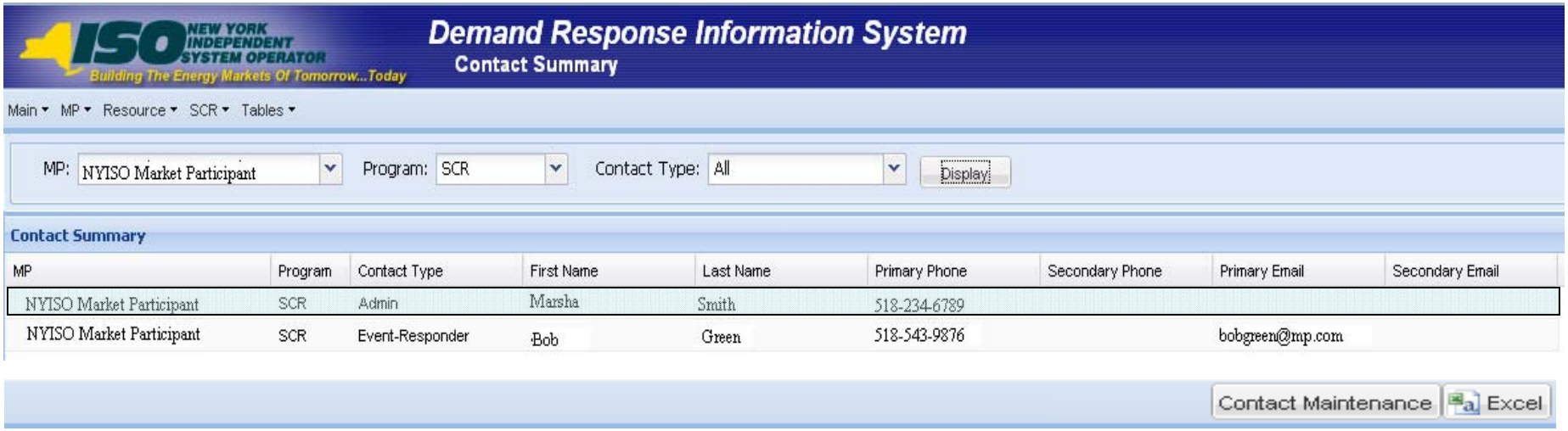
- Displays Contact Information
  - *Program Association*
  - *Contact Type*
  - *First and Last Name*
  - *Primary and Secondary Phone*
  - *Primary and Secondary Email*



Contact Details and Maintenance

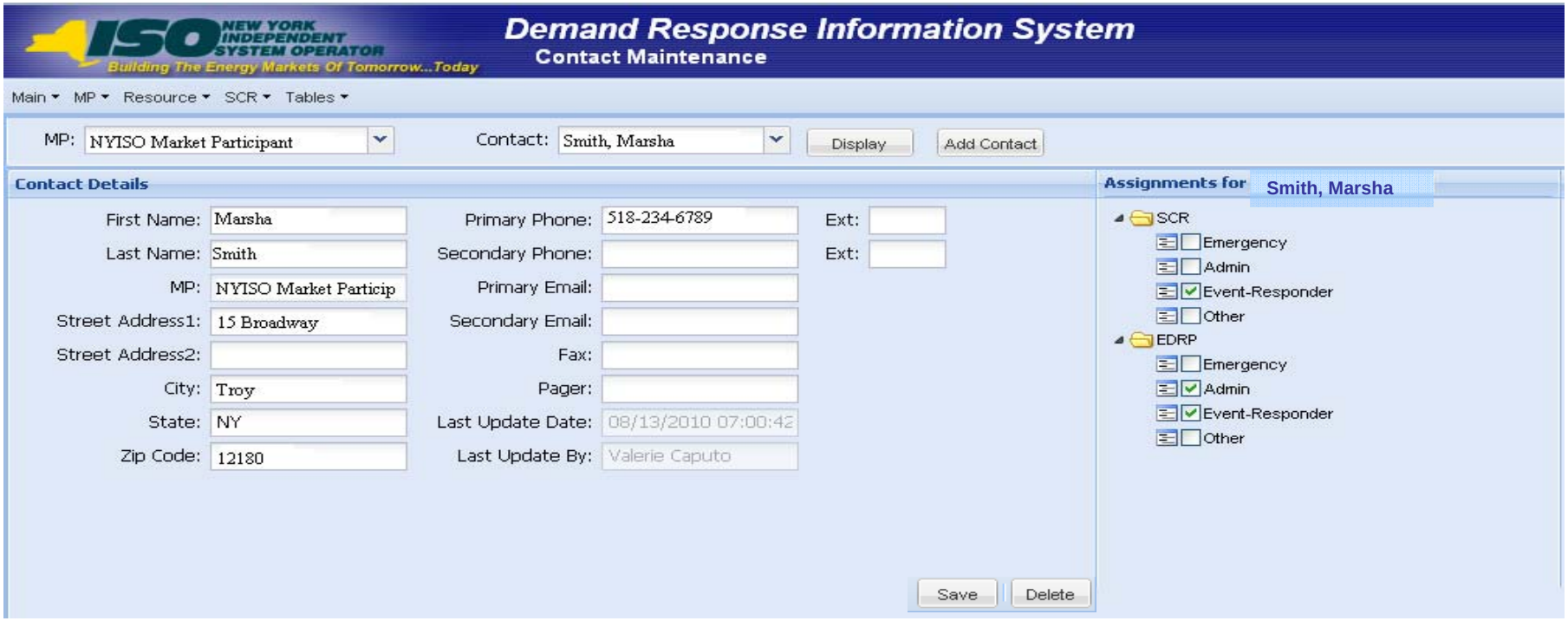
- Select Contact Maintenance
  - *From the MP menu*
  - *From Contact Summary screen*
    - Highlight a Contact and click on "Contact Maintenance" in the lower right corner





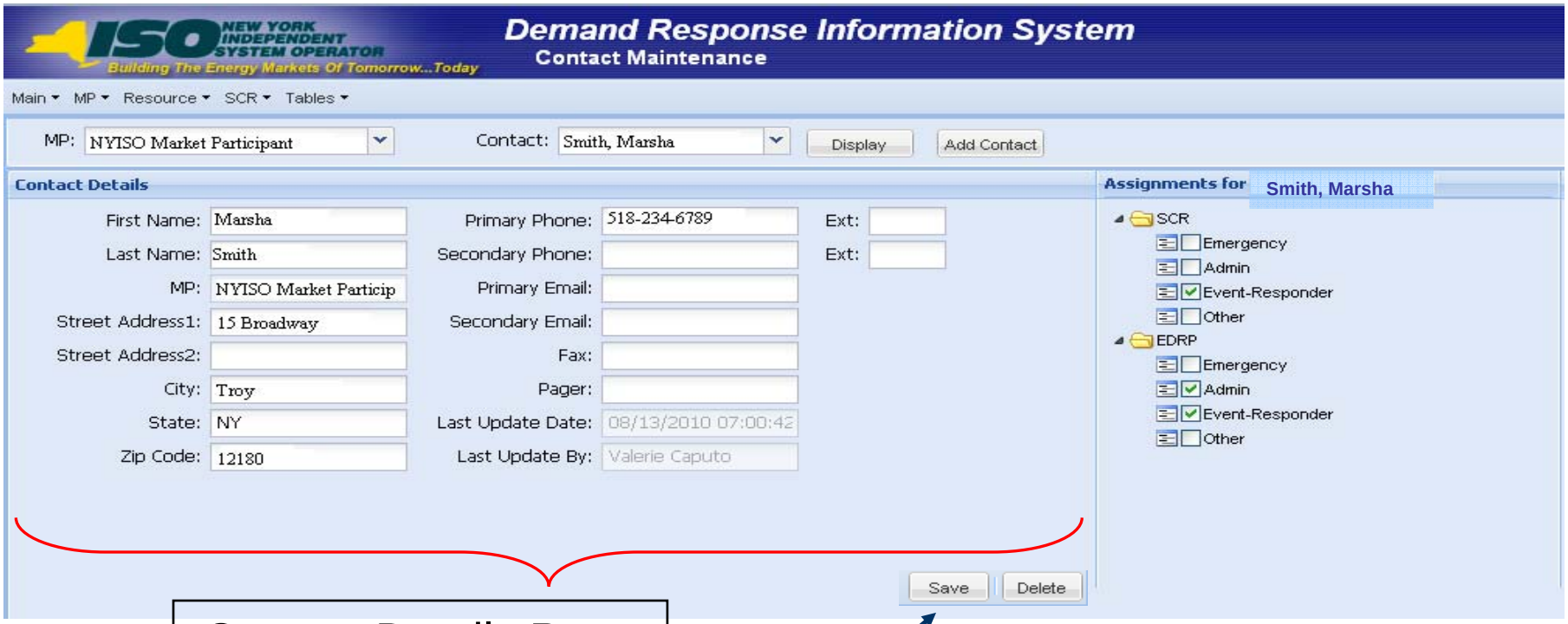
Contact Details and Maintenance

- Edit Contact Details
- Edit Contact Assignments
- Add Contact
- Delete Contact



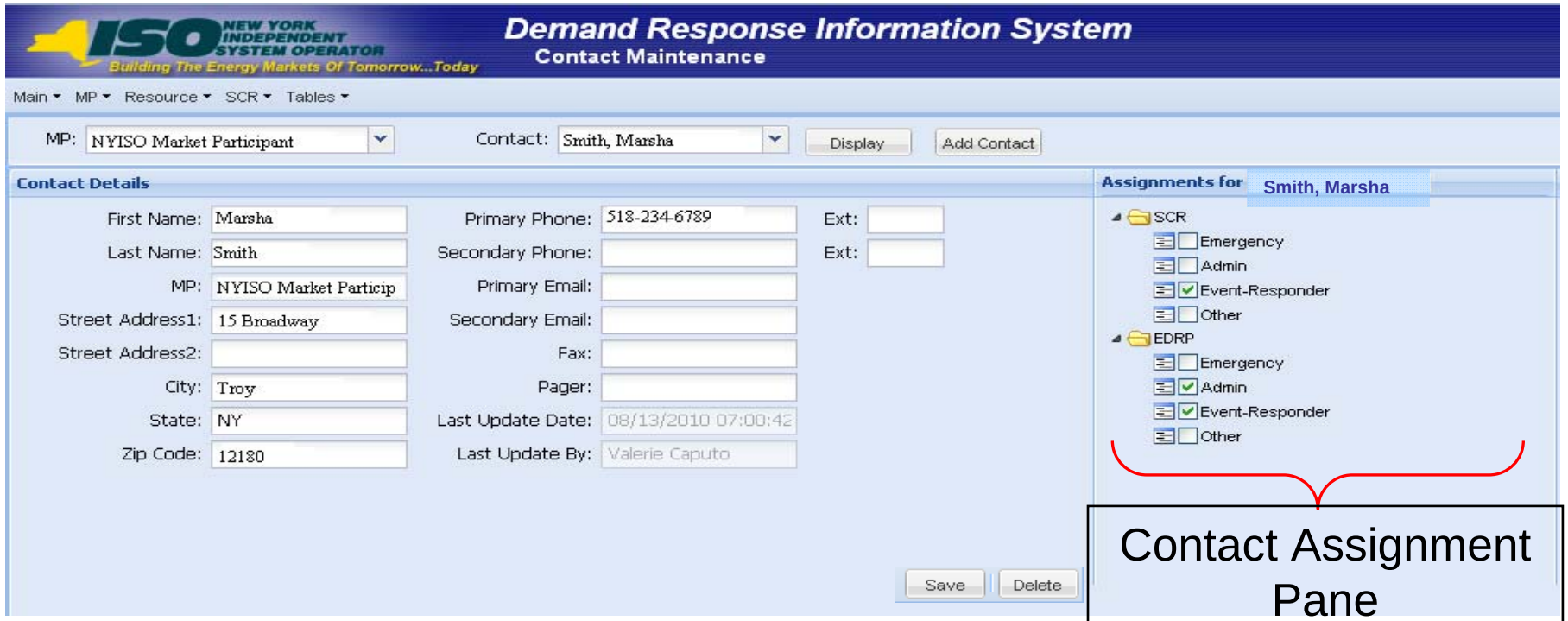
Edit Contact Details

- Modify a field in the Contact Details pane
- Click “Save”



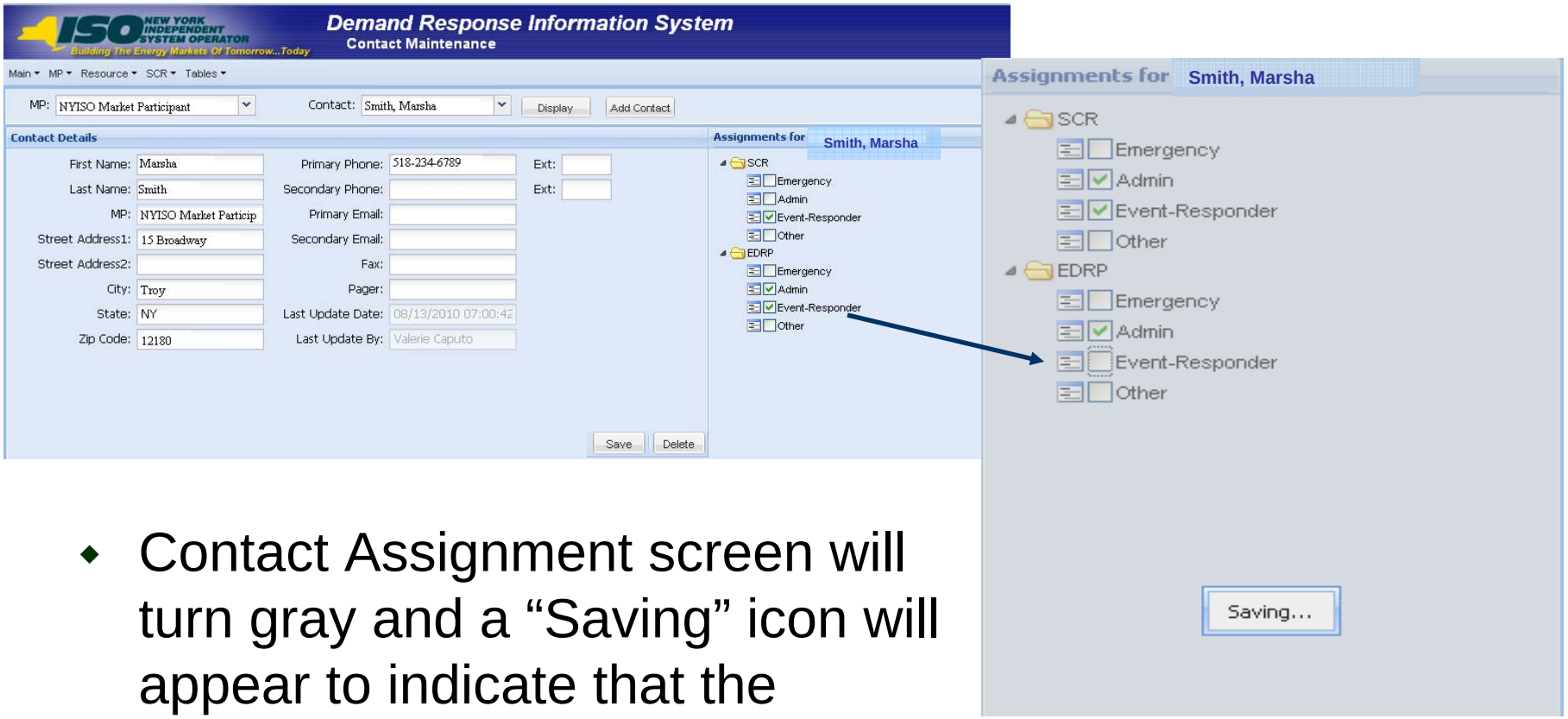
Edit Contact Assignments

- Determine the Program Assignment(s)
- Determine the Contact Type(s)
- Check the box corresponding to the Program and Type for the Contact visible in the Contact Details Pane



Edit Contact Assignments continued

- Checking or un-checking Program and Type assignments will automatically Save in DRIS



- Contact Assignment screen will turn gray and a “Saving” icon will appear to indicate that the change is saving

Edit Contact Assignments Rules

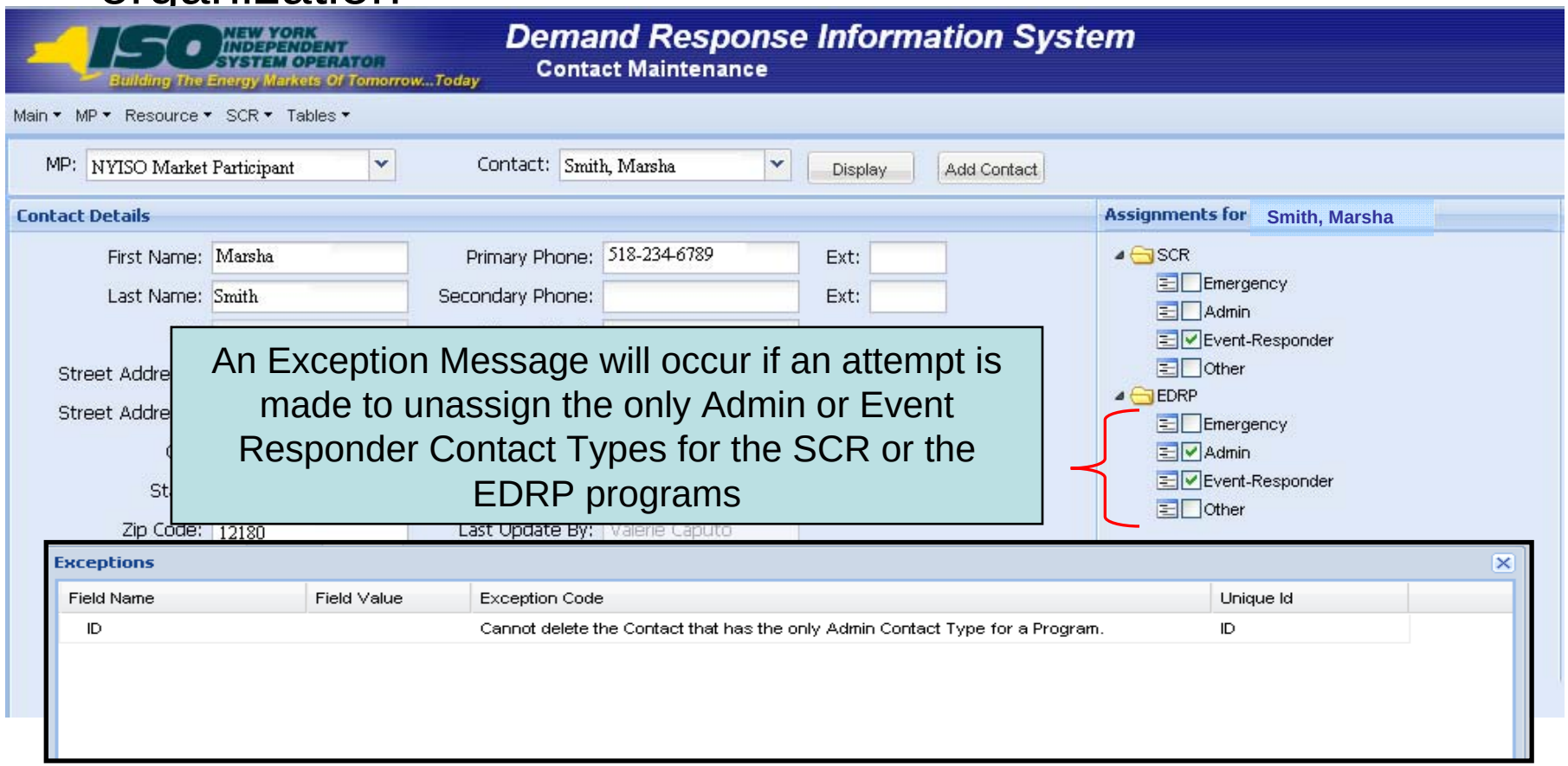
- An MP organization must have at one **Admin** Contact Type per Program

- An MP organization must have at least one **Event Responder** Contact Type per Program

- No resources may be enrolled until the Admin Contact Type and the Event Responder Contact Type are assigned for the specific DR program

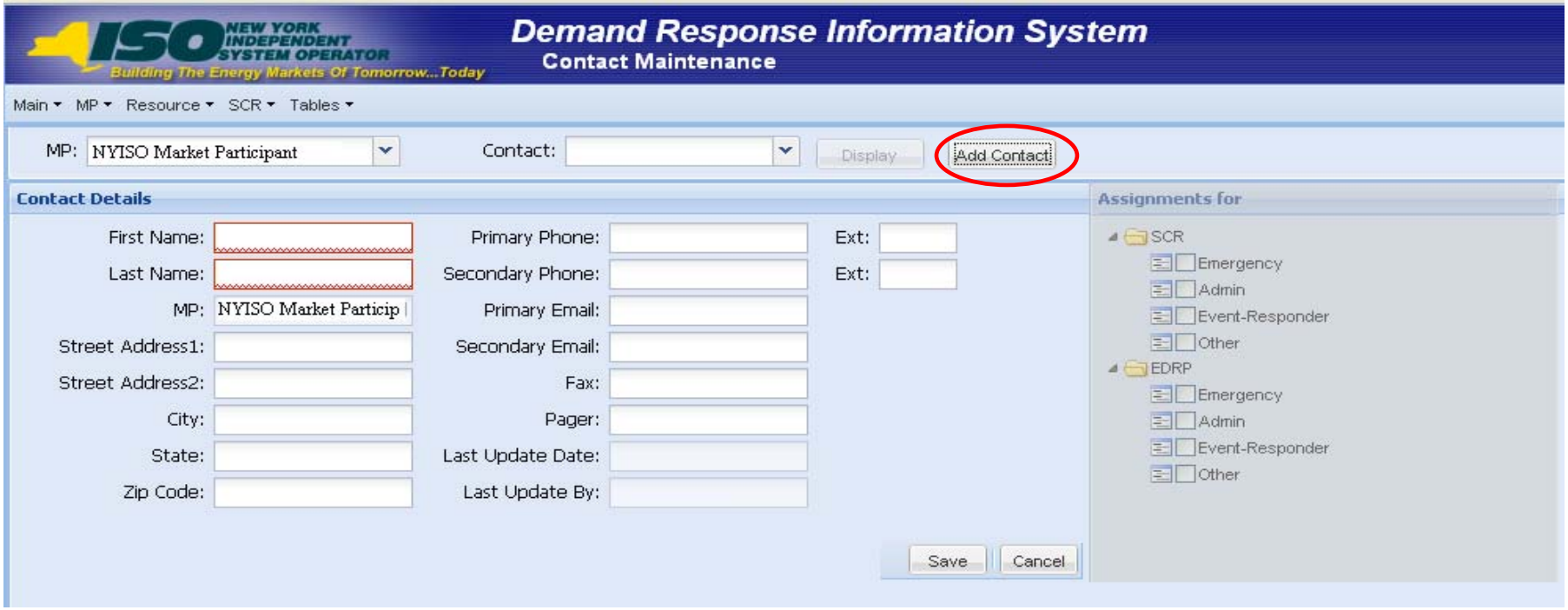
Edit Contact Assignments Rules

- Cannot remove the only assignment of an Admin Contact or Event Responder Contact for a specific Program before assigning the Type to another Contact in the organization



Add Contact

- Click “Add Contact” from the selection criteria
- Enter Contact Details
- Click “Save” before Assigning Contact Types
- Assign Program(s) and Contact Type(s) to the new Contact



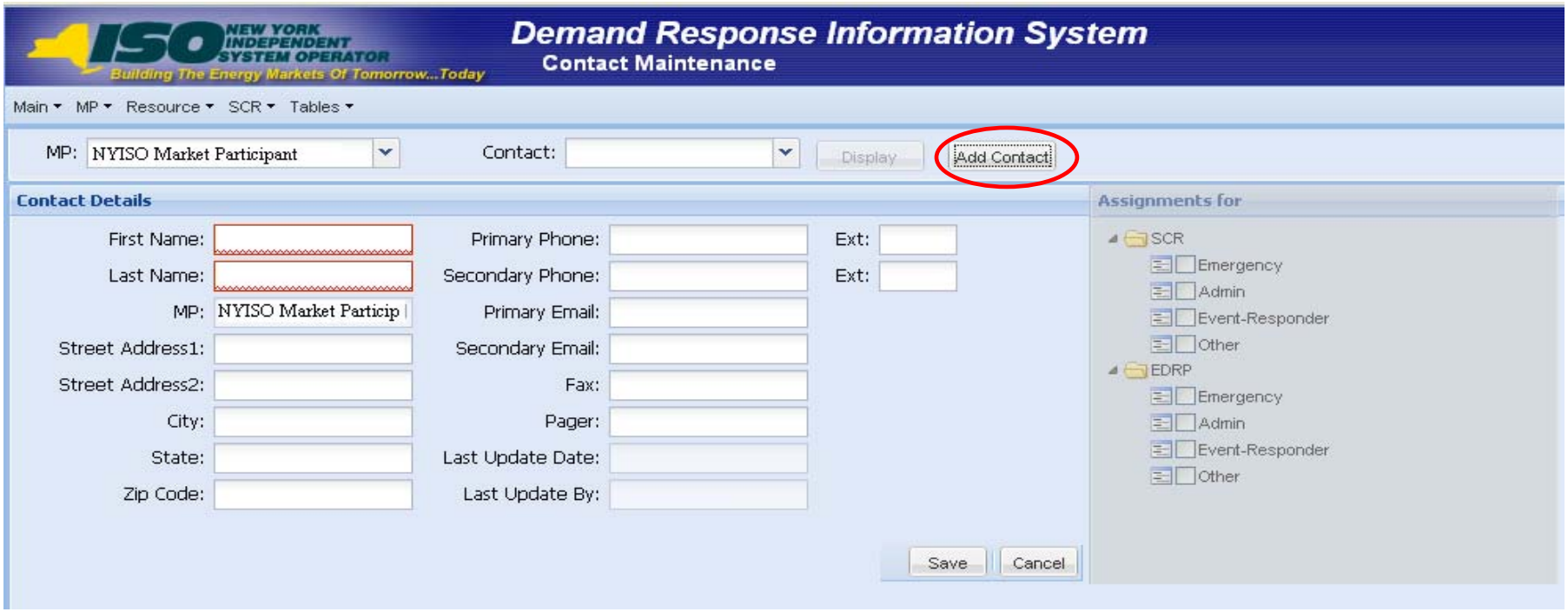
Contact Types

- Event-Responder Contact:
  - *The MP contact who will receive the Event Notifications*
  - *When a Demand Response Event or Test is called by the NYISO, Event-Responders will receive an email notification containing instructions and a link with which to respond to the Notification*
  - *They may also receive a phone message*

- Admin Contact:
  - *The MP contact who interacts with the NYISO for administrative tasks only*

Add Contact Rules

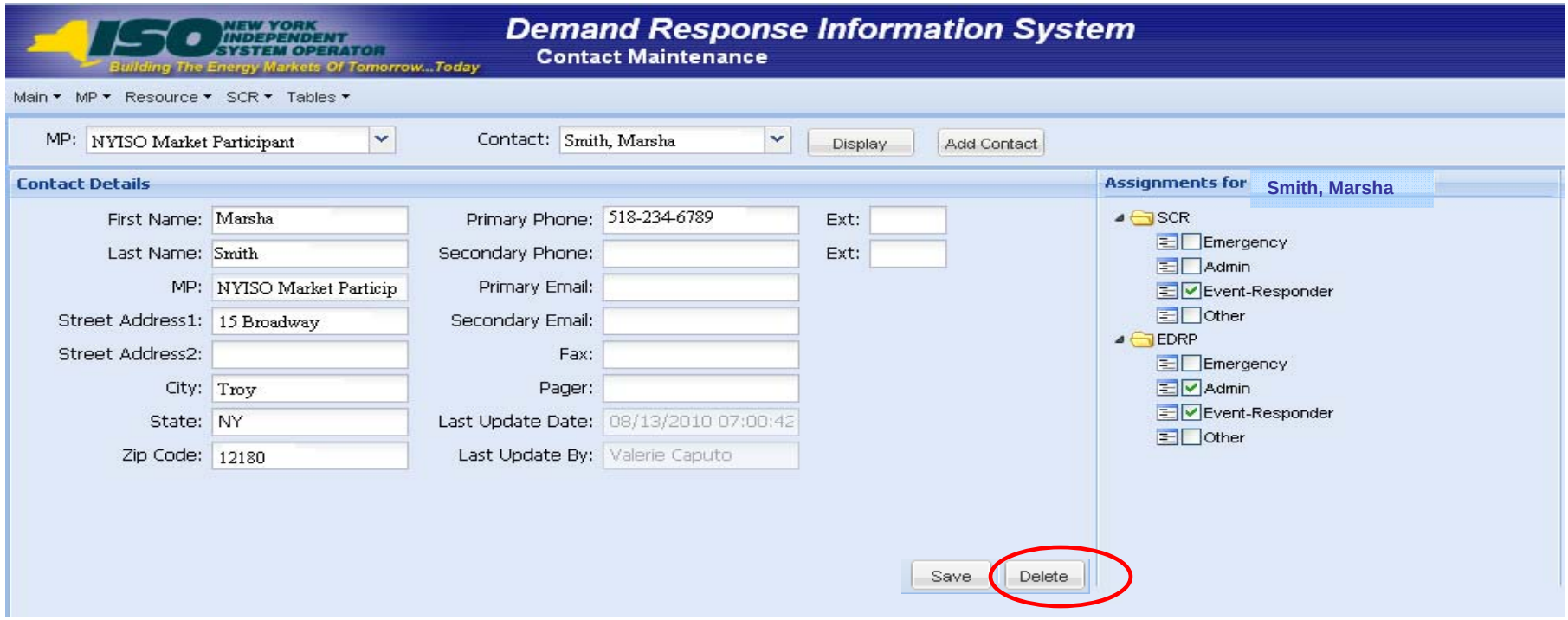
- Admin Contact Type required fields
  - *Name, Primary Phone, Address Information*
- Event Responder Contact Type required fields
  - *Name, Primary Phone, Primary Email*



Delete Contact Rules

- Click “Delete” in the lower right of the screen to delete the Contact visible in the Contact Details pane

- Cannot Delete the only Contact Type of an Admin or Event Responder for a specific Program before assigning the Type to another Contact in the organization



NEW YORK INDEPENDENT SYSTEM OPERATOR

The New York Independent System Operator (NYISO) is a not-for-profit corporation that began operations in 1999. The NYISO operates New York's bulk electricity grid, administers the state's wholesale electricity markets, and provides comprehensive reliability planning for the state's bulk electricity system.

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