

Demand Response Information  
System (DRIS) Training for  
September 2010 Deployment  
Part 5 – Manage Organization  
Contacts

**Stacia Wilcox**  
**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*

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# Market Participant Organization Contacts

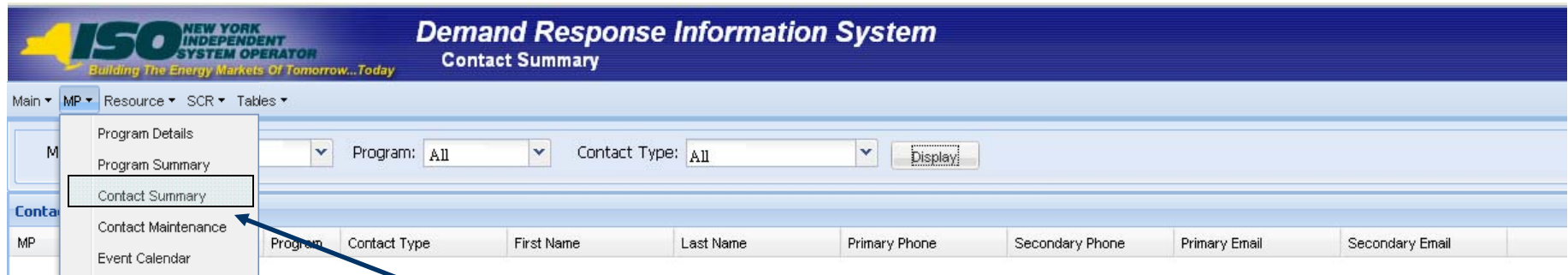
- ◆ The MP organization will be responsible for the management of their organization contacts in DRIS
- ◆ Auxiliary Market Operations will no longer accept or maintain MP contact information
- ◆ **The MP Contact List created from DRIS will be the only list used for Demand Response Event Notifications**

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# 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

The screenshot shows the "Demand Response Information System" interface. At the top, there is a blue header with the ISO logo and the text "Demand Response Information System" and "Contact Summary". Below the header, there is a navigation menu with "Main", "MP", "Resource", "SCR", and "Tables". The "MP" menu is open, showing options: "Program Details", "Program Summary", "Contact Summary" (highlighted with a blue box and a blue arrow pointing to it), "Contact Maintenance", and "Event Calendar". Below the menu, there are search criteria: "Program: All" and "Contact Type: All", followed by a "Display" button. At the bottom, there is a table with columns: "Program", "Contact Type", "First Name", "Last Name", "Primary Phone", "Secondary Phone", "Primary Email", and "Secondary Email".

- ◆ 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


Demand Response Information System  
Contact Summary

Main ▾ MP ▾ Resource ▾ SCR ▾ Tables ▾

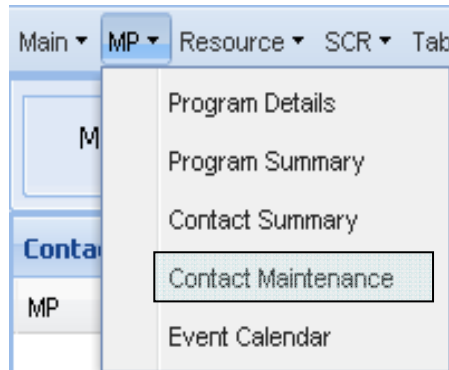
MP:  ▾ Program:  ▾ Contact Type:  ▾

**Contact Summary**

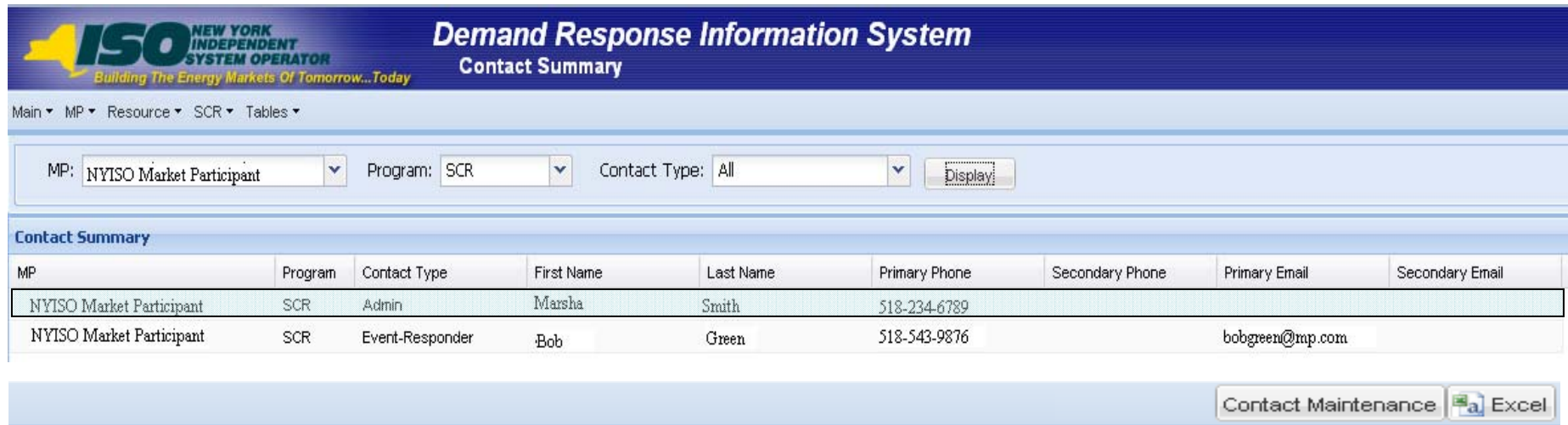
| MP                       | Program | Contact Type    | First Name | Last Name | Primary Phone | Secondary Phone | Primary Email   | Secondary Email |
|--------------------------|---------|-----------------|------------|-----------|---------------|-----------------|-----------------|-----------------|
| NYISO Market Participant | SCR     | Admin           | Marsha     | Smith     | 518-234-6789  |                 |                 |                 |
| NYISO Market Participant | SCR     | Event-Responder | Bob        | Green     | 518-543-9876  |                 | bobgreen@mp.com |                 |

# 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



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Building The Energy Markets Of Tomorrow...Today

## Demand Response Information System

### Contact Summary


Main ▾ MP ▾ Resource ▾ SCR ▾ Tables ▾

MP: NYISO Market Participant ▾ Program: SCR ▾ Contact Type: All ▾

| MP                       | Program | Contact Type    | First Name | Last Name | Primary Phone | Secondary Phone | Primary Email   | Secondary Email |
|--------------------------|---------|-----------------|------------|-----------|---------------|-----------------|-----------------|-----------------|
| NYISO Market Participant | SCR     | Admin           | Marsha     | Smith     | 518-234-6789  |                 |                 |                 |
| NYISO Market Participant | SCR     | Event-Responder | Bob        | Green     | 518-543-9876  |                 | bobgreen@mp.com |                 |

# Contact Details and Maintenance

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


Demand Response Information System  
Contact Maintenance

Main ▾ MP ▾ Resource ▾ SCR ▾ Tables ▾

|                                |                          |         |             |  |
|--------------------------------|--------------------------|---------|-------------|--|
| MP: NYISO Market Participant ▾ | Contact: Smith, Marsha ▾ | Display | Add Contact |  |
|--------------------------------|--------------------------|---------|-------------|--|

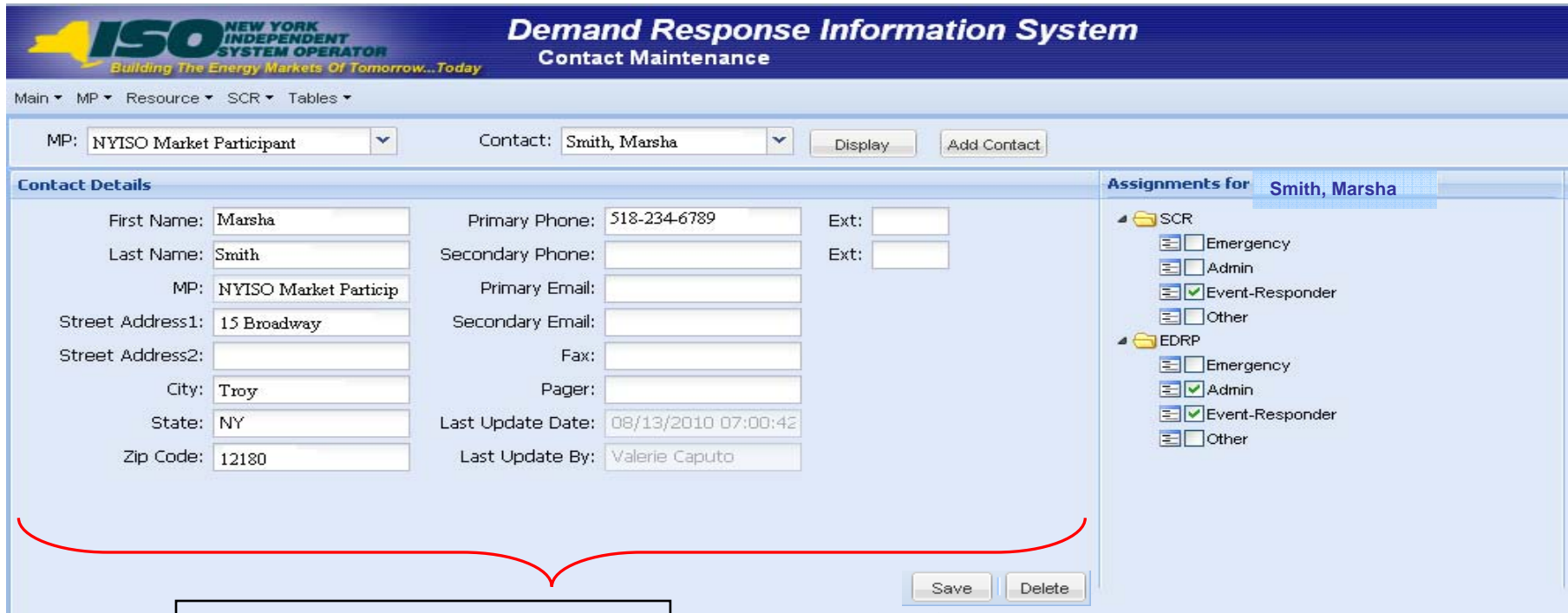
|                                       |                                       |                           |                               |  |  |
|---------------------------------------|---------------------------------------|---------------------------|-------------------------------|--|--|
| Contact Details                       |                                       |                           | Assignments for Smith, Marsha |  |  |
| First Name: Marsha                    | Primary Phone: 518-234-6789           | Ext: <input type="text"/> |                               |  |  |
| Last Name: Smith                      | Secondary Phone: <input type="text"/> | Ext: <input type="text"/> |                               |  |  |
| MP: NYISO Market Particip             | Primary Email: <input type="text"/>   |                           |                               |  |  |
| Street Address1: 15 Broadway          | Secondary Email: <input type="text"/> |                           |                               |  |  |
| Street Address2: <input type="text"/> | Fax: <input type="text"/>             |                           |                               |  |  |
| City: Troy                            | Pager: <input type="text"/>           |                           |                               |  |  |
| State: NY                             | Last Update Date: 08/13/2010 07:00:42 |                           |                               |  |  |
| Zip Code: 12180                       | Last Update By: Valerie Caputo        |                           |                               |  |  |

- SCR
  - Emergency
  - Admin
  - Event-Responder
  - Other
- EDRP
  - Emergency
  - Admin
  - Event-Responder
  - Other



# Edit Contact Details

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



**Demand Response Information System**  
Contact Maintenance

Main ▾ MP ▾ Resource ▾ SCR ▾ Tables ▾

MP: NYISO Market Participant Contact: Smith, Marsha Display Add Contact

**Contact Details**

|                  |                       |                   |                     |      |  |
|------------------|-----------------------|-------------------|---------------------|------|--|
| First Name:      | Marsha                | Primary Phone:    | 518-234-6789        | Ext: |  |
| Last Name:       | Smith                 | Secondary Phone:  |                     | Ext: |  |
| MP:              | NYISO Market Particip | Primary Email:    |                     |      |  |
| Street Address1: | 15 Broadway           | Secondary Email:  |                     |      |  |
| Street Address2: |                       | Fax:              |                     |      |  |
| City:            | Troy                  | Pager:            |                     |      |  |
| State:           | NY                    | Last Update Date: | 08/13/2010 07:00:42 |      |  |
| Zip Code:        | 12180                 | Last Update By:   | Valerie Caputo      |      |  |

Assignments for Smith, Marsha

- SCR
  - Emergency
  - Admin
  - Event-Responder
  - Other
- EDRP
  - Emergency
  - Admin
  - Event-Responder
  - Other

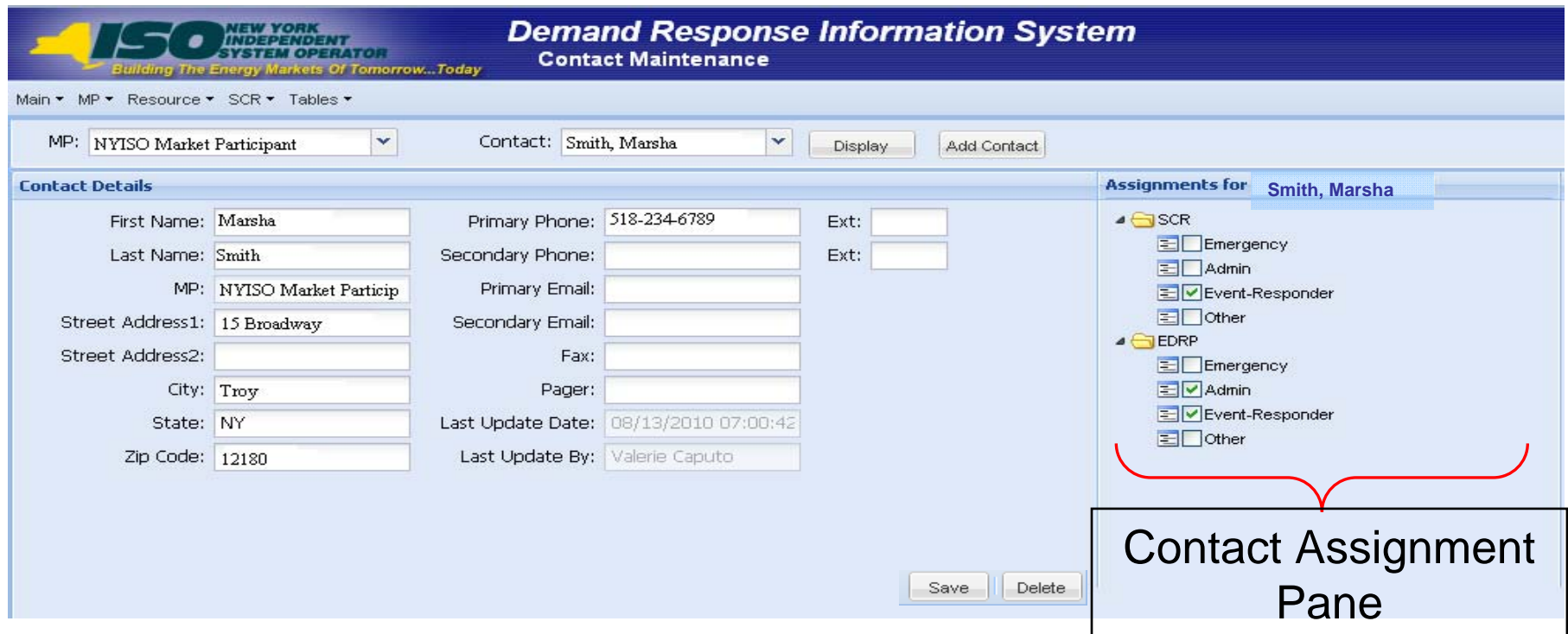
Save Delete

Contact Details Pane

“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



**Demand Response Information System**  
Contact Maintenance

Main ▾ MP ▾ Resource ▾ SCR ▾ Tables ▾

MP: NYISO Market Participant    Contact: Smith, Marsha    Display    Add Contact

| Contact Details  |                       |                   | Assignments for Smith, Marsha |      |  |
|------------------|-----------------------|-------------------|-------------------------------|------|--|
| First Name:      | Marsha                | Primary Phone:    | 518-234-6789                  | Ext: |  |
| Last Name:       | Smith                 | Secondary Phone:  |                               | Ext: |  |
| MP:              | NYISO Market Particip | Primary Email:    |                               |      |  |
| Street Address1: | 15 Broadway           | Secondary Email:  |                               |      |  |
| Street Address2: |                       | Fax:              |                               |      |  |
| City:            | Troy                  | Pager:            |                               |      |  |
| State:           | NY                    | Last Update Date: | 08/13/2010 07:00:42           |      |  |
| Zip Code:        | 12180                 | Last Update By:   | Valerie Caputo                |      |  |

Assignments for Smith, Marsha:

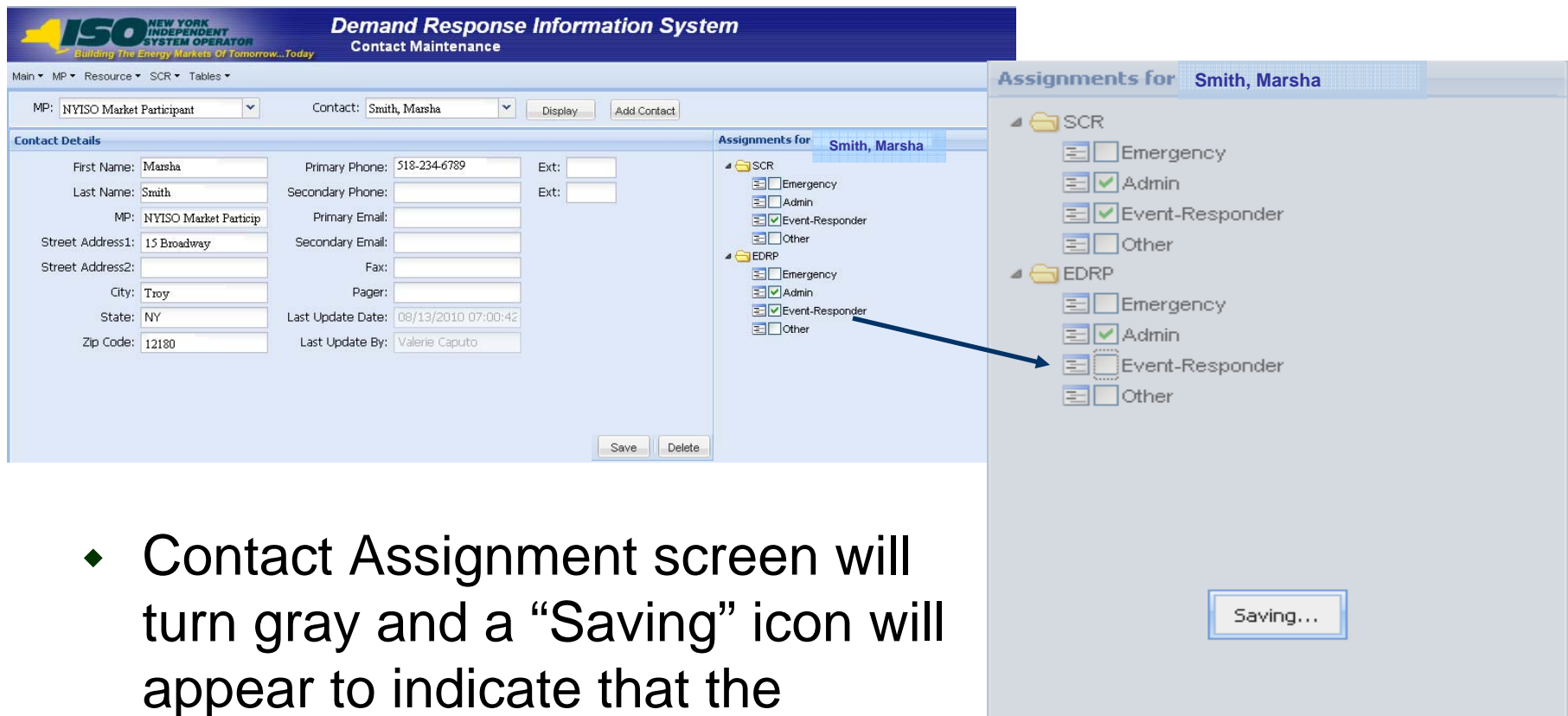
- SCR
  - Emergency
  - Admin
  - Event-Responder
  - Other
- EDRP
  - Emergency
  - Admin
  - Event-Responder
  - Other

Save    Delete

**Contact Assignment Pane**

# Edit Contact Assignments continued

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



**Demand Response Information System**  
Contact Maintenance

Main ▾ MP ▾ Resource ▾ SCR ▾ Tables ▾

MP: NYISO Market Participant Contact: Smith, Marsha Display Add Contact

**Contact Details**

|                                       |                                       |                           |
|---------------------------------------|---------------------------------------|---------------------------|
| First Name: Marsha                    | Primary Phone: 518-234-6789           | Ext: <input type="text"/> |
| Last Name: Smith                      | Secondary Phone: <input type="text"/> | Ext: <input type="text"/> |
| MP: NYISO Market Particip             | Primary Email: <input type="text"/>   |                           |
| Street Address1: 15 Broadway          | Secondary Email: <input type="text"/> |                           |
| Street Address2: <input type="text"/> | Fax: <input type="text"/>             |                           |
| City: Troy                            | Pager: <input type="text"/>           |                           |
| State: NY                             | Last Update Date: 08/13/2010 07:00:42 |                           |
| Zip Code: 12180                       | Last Update By: Valerie Caputo        |                           |

**Assignments for Smith, Marsha**

- SCR
  - Emergency
  - Admin
  - Event-Responder
  - Other
- EDRP
  - Emergency
  - Admin
  - Event-Responder
  - Other

**Assignments for Smith, Marsha**

- SCR
  - Emergency
  - Admin
  - Event-Responder
  - Other
- EDRP
  - Emergency
  - Admin
  - Event-Responder
  - Other

Saving...

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

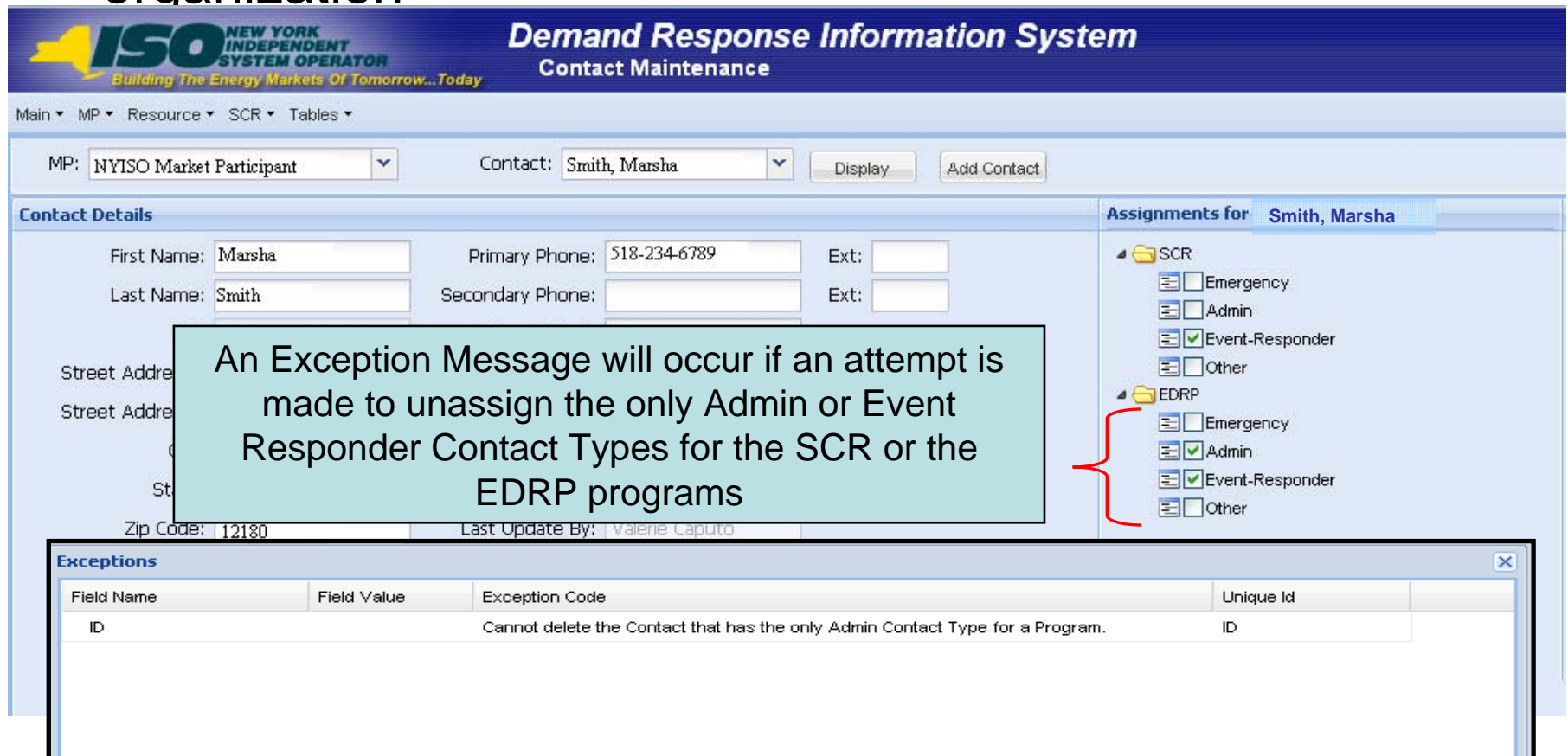
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## Edit Contact Assignments Rules

- ◆ 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



**Demand Response Information System**  
Contact Maintenance

MP: NYISO Market Participant Contact: Smith, Marsha Display Add Contact

**Contact Details**

First Name: Marsha Primary Phone: 518-234-6789 Ext:   
 Last Name: Smith Secondary Phone:  Ext:

Street Address:   
 Street Address:   
 Street Address:   
 Zip Code: 12180 Last Update By: Valerie Caputo

**Assignments for Smith, Marsha**

- SCR
  - Emergency
  - Admin
  - Event-Responder
  - Other
- EDRP
  - Emergency
  - Admin
  - Event-Responder
  - Other

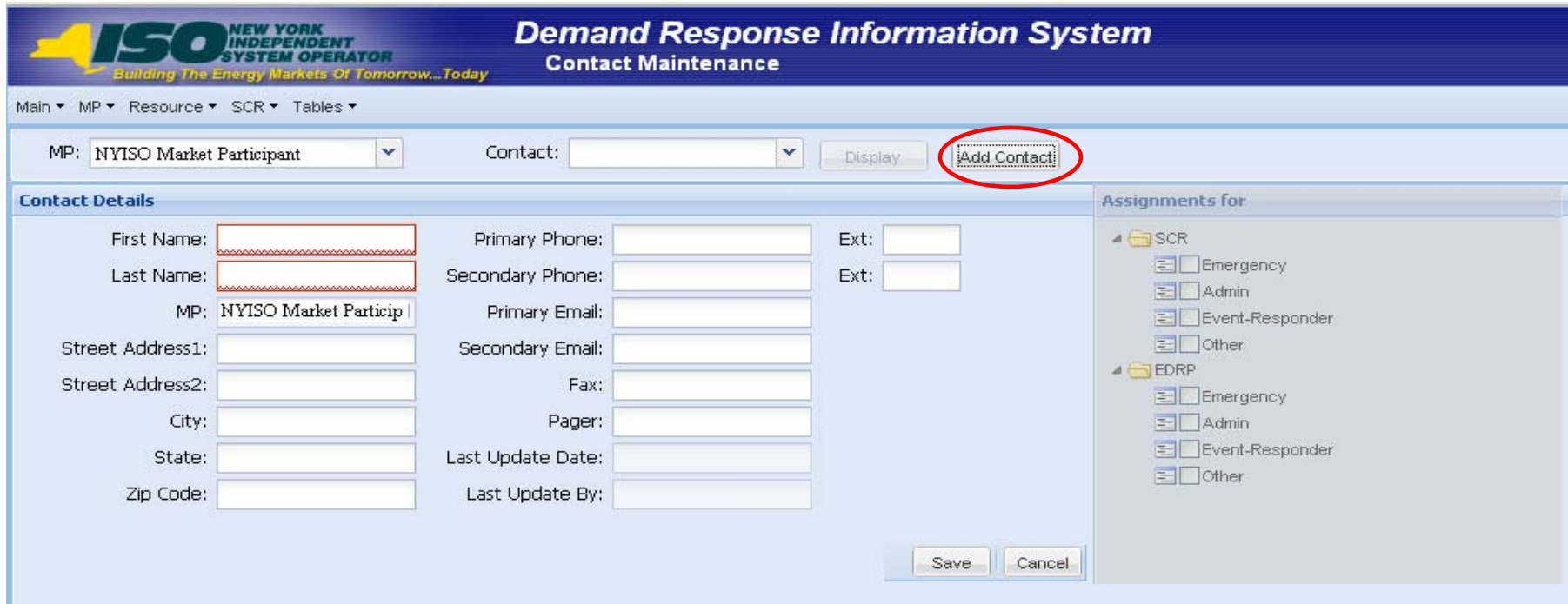
An Exception Message will occur if an attempt is made to unassign the only Admin or Event Responder Contact Types for the SCR or the EDRP programs

**Exceptions**

| Field Name | Field Value | Exception Code  | Unique Id |
|------------|-------------|---|-----------|
| ID         |             | Cannot delete the Contact that has the only Admin Contact Type for a Program. | ID        |

# 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



The screenshot shows the 'Demand Response Information System' interface for 'Contact Maintenance'. At the top, there is a navigation menu with 'Main', 'MP', 'Resource', 'SCR', and 'Tables'. Below this, there are two dropdown menus: 'MP: NYISO Market Participant' and 'Contact:'. To the right of these are 'Display' and 'Add Contact' buttons. The 'Add Contact' button is circled in red. The main area is divided into 'Contact Details' and 'Assignments for'. The 'Contact Details' section contains various input fields for personal and professional information, including First Name, Last Name, Street Address1, Street Address2, City, State, Zip Code, Primary Phone, Secondary Phone, Primary Email, Secondary Email, Fax, Pager, Last Update Date, and Last Update By. The 'Assignments for' section shows a tree view with 'SCR' and 'EDRP' categories, each containing 'Emergency', 'Admin', 'Event-Responder', and 'Other' options with checkboxes.

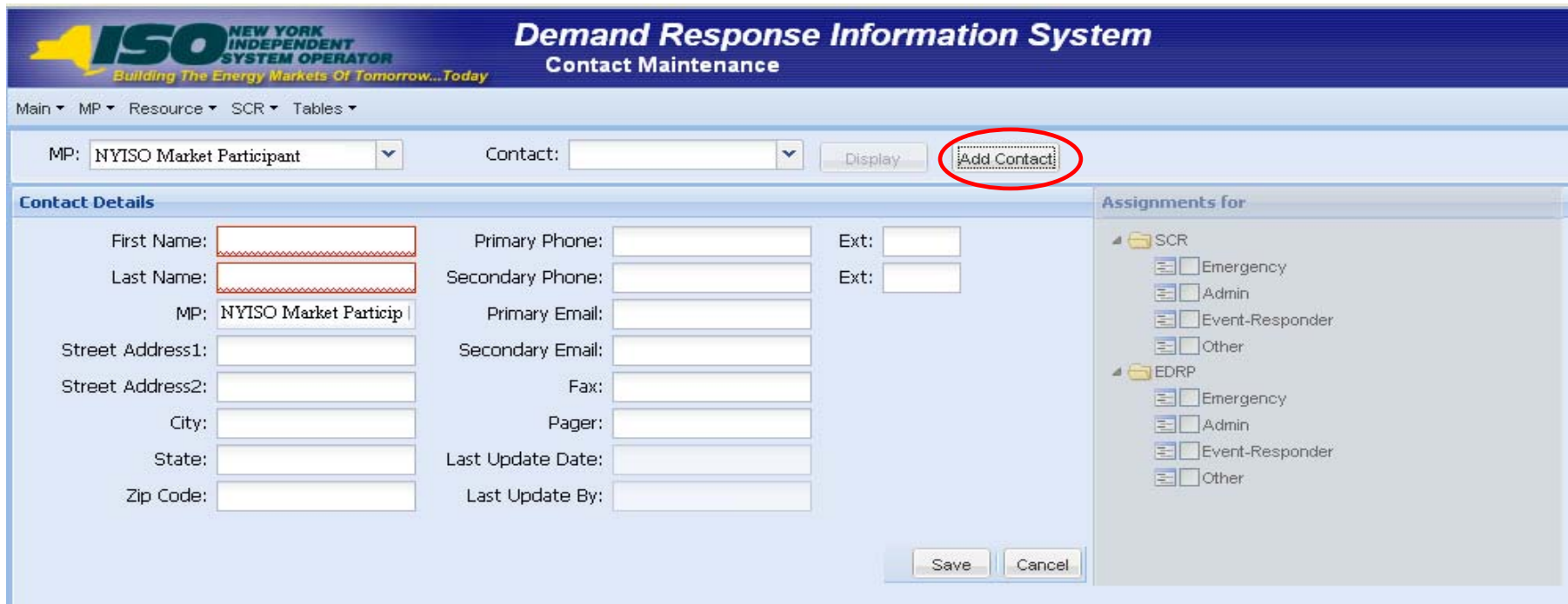
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# Contact Types

- ◆ 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*

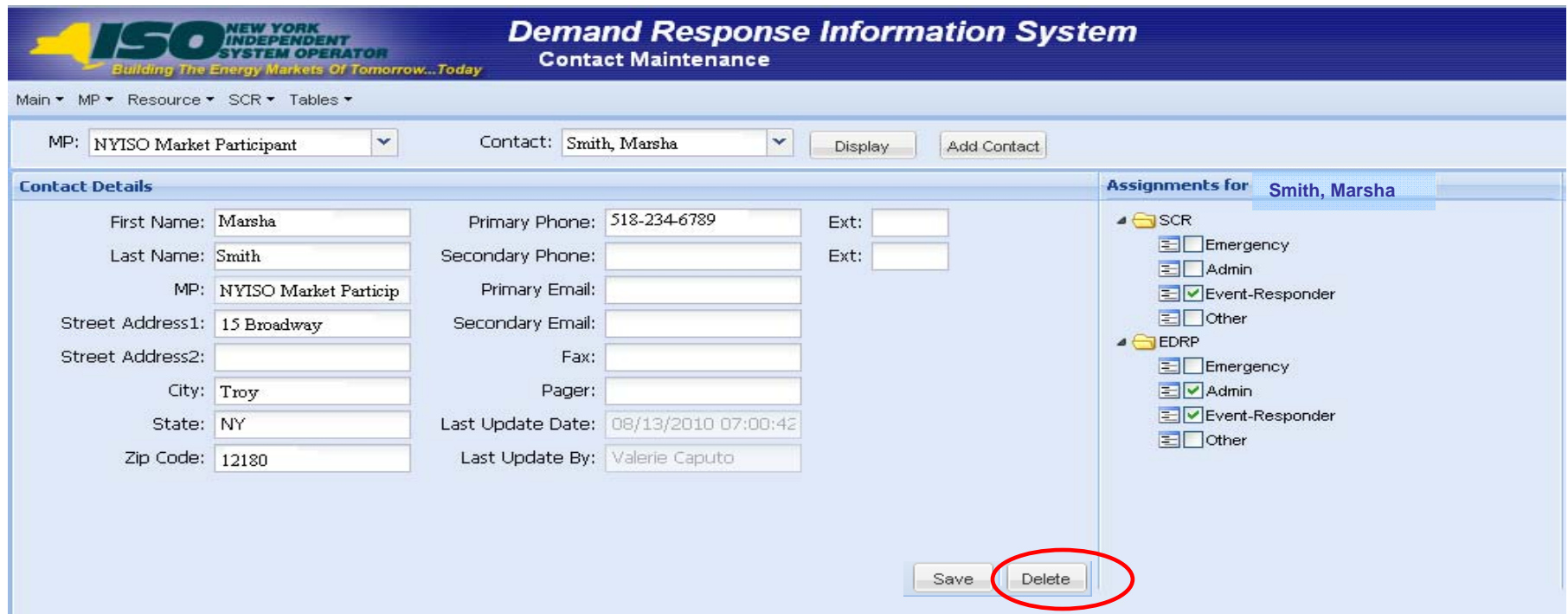


The screenshot shows the 'Demand Response Information System' interface for 'Contact Maintenance'. At the top, there is a navigation menu with 'Main', 'MP', 'Resource', 'SCR', and 'Tables'. Below this, there are dropdown menus for 'MP' (set to 'NYISO Market Participant') and 'Contact'. To the right of these are 'Display' and 'Add Contact' buttons. The 'Add Contact' button is circled in red. The main area is divided into 'Contact Details' and 'Assignments for'. The 'Contact Details' section contains various input fields: First Name, Last Name, MP (set to 'NYISO Market Particip'), Street Address1, Street Address2, City, State, Zip Code, Primary Phone, Secondary Phone, Primary Email, Secondary Email, Fax, Pager, Last Update Date, and Last Update By. The 'Assignments for' section shows a tree view with 'SCR' and 'EDRP' folders, each containing checkboxes for 'Emergency', 'Admin', 'Event-Responder', and 'Other'. At the bottom right, there are 'Save' and 'Cancel' buttons.



# 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



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**Demand Response Information System**  
Contact Maintenance

Main ▾ MP ▾ Resource ▾ SCR ▾ Tables ▾

MP: NYISO Market Participant Contact: Smith, Marsha Display Add Contact

**Contact Details**

|                  |                       |                   |                     |      |  |
|------------------|-----------------------|-------------------|---------------------|------|--|
| First Name:      | Marsha                | Primary Phone:    | 518-234-6789        | Ext: |  |
| Last Name:       | Smith                 | Secondary Phone:  |                     | Ext: |  |
| MP:              | NYISO Market Particip | Primary Email:    |                     |      |  |
| Street Address1: | 15 Broadway           | Secondary Email:  |                     |      |  |
| Street Address2: |                       | Fax:              |                     |      |  |
| City:            | Troy                  | Pager:            |                     |      |  |
| State:           | NY                    | Last Update Date: | 08/13/2010 07:00:42 |      |  |
| Zip Code:        | 12180                 | Last Update By:   | Valerie Caputo      |      |  |

**Assignments for Smith, Marsha**

- SCR
  - Emergency
  - Admin
  - Event-Responder
  - Other
- EDRP
  - Emergency
  - Admin
  - Event-Responder
  - Other

Save Delete



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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