Part 4 – DSASP Aggregations in DRIS
Demand Response Information System (DRIS) Training for March 2013 Deployment

Michael Lavillotti

Product Business Analyst

New York Independent System Operator

Tuesday, March 5th, 2013 09:00 AM – 12:00 PM

Thursday, March 14th, 2013 01:00 PM – 04:00 PM

Web Ex - Rensselaer, NY

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DRAFT – FOR DISCUSSION PURPOSES ONLY

Training Topics

- Part 1: Introduction to DRIS
  - *DRIS User Requirements*
  - *User Privileges*
  - *Access to DRIS*
- Part 2: DSASP Overview
- Part 3: DSASP Resource Enrollment in DRIS
  - *Export Enrollment File*
  - *Import DSASP Resources*
  - *Resource Import Validations*
  - *Manage Import Results*
- **Part 4: DSASP Aggregations in DRIS**
  - ***View DSASP Aggregations and Resources***
  - ***DSASP Resource Enrollment Statuses***
  - ***Manage DSASP Aggregations***
- Part 5: DSASP Resource Registration for MIS
  - *Export DSASP Resource Report from DRIS*
  - *Submit DSASP Registration Report*
- Part 6: Submitted Aggregations in DRIS
  - *View History of Submitted Aggregations*
- Part 7: View DSASP Resource Enrollment in DRIS
- Part 8: Deployment
  - *Additional Training Sessions*
  - *Deployment Activities*

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Prerequisites to DSASP Aggregation Management

- **Prior to managing DSASP Aggregations in DRIS, Market Participants must have completed the following:**
  - ***Successfully imported a capacity of 1MW or greater for the aggregation***
  - ***Imports can be done incrementally for the aggregation, until 1 MW has been reached***

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Manage DSASP Aggregations

- **DSASP Aggregation Management in DRIS consists of:**
  - ***Viewing summary level information for the aggregation***
  - ***Viewing detailed information for the individual Demand Side Resources within an aggregation***
  - ***Selecting Demand Side Resources to add to a Qualified aggregation or update resources within a Qualified aggregation***
  - ***De-Selecting Demand Side Resources to remove from a Qualified aggregation***
  - ***Submitting Validated resources to become a Qualified aggregation***

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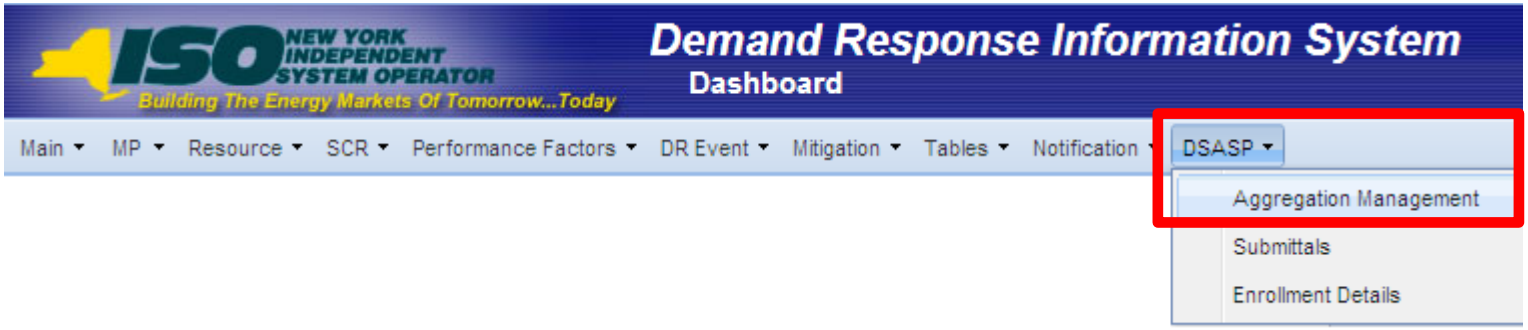
DSASP Aggregation Management

- From the DSASP Menu select Aggregation Management



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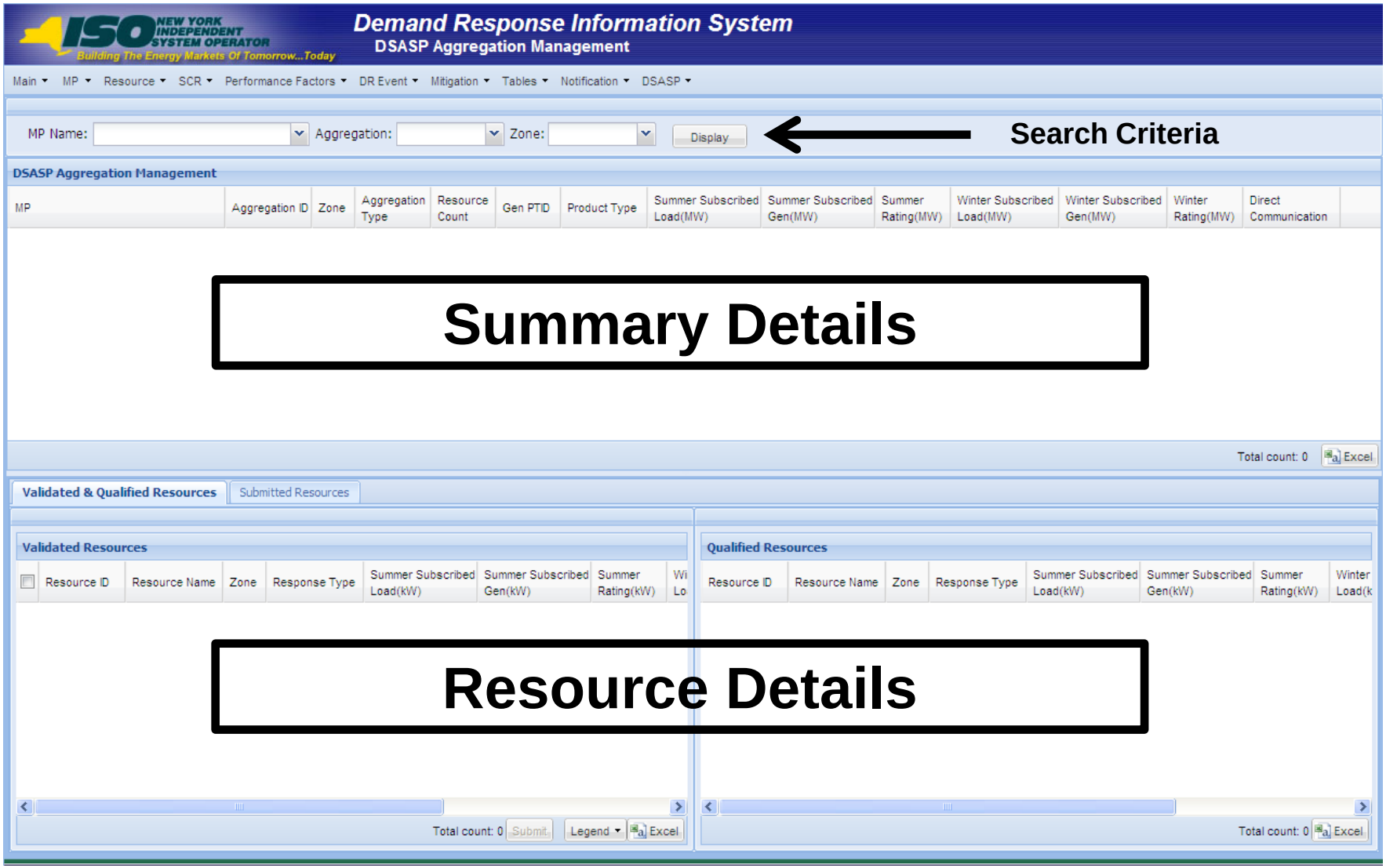
DSASP Aggregation Management



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DSASP Aggregation Management

- **Search Criteria**
  - ***MP***
    - **Defaults to MP organization**
  - ***Aggregation***
    - **Defaults to All**
    - **Select an existing Aggregation**
  - ***Zone***
    - **Defaults to All**
    - **Select a specific Zone**

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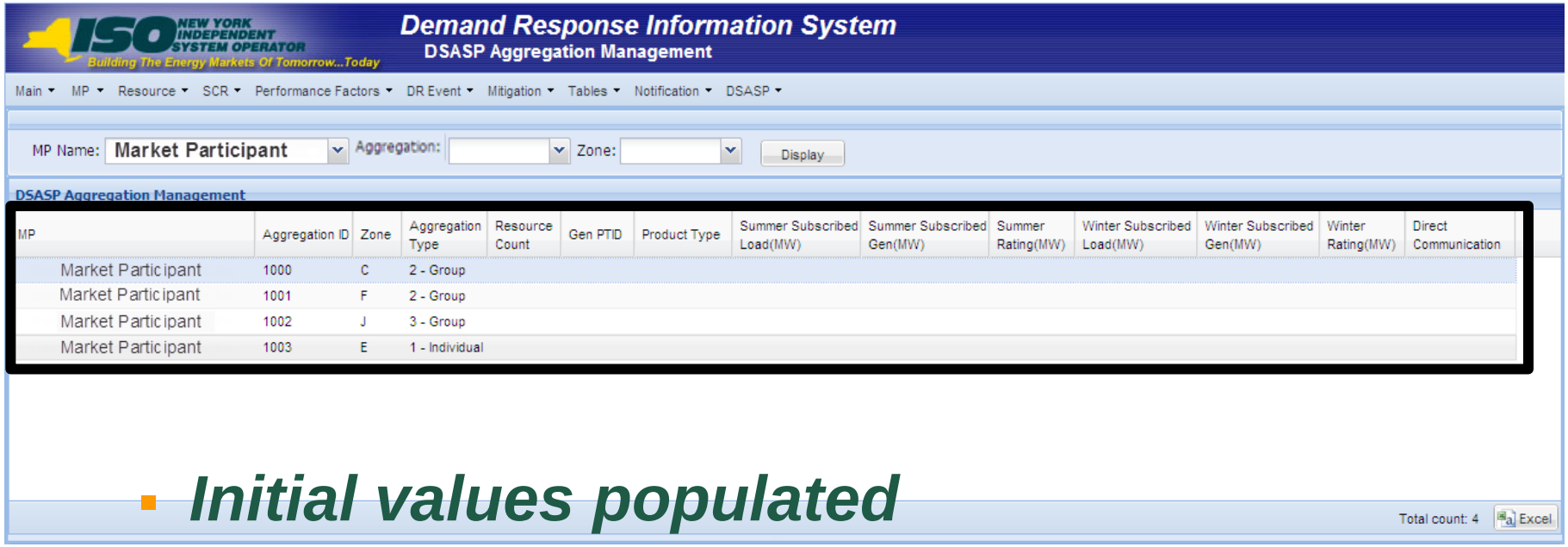
DSASP Aggregation Management

- **DSASP Aggregation Summary Details prior to the Aggregation becoming Qualified and participating in the market**



  - ***Initial values populated***
    - **MP Name**
    - **Aggregation ID**
    - **Zone**
    - **Aggregation Type**

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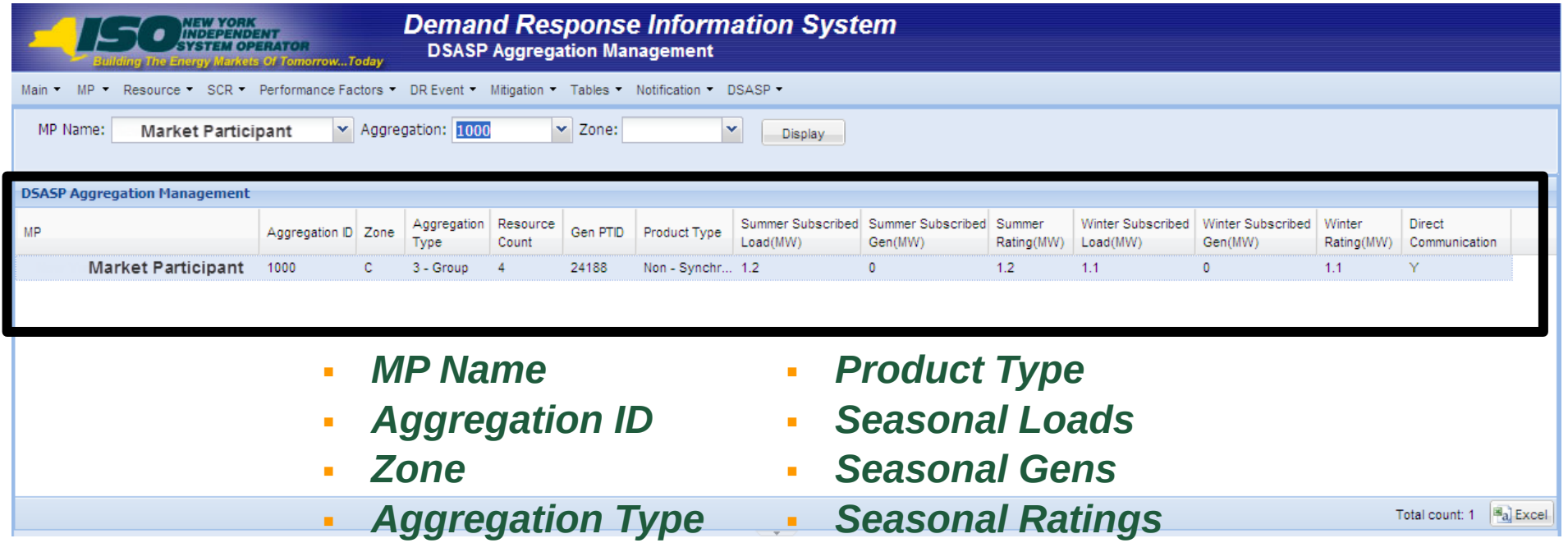
DSASP Aggregation Management

- **DSASP Aggregation Summary Details after the Aggregation is Qualified and participating in the market**



- *MP Name*
- *Aggregation ID*
- *Zone*
- *Aggregation Type*
- *Resource Count*
- *Gen PTID*
- *Product Type*
- *Seasonal Loads*
- *Seasonal Gens*
- *Seasonal Ratings*
- *Direct Communication*

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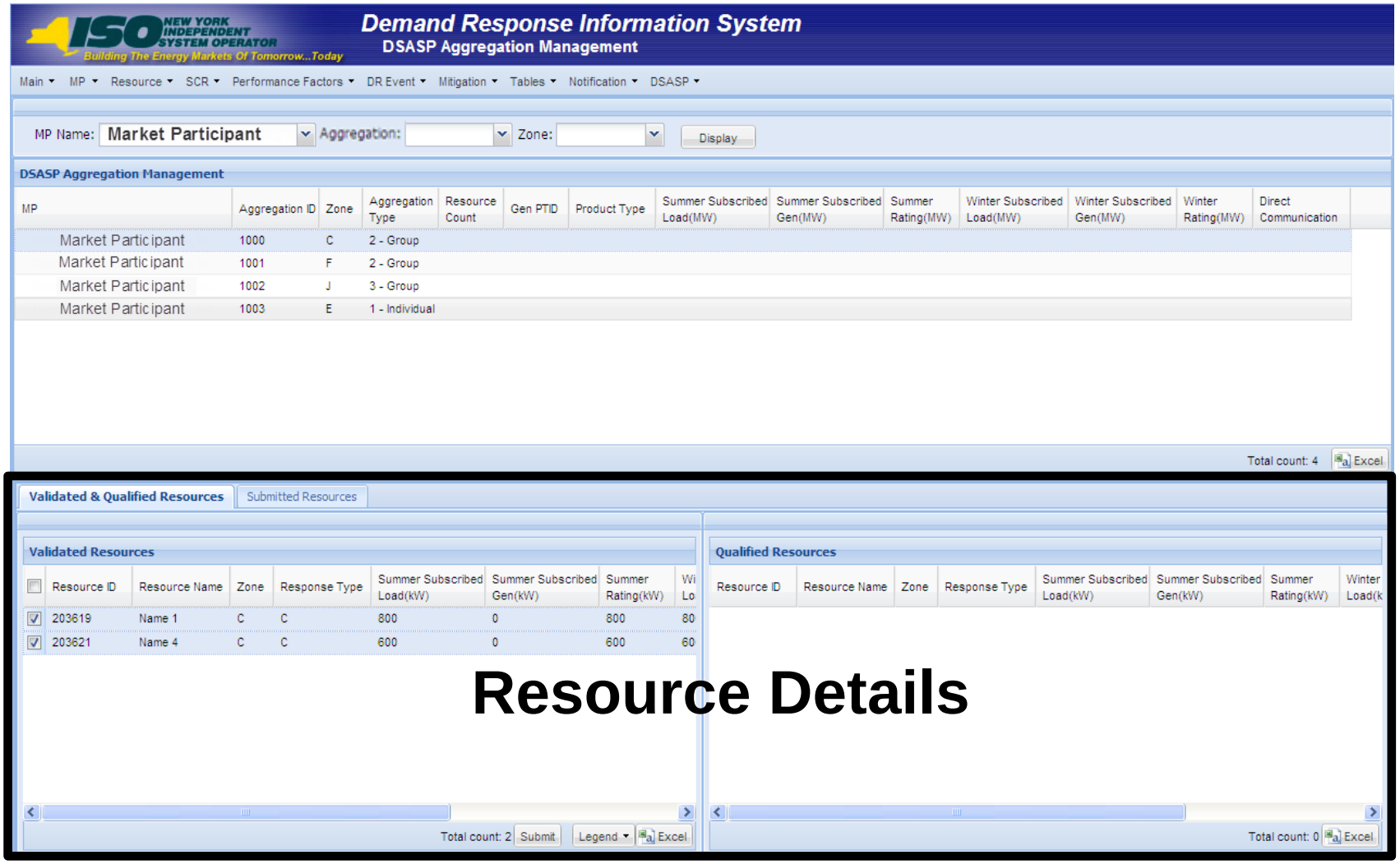
DSASP Resource Details



Resource Details

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DSASP Resource Enrollment Statuses

- **A DSASP Demand Side Resource and a DSASP Resource may have any one, or combination of, the following three Enrollment Statuses on the DSASP Aggregation Management screen**
  - ***Validated***
    - **Demand Side Resources have been successfully imported and passed initial validation**
  - ***Submitted***
    - **Demand Side Resources have been submitted for registration and exists in a frozen state while being processed by NYISO Member Relations**
  - ***Qualified***
    - **Demand Side Resources now exist in an active DSASP Resource Aggregation which has passed all registration and testing requirements, the DSASP Resource is now ready to participate in the market**

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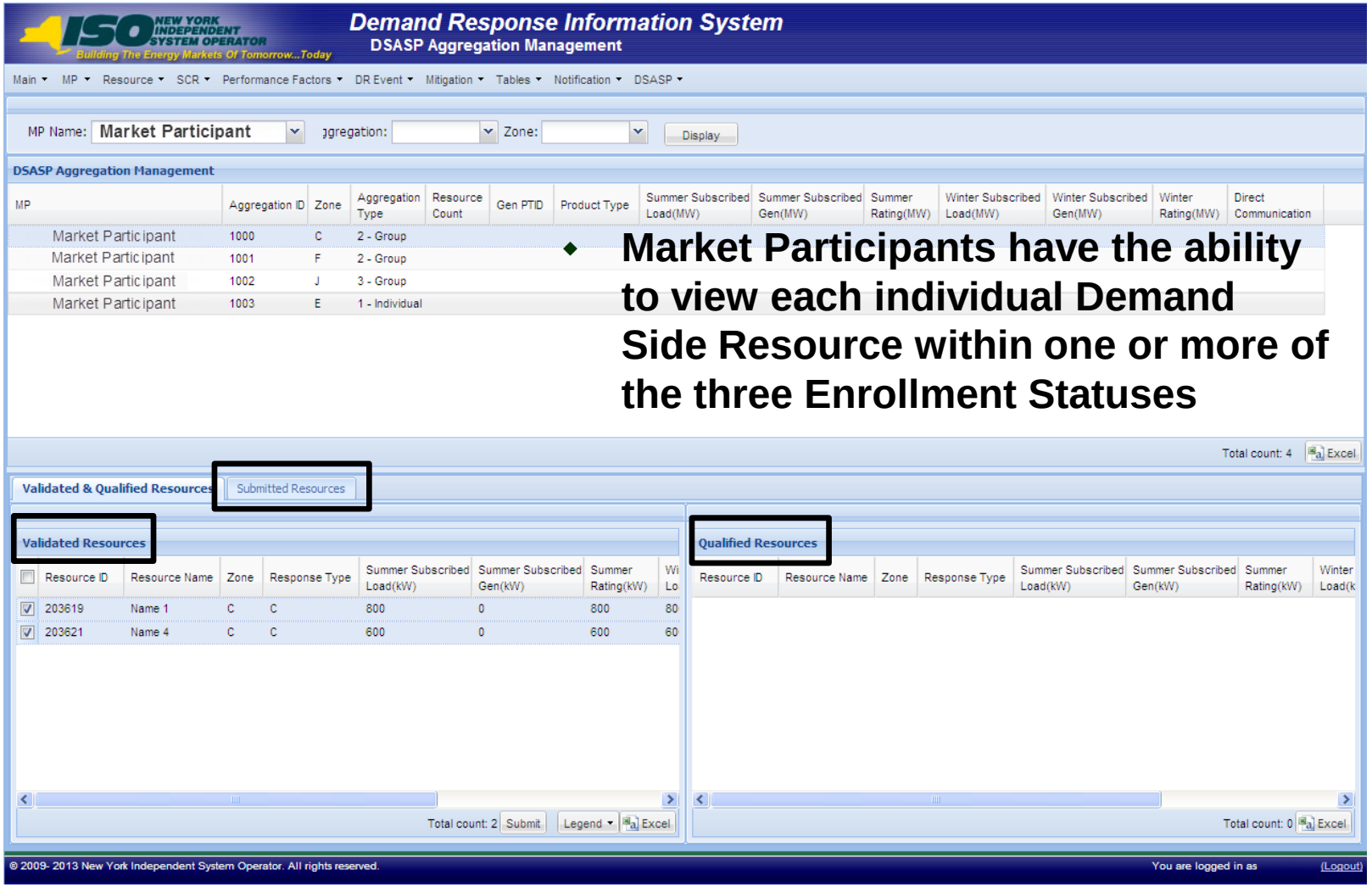
DSASP Resource Enrollment Statuses



- Market Participants have the ability to view each individual Demand Side Resource within one or more of the three Enrollment Statuses

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DSASP Resource Details

- **Validated Resource Fields**
  - *Resource ID*
  - *Resource Name*
  - *Zone*
  - *Response Type*
  - *Seasonal Loads*
  - *Seasonal Generation*
  - *Seasonal Ratings*
    - **(Load + Gen for Response Types B & G)**
  - *Reliability Enrollment Indicator*

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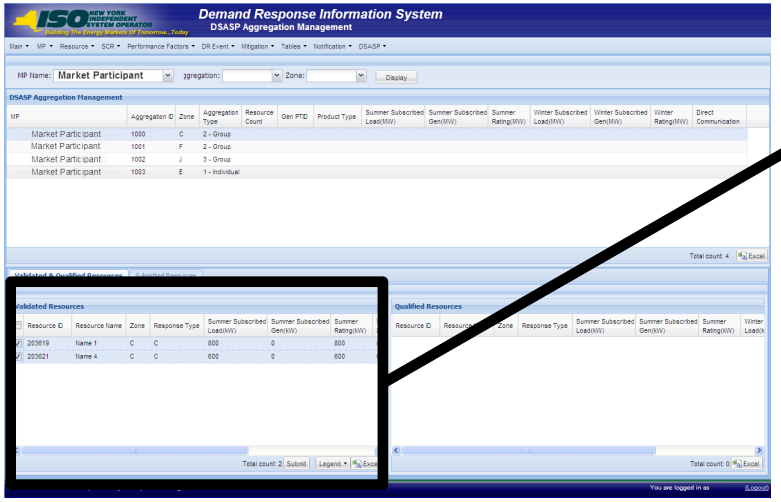
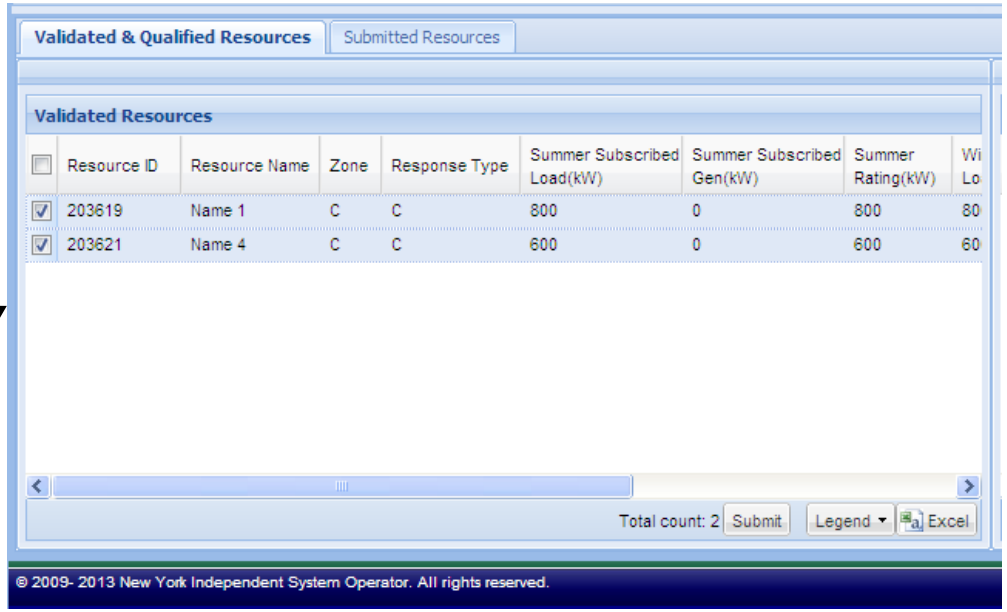
Validated Resources

- A resource is Validated each time it has been successfully imported
  - *Will always appear in Validated tab, if imported successfully*
    - May appear:
      - Checked
      - Un-checked
      - Highlighted





  - *View resource level details*
    - Selection of a checkbox is not saved when navigating away from this screen

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Managing Resources

- **Managing an aggregation prepares resources for Qualification**
  - ***Select new resources to add to the aggregation***
  - ***De-select existing resources to remove from aggregation***
  - ***No selection required for updating existing resources in a Qualified aggregation***
  - ***Select the Submit button to validate aggregation details and prepare the DSASP Resource Report***
    - **Submitted resources will be assigned an Enrollment Status of "Submitted"**
    - **The DSASP Resource Report must be submitted to the NYISO with the DSASP Resource Registration Packet**

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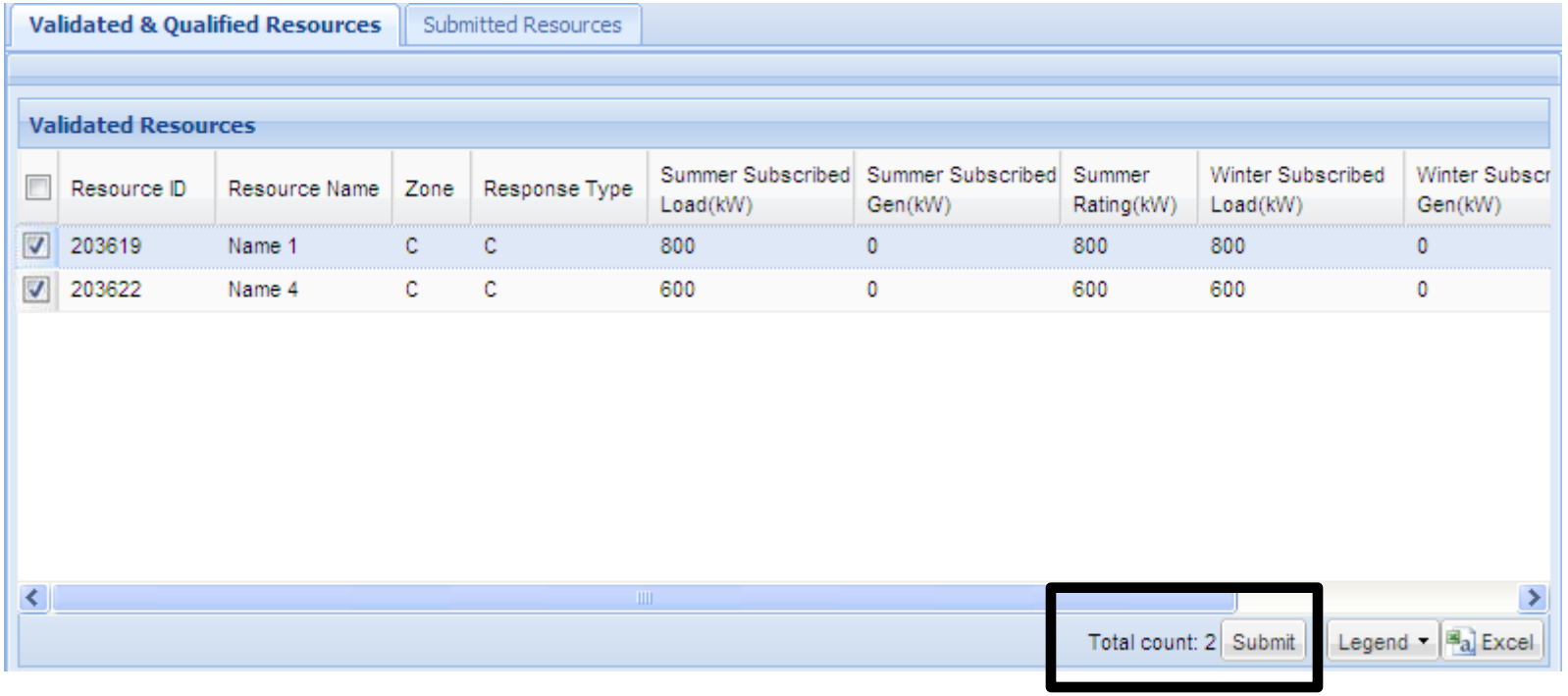
Validated Resources

- **Once Validated, Resources may be selected for Submission to NYISO Member Relations as part of a DSASP Resource/Aggregation**
  - ***Select Resources***
  - ***Choose Submit to produce DSASP Resource Report***



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DSASP Aggregation Validations

- **Selecting to "Submit" will validate the resources at an Aggregate level**
  - ***Resource Count***
  - ***MW level***
  - ***Change from previous***
  - ***Cannot Submit if there is an "Active" Submission***

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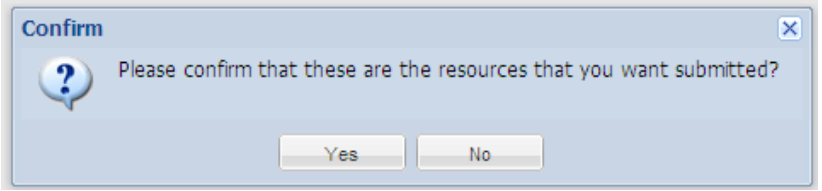
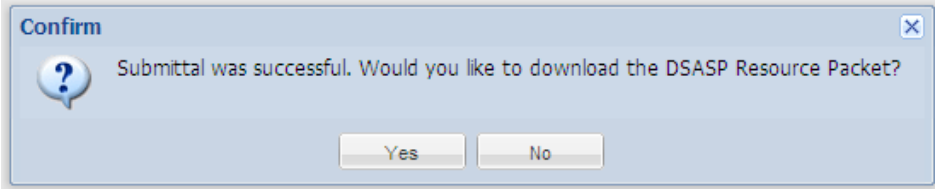
Submitting Resources

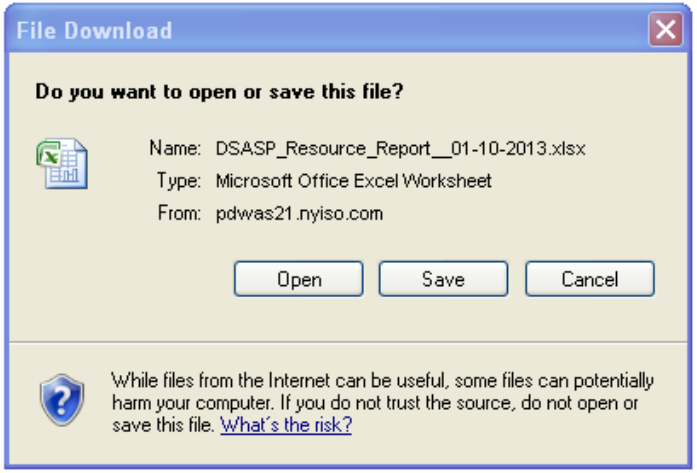
- **Confirm Intent**



- **Download DSASP Resource Report**



- **Save DSASP Resource Report**



Details of the Resource Report are in
Section 5: DSASP Resource Registration for MIS

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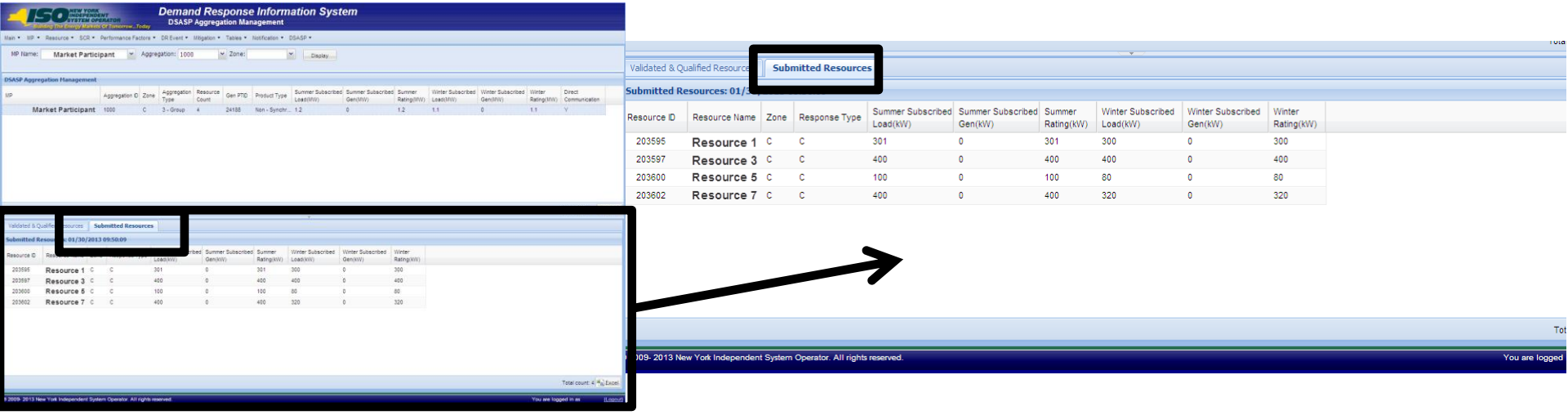
Submitted Resources

- **A resource is viewable on the Submitted Tab once it has been successfully added to a Submittal**
  - ***View resource level details***
    - **Once Submitted, the Aggregation cannot be modified and the resources which are part of the Submission cannot import changes**
  - ***Will be viewable on the Submitted Tab until Submission of Aggregation has been approved or canceled***



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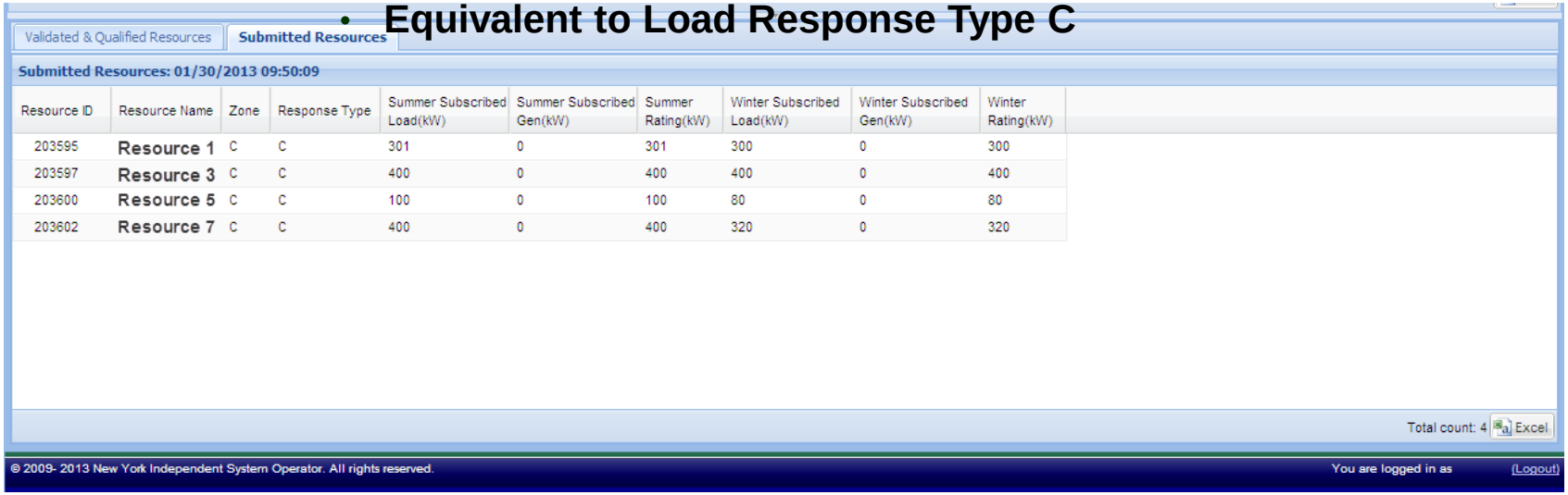
DSASP Resource Details

- **Submitted Resources**
  - ***Resource ID***
  - ***Resource Name***
  - ***Zone***
  - ***Response Type***
  - ***Seasonal Loads***
  - ***Seasonal Generation***
  - ***Seasonal Ratings***
    - **Equivalent to Load plus Generation for Response Types B & G**
    - **Equivalent to Load Response Type C**



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Submitted Resources

- **Successfully Submitting an aggregation will update resources and initiate the following:**
  - ***Resources will be assigned an Enrollment Status of "Submitted"***
  - ***Resources will now appear on the "Submitted Resources" tab on the DSASP Aggregation Management Screen***
    - **Resources will be viewable on the Submitted Tab until Submission of Aggregation has been approved or canceled**
  - ***DRIS will export a portion of the DSASP Registration Packet to the MP, the DSASP Resource Report***
  - ***Aggregation will be viewable on the DSASP Submittals Screen***
    - **DSASP Resource Report can be manually generated from this screen**
  - ***Once an aggregation has been Submitted, changes may not be made to resources or aggregation without first contacting NYISO Stakeholder Services***

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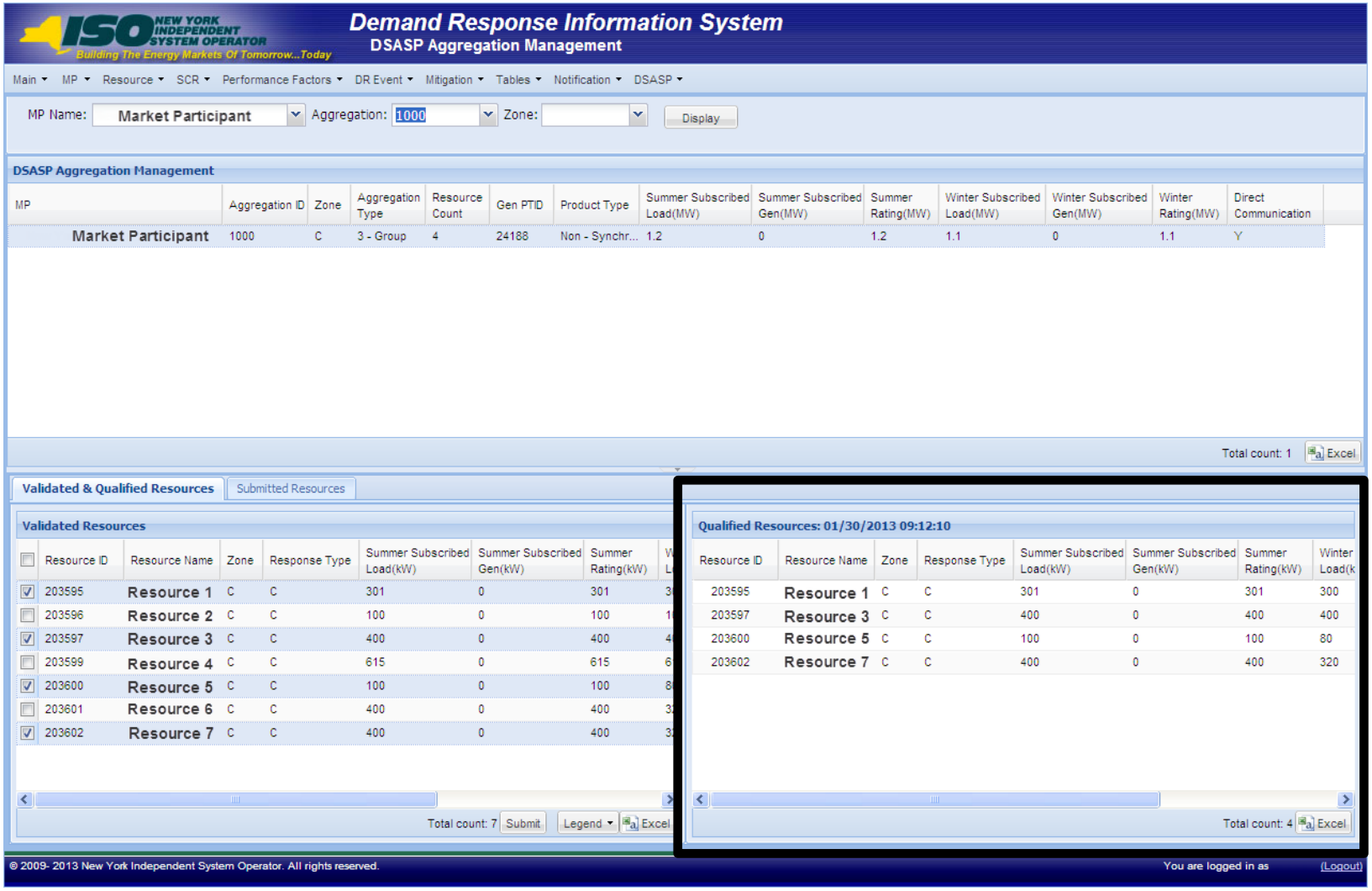
Qualified Resources



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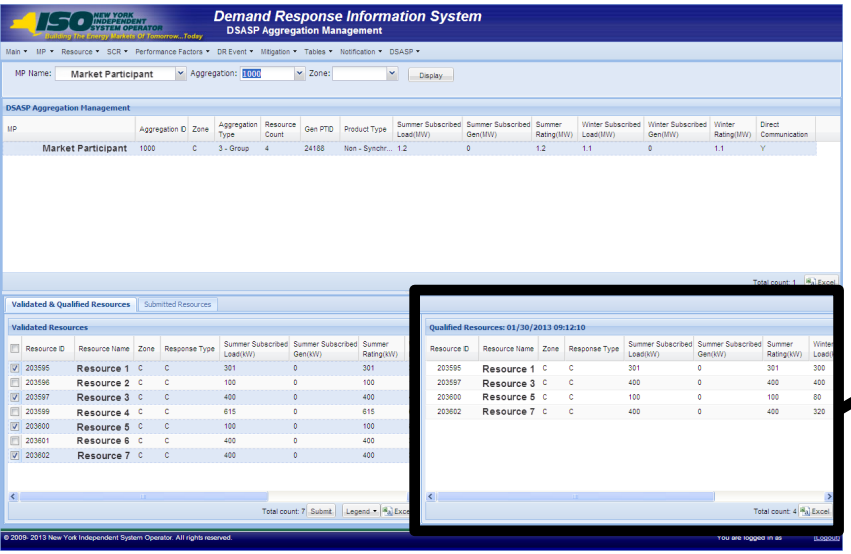
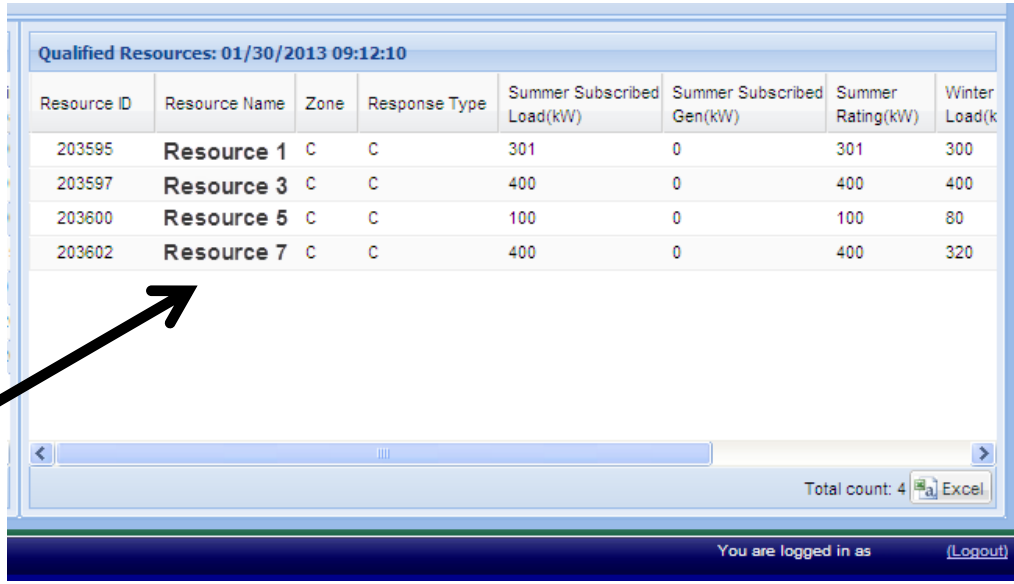
Qualified Resources

- **A Resource has become Qualified when the Aggregation it belongs to has:**
  - ***Finalized the registration process through Member Relations***
  - ***Successfully completed a communications test***
    - **Direct Communication, or**
    - **Through Transmission Owner**
  - ***Successfully completed the appropriate pre-qualification test***





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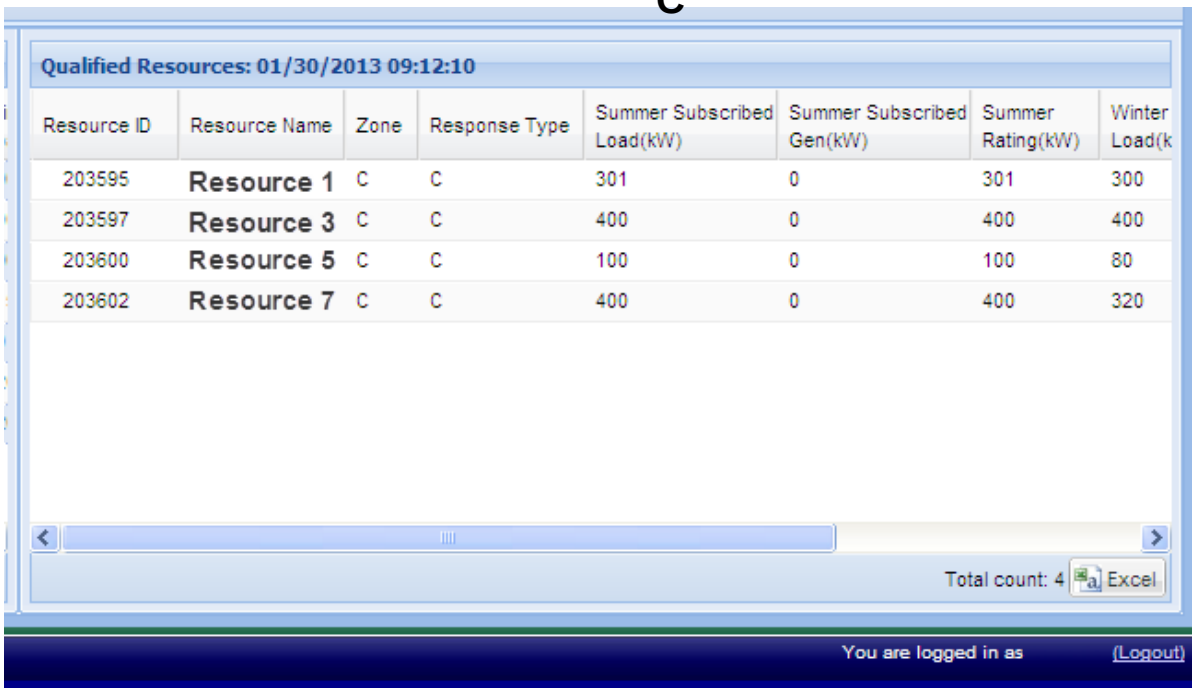
DSASP Resource Details

- **Qualified Resources**
  - *Resource ID*
  - *Resource Name*
  - *Zone*
  - *Response Type*
  - *Seasonal Loads*
  - *Seasonal Generation*
  - *Seasonal Ratings*
    - **Equivalent to Load plus Generation for Response Types B & G**
    - **Equivalent to Load Response Type C**



Qualified Resources: 01/30/2013 09:12:10

Resource ID	Resource Name	Zone	Response Type	Summer Subscribed Load(kW)	Summer Subscribed Gen(kW)	Summer Rating(kW)	Winter Load(k
203595	Resource 1	C	C	301	0	301	300
203597	Resource 3	C	C	400	0	400	400
203600	Resource 5	C	C	100	0	100	80
203602	Resource 7	C	C	400	0	400	320

Total count: 4 Excel

You are logged in as (Logout)

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View Validated Resource Details of Qualified Resource

- **"Checked" Resources**
  - ***A Validated resource will appear checked when:***
    - **The check box is selected and**
    - **A resource is part of a current Submittal and/or**
    - **A resource is part of a Qualified Aggregation**

Validated Resources

☑	Resource ID	Resource Name	Zone	Response Type	Summer Subscribed Load(kW)	Summer Subscribed Gen(kW)	Summer Rating(kW)	Winter Subscribed Load(kW)	W G
☑	203619	Name 1	C	C	800	0	800	800	0
☑	203622	Name 4	C	C	600	0	600	600	0

- **Highlighted Resources**
  - ***A Validated resource will appear highlighted when:***
    - **Both a Validated and Qualified record exist for a resource when one or more resource details do not match**

☑ Rows default to checked if an active Submitted or Qualified record exists.

Row with a Validated record that is different from the Qualified record of the resource.

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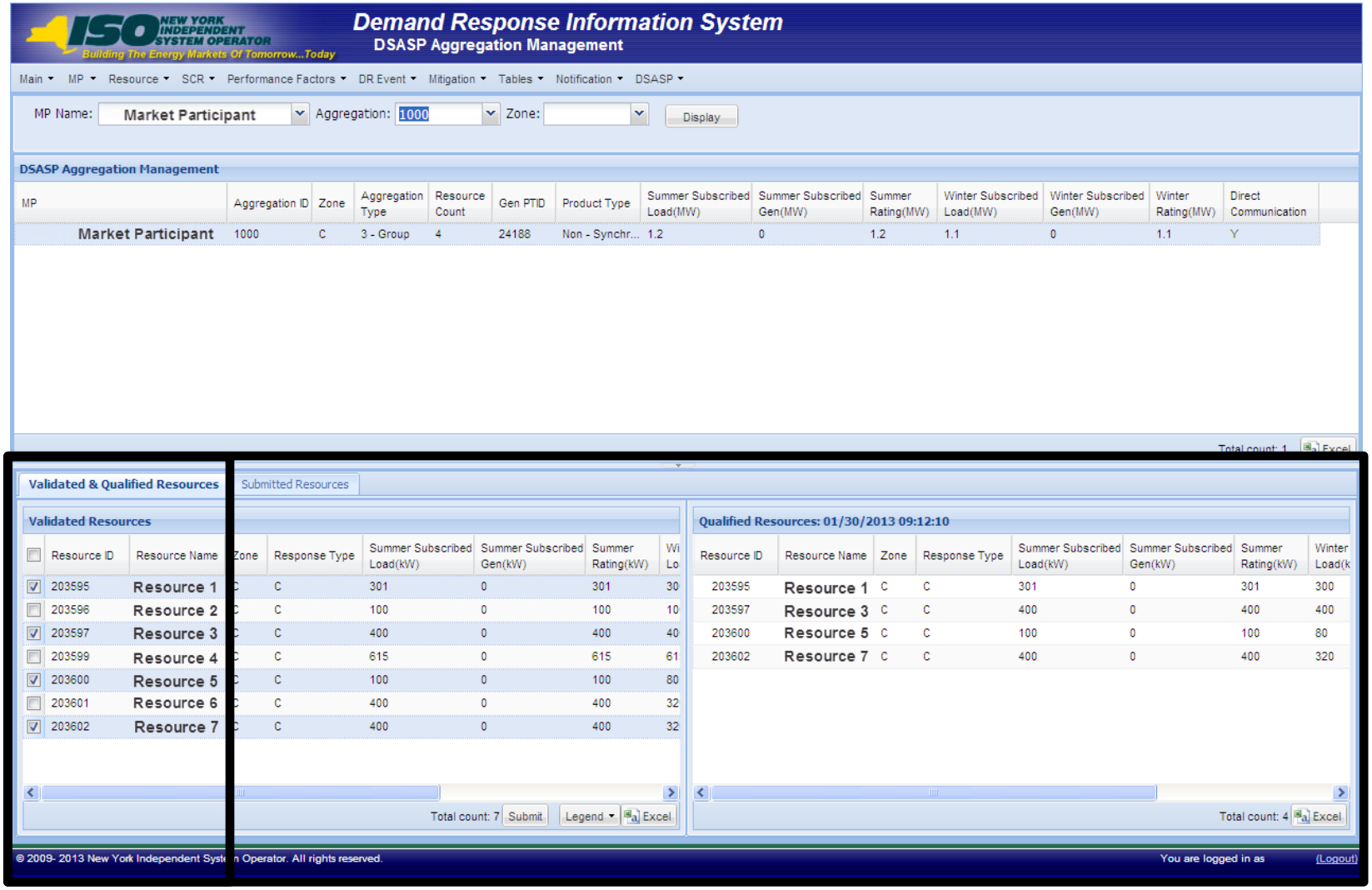
View Qualified DSASP Resource



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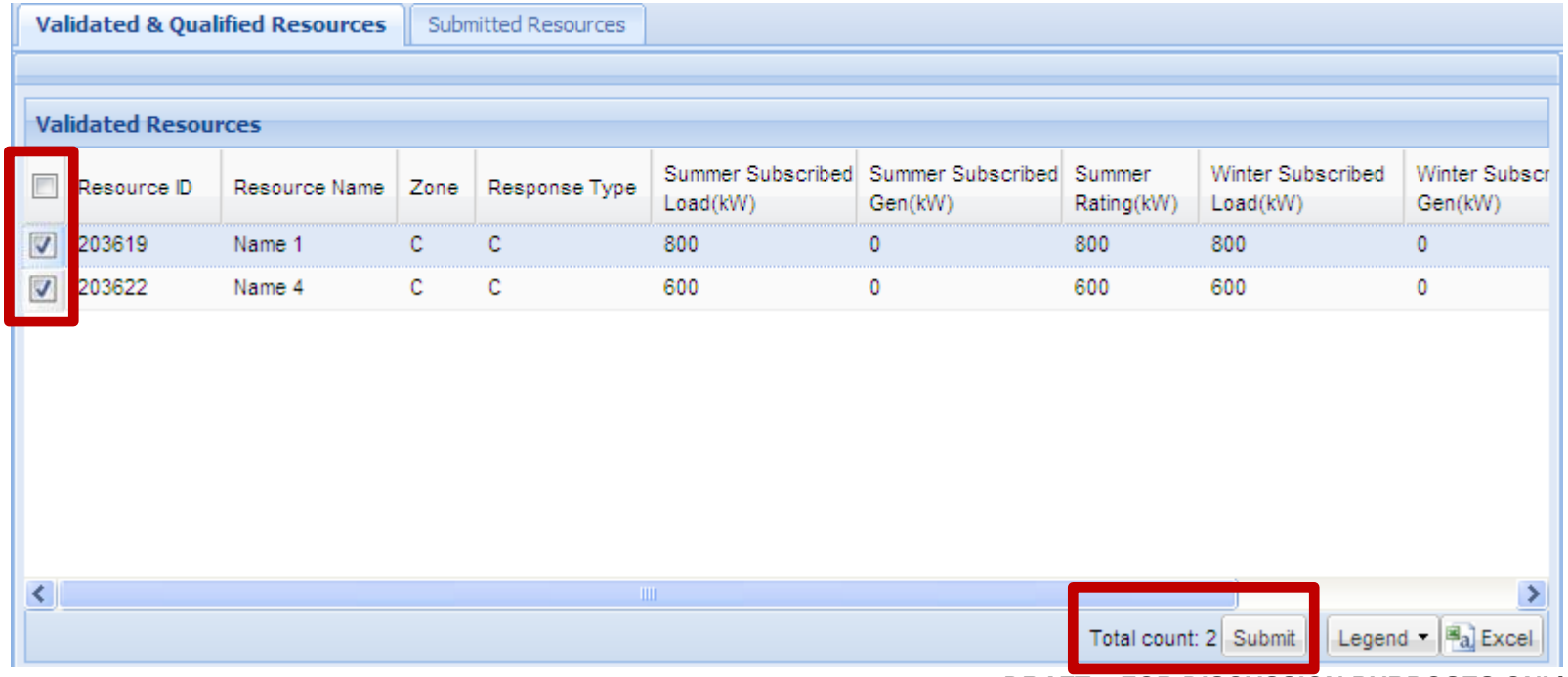
Validated Resources

- **Removing selected resources**
  - ***Un-Check resources you have selected to remove from the aggregation***
  - ***Once finalized, Choose Submit***
  - ***Follow registration process to update DSASP Resource with Member Relations***



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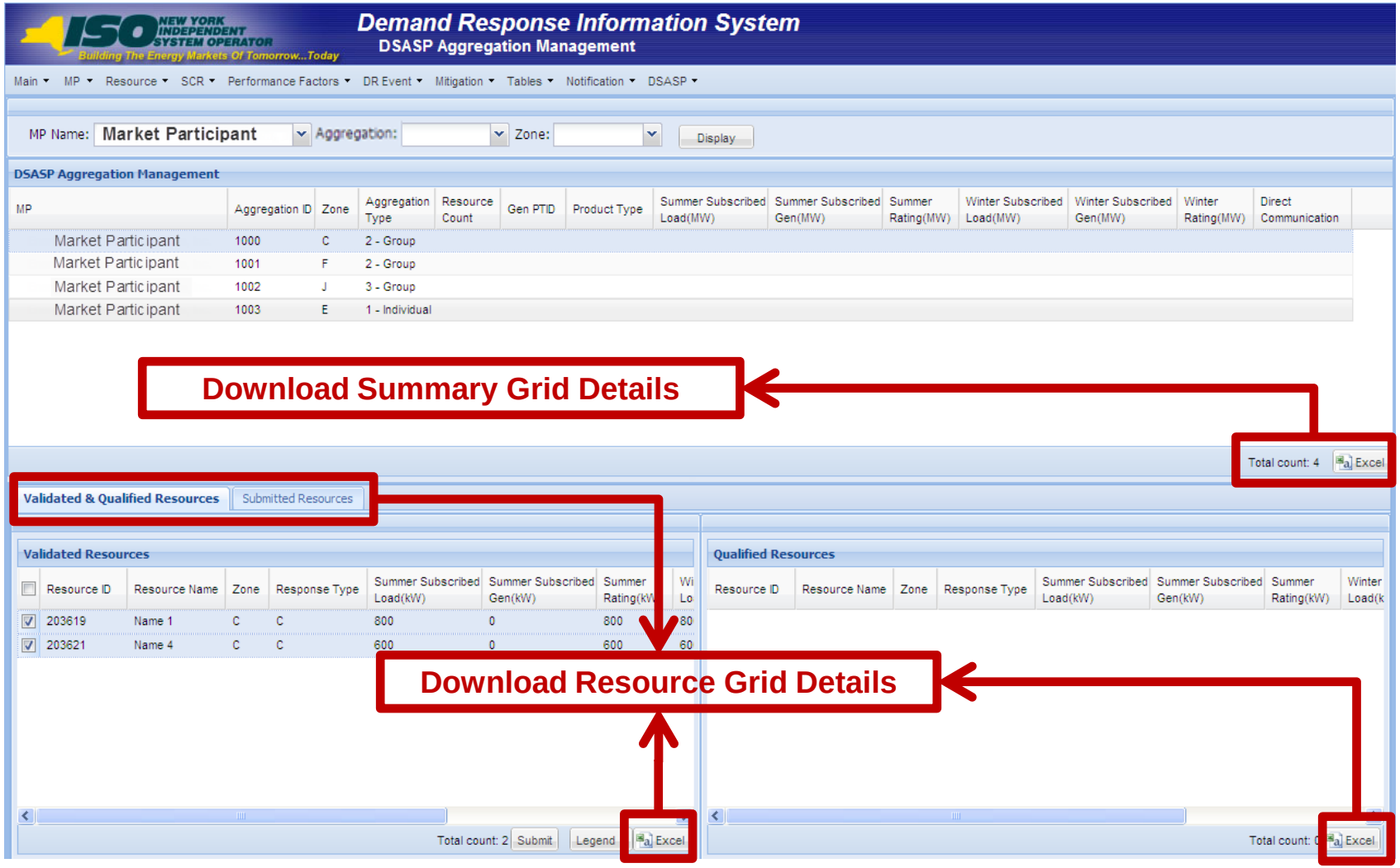
DSASP Resource Details



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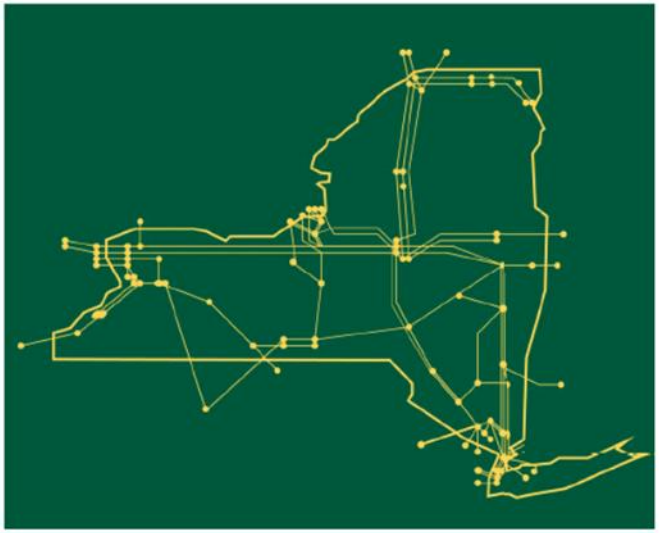

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