

# **Part 7 – Enrollment Screens Demand Response Information System (DRIS) Training for March 2013 Deployment**

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***Tuesday, March 5<sup>th</sup>, 2013 09:00 AM – 12:00 PM***

***Thursday, March 14<sup>th</sup>, 2013 01:00 PM – 04:00 PM***

**Web Ex - Rensselaer, NY**

# Training Topics

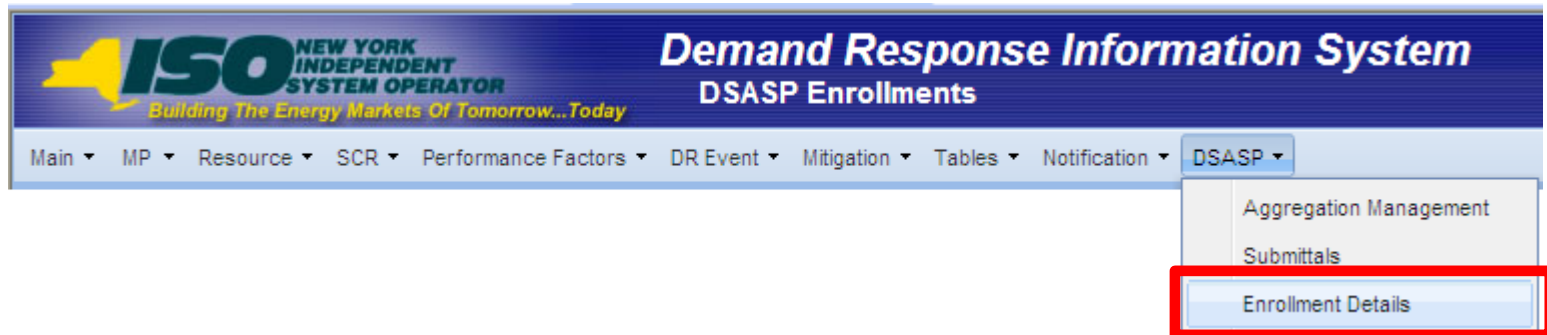
- ◆ Part 1: Introduction to DRIS
  - *DRIS User Requirements*
  - *User Privileges*
  - *Access to DRIS*
- ◆ Part 2: DSASP Overview
- ◆ Part 3: DSASP Resource Enrollment in DRIS
  - *Export Enrollment File*
  - *Import DSASP Resources*
  - *Resource Import Validations*
  - *Manage Import Results*
- ◆ 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*

# Prerequisites to View DSASP Enrollments

- ◆ Prior to viewing DSASP Resources in DRIS, Market Participants must have completed the following:
  - *Successfully imported Demand Side Resources (DSRs) into DRIS for DSASP*

# DSASP Enrollment Details

- ◆ From the DSASP Menu select Enrollment Details



- ◆ Enrollment details are viewable on the DSASP Enrollment Screen
- ◆ An enrollment record will be displayed for a DSASP resource each time the resource has received a new Enrollment Status

# DSASP Enrollment Details

**Demand Response Information System**  
DSASP Enrollments

Main ▾ MP ▾ Resource ▾ SCR ▾ Performance Factors ▾ DR Event ▾ Mitigation ▾ Tables ▾ Notification ▾ DSASP ▾

MP Name: Market Participant ▾ Resource ID: ▾ Zone: ▾ Aggregation: ▾ From Date: [X] [C]  
Gen PTID: ▾ Status: Active Record ▾ To Date: [X] [C] Display ▾

**Search Criteria**

**DSASP Enrollments**

Resource ID	Resource Name	TO Account Number	Status	Begin Effective Date	End Effective Date	Aggregation ID	Gen PTID	Response Type	Product Type	Aggregation Type	Summer Subscribed Load(kW)	Summer Subscribed Gen(kW)	Sum Rate
203625	Name 1	R564867431	Validated	01/14/2013 12:55:33		1009		C	Spinning	2 - Group	800	0	800
203626	Name 2	T963488552	Submitted	01/14/2013 13:47:19		1010		C	Spinning & R...	2 - Group	800	0	800
203627	Name 3	T111983459	Validated	01/14/2013 12:55:33		1011		B	Non - Synchr...	3 - Group	500	500	1000
203628	Name 4	R357814337	Validated	01/14/2013 12:55:33		1009		C	Spinning	2 - Group	600	0	600
203629	Name 5	T468473589	Submitted	01/14/2013 13:47:19		1010		C	Spinning & R...	2 - Group	700	0	700
203630	Name 6	T111934863	Validated	01/14/2013 12:55:33		1011		B	Non - Synchr...	3 - Group	900	700	1600
203631	Name 7	T93728569723	Validated	01/14/2013 12:55:33		1012		C	Spinning & R...	1 - Individual	2300	0	2300

**Resource Details**

*Defaults to Active Records for MP Organization*

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# DSASP Enrollment Details


## ◆ Search Criteria

- *MP Name*
- *Resource ID*
- *Zone*
- *Aggregation*
- *Gen PTID*
- *From/To Dates*

## ■ *Status*

- **Active Record - Default**
  - **Displays most recent enrollment record with no End Effective Date for one of the following Enrollment Statuses**
- **Qualified**
- **Submitted**
- **Validated**
- **Separated**

# DSASP Enrollment Details


Demand Response Information System  
DSASP Enrollments

Main ▾ MP ▾ Resource ▾ SCR ▾ Performance Factors ▾ DR Event ▾ Mitigation ▾ Tables ▾ Notification ▾ DSASP ▾
Search Criteria

MP Name:  Resource ID:  Zone:  Aggregation:  From Date:

Gen PTID:  Status:  To Date:

**DSASP Enrollments**

Resource ID	Resource Name	TO Account Number	Status	Begin Effective Date	End Effective Date	Aggregation ID	Gen PTID	Response Type	Product Type	Aggregation Type	Summer Subscribed Load(kW)	Summer Subscribed Gen(kW)	Sum Ratio
203625	Name 1	R564867431	Submitted	01/14/2013 13:04:04	01/14/2013 13:46:50	1009		C	Spinning	2 - Group	800	0	800
203625	Name 1	R564867431	Validated	01/14/2013 12:55:33		1009		C	Spinning	2 - Group	800	0	800
203626	Name 2	T963498552	Submitted	01/14/2013 13:47:19		1010		C	Spinning & R...	2 - Group	800	0	800
203626	Name 2	T963498552	Validated	01/14/2013 12:55:33		1010		C	Spinning & R...	2 - Group	800	0	800
203627	Name 3	T111963459	Validated	01/14/2013 12:55:33		1011		B	Non - Synchron...	3 - Group	500	500	1000
203628	Name 4	R357814337	Submitted	01/14/2013 13:04:04	01/14/2013 13:46:50	1009		C	Spinning	2 - Group	600	0	600
203628	Name 4	R357814337	Validated	01/14/2013 12:55:33		1009		C	Spinning	2 - Group	600	0	600
203629	Name 5	T468473589	Submitted	01/14/2013 13:47:19		1010		C	Spinning & R...	2 - Group	700	0	700
203629	Name 5	T468473589	Validated	01/14/2013 12:55:33		1010		C	Spinning & R...	2 - Group	700	0	700
203630	Name 6	T111934863	Validated	01/14/2013 12:55:33		1011		B	Non - Synchron...	3 - Group	900	700	1600
203631	Name 7	T93728569723	Validated	01/14/2013 12:55:33		1012		C	Spinning & R...	1 - Individual	2300	0	2300

Resource Details

All DSASP records for MP Organization

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# DSASP Enrollment Details

- ◆ **Example:**
  - *Resource ID 203700 was successfully imported, creating a record with a Validated Enrollment Status*
  - *Resource ID 203700 has an Enrollment Status of Submitted with an End Effective Date, which indicates the resource was either selected in the submission of Aggregation 1027 and that the aggregation became Qualified (Similarly possible when the submission is canceled)*
  - *Resource ID 203700 has an Enrollment Status of Qualified with a Null End Effective Date, which indicates the resource is currently participating as part of a DSASP Resource in the Ancillary Services Market*
  - *If another submission of Aggregation 1027 occurs and Resource ID 203700 is selected to remain in the Qualified Aggregation, the resource would have an additional record with an Enrollment Status of Submitted with no End Effective Date*

DSASP Enrollments												
Resource ID	Resource Name	TO Account Number	Status	Begin Effective Date	End Effective Date	Aggregation ID	Gen PTID	Response Type	Product Type	Aggregation Type	Summer Subscribed Load(kW)	Su Ge
203700	Name 15	R257914884237	Qualified	01/30/2013 13:28:59		1027	24188	C	Non - Synchr...	1 - Individual	1000	0
203700	Name 15	R257914884237	Submitted	01/29/2013 10:40:37	01/30/2013 13:28:58	1027	24188	C	Non - Synchr...	1 - Individual	1000	0
203700	Name 15	R257914884237	Validated	01/28/2013 11:18:08		1027	24188	C	Non - Synchr...	1 - Individual	1000	0



# DSASP Enrollment Details

## ◆ Resource Details

- *Resource ID*
- *Resource Name*
- *TO Account Number*
- *Status*
- *Begin Effective Date*
- *End Effective Date*
- *Aggregation ID*
- *Gen PTID*
- *Response Type*
- *Product Type*
- *Aggregation Type*
- *Seasonal Values*
- *Direct Communication*
- *DSASP Authorization*
- *Zone*
- *Subload Pocket*
- *Gen Type*
- *Gen Rating*
- *TO*
- *Address*

# Separating a DSR from MP Portfolio

# Separating a DSR from MP Portfolio

- ◆ **Validated**
  - *When the only resource record with no End Effective Date is a Validated record, the resource can be immediately Separated from an aggregation*
- ◆ **Submitted**
  - *A Submitted record exists with no End Effective Date*
  - *A resource cannot be Separated when it is part of an active Submittal*
- ◆ **Qualified**
  - *A Qualified record exists with no End Effective Date*
  - *A resource cannot be Separated when it is part of a Qualified Aggregation*
  - *The resource must be removed from active participation in the Qualified Aggregation through the Submittal process, before separating*

# DSASP Enrollment Details

## ◆ Separating a resource

**Demand Response Information System**  
DSASP Enrollments

Main ▾ MP ▾ Resource ▾ SCR ▾ Performance Factors ▾ DR Event ▾ Mitigation ▾ Tables ▾ Notification ▾ DSASP ▾

MP Name: Market Participant ▾ Resource ID: ▾ Zone: ▾ Aggregation: ▾ From Date: [X] [?] To Date: [X] [?] Status: Active Record ▾ **Display ▾**

Resource ID	Resource Name	TO Account Number	Status	Begin Effective Date	End Effective Date	Aggregation ID	Gen PTID	Resource Type	Product Type	Aggregation Type	Summer Subscribed Load(kW)	Summer Subscribed Gen(kW)	Sum
203625	Name 1	R564867431	Validated	01/14/2013 12:55:33		1009		C	Spinning	2 - Group	800	0	800
203626	Name 2	T963498552	Submitted	01/14/2013 13:47:19		1010		C	Spinning & R...	2 - Group	800	0	800
203627	Name 3	T111963489	Validated	01/14/2013 12:55:33		1011		B	Non - Synchron...	3 - Group	500	500	1000
203628	Name 4	R357814337	Validated	01/14/2013 12:55:33		1009		C	Spinning	2 - Group	600	0	600
203630	Name 6	T111934863	Validated	01/14/2013 12:55:33		1011		B	Non - Synchron...	3 - Group	900	700	1600
203631	Name 7	T93728569723	Validated	01/14/2013 12:55:33		1012		C	Spinning & R...	1 - Individual	2300	0	2300

**Search, Select, Separate**

Displaying 1 - 7 of 7 **Separate**

Displaying 1 - 7 of 7 **Separate**

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# DSASP Enrollment Details


## ◆ Separating a resource - Validated

- Choose a resource which has only a Validated Enrollment record with a null end effective date

DSASP Enrollments					
Resource ID	Resource Name	TO Account Number	Status	Begin Effective Date	End Effective Date
203622	Name 1	N11115	Validated	01/30/2013 14:52:28	

- Confirm separation

**Confirm** ✕

 Separating the resource will remove the resource from the Market Participant's portfolio and cannot be undone. Please confirm?

- Successfully separating a resource will end-date the Validated Enrollment record

DSASP Enrollments					
Resource ID	Resource Name	TO Account Number	Status	Begin Effective Date	End Effective Date
203622	Name 1	N11115	Validated	01/30/2013 14:52:28	01/31/2013 15:18:51

- Successfully separating a resource will begin-date a resource Enrollment record of Separated

DSASP Enrollments					
Resource ID	Resource Name	TO Account Number	Status	Begin Effective Date	End Effective Date
203622	Name 1	N11115	Separated	01/31/2013 15:18:52	

# DSASP Enrollment Details


## ◆ Separating a resource - Qualified

- *Choose a resource which has a Qualified Enrollment record with a null end effective date*

DSASP Enrollments					
Resource ID	Resource Name	TO Account Number	Status	Begin Effective Date	End Effective Date
R235986	Name 1	N11115	Qualified	01/30/2013 14:52:28	

- *Confirm separation*

**Confirm** ✕

 Separating the resource will remove the resource from the Market Participant's portfolio and cannot be undone. Please confirm?

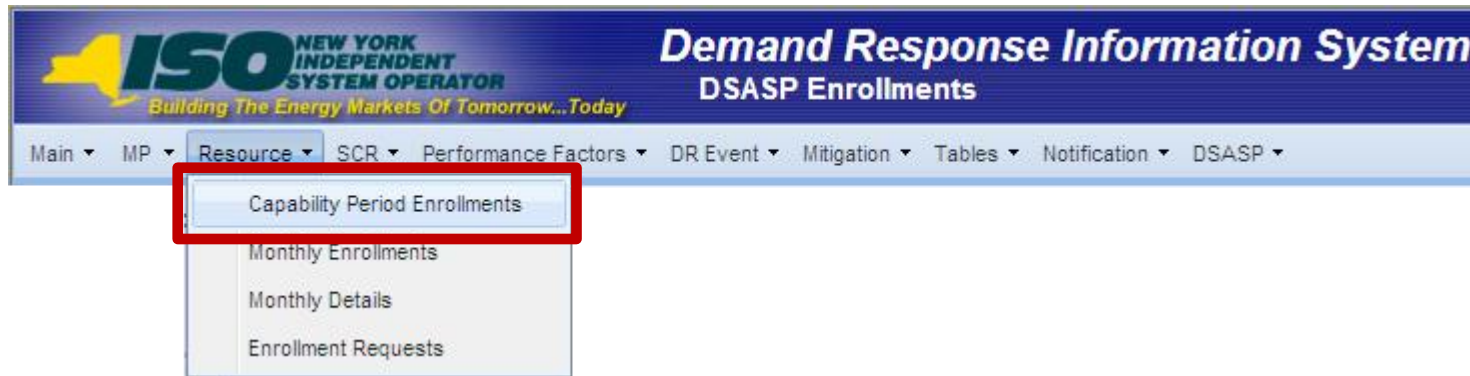
- *Exception error will display*

Exceptions			
Field Name	Field Value	Exception Code	Unique Id
Status		To change the selected enrollment to Separated, it cannot have a status of Submitted or Qualified.	Resource ID:203603

# **DSASP Resource Enrollment Information on the Capability Period Enrollments Screen**

# DSASP Resource Enrollment Information

- ◆ From the Resource Menu select Capability Period Enrollments



- *Existing Screen*
- *Additional view of DSASP resource enrollment and reliability program enrollment information*
  - When the resource is enrolled in an economic and reliability program with the same MP



# Resource Capability Period Enrollments

**Search Criteria**

MP Name: Market Participant    Resource ID:    Capability Period: Winter 2012-2013    Program: DSASP    Zone:    Display

**Summary of Enrollment Information**

Resource ID	Resource Name	Capability Period	Zone	Sub-load Pocket	Approval Date	Enrollment Date	Approval Date	Enrollment Date	Enrollment Date
203625	Name 1								01/14/2013
203626	Name 2		F						01/14/2013
203627	Name 3								01/14/2013
203628	Name 4								01/14/2013
203629	Name 5		F						01/14/2013
203630	Name 6		J						01/14/2013
203631	Name 7		E						01/14/2013

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**Resource Details**

Resource Name:    Zone:    Sub-load Pocket:    Meter Installation Date:    Small Customer:

**Program Capability Details**

Enrollment Date:    PMD Date 1:    PMD Hour 1:    PMD kW 1:    Question:    PMD Date 2:    PMD Hour 2:    PMD kW 2:    PMD Date 3:    PMD Hour 3:    PMD kW 3:    PMD Date 4:    PMD Hour 4:    PMD kW 4:

**Resource Details**

**SCR/EDRP Details**

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# Resource Capability Period Enrollments

## ◆ Search Criteria


- *MP Name*
- *Resource ID*
- *Capability Period*
- *Program*
  - Now includes DSASP
- *Zone*

# Resource Capability Period Enrollments

- ◆ **Search results – DSASP Enrollment Only**
  - *Resource Summary Information - Fields Displayed*
    - Resource ID
    - Resource Name
    - Capability Period
    - Zone
    - Sub-load Pocket – If applicable
    - SCR/EDRP Approval Date – No Information displayed if not enrolled in a Reliability Program
    - SCR/EDRP Enrollment Date – No Information displayed if not enrolled in a Reliability Program
    - DSASP Enrollment Date

# Resource Capability Period Enrollments

- ◆ Search results – DSASP only


Demand Response Information System  
Resource Capability Period Enrollments

Main ▾ MP ▾ Resource ▾ SCR ▾ Performance Factors ▾ DR Event ▾ Mitigation ▾ Tables ▾ Notification ▾ DSASP ▾

MP Name:  Resource ID:  Capability Period:  Program:  Zone:

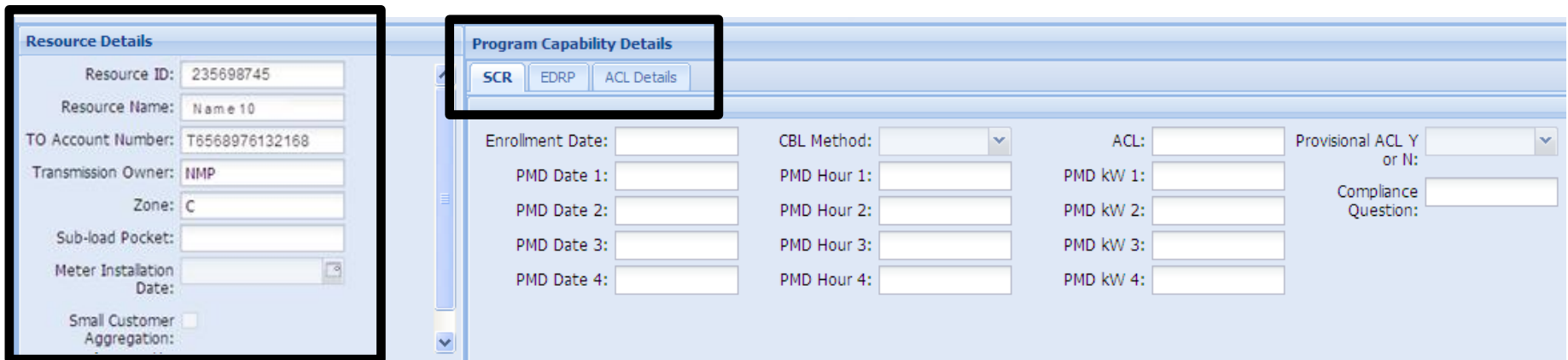
### Capability Period Enrollments

Resource ID	Resource Name	Capability Period	Zone	Sub-load Pocket	SCR		EDRP		DSASP
					Approval Date	Enrollment Date	Approval Date	Enrollment Date	Enrollment Date
203625	Name 1		C						01/14/2013
203626	Name 2		F						01/14/2013
203627	Name 3		J						01/14/2013
203628	Name 4		C						01/14/2013
203629	Name 5		F						01/14/2013
203630	Name 6		J						01/14/2013
203631	Name 7		E						01/14/2013

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# Resource Capability Period Enrollments

- ◆ Search results – DSASP only
  - *Bottom half of screen*
  - *Program Capability Details will remain blank unless also enrolled in SCR or EDRP with same MP, in Capability Period defined in search criteria*



**Resource Details**

Resource ID: 235698745

Resource Name: Name 10

TO Account Number: T6568976132168

Transmission Owner: NMP

Zone: C

Sub-load Pocket:

Meter Installation Date:

Small Customer Aggregation:

**Program Capability Details**

SCR EDRP ACL Details

Enrollment Date:

CBL Method:

ACL:

Provisional ACL Y or N:

PMD Date 1:

PMD Hour 1:

PMD kW 1:

PMD Date 2:

PMD Hour 2:

PMD kW 2:

PMD Date 3:

PMD Hour 3:

PMD kW 3:

PMD Date 4:

PMD Hour 4:

PMD kW 4:


Compliance Question:

# Resource Capability Period Enrollments

- ◆ **Search results – Joint Enrollment in Economic and Reliability Programs with same MP**
  - ***Resource Summary - Fields displayed***
    - Resource ID
    - Resource Name
    - Capability Period
    - Zone
    - Sub-load Pocket – If applicable
    - SCR/EDRP Approval Date
    - SCR/EDRP Enrollment Date
    - DSASP Enrollment Date

# Resource Capability Period Enrollments

- ◆ Search results – Joint Enrollment


Demand Response Information System  
Resource Capability Period Enrollments

Main ▾ MP ▾ Resource ▾ SCR ▾ Performance Factors ▾ DR Event ▾ Mitigation ▾ Tables ▾ Notification ▾ DSASP ▾

MP Name:

Resource ID:

Capability Period:

Program:

Zone:

Display ▾

**Capability Period Enrollments**

Resource ID	Resource Name	Capability Period	Zone	Sub-load Pocket	SCR		EDRP		DSASP
					Approval Date	Enrollment Date	Approval Date	Enrollment Date	Enrollment Date
235698745	Name 10	Winter 2012-2013	C		12/29/2012	12/28/2012			01/14/2013

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Displayin

# Resource Capability Period Enrollments

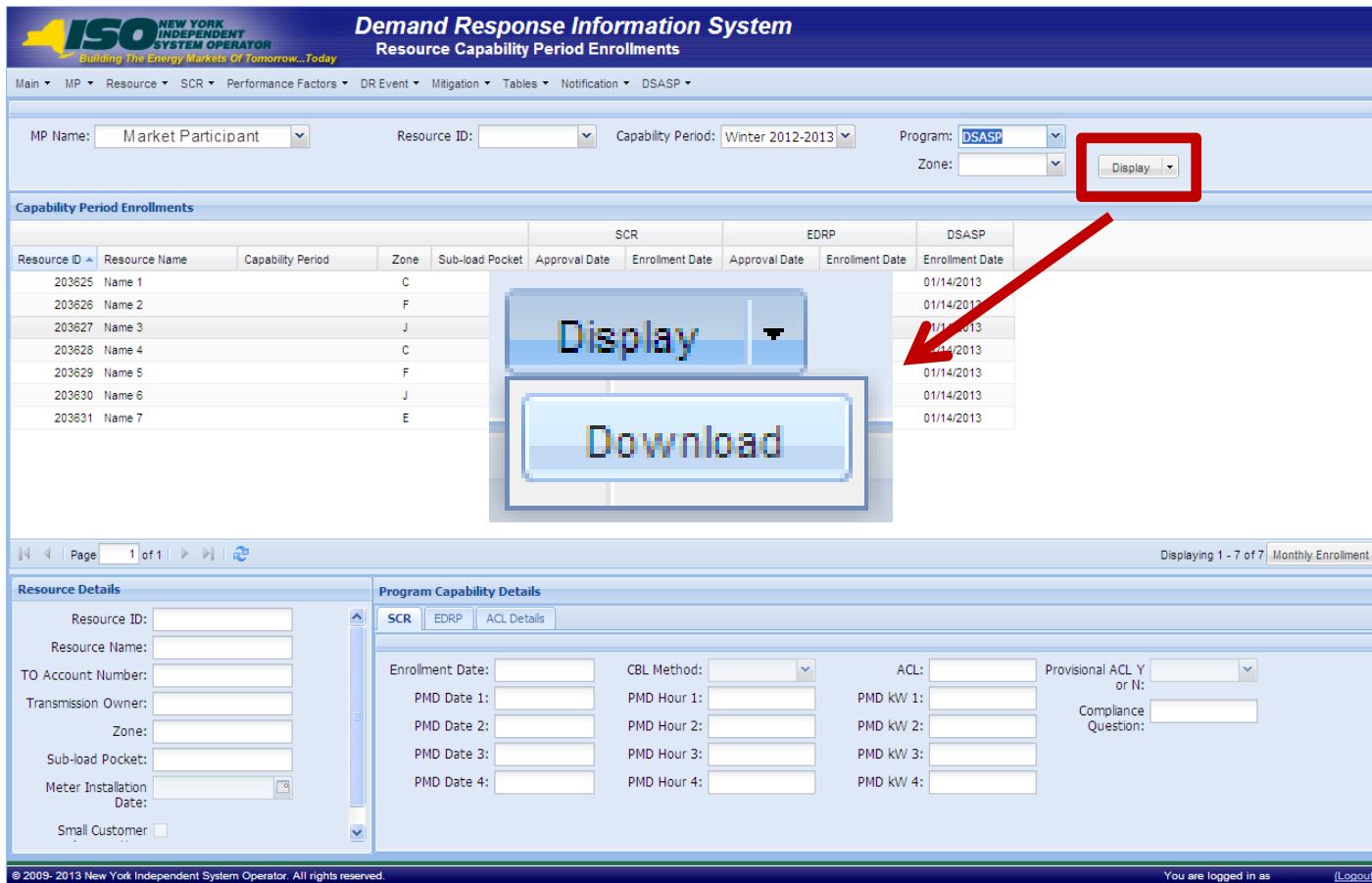
- ◆ Search results – Joint Enrollment
  - *Bottom half of screen*
  - *Program Capability Details pertains to the record for SCR/EDRP only*
  - *Fields displayed as applicable*

Resource Details		Program Capability Details			
Resource ID:	235698745	SCR	EDRP	ACL Details	
Resource Name:	Name 10	Enrollment Date:	12/28/2012	CBL Method:	W
TO Account Number:	T6568976132168	ACL:	500	Provisional ACL Y or N:	N
Transmission Owner:	NMP	Compliance Question:			
Zone:	C				
Sub-load Pocket:					
Meter Installation Date:					
Small Customer Aggregation:	<input type="checkbox"/>				



# Resource Capability Period Enrollments

- ◆ Download Search results



**Demand Response Information System**  
Resource Capability Period Enrollments

Main ▾ MP ▾ Resource ▾ SCR ▾ Performance Factors ▾ DR Event ▾ Mitigation ▾ Tables ▾ Notification ▾ DSASP ▾

MP Name:  Resource ID:  Capability Period:  Program:  Zone:  Display ▾

**Capability Period Enrollments**

Resource ID	Resource Name	Capability Period	Zone	Sub-load Pocket	Approval Date	Enrollment Date	Approval Date	Enrollment Date	Enrollment Date
203625	Name 1		C						01/14/2013
203626	Name 2		F						01/14/2013
203627	Name 3		J						01/14/2013
203628	Name 4		C						01/14/2013
203629	Name 5		F						01/14/2013
203630	Name 6		J						01/14/2013
203631	Name 7		E						01/14/2013

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**Resource Details**

Resource ID:   
 Resource Name:   
 TO Account Number:   
 Transmission Owner:   
 Zone:   
 Sub-load Pocket:   
 Meter Installation Date:   
 Small Customer:

**Program Capability Details**

SCR | EDRP | ACL Details

Enrollment Date:  CBL Method:  ACL:  Provisional ACL Y or N:   
 PMD Date 1:  PMD Hour 1:  PMD kW 1:  Compliance Question:   
 PMD Date 2:  PMD Hour 2:  PMD kW 2:   
 PMD Date 3:  PMD Hour 3:  PMD kW 3:   
 PMD Date 4:  PMD Hour 4:  PMD kW 4:

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# Appendix

- ◆ **DSASP Enrollment Statuses**
  - *Begin Effective Dating*
  - *End Effective Dating*

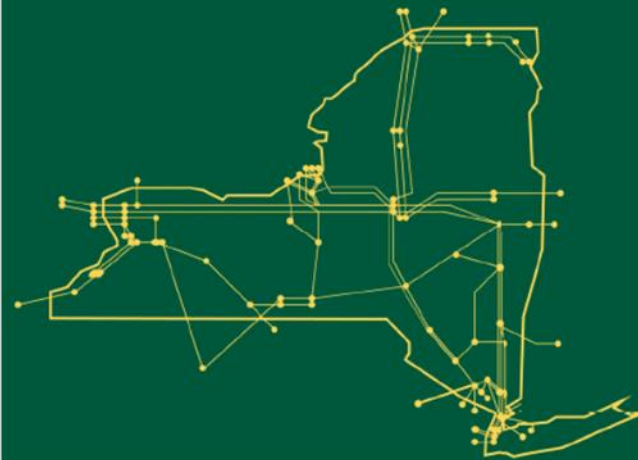
# DSASP Enrollment Statuses

Status	Begin Effective Date (when the record is created)	End Effective Date
<b>Validated</b>	<p><b>A new Validated record is created when:</b></p> <ul style="list-style-type: none"> <li>• The resource is initially imported successfully into DRIS</li> <li>• Each time an update to the resource is imported successfully into DRIS</li> </ul>	<p><b>The Validated record remains active until:</b></p> <ul style="list-style-type: none"> <li>• An update is imported into DRIS which creates a new Validated record</li> <li>• The resource is Separated from the Market Participant portfolio</li> </ul>
<b>Submitted</b>	<p><b>A new Submitted record is created when:</b></p> <ul style="list-style-type: none"> <li>• The resource is included in the submission of the Aggregation to either become or remain part of the Qualified Aggregation</li> <li>• The resource is currently part of the Qualified Aggregation and is being submitted for removal from the Qualified Aggregation (this <u>does not</u> remove the resource from a Validated Status in the aggregation)</li> </ul>	<p><b>The Submitted record remains active until:</b></p> <ul style="list-style-type: none"> <li>• The Submitted Aggregation becomes Qualified</li> <li>• The submission of the aggregation is Canceled</li> </ul>

# DSASP Enrollment Statuses

Status	Begin Effective Date (when the record is created)	End Effective Date
<b>Qualified</b>	<p><b>A new Qualified record is created when:</b></p> <ul style="list-style-type: none"> <li>• The Submitted Aggregation becomes Qualified <u>and</u> the resource was submitted to either become or remain part of the Qualified Aggregation</li> </ul>	<p><b>The Qualified record remains active until:</b></p> <ul style="list-style-type: none"> <li>• The resource was submitted on a subsequent Submission of the Aggregation to remain part of the Qualified Aggregation and a new Qualified record has been created for the resource based on the new Submission of the Aggregation becoming Qualified</li> <li>• The resource was submitted on a subsequent Submission of the Aggregation to be removed from the aggregation and the new Submission of the Aggregation becoming Qualified</li> <li>• The resource is Separated from the MP portfolio</li> </ul>
<b>Separated</b>	<p><b>A new Separated record is created when:</b></p> <ul style="list-style-type: none"> <li>• The resource is Separated from the MP portfolio</li> </ul>	<p><b>The Separated record remains active until:</b></p> <ul style="list-style-type: none"> <li>• The resource is re-enrolled with the MP in DSASP</li> </ul>

The New York Independent System Operator (NYISO) is a not-for-profit corporation responsible for operating the state's bulk electricity grid, administering New York's competitive wholesale electricity markets, conducting comprehensive long-term planning for the state's electric power system, and advancing the technological infrastructure of the electric system serving the Empire State.



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