



Demand Response Information System (DRIS) Training for June 2010 Deployment Part 5 – Aggregations

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May 11, 2010 1:00 pm – 4:00 pm
May 17, 2010 1:00 pm – 4:00 pm (Webex only)
June 8, 2010 9:00 am – 12:00 pm

Rensselaer, NY

Training Topics

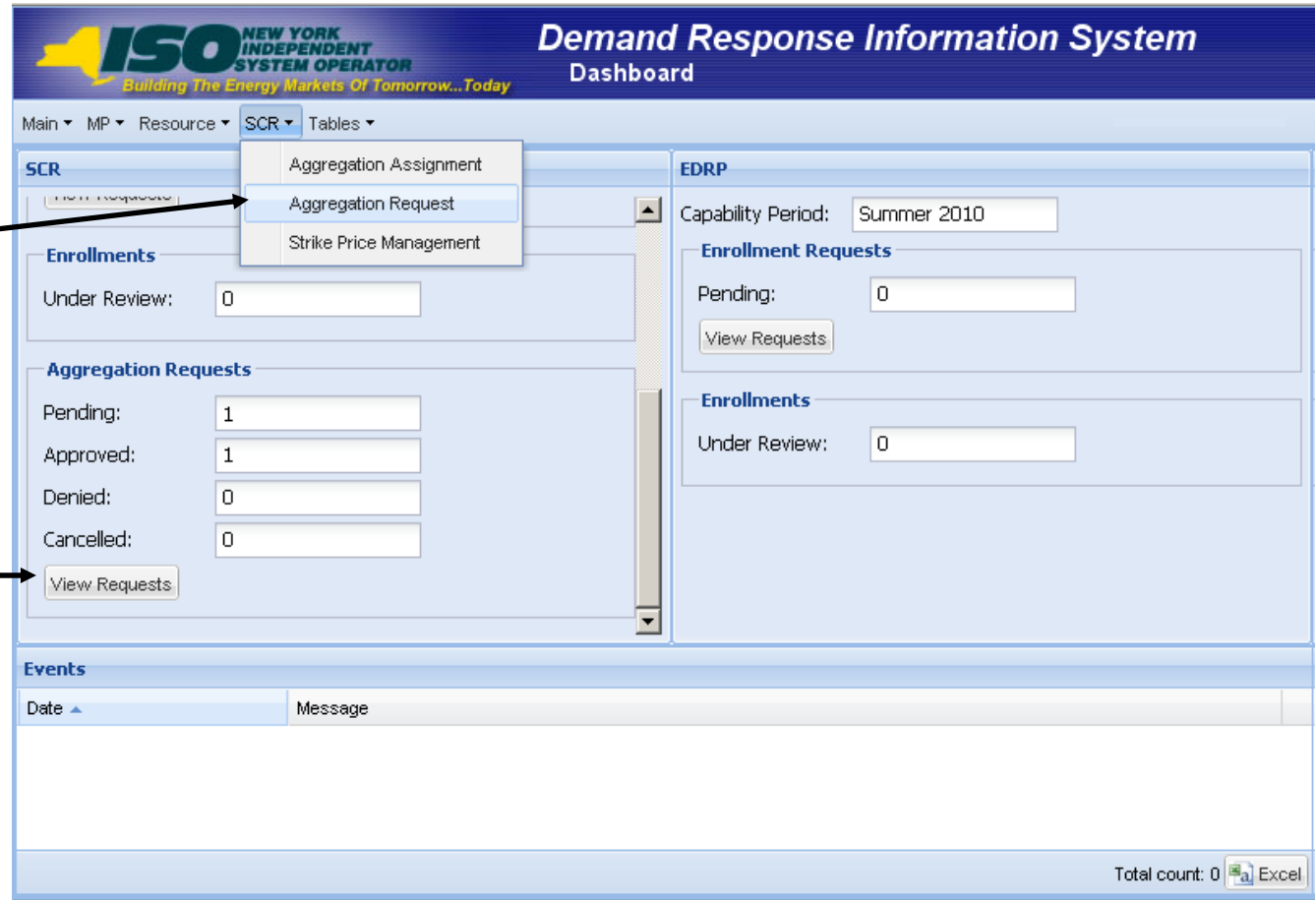
- ◆ Part 1: Introduction to DRIS
 - *DRIS User Requirements*
 - *Accessing DRIS*
 - *DRIS User Interface features*
 - *Terminology*
 - *Dashboard*
 - *DRIS Calendar*
 - *SCR and EDRP Activity Timelines*
- ◆ Part 2: Imports and Exports
- ◆ Part 3: Resource Import File
 - *Import Exceptions*
- ◆ Part 4: Post-Import Operations
 - *View Pending Records*
- ◆ Part 5: Aggregations
 - *Requesting Aggregation IDs*
 - *Aggregation Management*
 - *Strike Price*
- ◆ Part 6: Other DRIS Operations
 - *UCAP Report*
 - *Viewing Resource Information*
- ◆ Part 7: Training, Market Trials and Deployment
 - *Additional DRIS Training sessions for June Deployment*
 - *Market Trials*
 - *Deployment*

Requesting a New Aggregation ID

- ◆ From the SCR Menu, select "Aggregation Request"

OR

- ◆ From the Dashboard, select "View Requests" under Aggregation Requests

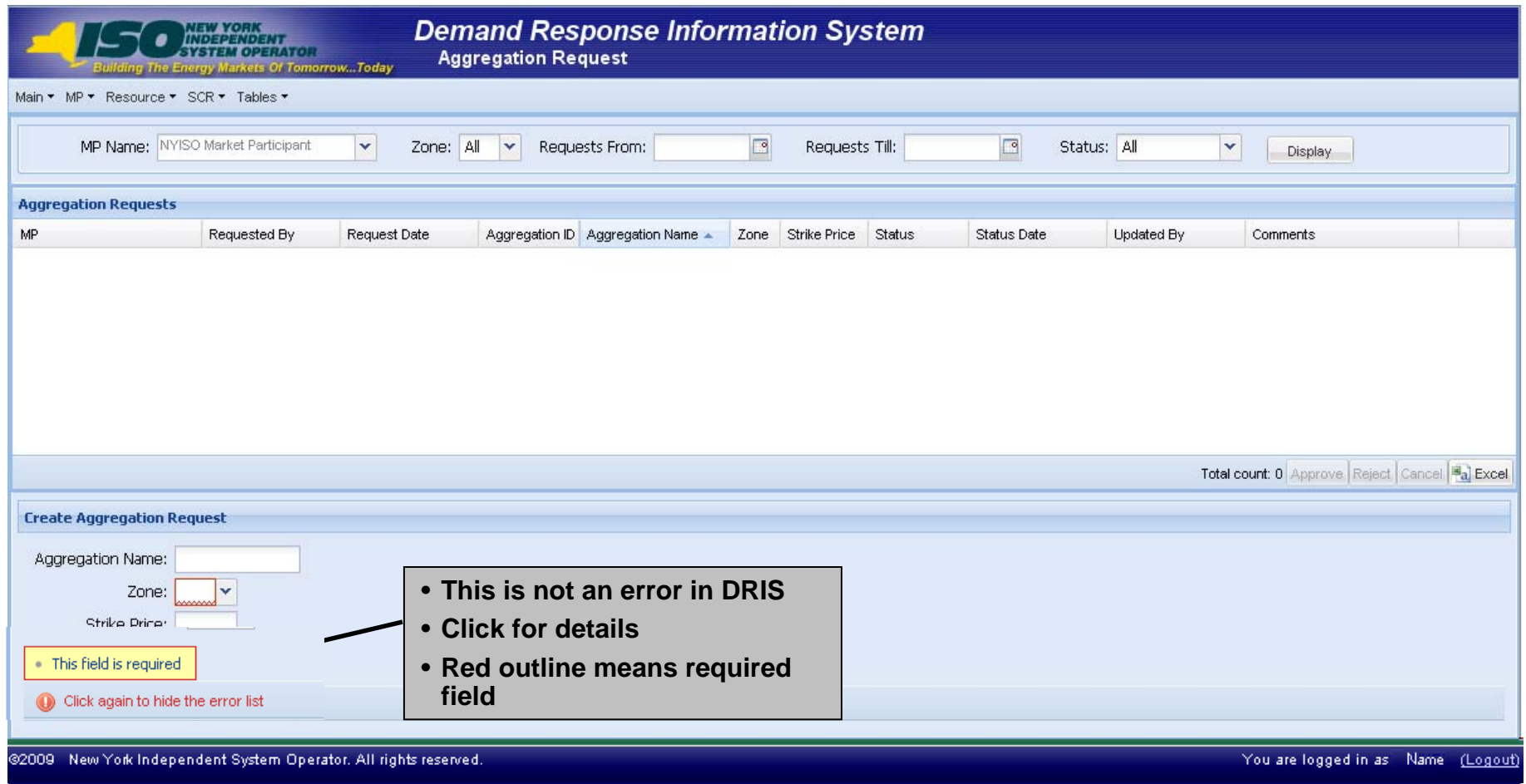


The screenshot shows the 'Demand Response Information System Dashboard' with the following components:

- Navigation:** Main ▾ MP ▾ Resource ▾ SCR ▾ Tables ▾
- SCR Section:**
 - Aggregation Assignment
 - Aggregation Request (highlighted)
 - Strike Price Management
- Enrollments:** Under Review: 0
- Aggregation Requests:**
 - Pending: 1
 - Approved: 1
 - Denied: 0
 - Cancelled: 0
 - View Requests (button)
- EDRP Section:**
 - Capability Period: Summer 2010
 - Enrollment Requests: Pending: 0, View Requests (button)
 - Enrollments: Under Review: 0
- Events:** Table with columns Date and Message.
- Footer:** Total count: 0, Excel icon

Aggregation Request Screen

- ◆ Select any filter options from the drop-down lists
- ◆ Click “Display” to see existing Aggregation ID Requests



Demand Response Information System
Aggregation Request

Main ▾ MP ▾ Resource ▾ SCR ▾ Tables ▾

MP Name: NYISO Market Participant ▾ Zone: All ▾ Requests From: Requests Till: Status: All ▾

Aggregation Requests

MP	Requested By	Request Date	Aggregation ID	Aggregation Name	Zone	Strike Price	Status	Status Date	Updated By	Comments
Total count: 0 <input type="button" value="Approve"/> <input type="button" value="Reject"/> <input type="button" value="Cancel"/> <input type="button" value="Excel"/>										

Create Aggregation Request

Aggregation Name:

Zone: ▾


Strike Price:

• This field is required

- This is not an error in DRIS
- Click for details
- Red outline means required field

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View Aggregation ID Requests


Demand Response Information System
Aggregation Request

Main ▾ MP ▾ Resource ▾ SCR ▾ Tables ▾

MP Name:
Zone:
Requests From:
Requests Till:
Status:

Aggregation Requests

MP	Requested By	Request Date	Aggregation ID	Aggregation Name	Zone	Strike Price	Status	Status Update Date	Status Update By	Comments
NYISO Market Participant	Daniel Jackson	05/07/2010 17:28:56		Large Aggregation	J	500	Pending			
NYISO Market Participant	Daniel Jackson	05/03/2010 10:47:33	23416	Special Aggregation	F	499	Approved	05/10/2010	Samantha Carter	

Total count: 0

Create Aggregation Request

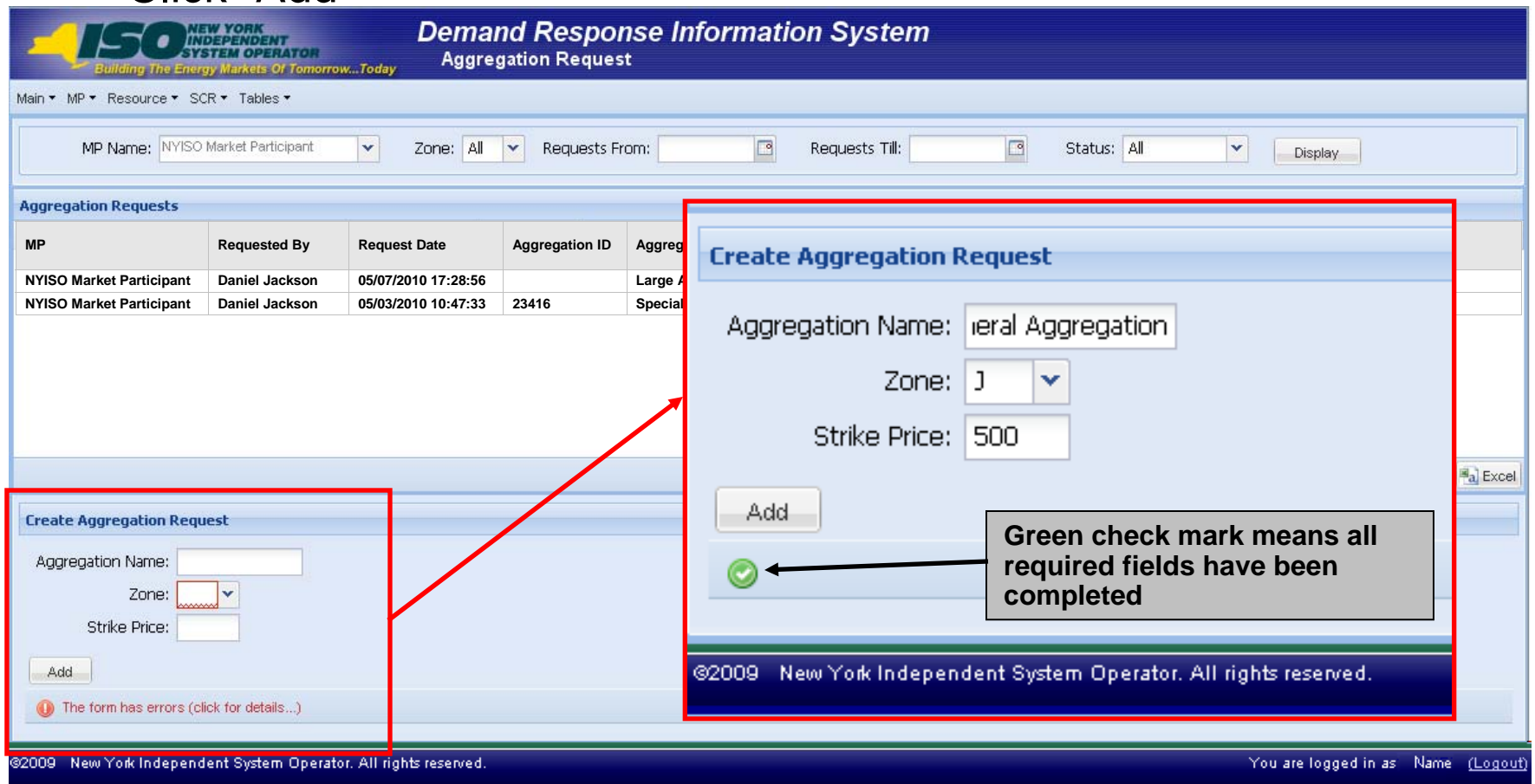
Aggregation Name:
Zone:
Strike Price:

❗ The form has errors (click for details...)

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Create an Aggregation ID Request

- ◆ Enter Aggregation Name, select Zone from the drop-down list and enter initial Strike Price
- ◆ Click “Add”



Demand Response Information System
Aggregation Request

Main ▾ MP ▾ Resource ▾ SCR ▾ Tables ▾

MP Name: NYISO Market Participant ▾ Zone: All ▾ Requests From: Requests Till: Status: All ▾

MP	Requested By	Request Date	Aggregation ID	Aggregation
NYISO Market Participant	Daniel Jackson	05/07/2010 17:28:56		Large A
NYISO Market Participant	Daniel Jackson	05/03/2010 10:47:33	23416	Special

Create Aggregation Request

Aggregation Name:

Zone: ▾

Strike Price:

Green check mark means all required fields have been completed


Green check mark means all required fields have been completed

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Aggregation ID Request List

- ◆ New Aggregation ID request is immediately added to the list
- ◆ Dashboard count is updated



Demand Response Information System
Aggregation Request

Main ▾ MP ▾ Resource ▾ SCR ▾ Tables ▾

MP Name: Zone: Requests From: Requests Till: Status:

Aggregation Requests

MP	Requested By	Request Date	Aggregation ID	Aggregation Name	Zone	Strike Price	Status	Status Update Date	Status Update By	Comments
NYISO Market Participant	Daniel Jackson	05/08/2010 11:43:08		General Aggregation	J	500	Pending			
NYISO Market Participant	Daniel Jackson	05/07/2010 17:28:56		Large Aggregation	J	500	Pending			
NYISO Market Participant	Daniel Jackson	05/03/2010 10:47:33	23416	Special Aggregation	F	499	Approved	05/10/2010	Samantha Carter	


Demand Response Information System
Dashboard

Main ▾ MP ▾ Resource ▾ SCR ▾ Tables ▾

Create Aggregation Request

Aggregation Name:

Zone:

Strike Price:

❗ The form has errors (click for details...)

SCR

Enrollments

Under Review:

Aggregation Requests

Pending:

Approved:

Denied:

Cancelled:

EDRP

Capability Period:

Enrollment Requests

Pending:

Enrollments

Under Review:

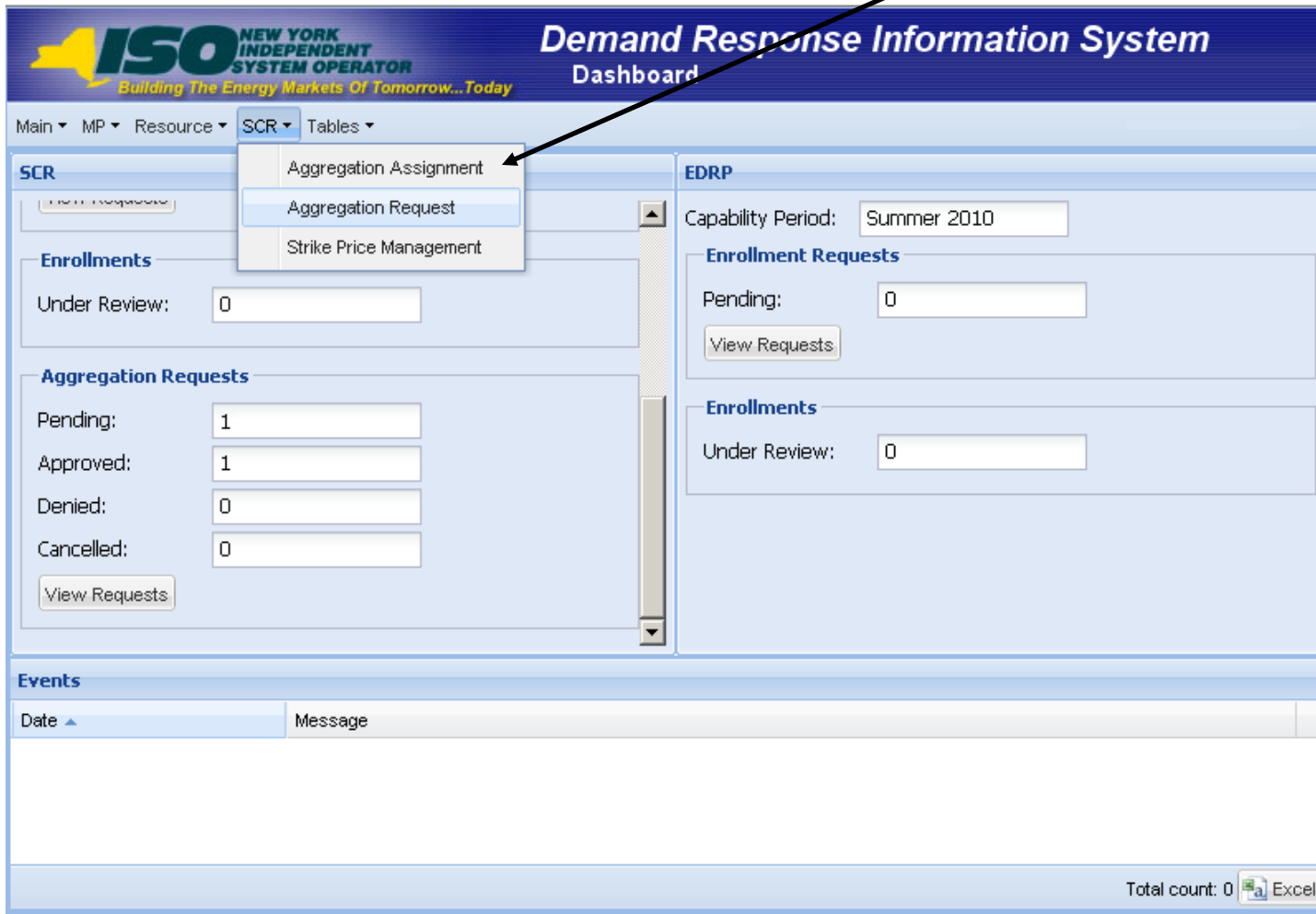
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Aggregation Assignment

- ◆ Reassignment of SCR resources once they have been imported into DRIS
 - *All SCRs require an initial aggregation ID in the import file*
- ◆ Aggregation Assignment is a calendar event
 - *Begins after SCR Enrollment Period ends*
 - *Ends before UCAP Report can be exported*
- ◆ No changes to aggregation rules
 - *Limited by zone, single strike price per aggregation ID, etc.*

Managing Aggregation Assignments

- ◆ From the SCR Menu, select “Aggregation Assignment”



The screenshot displays the "Demand Response Information System Dashboard" for the ISO New York Independent System Operator. The navigation menu at the top includes "Main", "MP", "Resource", "SCR", and "Tables". The "SCR" menu is expanded, showing three options: "Aggregation Assignment" (highlighted with a blue bar and an arrow), "Aggregation Request", and "Strike Price Management".

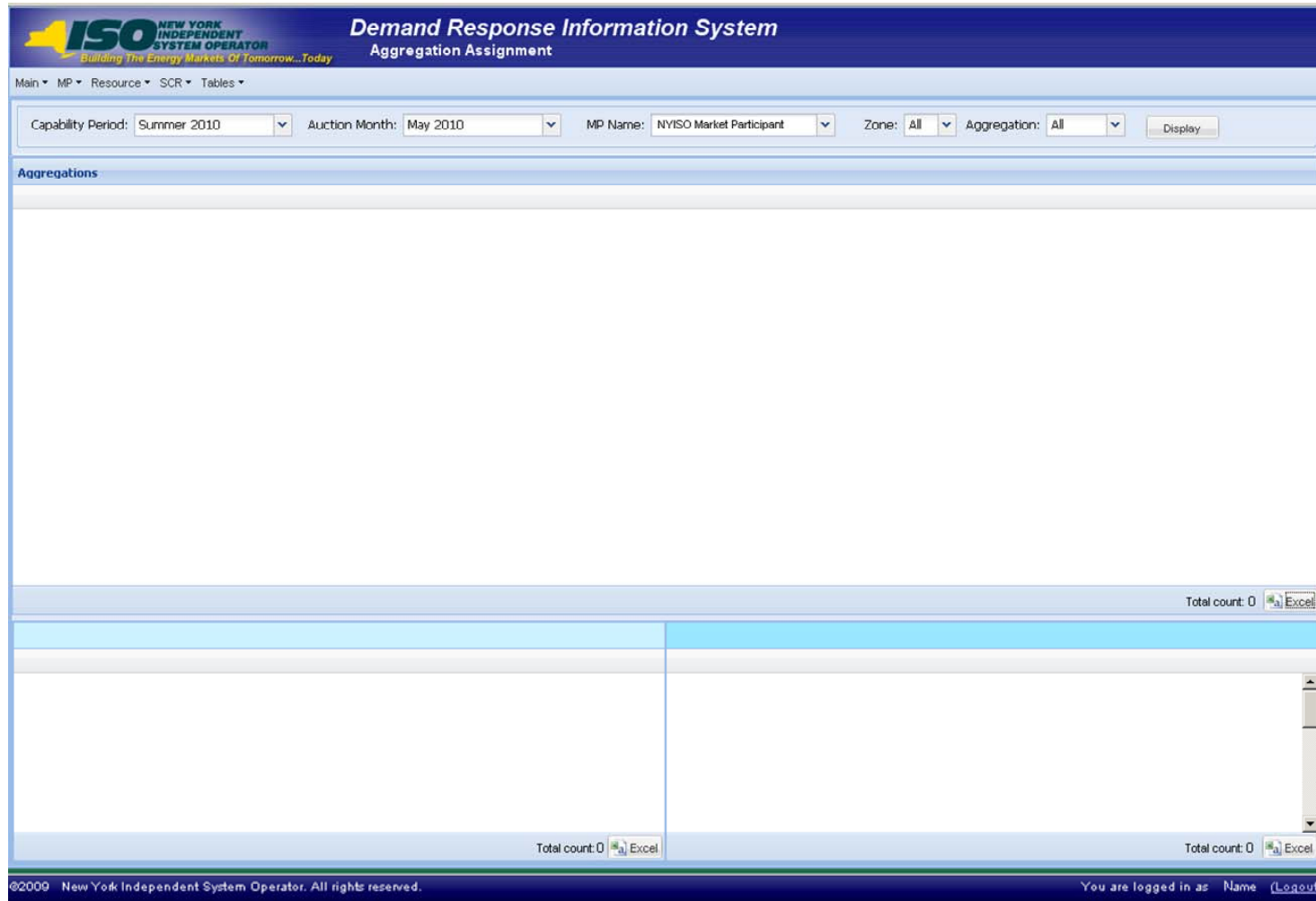
The dashboard is divided into several sections:

- SCR Section:** Includes a "View Requests" button, an "Enrollments" section with "Under Review: 0", and an "Aggregation Requests" section with fields for "Pending: 1", "Approved: 1", "Denied: 0", and "Cancelled: 0", along with a "View Requests" button.
- EDRP Section:** Includes a "Capability Period" dropdown set to "Summer 2010", an "Enrollment Requests" section with "Pending: 0" and a "View Requests" button, and an "Enrollments" section with "Under Review: 0".
- Events Section:** A table with columns for "Date" and "Message".


At the bottom right of the dashboard, it shows "Total count: 0" and an "Excel" export button.

Aggregation Assignment Screen

- ◆ Select any filter options from the drop-down lists
- ◆ Click “Display” to see Aggregation ID information

The screenshot shows a web application interface for the Demand Response Information System. At the top, there is a blue header with the ISO logo and the text "Demand Response Information System" and "Aggregation Assignment". Below the header is a navigation menu with "Main", "MP", "Resource", "SCR", and "Tables". The main content area contains a search form with several drop-down menus: "Capability Period" (set to "Summer 2010"), "Auction Month" (set to "May 2010"), "MP Name" (set to "NYISO Market Participant"), "Zone" (set to "All"), and "Aggregation" (set to "All"). A "Display" button is located to the right of these filters. Below the search form is a section titled "Aggregations" which is currently empty. At the bottom of the page, there is a footer with the text "©2009 New York Independent System Operator. All rights reserved." and "You are logged in as Name (Logout)".

Aggregation Information


Demand Response Information System
Aggregation Assignment


Main ▾ MP ▾ Resource ▾ SCR ▾ Tables ▾


Capability Period: Summer 2010 ▾ Auction Month: May 2010 ▾ MP Name: NYISO Market Participant ▾ Zone: All ▾ Aggregation: All ▾ Display


Aggregations

MP	Aggregation ID	Zone	Resource Count	Ucap MW
NYISO Market Participant	23416	F	2	10.3
NYISO Market Participant	41437	G	4	28.81
NYISO Market Participant	10267	J	3	15.31
NYISO Market Participant	13394	J	2	3.8
NYISO Market Participant	13395	J	7	18.32
NYISO Market Participant	13396	J	9	61
NYISO Market Participant	16680	J	5	10.2
NYISO Market Participant	16895	J	17	82.451
NYISO Market Participant	32109	J	3	15.6
NYISO Market Participant	21745	K	10	3.504

- Top pane displays aggregations based on selected search criteria
- Lower left and right panes are used for transfer of resources from one aggregation ID to another
- Total aggregation count and ability to export each pane to Excel

Total count: 10 

Total count: 0 

Total count: 0 

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Transferring Resources

- ◆ Drag one aggregation ID from the top pane into the lower left pane
 - *DRIS displays the list of resources in the aggregation*
 - *Color of header of lower left pane matches color of selected aggregation ID row in top pane*
 - *Header identifies the aggregation ID, number of resources in the aggregation and total KW*
- ◆ Drag the second aggregation ID from the top pane into the lower right pane
 - *DRIS displays the list of resources*
 - *Header in the right pane is highlighted in another color*
- ◆ Drag resources from one pane to another to reassign
 - *Counts and totals will automatically update*

Move One Aggregation into Left Pane

Demand Response Information System
Aggregation Assignment

Main ▾ MP ▾ Resource ▾ SCR ▾ Tables ▾

Capability Period: Summer 2010 ▾ Auction Month: May 2010 ▾ MP Name: NYISO Market Participant ▾ Zone: All ▾ Aggregation: All ▾ Display

Aggregations

MP	Aggregation ID	Zone	Resource Count	Ucap MW
NYISO Market Participant	23416	F	2	10.3
NYISO Market Participant	41437	G	4	28.81
NYISO Market Participant	10267	J	3	15.31
NYISO Market Participant	13394	J	2	3.8
NYISO Market Participant	13395	J	7	18.32
NYISO Market Participant	13396	J	9	61
NYISO Market Participant	16680	J	5	10.2
NYISO Market Participant	16895	J	17	82.451
NYISO Market Participant	32109	J	3	15.6
NYISO Market Participant	21745	K	10	3.504

⊘ 1 selected row

✔ 1 selected row

While dragging an aggregation ID or resource, the pointer will change to indicate whether the action is permitted or not

Total count: 10

Resources for Aggregation 13394 Resource Count 2 Ucap 3800 kW

Resource ID	Ucap kW
20901473	860
26300191	2940

Total count: 2

Total count: 0

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Move the Second Aggregation into Right Pane

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Demand Response Information System

Aggregation Assignment

Main ▾ MP ▾ Resource ▾ SCR ▾ Tables ▾

Capability Period: Summer 2010 ▾ Auction Month: May 2010 ▾ MP Name: NYISO Market Participant ▾ Zone: All ▾ Aggregation: All ▾

Aggregations

MP	Aggregation ID	Zone	Resource Count	Ucap MW
NYISO Market Participant	23416	F	2	10.3
NYISO Market Participant	41437	G	4	28.81
NYISO Market Participant	10267	J	3	15.31
NYISO Market Participant	13394	J	2	3.8
NYISO Market Participant	13395	J	7	18.32
NYISO Market Participant	13396	J	9	61
NYISO Market Participant	16680	J	5	10.2
NYISO Market Participant	16895	J	17	82.451
NYISO Market Participant	32109	J	3	15.6
NYISO Market Participant	21745	K	10	3.504

Total count: 10

Resources for Aggregation 13394		Resource Count 2	Ucap 3800 kW	Resources for Aggregation 16680		Resource Count 5	Ucap 10200 kW
Resource ID	Ucap kW			Resource ID	Ucap kW		
20901473	860			21151190	3200		
26300191	2940			21311202	550		
				21139788	1000		
				30025743	5420		
				30214783	30		

Total count: 2 Total count: 5

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Resource Assignment Error Message

- ◆ If the user attempts to transfer resources from an aggregation ID in one zone to an aggregation ID of another zone, the following error message will display



Aggregations after Resource Reassignment

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Aggregation Assignment

Main ▾ MP ▾ Resource ▾ SCR ▾ Tables ▾

Capability Period: Summer 2010 ▾ Auction Month: May 2010 ▾ MP Name: NYISO Market Participant ▾ Zone: All ▾ Aggregation: All ▾

Aggregations

MP	Aggregation ID	Zone	Resource Count	Ucap MW
NYISO Market Participant	23416	F	2	10.3
NYISO Market Participant	41437	G	4	28.81
NYISO Market Participant	10267	J	3	15.31
NYISO Market Participant	13394	J	3	7
NYISO Market Participant	13395	J	7	18.32
NYISO Market Participant	13396	J	9	61
NYISO Market Participant	16680	J	4	7
NYISO Market Participant	16895	J	17	82.451
NYISO Market Participant	32109	J	3	15.6
NYISO Market Participant	21745	K	10	3.504

Total count: 10

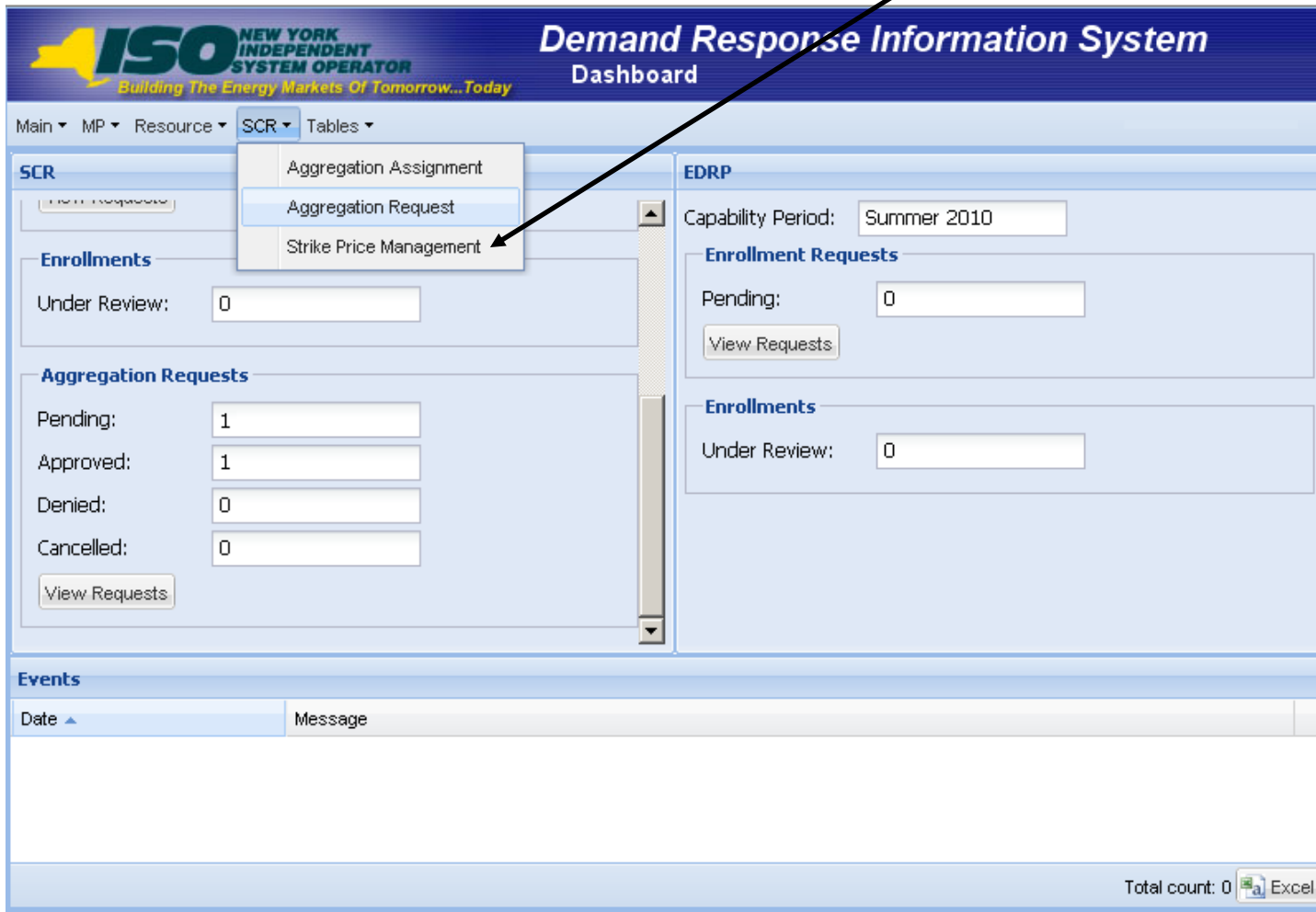
Resources for Aggregation 13394		Resource Count 3	Ucap 7000 kW	Resources for Aggregation 16680		Resource Count 4	Ucap 7000 kW
Resource ID	Ucap kW			Resource ID	Ucap kW		
20901473	860			21311202	550		
21151190	3200			21139788	1000		
26300191	2940			30025743	5420		
				30214783	30		

Total count: 3 Total count: 4

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Strike Price Management

- ◆ From the SCR Menu, select “Strike Price Management”



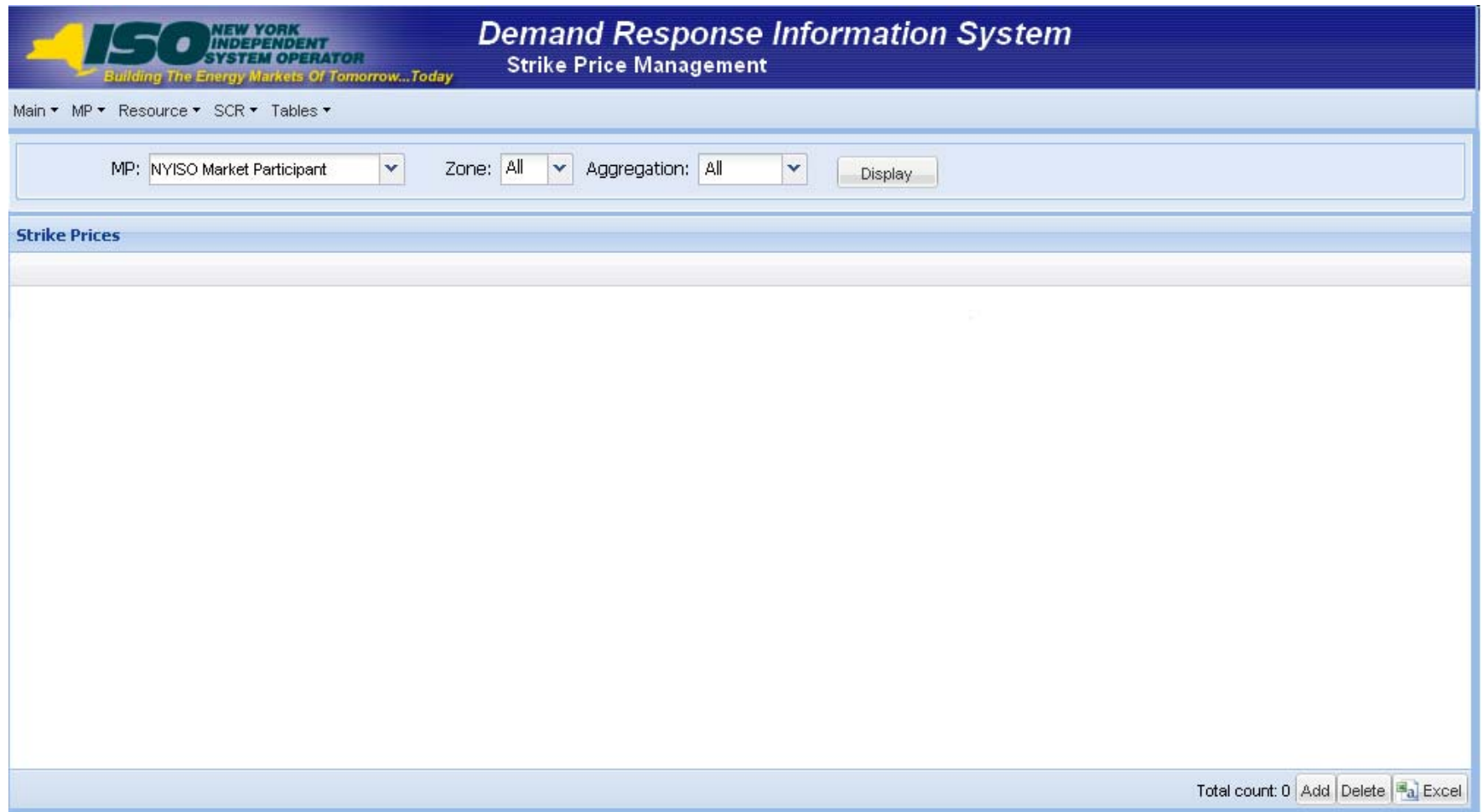
The screenshot displays the Demand Response Information System Dashboard. The top navigation bar includes the ISO logo and the text "Demand Response Information System Dashboard". Below the navigation bar, there are several sections:

- SCR (Supply Contract Request) Section:** Contains a dropdown menu for "SCR" with options: "Aggregation Assignment", "Aggregation Request", and "Strike Price Management". An arrow points to "Strike Price Management". Below this are fields for "Enrollments Under Review" (0) and "Aggregation Requests" (Pending: 1, Approved: 1, Denied: 0, Cancelled: 0).
- EDRP (Energy Demand Response Program) Section:** Contains a "Capability Period" dropdown set to "Summer 2010", "Enrollment Requests Pending" (0), and "Enrollments Under Review" (0).
- Events Section:** A table with columns for "Date" and "Message".


At the bottom right, there is a "Total count: 0" and an "Excel" button.

Strike Price Management Page

- ◆ Select any filter options from the drop-down lists
- ◆ Click “Display” to see Strike Price records for Aggregation IDs

The screenshot shows a web application interface for "Demand Response Information System Strike Price Management". At the top left is the ISO logo with the tagline "Building The Energy Markets Of Tomorrow...Today". The main title "Demand Response Information System Strike Price Management" is centered. Below the title is a navigation menu with "Main", "MP", "Resource", "SCR", and "Tables". The main content area contains three filter dropdowns: "MP: NYISO Market Participant", "Zone: All", and "Aggregation: All", followed by a "Display" button. Below the filters is a section titled "Strike Prices" which is currently empty. At the bottom right, there is a status bar showing "Total count: 0" and buttons for "Add", "Delete", and "Excel".

Strike Price List by Aggregation ID


Demand Response Information System
Strike Price Management

Main ▾ MP ▾ Resource ▾ SCR ▾ Tables ▾

MP:
Zone:
Aggregation:
Display

Strike Prices

MP	Aggregation	Zone	Strike Price	Start Month	End Month	Last Updated By	Last Update Date
NYISO Market Participant	13394	K	500	11/01/2009		Daniel Jackson	10/01/2009 10:17:45
NYISO Market Participant	21745	F	500	11/01/2009		Daniel Jackson	10/19/2009 17:28:56
NYISO Market Participant	16680	J	500	11/01/2009		Daniel Jackson	10/23/2009 09:19:24
NYISO Market Participant	32109	C	500	11/01/2009		Daniel Jackson	10/30/2009 14:37:28

Total count: 4

Changing a Strike Price

- ◆ To change a Strike Price for an Aggregation ID
 - *Click the “Add” button in the lower right portion of the screen*
 - *Select the Start Month for the new Strike Price*
 - *Select the Aggregation ID from the drop-down list*
 - *Enter the Strike Price amount*
 - *DRIS returns a confirmation message*
- ◆ Only one strike price per month per Aggregation ID
 - *Attempts to add a second Strike Price for the same month will produce an error message*
 - Delete the Strike Price entered for the month
 - Select the Strike Price record for the Aggregation ID
 - Click the “Delete” button in the lower right portion of the screen
 - Add the intended Strike Price for the month

Adding A Strike Price to An Aggregation ID

Demand Response Information System
Strike Price Management

Main ▾ MP ▾ Resource ▾ SCR ▾ Tables ▾

MP: NYISO Market Participant ▾ Zone: All ▾ Aggregation: All ▾

Strike Prices

MP	Aggregation ID	Month	Last Updated By	Last Update Date
NYISO Market Participant	13394		Daniel Jackson	10/01/2009 10:17:45
NYISO Market Participant	21745		Daniel Jackson	10/19/2009 17:28:56
NYISO Market Participant	16680		Daniel Jackson	10/23/2009 09:19:24
NYISO Market Participant	32109		Daniel Jackson	10/30/2009 14:37:28

Create

Start Month:
June 2010 ▾

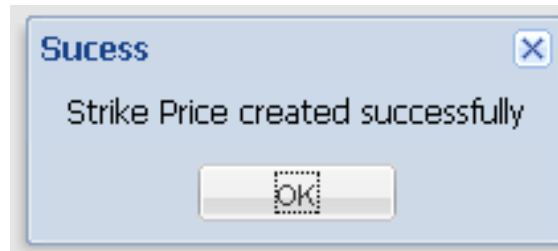
Aggregation:

Strike Price:

Total count: 4

Total count: 4

Strike Price Messages



There was an error creating Strike Price record.

Field Name	Field Value	Exception Code	Unique Id
Start Month	Tue Jun 01 04:00:01	Start Month must be greater than the Start Month of the latest existing strike price	Start Month



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