



Web-Based Reconciliation (WBR)

Summary of Product Requests

**Reviewed During the
WBR Technical Conference
September 12, 2006**

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1 Overview

During the September 12, 2006 technical conference for Web-Based Reconciliation (WBR), NYISO staff reviewed two primary listings of product requests with conference attendees. These requests were provided by WBR users to NYISO over the last 3+ years.

1.1 Document Purpose

The purpose of this document is to provide a summary of the requests and issues that were discussed during the September 12th technical conference. From the items identified in this document, NYISO will conduct an internal feasibility assessment; the outcome of which will be the scope and plan for addressing these items.

1.2 Document Layout

NYISO has begun a process of categorizing the items for easier identification and resolution.

The following categories have been used in this document:

- ❖ Checks and Balances - data verification for MPs
- ❖ Reporting – capability for MPs to create reports
- ❖ Issues– items that were part of original WBR delivery that need to be investigated
- ❖ Enhancements – items that were not part of the original WBR delivery
- ❖ Communication – communication between NYISO and the Market Participants (MP)
- ❖ Maintenance - data cleanup

2 WBR Overview of Templates and Reports

2.1 Upload Templates

The following listing identifies the WBR Upload templates for hourly MWh data

- TIE_GEN_SUBZONE_DATA – includes tie, Generator and subzone data
- LOAD_BUS_HOUR_DATA - includes load bus data
- METER_AUTHORITY_AGREEMENT – allows Meter Authority (MA) to confirm subzone load calculation

2.2 Download Templates

The following listing identifies the WBR Download templates:

- TIE_GEN_SUBZONE_DETAIL - includes tie, Generator and subzone hourly MWh data
- LOAD_BUS_HOUR_DETAIL - - includes load bus data
- SUBZONE_LOAD – includes subzone load and losses
- WHOLESALE VERIFICATION – includes wholesale load data
- INVOICE_HIST – includes invoice history data

2.3 Reports

The following listing identifies the WBR Reports available on the Web:

- Calculated Subzone Load – subzone load data for a specified month for all subzones by Transmission Owner (TO)
- Subzone Load Detail - subzone load inputs
- Gen/Tie Detail – individual Generator and tie detail
- Wholesale Load Bus Detail – provides bus level MWhR data
- Subzone Load Verification – allows TO to verify subzone load calculation

3 Checks and Balances

- A. Provide a detailed response message indicating the success or failure of the WBR upload requests (refer to section 2.1)
- B. Provide improved response time for upload requests, as defined by the WBR requirements effort (refer to section 2.1)
- C. Provide improved response time for download requests, as defined by the WBR requirements effort (refer to section 2.2)
- D. Reduce the occurrence of timeout errors received during the transmission of a Transmission Owner Load (TOL) file via the load_bus_hour_data upload request
- E. Reduce the occurrence of security errors received during the transmission of a TOL file via the load_bus_hour_data upload request
- F. Improve WBR's downloading capabilities by providing the ability to retrieve large quantities of data at one time without encountering errors
- G. Provide the ability for only specified data set(s) to be unlocked instead unlocking the data for a given day
- H. Ensure generator and tie data submitted via uploads are within tolerance
- I. Provide history of data changes by PTID
- J. Provide XML wrapper for Oracle errors returned by upload templates

4 Reporting

- A. Provide users with the ability to select “All” or a combination of items contained in the drop down lists on all report types (refer to section 2.3)
- B. Provide access to tie, Generator or load data for periods prior to a change of MA ownership
- C. Provide report capability to view data when requested period spans more than one day
- D. Provide authorized parties the ability to view individual Gen/Tie data regardless of the Metering Authority (MA) designation
- E. Provide authorized parties the ability to download individual Gen/Tie data regardless of the MA designation
- F. Provide ability for user to view last executed query parameters on a WBR report, by using the browser’s back button
- G. Provide a monthly summary report for MAs, by LSE and sub-zone
- H. Provide a MA lockout report by billing month, indicating the time period available for updates
- I. Enable search by PTID or Generator Name for the Gen/Tie Detail Report
- J. Provide download data in CSV and XML format (refer to section 2.3)
- K. Reformat the WBR Results reports:
 - a. Subzone Load Detail Results Page: Move the Date/Time field to the left of the PTID column
 - b. Subzone Load Detail Results Page: Separate the results by Generators, Tie lines, DRP (Gens)
 - c. Gens/Ties Hourly Load Detail Results Page: Move the Date/Time field to the left of the PTID column
 - d. Gens/Ties Hourly Load Detail Results Page: Provide daily totals for requested gens/ties regardless of number of hours requested in report query
 - e. Wholesale Load Bus Detail Results Page: Move the Date/Time field to the left of the PTID column

5 Issues

- A. Improve performance to enable upload of entire monthly TOL files without having to split the file into smaller pieces

6 Enhancements

- A. Provide a test facility for WBR users in order for them to test their system enhancements

7 Communication

- A. Provide affected MPs with notification of tie or Generator changes made during the review and correction periods, as provided by the Tariff
- B. Provide affected MPs with notification when their tie and Generator data is locked and ready for TOL calculation
- C. Provide WBR outage notification to MPs

8 Maintenance

- A. Improve performance of WBR by removing zeros from results reports from inactive PTIDs
- B. Improve performance of WBR by removing inactive Generator and tie PTIDs