

DSS Task Force

May 15, 2003

For Discussion of:

**NYISO Decision Support System
Customer Settlements Data Mart**

Today's Agenda

- DSS Project Update
- MP Report Design Review Process Update

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- **DSS Project Update**
- **MP Report Design Review Process Update**

Project Update / Status

➤ Summary

- *Major development is complete, and we're now focused on testing and issue resolution*
- *Testing so far has provided very positive feedback; limited defects and issues identified*
- *Still working with MPs regarding report designs*
- *Overall, project is still on-track for planned release dates*

➤ Production Release Planned for July 15, 2003

- *Data gathering to begin June 1, 2003 for internal testing*

Project Update / Status – Team Reports

➤ **Application Team**

- *Business Objects Universe development complete*
- *Corporate Report development complete, pending MP feedback*
- *Now focused on supporting testing and issue resolution*

➤ **ETL Team**

- *ETL process development complete*
- *Now focused on supporting testing and issue resolution*

➤ **QA Team**

- *Several testing phases underway; results have been positive*
 - ▶ Unit Testing
 - ▶ Data Validation Testing
 - ▶ System Integration Testing
 - ▶ Performance Testing

Today's Agenda

- DSS Project Update
- **MP Report Design Review Process Update**

MP Report Design Review Process

- **In order to obtain MP Input on Corporate Reports, the DSS Team plans to:**
 - *Create Sub-teams within the DSS Task Force / BAWG to provide input on proposed report designs (LSE, Power Supplier, Transactions, etc.) (complete)*
 - *Work with the DSS Task Force to create a list of planned Corporate Reports for Release 1 (complete)*
 - *For each planned report, the DSS Team will create a proposed report design for review by the sub-teams (**complete**)*
 - *The corresponding sub-team will review and make suggestions that will clarify, correct, or complete the report (**in progress**)*
 - *The DSS Team will attempt to incorporate the feedback from the sub-teams into the Corporate Reports prior to Release 1 Implementation (**in progress**)*
- **NOTE: We are going to post all report designs to nyiso.com shortly.**

Report Design Review – Status

- **Load Serving Entity Sub-Team (complete)**
 - *Gathered comments re: LSE BalMkt Energy Settlement Detail Report*
- **Transaction Customer Sub-Team (in progress)**
 - *Conducted kick-off call; wrap-up call scheduled for Friday*
 - *Reviewing 4 settlement detail reports: TC BalMkt LBMP, TC BalMkt TUC, TC BalMkt Replacement Energy, TC RT BPCG*
- **Power Supplier Sub-Team (scheduled)**
 - *Dates for kick-off and wrap-up calls set (next week)*
 - *Report Designs and conference call info to be distributed this week*
 - *Will review 2 settlement details reports & 2 generator output charts: PS BalMkt Energy, PS RT BPCG, Generator Performance Chart, Generator Commitment Chart*
- **Common Reports – All Sub-Teams (not started)**
 - *Currently determining dates for kick-off and wrap-up calls*
 - *Will review Settlement Results Report, Settlement Comparison Report, & Invoice Version Control Log*

Summary of MP Feedback so far...

➤ **Comments from LSE Settlement Detail Report Reviews**

■ *Generally:*

- ▶ It is complete – everything is there.
- ▶ It is clear – well organized.
- ▶ We will use it.
- ▶ We see value in it.
- ▶ There's more detail here than existing reports, and we're excited to see it all together in an organized manner.

■ *Specifically (a few highlights):*

- ▶ Add billing codes to column headers when possible
- ▶ General formatting requests, to get more data on a single page
 - Smaller font size (titles and data)
 - Smaller margins (top, bottom, left, & right)
 - Move section break titles to a single line (even with cropping potential)
- ▶ Need something to help better understand how the various reports are designed to work together