

Decision Support System (DSS)

Application Walk Through

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Accounting & Billing Workshop

November 27 – December 1, 2023

Remote Learning

Agenda Items

- Four ways to obtain data from DSS
- Creating a new Web intelligence report
- Modifying an existing report
- Multiple data providers
- Graphing
- Saving & exporting report data
- Creating Folders
- Sending & receiving DSS reports via DSS inbox
- Automated Data Delivery

DSS Overview

Access, Homepage, Data

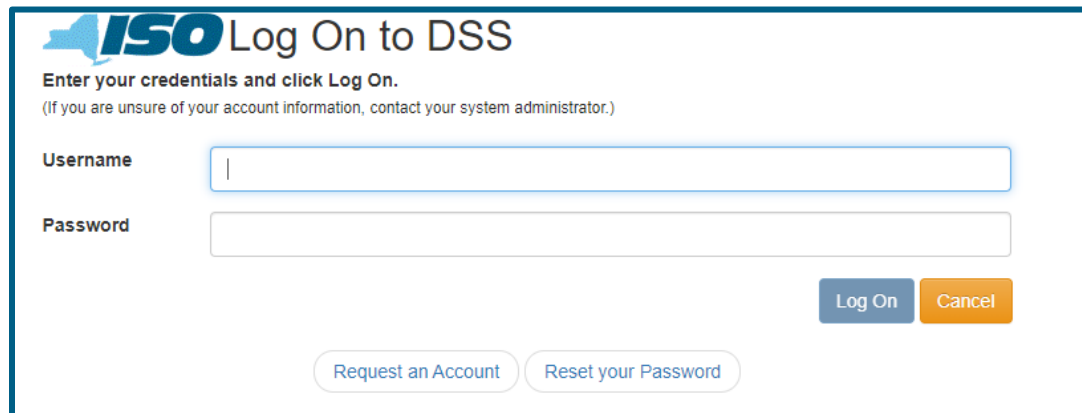
Overview

- **Requires Digital Certificate and DSS account**

- Account types: Public Market Data User, Customer Settlement User

- **Browser compatibility**

- Mozilla Firefox and Google Chrome

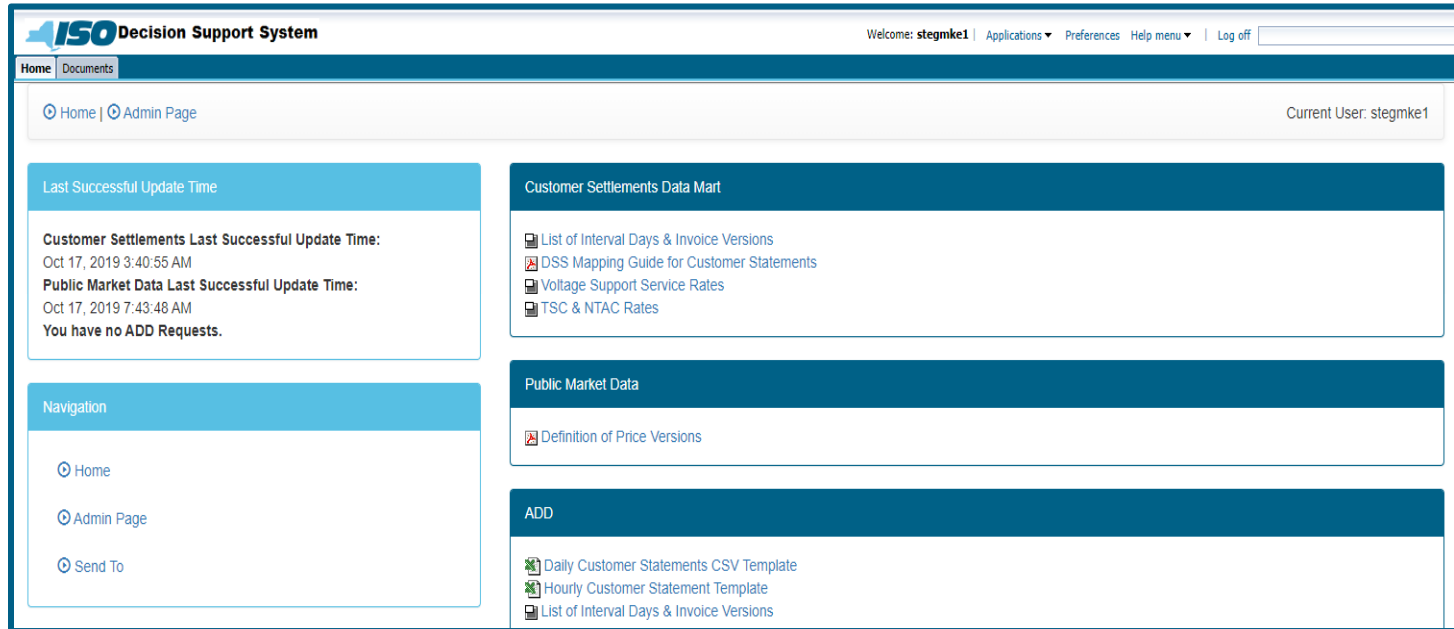


The screenshot shows a login form titled "Log On to DSS" with the New York ISO logo. Below the title, it says "Enter your credentials and click Log On." and "(If you are unsure of your account information, contact your system administrator.)". There are two input fields: "Username" and "Password". At the bottom right, there are two buttons: "Log On" (blue) and "Cancel" (orange). At the bottom center, there are two links: "Request an Account" and "Reset your Password".

Overview

■ Homepage

- Links to resource documents



The screenshot displays the ISO Decision Support System homepage. At the top, the header includes the ISO logo and the text "Decision Support System". On the right side of the header, there is a welcome message "Welcome: stegmke1" and navigation links for "Applications", "Preferences", "Help menu", and "Log off". Below the header, there are two tabs: "Home" and "Documents". The main content area is divided into several sections:

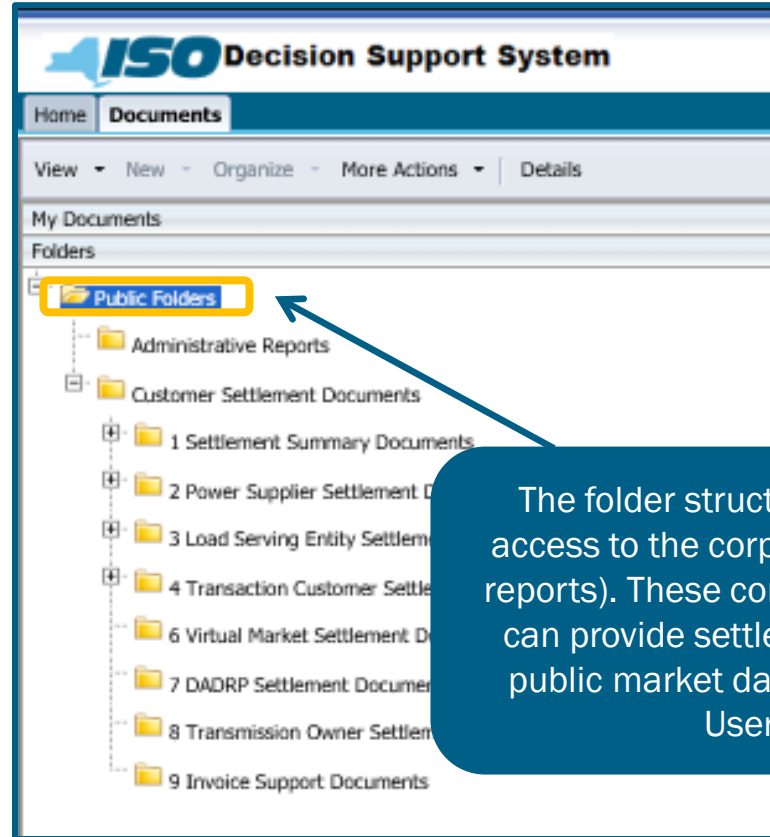
- Home | Admin Page**: A breadcrumb trail with "Home" and "Admin Page" links.
- Last Successful Update Time**: A section with a blue header containing update times for "Customer Settlements" (Oct 17, 2019 3:40:55 AM) and "Public Market Data" (Oct 17, 2019 7:43:48 AM), along with the message "You have no ADD Requests."
- Customer Settlements Data Mart**: A section with a dark blue header containing links to "List of Interval Days & Invoice Versions", "DSS Mapping Guide for Customer Statements", "Voltage Support Service Rates", and "TSC & NTAC Rates".
- Public Market Data**: A section with a dark blue header containing a link to "Definition of Price Versions".
- Navigation**: A section with a blue header containing links for "Home", "Admin Page", and "Send To".
- ADD**: A section with a dark blue header containing links to "Daily Customer Statements CSV Template", "Hourly Customer Statement Template", and "List of Interval Days & Invoice Versions".

The current user is identified as "stegmke1" in the top right corner.

Overview

■ Folder Structure

- Documents
- Public Market Data
- Corporate Reports



The folder structure provides access to the corporate (canned reports). These corporate reports can provide settlement data or public market data to the DSS User.

Overview

■ Corporate Reports

ISO Decision Support System

Welcome: stegmke1 | Applications | Preferences | Help menu | Log off

Home Documents

View | New | Organize | More Actions | Details

My Documents

Folders

- Public Folders
 - Administrative Reports
 - Customer Settlement Documents
 - 1 Settlement Summary Documents
 - 2 Power Supplier Settlement Documents
 - Power Supplier - Ancillary
 - Power Supplier - Energy
 - Power Supplier - DAM Margin Assurance**
 - Power Supplier - RT BPCG
 - Power Supplier - Supplemental Event
 - 3 Load Serving Entity Settlement Documents
 - 4 Transaction Customer Settlement Documents
 - 5 Transmission Congestion Contract Settlement Documents
 - 6 Virtual Market Settlement Documents
 - 7 DADRP Settlement Documents
 - 8 Transmission Owner Settlement Documents
 - 9 Invoice Support Documents
 - RTO Settlements
 - Public Market Documents

Title	Type	Last Run	Instances	Description	Created By
Settlement Details - Power Supplier - DAM Margin Assurance - (Bids)	Web Intelligence		0	Purpose is to support detailed settlement ana	Administrator
Settlement Details - Power Supplier - DAM Margin Assurance (Adjusted Sc	Web Intelligence		0	Purpose is to support detailed settlement ana	Administrator
Settlement Details - Power Supplier - DAM Margin Assurance (Results)	Web Intelligence		0	Purpose is to support detailed settlement ana	Administrator

Corporate reports can be modified but you must first save the report to the 'Favorites' folder before modifying it.

Overview

■ Documents – Display Options

ISO Decision Support System

Welcome: stegmke1 | Applications | Preferences | Help menu | Log off

Home Documents

View New Organize More Actions Details

My Documents

Folders

- Public Folders
 - Administrative Reports
 - Customer Settlement Documents
 - 1 Settlement Summary Documents
 - 2 Power Supplier Settlement Documents
 - Power Supplier - Ancillary
 - Power Supplier - Energy
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Settlement Details - Power Supplier - DAM Margin Assurance (Results)	Web Intelligence		0	Purpose is to support detailed settlement ana	Administrator

User can choose which columns to display on the Documents Tab by going to Preferences on the Menu Bar

Options for Obtaining DSS Data

Customer Settlements Reports

- Corporate or Canned Reports
- Custom Report

Automated Data Delivery (ADD)

- Advisory hourly/daily billing files or FERC EQR files
- User can schedule report to run at a designated time

Public Market Data

- OASIS data as seen on the NYISO website
- User-created report
- Corporate reports

Custom Automated Data Delivery (CADD)

- Data extraction via a customer's automation processes to csv or xml format

Create Custom Queries



Web Intelligence (Webi)

- **Software Application used to produce reports from a data universe (🌸)**
 - The universe maps data components to data objects
 - The universe contains dimensions, details, and measures that are combined using a query
 - The query generates a document containing one or more reports

Web Intelligence (Webi)

■ What are objects?

- Dimension objects (▭) are qualitative data and are non-mathematical
 - For example, Generator Name and Generator PTID are dimensions

 Gen Name
 Gen PTID

■ What are details/attributes?

- A detail object (◆) is always associated to one dimension object, on which it provides additional information

Web Intelligence (Webi)

■ What is a measure?

- Measures (📊) are numerical data values that mathematical functions can be applied
 - For example, a settlement revenue is a measure because you can find out a total or average the data

📊 Day DAM Energy Stlmnt: Gen (\$)

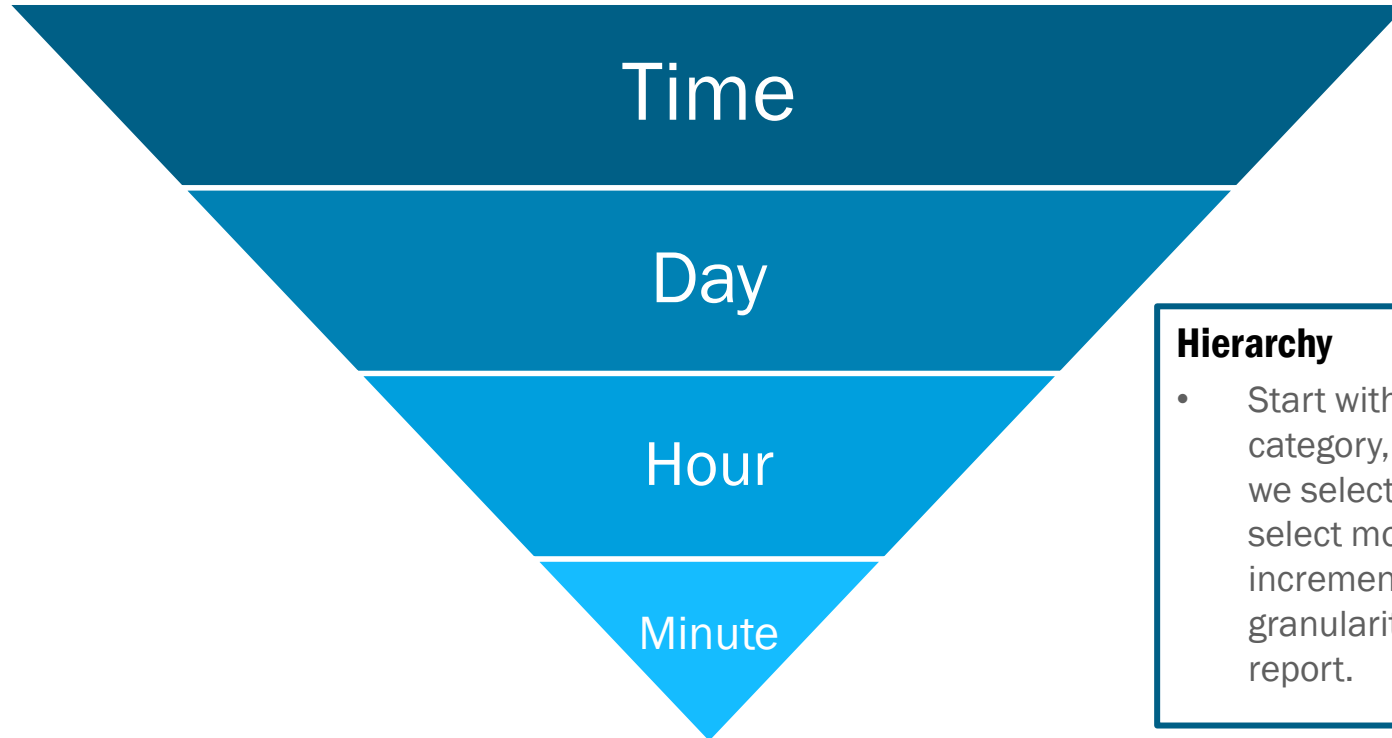
📊 Day DAM Loss Stlmnt: Gen (\$)

📊 Day DAM Cong Stlmnt: Gen (\$)

📊 Day Total DAM Stlmnt: Gen (\$)

Data Flow in DSS

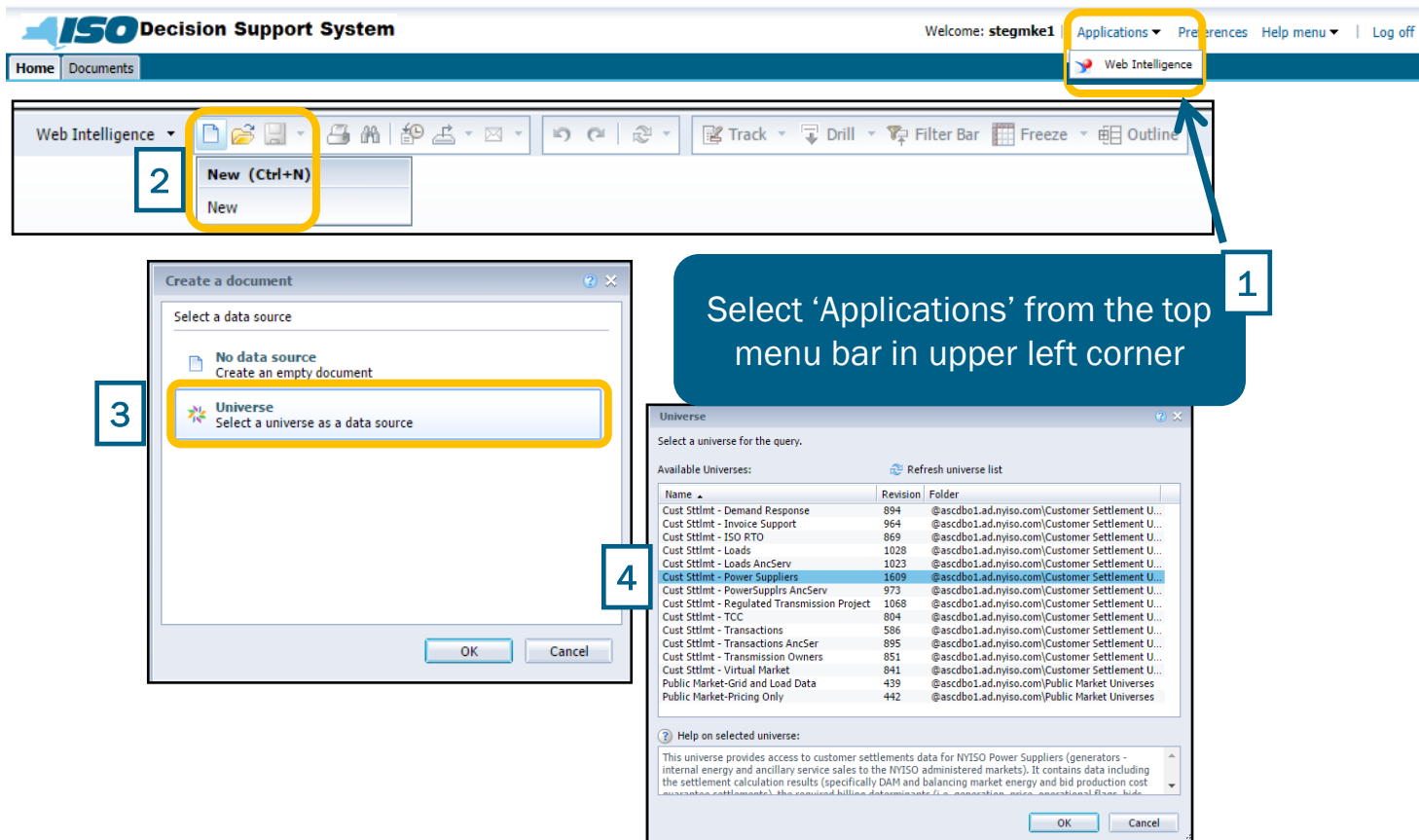
■ Example: Time Granularity



Hierarchy

- Start with broadest category, in this example, we selected time. Then, select more specific time increments to reach the granularity needed for the report.

Create a Web Intelligence Report



The screenshot shows the NYISO Decision Support System interface. The top navigation bar includes 'Home', 'Documents', 'Applications', 'Preferences', 'Help menu', and 'Log off'. A yellow box highlights the 'Web Intelligence' link in the 'Applications' dropdown menu. Below the navigation bar is a toolbar with various icons. A yellow box highlights the 'New (Ctrl+N)' button, with a blue box containing the number '2' next to it. A callout box with a blue background and white text, labeled with a blue box containing the number '1', points to the 'Web Intelligence' link and contains the text: 'Select 'Applications' from the top menu bar in upper left corner'. Below the toolbar is a 'Create a document' dialog box. A yellow box highlights the 'Universe' option, with a blue box containing the number '3' next to it. Below the dialog box is a 'Universe' dialog box. A yellow box highlights the 'Cust Sttlmt - Power Suppliers' option, with a blue box containing the number '4' next to it. The 'Universe' dialog box contains a table of available universes and a help section for the selected universe.

Welcome: stegmke1 Applications Preferences Help menu | Log off

Home Documents

Web Intelligence

New (Ctrl+N)

New

Create a document

Select a data source

No data source
Create an empty document

Universe
Select a universe as a data source

Universe

Select a universe for the query.

Available Universes: Refresh universe list

Name	Revision	Folder
Cust Sttlmt - Demand Response	894	@ascb01.ad.nyiso.com/Customer Settlement U...
Cust Sttlmt - Invoice Support	964	@ascb01.ad.nyiso.com/Customer Settlement U...
Cust Sttlmt - ISO RTO	869	@ascb01.ad.nyiso.com/Customer Settlement U...
Cust Sttlmt - Loads	1028	@ascb01.ad.nyiso.com/Customer Settlement U...
Cust Sttlmt - Loads AncServ	1023	@ascb01.ad.nyiso.com/Customer Settlement U...
Cust Sttlmt - Power Suppliers	1609	@ascb01.ad.nyiso.com/Customer Settlement U...
Cust Sttlmt - PowerSupplies AncServ	973	@ascb01.ad.nyiso.com/Customer Settlement U...
Cust Sttlmt - Regulated Transmission Project	1068	@ascb01.ad.nyiso.com/Customer Settlement U...
Cust Sttlmt - TCC	804	@ascb01.ad.nyiso.com/Customer Settlement U...
Cust Sttlmt - Transactions	586	@ascb01.ad.nyiso.com/Customer Settlement U...
Cust Sttlmt - Transactions AncSer	895	@ascb01.ad.nyiso.com/Customer Settlement U...
Cust Sttlmt - Transmission Owners	851	@ascb01.ad.nyiso.com/Customer Settlement U...
Cust Sttlmt - Virtual Market	841	@ascb01.ad.nyiso.com/Customer Settlement U...
Public Market-Grid and Load Data	439	@ascb01.ad.nyiso.com/Public Market Universes
Public Market-Pricing Only	442	@ascb01.ad.nyiso.com/Public Market Universes

Help on selected universe:

This universe provides access to customer settlements data for NYISO Power Suppliers (generators - internal energy and ancillary service sales to the NYISO administered markets). It contains data including the settlement calculation results (specifically DAM and balancing market energy and bid production cost...)

OK Cancel

Create a Web Intelligence Report

■ Review of Query Panel for New Report

Data Manager

- Consists of data object measures and dimensions to build query

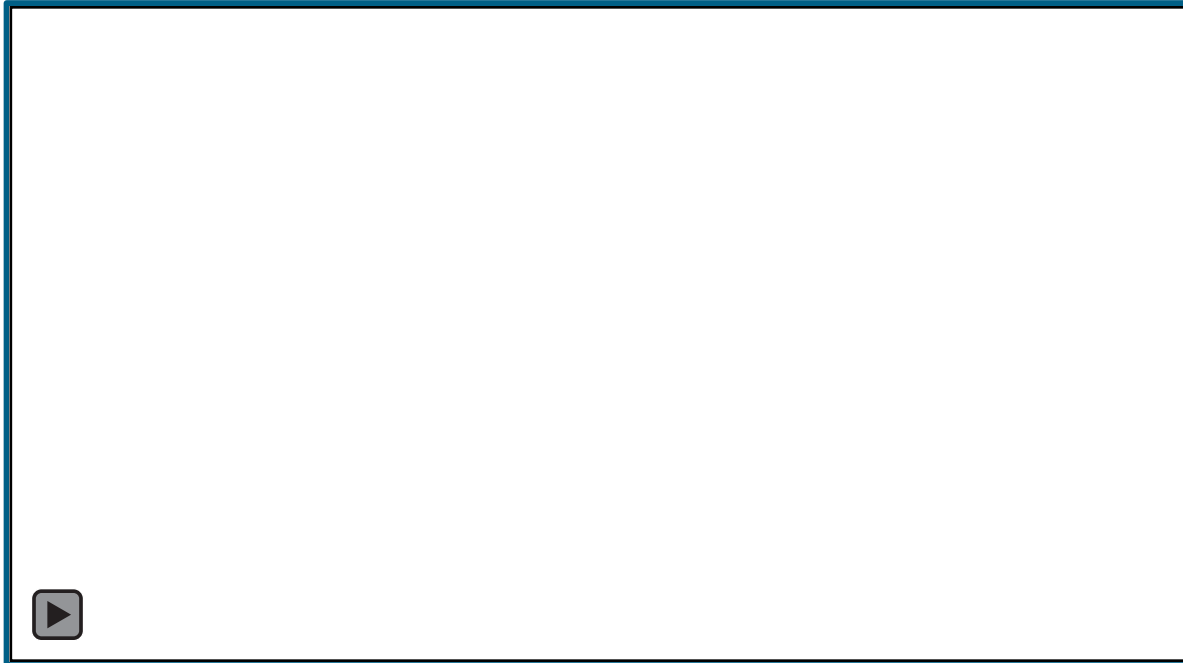
The screenshot displays the 'Query Panel' interface. On the left, the 'Universe outline' shows a tree structure under 'Cust Sttlmt - Power Suppliers' with various categories like Time, Invoice Version, Zone / Subzone, Organization, Generators, and Settlement types. The 'Result Objects' section on the right contains instructions: 'To include data in reports, select objects on the Universe pane and add them here by clicking the arrow. Click Run Query to return the results.' Below this, the 'Query Filters' section has instructions: 'To filter the query, select predefined filters or objects in the Universe pane and add them here by clicking the arrow. Select Filter to specify the values you want returned to reports or select Prompt to define a message so users can select values of their choice.' The 'Data Preview' section at the bottom right has a 'Refresh' button and a text input field for filtering values. A blue bracket on the left side of the screenshot groups the 'Universe outline' and 'Data Manager' text.

Data objects are brought into this pane for desired report results

Apply Filters and Prompts to capture a specific data set

Allows review of report based on current Result Objects and Query Filters

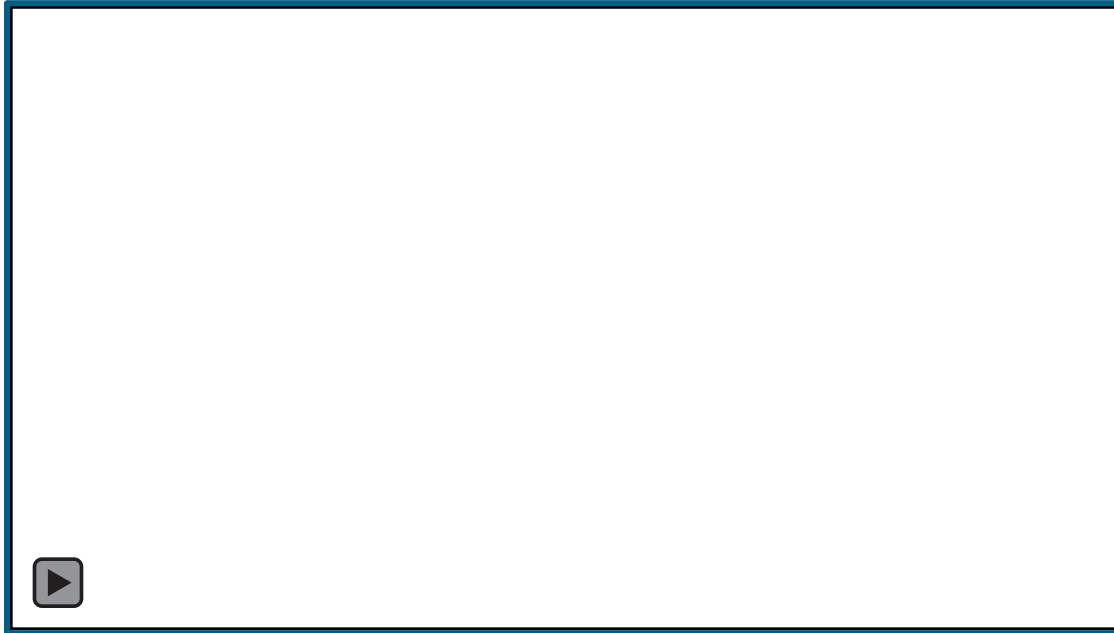
Create a Web Intelligence Report



Results Objects Pane

- Data objects are brought into this pane for desired report results
- Drag and drop or double click objects into Report Objects Pane

Create a Web Intelligence Report



Query Filters Pane

- Apply Filters and/or Prompts to capture a specific data set (and to narrow search results)
- Drag and drop or double click filters and/or prompts into the Query Filters Pane

Create a Web Intelligence Report



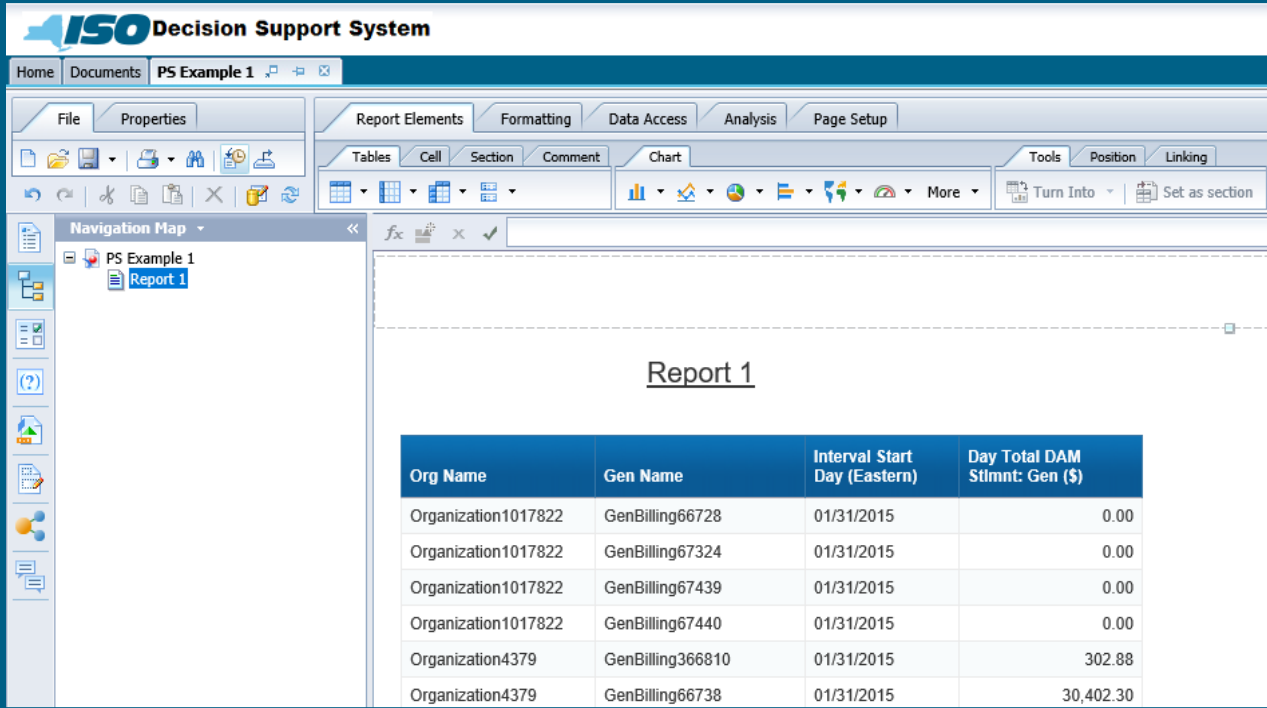
Select Refresh to preview the data in the Data Preview Panel or Select Run Query to produce the report

Create a Web Intelligence Report

The screenshot displays the SAP BusinessObjects Web Intelligence interface. The main window is titled "Query Panel" and contains a toolbar with "Add Query" and "Run Query" buttons. The "Run Query" button is highlighted with a yellow box. Below the toolbar, the "Universe outline" shows the "Master perspective" and a search field. The "Result Objects" pane displays a list of objects: "Org Name", "Gen Name", "Interval Start Day (Eastern)", and "Day Total DAM Stlmt: Gen (\$)".

A "Prompts" dialog box is overlaid on the main window. It has a "Prompts Summary" pane on the left and a main area titled "Select Org Name or enter * for all Org Names". The main area contains a "Type values here" text box, a "Refresh Values" button (highlighted with a yellow box), and a list of "Org Name" values: "*", "Organization1011037", "Organization1017822", "Organization1032210", "Organization1038278", and "Organization1038546". A "Refresh" button is also highlighted with a yellow box in the bottom right of the dialog. A blue callout box with white text says: "Click on Refresh Values button to populate the list to make a selection".

Web Intelligence Report Created!

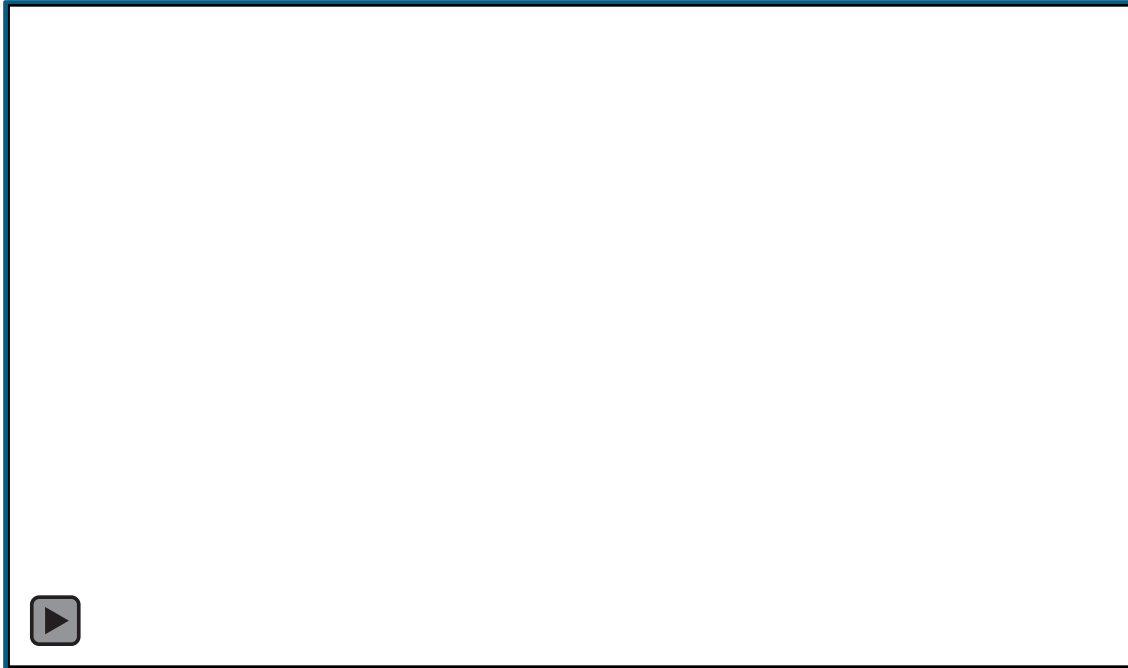


The screenshot displays the IISO Decision Support System interface. The main window shows a report titled "Report 1" with a table of data. The table has four columns: "Org Name", "Gen Name", "Interval Start Day (Eastern)", and "Day Total DAM Stimnt: Gen (\$)". The data rows are as follows:

Org Name	Gen Name	Interval Start Day (Eastern)	Day Total DAM Stimnt: Gen (\$)
Organization1017822	GenBilling66728	01/31/2015	0.00
Organization1017822	GenBilling67324	01/31/2015	0.00
Organization1017822	GenBilling67439	01/31/2015	0.00
Organization1017822	GenBilling67440	01/31/2015	0.00
Organization4379	GenBilling366810	01/31/2015	302.88
Organization4379	GenBilling66738	01/31/2015	30,402.30

- Body of report results will contain columns that are in direct relationship to the data objects selected
- Data within those columns will be informational, *i.e.*, dollar values, names, zones, MW values, etc.

Saving Documents



- To save a report, select the save icon or the drop down arrow located next to the save icon above Data Manager
- There are two Save options
 - **'Save'** will save the report in its current view
 - **'Save As'** will prompt the user to save the report to their Favorites folder in Info View

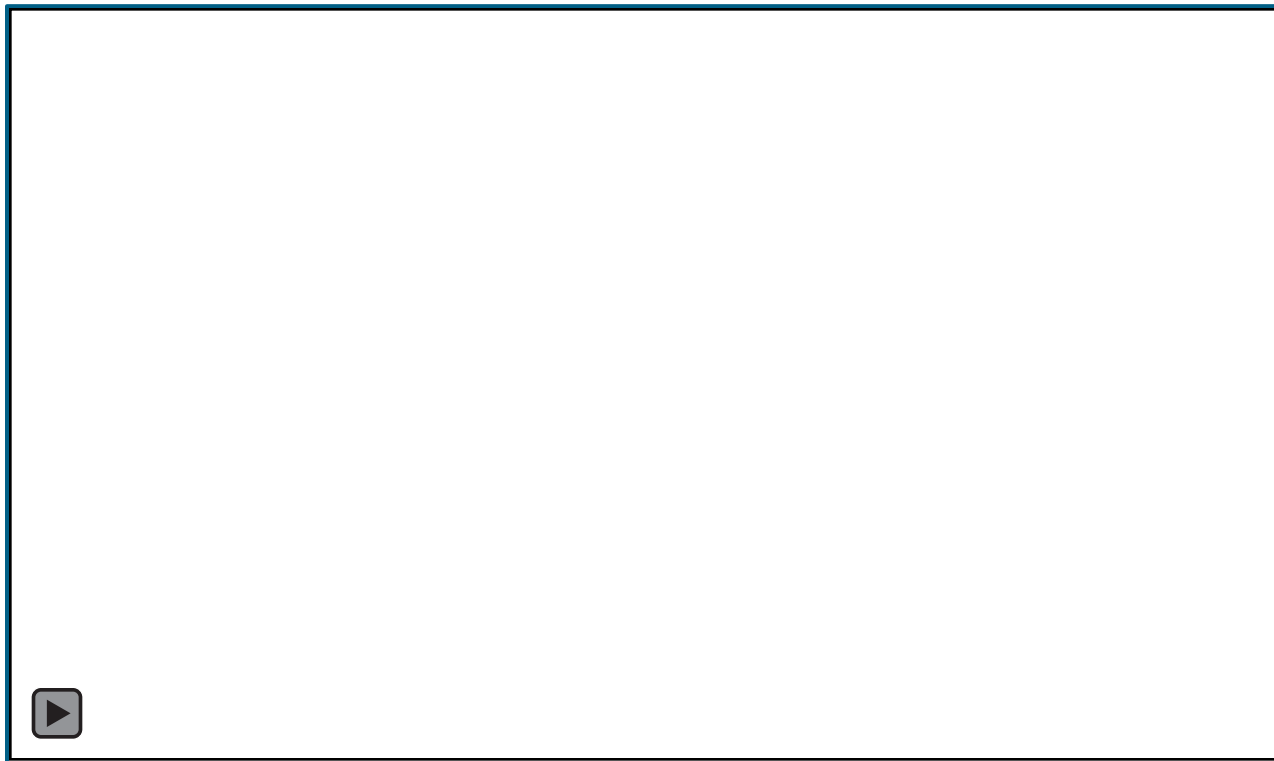
Locate Saved Report

The screenshot shows the ISO Decision Support System interface. At the top, it says "ISO Decision Support System" and "Welcome: stegmke1". Below that, there are navigation tabs for "Home" and "Documents". A menu bar includes "View", "New", "Organize", "More Actions", and "Details". On the left, there is a "My Documents" sidebar with "My Favorites" and "Inbox". The main area displays a document titled "Power Supplier Example" in a table with columns: "Title", "Last Run", "Instances", "Description", and "Created By". The "Created By" column shows "stegmke1". A context menu is open over the document, listing options: View, Properties, Modify, Schedule, Mobile Properties, History, Categories, Document Link, New, Organize, and Details. A blue callout box with an arrow points to the menu, containing the text "Highlight Report for Options to Appear".

Highlight Report for
Options to Appear

Renaming Reports

- To rename a report, right click over report tab
- Highlight the existing report name on the properties tab or report tab and type in the new name
- Hit enter and the new name will appear



Saving Documents

The screenshot shows a 'Save As' dialog box with a file explorer view. The 'Favorites Folder' is highlighted with a yellow box. A callout box points to it with the text 'Save Documents to the 'Favorites Folder''. The file explorer shows a tree view with folders: Favorites Folder, ~Webintelligence, DSS Intermediate, ICAP Universe Training, LSE Data, and PS Data. The main pane shows a table with columns 'Title' and 'Last Run Time'.

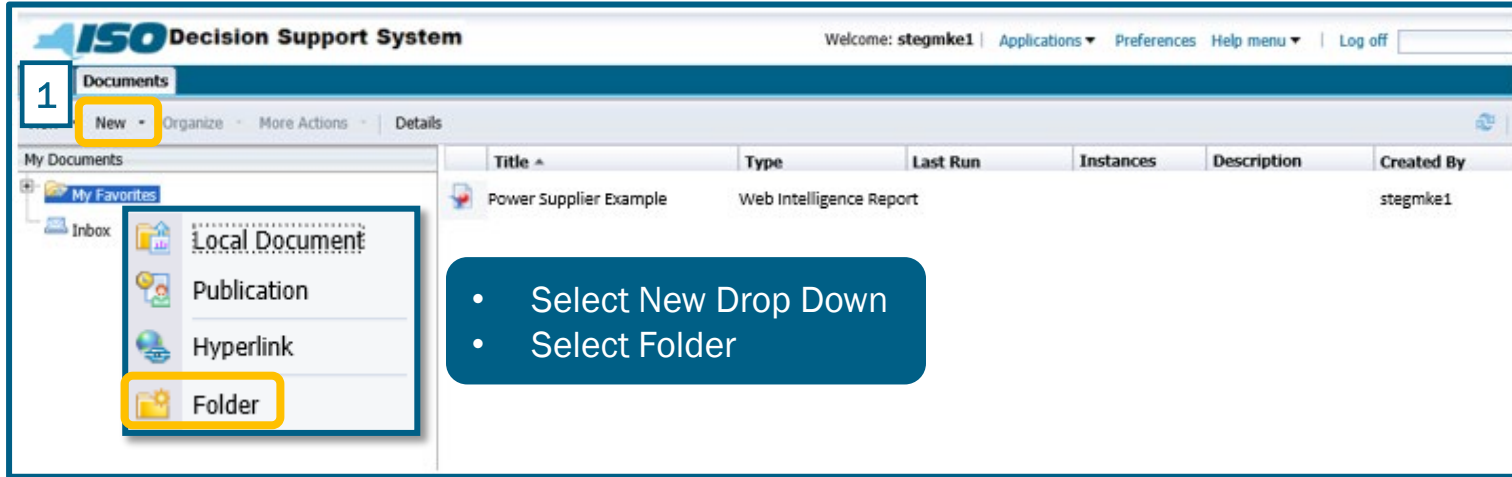
Title	Last Run Time
~Webintelligence	
DSS Intermediate	
ICAP Universe Training	
LSE Data	
PS Data	

File Name: PS Example_1

Save As Type: Web Intelligence

Buttons: Save, Cancel

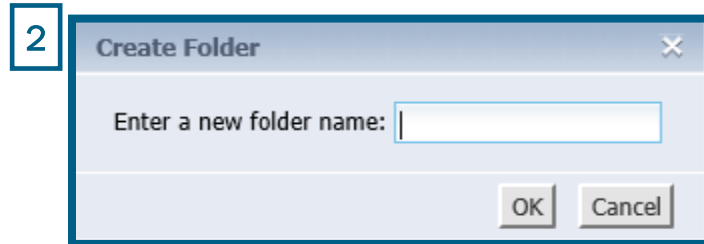
Creating Sub-Folders



The screenshot shows the ISO Decision Support System interface. The 'Documents' tab is active, and the 'New' dropdown menu is open, highlighting the 'Folder' option. A table of documents is visible in the background.

Title	Type	Last Run	Instances	Description	Created By
Power Supplier Example	Web Intelligence Report				stegmke1

- Select New Drop Down
- Select Folder



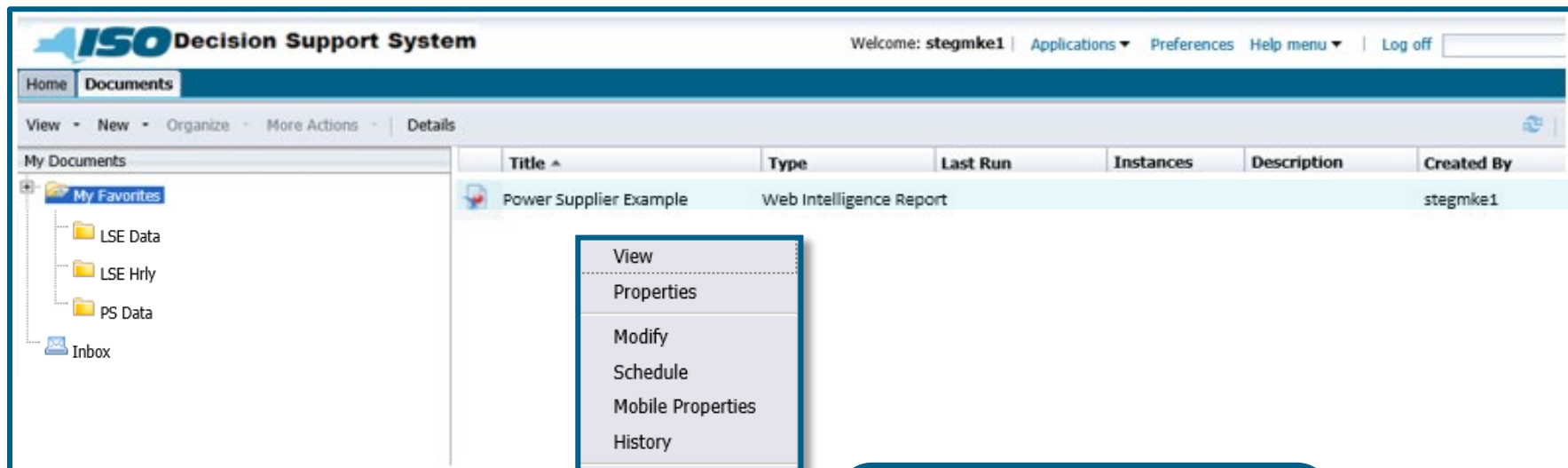
The 'Create Folder' dialog box is shown, prompting the user to enter a new folder name. The 'OK' and 'Cancel' buttons are visible at the bottom.

Enter a new folder name:

OK Cancel

- Type in Folder Name
- Select OK

Moving Files



The screenshot shows the ISO Decision Support System interface. The top navigation bar includes 'Home' and 'Documents'. Below it is a menu with 'View', 'New', 'Organize', 'More Actions', and 'Details'. A table lists documents with columns for Title, Type, Last Run, Instances, Description, and Created By. A document titled 'Power Supplier Example' is selected, and a context menu is open over it, showing options like View, Properties, Modify, Schedule, Mobile Properties, History, Categories, Document Link, New, Organize, and Details. The 'Organize' option is highlighted.

Title	Type	Last Run	Instances	Description	Created By
Power Supplier Example	Web Intelligence Report				stegmke1

- Select Report to be Moved
- Right Click for Options
- Select Organize
- Make Desired Choice
 - Copy or Cut

Which data objects can be summed?

a) Dimensions

b) Details/attributes

c) Measures

d) All of the above

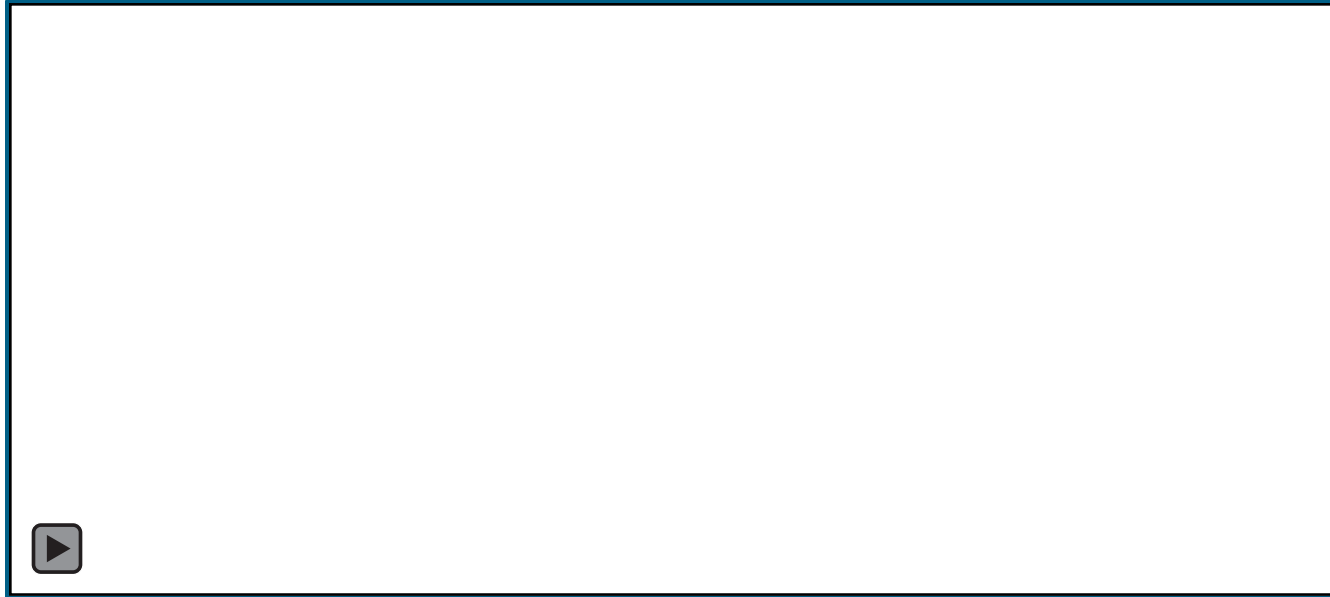
Edit Custom Queries

Edit Custom Queries

■ Duplicating Queries and Reports

- You may edit your existing query, run it, and add the new data objects into the existing report
- You may edit your existing query, run it, and add the new data objects into a duplicate report
- You may duplicate your existing query and edit the query duplicate, run it, and add the new data objects into the existing report
- You may duplicate your existing query and edit the query duplicate, run it, and add the new data objects into a duplicate report

Modify an existing report



- Locate the report you wish to edit from the 'My Favorites' folder
- Select 'Modify' in order to open the report

Modify an existing report

ISO Decision Support System Welcome: [stegmke1](#) | [Applications](#) ▾ | [Preferences](#) | [Help menu](#) ▾ | [Log off](#)

Home Documents

View ▾ New ▾ Organize ▾ More Actions ▾ Details

My Documents	Title ^	Type	Last Run	Instances	Description	Created By	Created On
My Favorites	Example 4	Web Intelligence		0		train07	Apr 2, 2016 3:07 PM
~Webintelligence	Example 5	Web Intelligence		0		train07	Apr 4, 2016 10:48 AM
DSS Intermediate	LSE Example 3	Web Intelligence		0		train07	Apr 1, 2016 11:54 AM
ICAP Universe Training	PS Example 1	Web Intelligence		0		train07	Mar 25, 2016 12:37 PM
LSE Data	PS Example 2	Web Intelligence		0		train07	Mar 30, 2016 1:29 PM
PS Data							
Inbox							
Personal Categories							

Modify an existing report

■ Web Intelligence Design View [Edit Mode]

Available Objects

- New Document
 - Gen Name
 - Interval Start Day (Eastern)
 - Org Name
 - Day Total DAM Stlmnt: Gen (\$)
 - Variables

Report 1

Org Name	Gen Name	Interval Start Day (Eastern)	Day Total DAM Stlmnt: Gen (\$)	
Add Report	Ctrl+Shift+R	66728	01/31/2015	0.00
Duplicate Report		67324	01/31/2015	0.00
Delete Report		67439	01/31/2015	0.00
Rename Report		67440	01/31/2015	0.00
Move Report		366810	01/31/2015	302.88
Format Report...				

Design

- Display the report in Design mode
- With Data Ctrl+2
- Structure only Ctrl+3

Duplicate report to create a copy before editing it

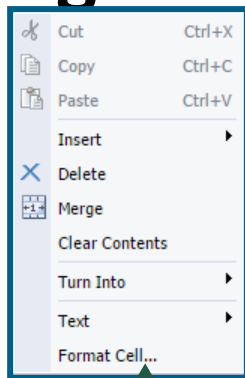
Selecting 'Design' expands the ribbon and allows you to edit.

Modify an existing report

■ Web Intelligence Design View [Edit Mode]

Report 1

Org Name	Gen Name	Interval Start D	Day Total DAM
Organization1017822	GenBilling66728	01/31/2015	0.00
Organization1017822	GenBilling67324	01/31/2015	0.00
Organization1017822	GenBilling67439	01/31/2015	0.00
Organization1017822	GenBilling67440	01/31/2015	0.00
Organization4379	GenBilling366810	01/31/2015	302.88
Organization4379	GenBilling66738	01/31/2015	30,402.30
Organization4379	GenBilling66855	01/31/2015	67,319.01
Organization4379	GenBilling67357	01/31/2015	0.00
Organization6851	GenBilling67197	01/31/2015	34,603.20
Organization6851	GenBilling67221	01/31/2015	170,930.76
Organization6851	GenBilling67236	01/31/2015	0.00
Organization7630	GenBilling366813	01/31/2015	247.35
Organization7630	GenBilling366904	01/31/2015	477.30
Organization7630	GenBilling66977	01/31/2015	-912.66
Organization7962	GenBilling66722	01/31/2015	0.00
Organization7962	GenBilling66774	01/31/2015	90,804.78
Organization7962	GenBilling67307	01/31/2015	0.00
Organization7962	GenBilling67316	01/31/2015	0.00



You can modify columns by right clicking on a cell within the column much like working in Excel

Report 1

Org Name	Gen Name	Interval Start Day (Eastern)	Day Total DAM Stimt: Gen (\$)
Organization1017822	GenBilling66728	01/31/2015	0.00
Organization1017822	GenBilling67324	01/31/2015	0.00
Organization1017822	GenBilling67439	01/31/2015	0.00
Organization1017822	GenBilling67440	01/31/2015	0.00
Organization4379	GenBilling366810	01/31/2015	302.88
Organization4379	GenBilling66738	01/31/2015	30,402.30
Organization4379	GenBilling66855	01/31/2015	67,319.01
Organization4379	GenBilling67357	01/31/2015	0.00
Organization6851	GenBilling67197	01/31/2015	34,603.20
Organization6851	GenBilling67221	01/31/2015	170,930.76
Organization6851	GenBilling67236	01/31/2015	0.00
Organization7630	GenBilling366813	01/31/2015	247.35
Organization7630	GenBilling366904	01/31/2015	477.30
Organization7630	GenBilling66977	01/31/2015	-912.66
Organization7962	GenBilling66722	01/31/2015	0.00
Organization7962	GenBilling66774	01/31/2015	90,804.78
Organization7962	GenBilling67307	01/31/2015	0.00
Organization7962	GenBilling67316	01/31/2015	0.00

Edit Custom Queries

■ Adding Additional Data Objects

- From your report results page, select ‘Edit Query’ to return to the New Report Panel
- Once in the New Report Panel, add your desired data objects to your Result Objects pane
- Make any changes you may desire to the Query Filter pane
- Run your report (you may choose to change your prompt details or you may choose to keep them the same)

Modify an existing report

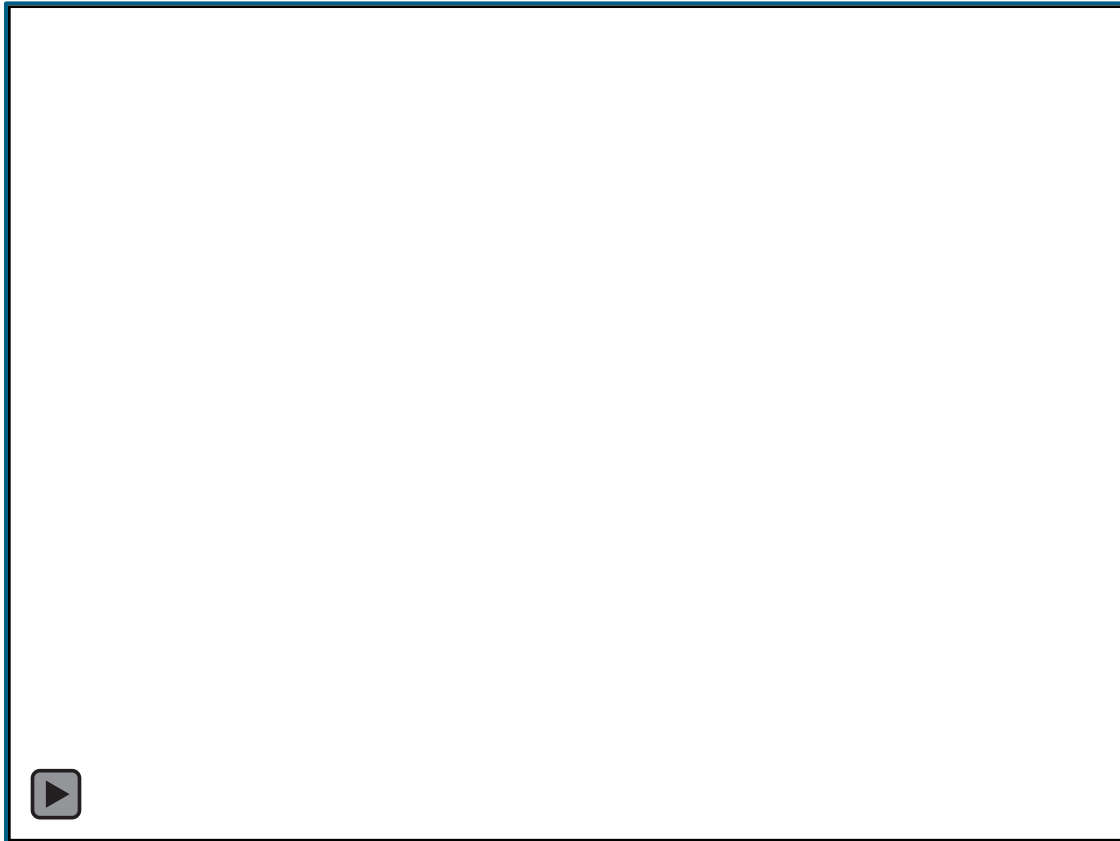
■ Web Intelligence Design View [Edit Mode]

Selecting the 'Edit Data Provider' icon opens the Query Panel and allows you to add/delete data objects

Add these objects and run query

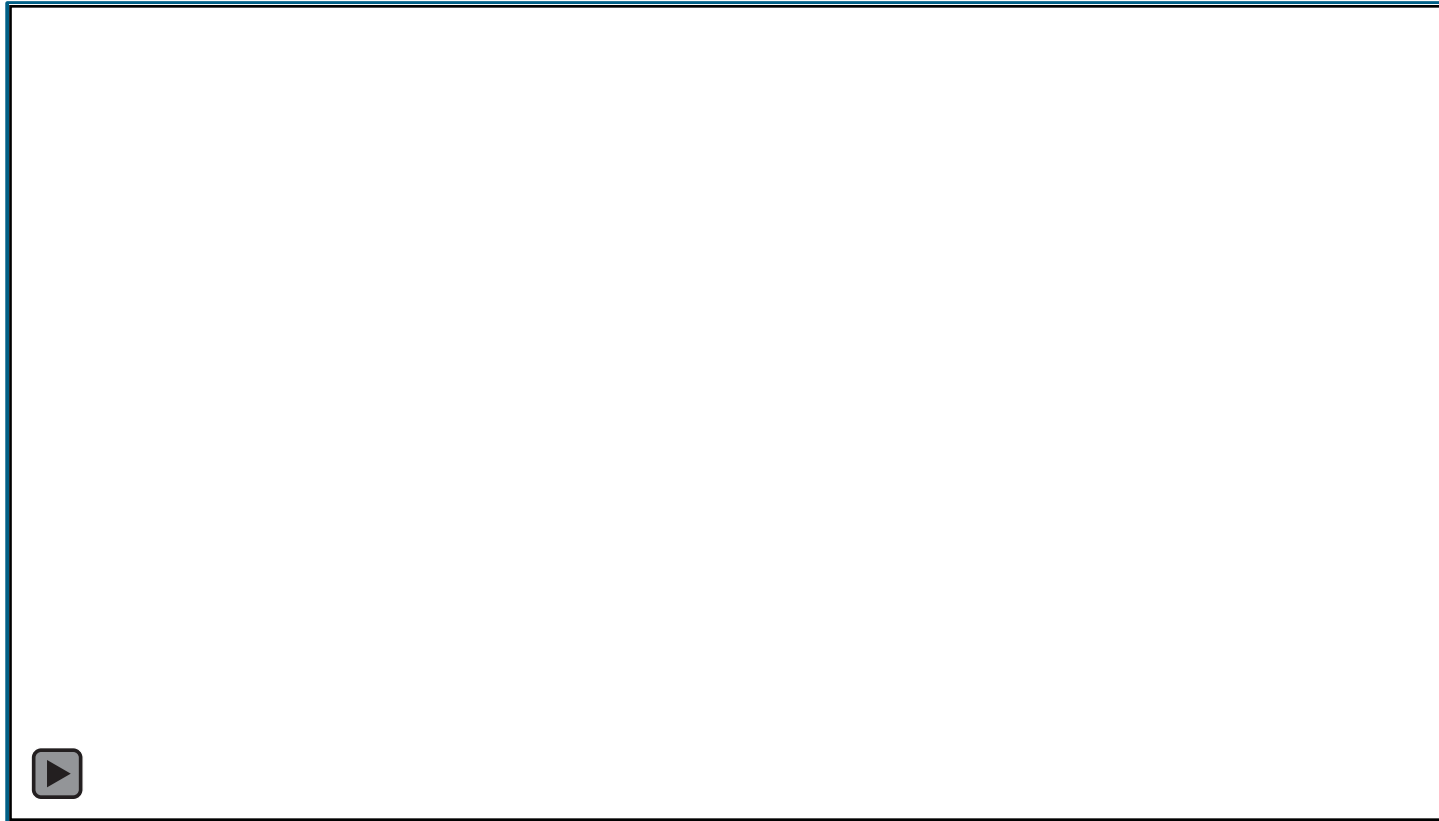
Add these objects and run query

Report Results



You will then be returned to
the Reports Results page

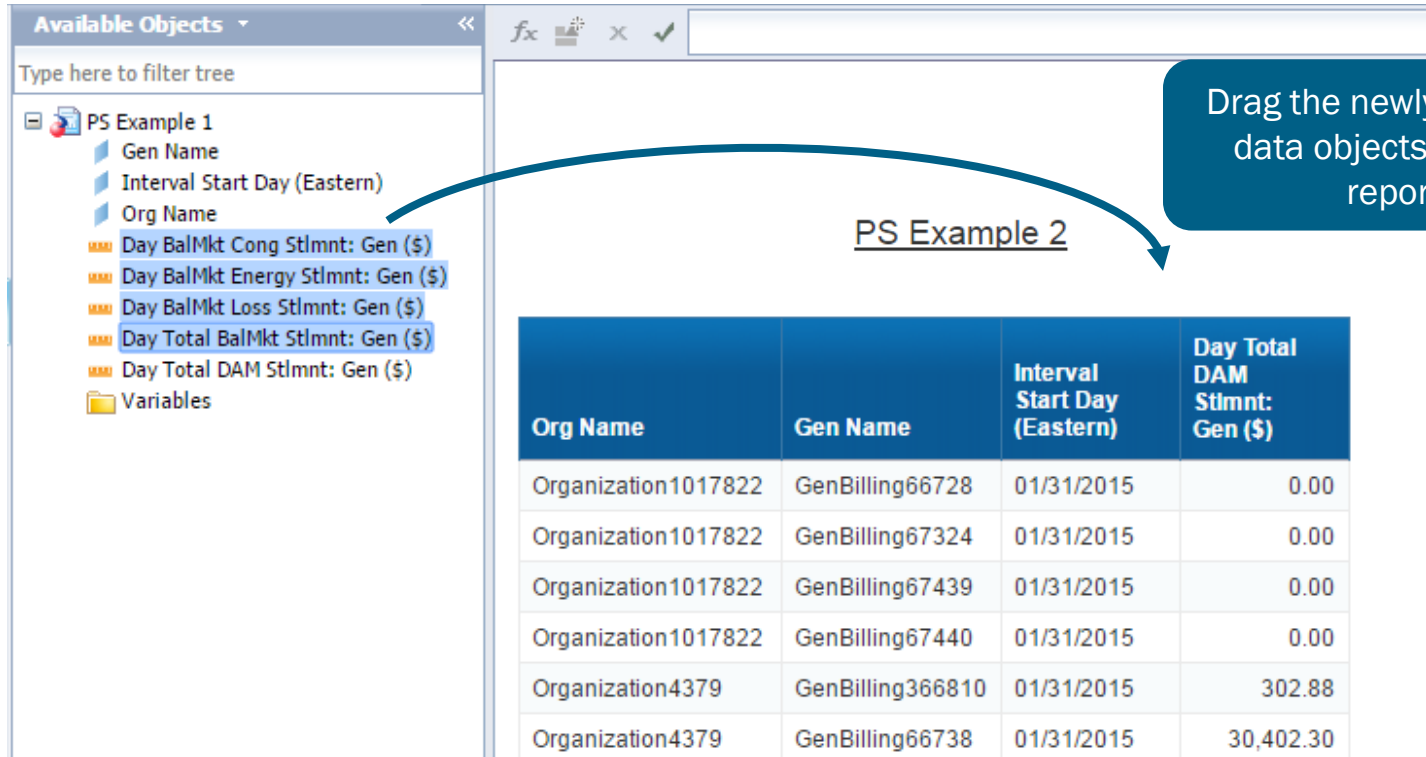
Design View



Selecting 'Design' expands the ribbon and allows you to edit.

Modify an existing report

- Web Intelligence Design View [Edit Mode]



Available Objects

Type here to filter tree

- PS Example 1
 - Gen Name
 - Interval Start Day (Eastern)
 - Org Name
 - Day BalMkt Cong Stlmnt: Gen (\$)
 - Day BalMkt Energy Stlmnt: Gen (\$)
 - Day BalMkt Loss Stlmnt: Gen (\$)
 - Day Total BalMkt Stlmnt: Gen (\$)
 - Day Total DAM Stlmnt: Gen (\$)
 - Variables

PS Example 2

Org Name	Gen Name	Interval Start Day (Eastern)	Day Total DAM Stlmnt: Gen (\$)
Organization1017822	GenBilling66728	01/31/2015	0.00
Organization1017822	GenBilling67324	01/31/2015	0.00
Organization1017822	GenBilling67439	01/31/2015	0.00
Organization1017822	GenBilling67440	01/31/2015	0.00
Organization4379	GenBilling366810	01/31/2015	302.88
Organization4379	GenBilling66738	01/31/2015	30,402.30

Drag the newly added data objects into the report

Modify an existing report

■ Web Intelligence Design View [Edit]

Available Objects

Type here to filter tree

- PS Example 1
 - Gen Name
 - Interval Start Day (Eastern)
 - Org Name
 - Day BalMkt Cong Stlmnt: Gen (\$)
 - Day BalMkt Energy Stlmnt: Gen (\$)
 - Day BalMkt Loss Stlmnt: Gen (\$)
 - Day Total BalMkt Stlmnt: Gen (\$)
 - Day Total DAM Stlmnt: Gen (\$)
 - Variables

PS Example 2

Org Name	Gen Name	Interval Start Day (Eastern)	Day Total DAM Stlmnt: Gen (\$)	Day BalMkt Cong Stlmnt: Gen (\$)	Day BalMkt Energy Stlmnt: Gen (\$)	Day BalMkt Loss Stlmnt: Gen (\$)	Day Total BalMkt Stlmnt: Gen (\$)
Organization1017822	GenBilling66728	01/31/2015	0.00	0.00	0.00	0.00	0.00
Organization1017822	GenBilling67324	01/31/2015	0.00	0.00	0.00	0.00	0.00
Organization1017822	GenBilling67439	01/31/2015	0.00	0.00	0.00	0.00	0.00
Organization1017822	GenBilling67440	01/31/2015	0.00	0.00	0.00	0.00	0.00
Organization4379	GenBilling366810	01/31/2015	302.88	-14.88	-43.92	-0.57	-59.37
Organization4379	GenBilling66738	01/31/2015	30,402.30	2,977.83	7,117.56	132.36	10,227.75

Which option should be selected when you want to edit or modify an existing report?

a) Reading Mode

b) Design Mode

Multiple Data Providers and Merging Universes

Multiple Data Providers

- **Obtain data from multiple Universes**
 - Examples:
 - Bringing in data from both the Load and Load-Ancillary Service Universes
 - Bringing in data from both the Power Supplier and Transaction Universes
- **Three options for viewing multiple universes in one report:**
 - Add data to a separate tab in the report
 - Create a second table for the data within the report
 - Bring the data into the same table within the report

Multiple Data Providers

1

Selecting 'Add Query' allows you to pull additional data from another Universe

2

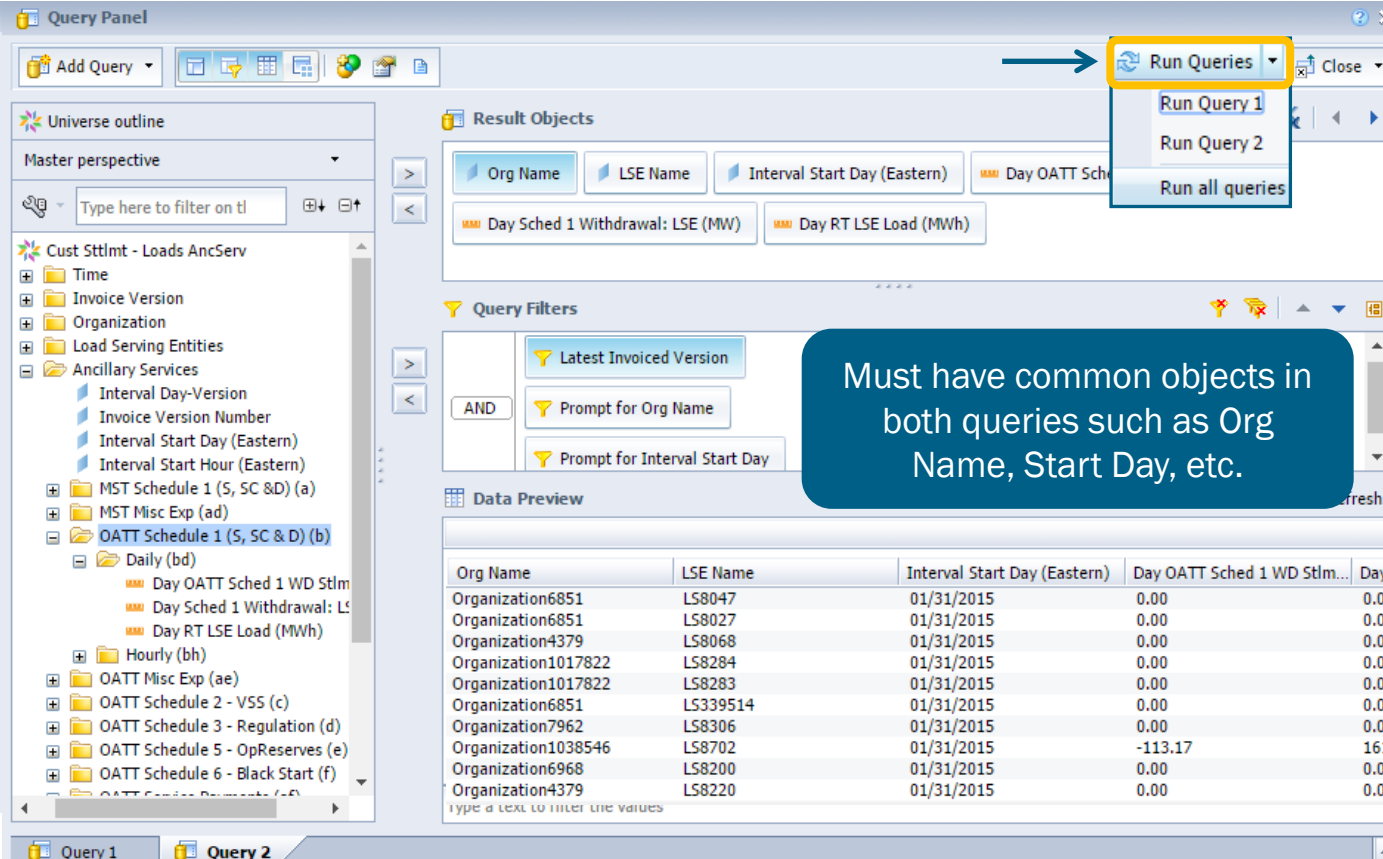
Add Query

Select the universe you want to use to build your report:

Available Universes: Refresh universe list

Name	Revision	Folder
Cust Sttlmt - Demand Response	894	@atcdbo1.ad.nyiso.com_6400\Customer Settlem...
Cust Sttlmt - Invoice Support	969	@atcdbo1.ad.nyiso.com_6400\Customer Settlem...
Cust Sttlmt - Loads	1028	@atcdbo1.ad.nyiso.com_6400\Customer Settlem...
Cust Sttlmt - Loads AncServ	1023	@atcdbo1.ad.nyiso.com_6400\Customer Settlem...
Cust Sttlmt - Power Suppliers	1609	@atcdbo1.ad.nyiso.com_6400\Customer Settlem...
Cust Sttlmt - PowerSupplrs AncServ	973	@atcdbo1.ad.nyiso.com_6400\Customer Settlem...
Cust Sttlmt - Transactions	586	@atcdbo1.ad.nyiso.com_6400\Customer Settlem...
Cust Sttlmt - Transactions AncSer	895	@atcdbo1.ad.nyiso.com_6400\Customer Settlem...
Cust Sttlmt - Transmission Owners	851	@atcdbo1.ad.nyiso.com_6400\Customer Settlem...
Cust Sttlmt - Virtual Market	841	@atcdbo1.ad.nyiso.com_6400\Customer Settlem...

Multiple Data Providers



The screenshot shows the Query Panel interface with a 'Run Queries' dropdown menu open. The menu options are 'Run Query 1', 'Run Query 2', and 'Run all queries'. A blue callout box contains the text: 'Must have common objects in both queries such as Org Name, Start Day, etc.'

Query Filters:

- Latest Invoiced Version
- Prompt for Org Name
- Prompt for Interval Start Day

Data Preview:

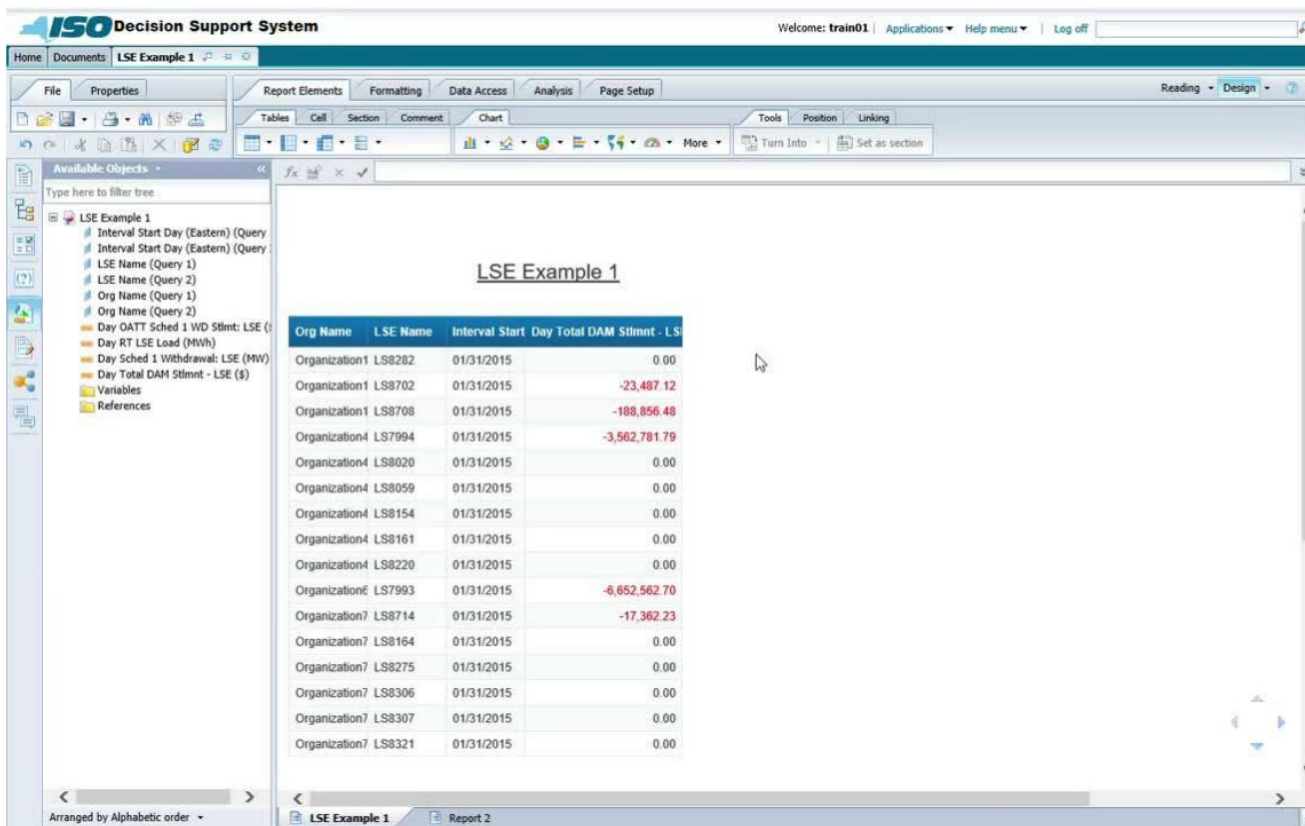
Org Name	LSE Name	Interval Start Day (Eastern)	Day OATT Sched 1 WD Stlm...	Day
Organization6851	LS8047	01/31/2015	0.00	0.00
Organization6851	LS8027	01/31/2015	0.00	0.00
Organization4379	LS8068	01/31/2015	0.00	0.00
Organization1017822	LS8284	01/31/2015	0.00	0.00
Organization1017822	LS8283	01/31/2015	0.00	0.00
Organization6851	LS339514	01/31/2015	0.00	0.00
Organization7962	LS8306	01/31/2015	0.00	0.00
Organization1038546	LS8702	01/31/2015	-113.17	161
Organization6968	LS8200	01/31/2015	0.00	0.00
Organization4379	LS8220	01/31/2015	0.00	0.00

Multiple Data Providers

The screenshot displays the 'Query Panel' interface. At the top right, a yellow box highlights the 'Run Queries' button with a blue arrow pointing to it. Below this, the 'Result Objects' section shows several data objects: 'Org Name', 'LSE Name', 'Interval Start Day (Eastern)', 'Day OATT Sched 1 WD Stlmt: LSE (\$)', 'Day Sched 1 Withdrawal: LSE (MW)', and 'Day RT LSE Load (MWh)'. An 'Add Query' dialog box is open in the foreground, containing the text 'Choose how you want to include the data from the new query.' and three radio button options. The first option, 'Insert a table in a new report', is selected and highlighted with a yellow box. A blue arrow points from a callout box at the bottom to this option. The callout box contains the text: 'When you run the queries you will be presented with three different options'. The dialog box also includes an 'OK' button at the bottom right.

When you run the queries you will be presented with three different options

Multiple Data Providers



The screenshot displays the ISO Decision Support System interface. The main window shows a report titled "LSE Example 1" with a table of data. The table has the following columns: Org Name, LSE Name, Interval Start, Day Total DAM Stlmnt - L\$, and L\$. The data is sorted by Day Total DAM Stlmnt - L\$ in descending order.

Org Name	LSE Name	Interval Start	Day Total DAM Stlmnt - L\$	L\$
Organization1	LS8282	01/31/2015		0.00
Organization1	LS8702	01/31/2015		-23,487.12
Organization1	LS8708	01/31/2015		-188,856.48
Organization4	LS7994	01/31/2015		-3,562,781.79
Organization4	LS8020	01/31/2015		0.00
Organization4	LS8059	01/31/2015		0.00
Organization4	LS8154	01/31/2015		0.00
Organization4	LS8161	01/31/2015		0.00
Organization4	LS8220	01/31/2015		0.00
Organization6	LS7993	01/31/2015		-6,652,562.70
Organization7	LS8714	01/31/2015		-17,362.23
Organization7	LS8164	01/31/2015		0.00
Organization7	LS8275	01/31/2015		0.00
Organization7	LS8306	01/31/2015		0.00
Organization7	LS8307	01/31/2015		0.00
Organization7	LS8321	01/31/2015		0.00

ew
ew data
erse

Multiple Data Providers

ISO Decision Support System

Welcome: train01 | Applications | Help menu | Log off

Home Documents LSE Example 1

Report Elements Formatting Data Access Analysis Page Setup

Tables Cell Section Comment Chart Tools Position Linking Table Layout Behaviors

fx =NameOf([Day RT LSE Load (MWh)])

LSE Example 1

Org Name	LSE Name	Interval Start	Day Total DAM Stmnt - LSE	Org Name	LSE Name	Interval Start	Day OATT S	Day Sched 1 Withdra	Day RT LSE Load
Organization1	LS8282	01/31/2015	0.00	Organization1	LS8282	01/31/2015	0.00	0.0000	0.0000
Organization1	LS8702	01/31/2015	-23,487.12	Organization1	LS8283	01/31/2015	0.00	0.0000	0.0000
Organization1	LS8708	01/31/2015	-188,856.48	Organization1	LS8284	01/31/2015	0.00	0.0000	0.0000
Organization4	LS7994	01/31/2015	-3,562,781.79	Organization1	LS8529	01/31/2015	0.00	0.0000	0.0000
Organization4	LS8020	01/31/2015	0.00	Organization1	LS8576	01/31/2015	0.00	0.0000	0.0000
Organization4	LS8059	01/31/2015	0.00	Organization1	LS8702	01/31/2015	-100.43	143.6486	143.6486
Organization4	LS8154	01/31/2015	0.00	Organization1	LS8708	01/31/2015	-652.17	932.8385	932.8385
Organization4	LS8161	01/31/2015	0.00	Organization4	LS339512	01/31/2015	0.00	0.0000	0.0000
Organization4	LS8220	01/31/2015	0.00	Organization4	LS7994	01/31/2015	-17,849.96	25,532.0448	25,532.0448
Organization6	LS7993	01/31/2015	-6,652,562.70	Organization4	LS8019	01/31/2015	0.00	0.0000	0.0000
Organization7	LS8714	01/31/2015	-17,362.23	Organization4	LS8020	01/31/2015	0.00	0.0000	0.0000
Organization7	LS8164	01/31/2015	0.00	Organization4	LS8021	01/31/2015	0.00	0.0000	0.0000
Organization7	LS8275	01/31/2015	0.00	Organization4	LS8059	01/31/2015	0.00	0.0000	0.0000
Organization7	LS8306	01/31/2015	0.00	Organization4	LS8064	01/31/2015	0.00	0.0000	0.0000
Organization7	LS8307	01/31/2015	0.00	Organization4	LS8068	01/31/2015	0.00	0.0000	0.0000
Organization7	LS8321	01/31/2015	0.00	Organization4	LS8153	01/31/2015	0.00	0.0000	0.0000
				Organization4	LS8154	01/31/2015	0.00	0.0000	0.0000

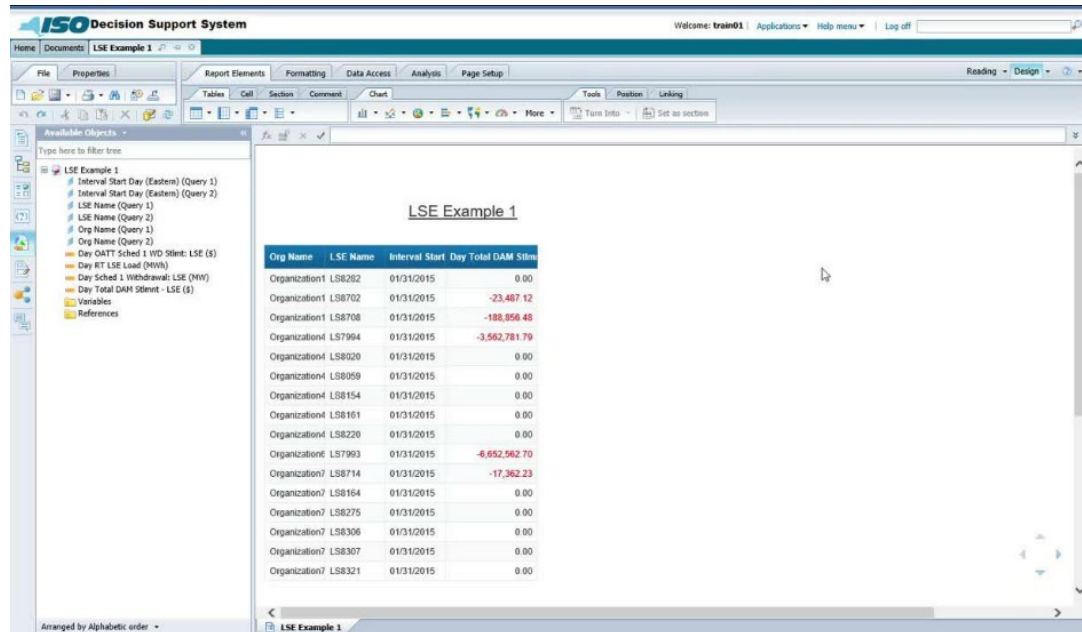
Arranged by Alphabetic order

Option #2 creates a second table within the same report. Data is on the same page in two separate tables.

Multiple Data Providers

Option #3 requires you to manually drag and drop the data objects into the original report table so that all data from each Universe is in a single table.

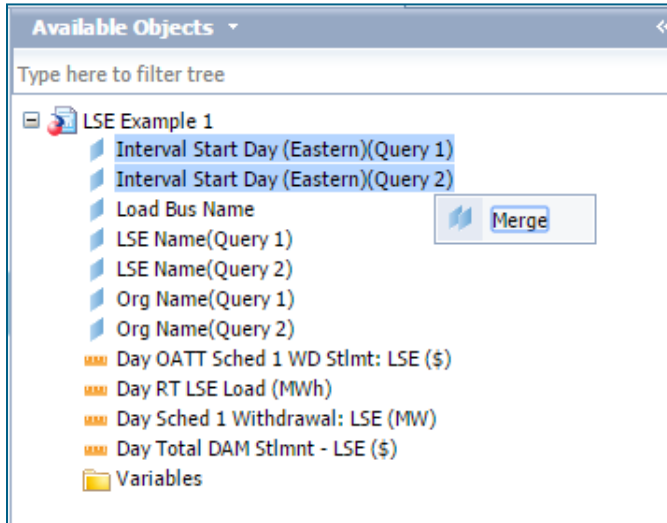
- You must merge the dimensions first in the data manager in order to pull them into the table and to have accurate data values.
- Due to some limited data in the Training Environment, you may have null values in the cells.
- Some data objects from a particular Universe may not be compatible to be pulled into the report.



The screenshot shows the ISO Decision Support System interface. The main window displays a report titled "LSE Example 1". The report contains a table with the following data:

Org Name	LSE Name	Interval Start	Day Total DAM \$/MWh
Organization1	LS8282	01/31/2015	0.00
Organization1	LS8702	01/31/2015	-23,487.12
Organization1	LS8708	01/31/2015	-188,956.48
Organization4	LS7994	01/31/2015	-3,582,781.79
Organization4	LS8020	01/31/2015	0.00
Organization4	LS8059	01/31/2015	0.00
Organization4	LS8154	01/31/2015	0.00
Organization4	LS8161	01/31/2015	0.00
Organization4	LS8220	01/31/2015	0.00
Organization6	LS7993	01/31/2015	-6,652,562.70
Organization7	LS8714	01/31/2015	-17,362.23
Organization7	LS8164	01/31/2015	0.00
Organization7	LS8275	01/31/2015	0.00
Organization7	LS8306	01/31/2015	0.00
Organization7	LS8307	01/31/2015	0.00
Organization7	LS8321	01/31/2015	0.00

Multiple Data Providers

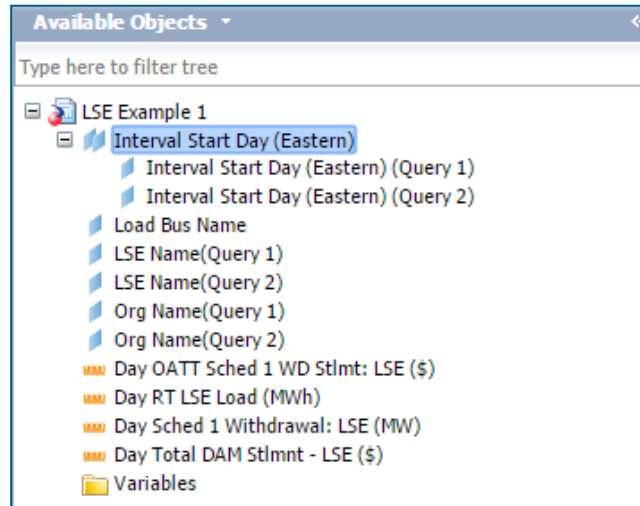


The screenshot shows the 'Available Objects' window with a search bar containing 'Type here to filter tree'. Under the 'LSE Example 1' folder, the following objects are listed:

- Interval Start Day (Eastern)(Query 1)
- Interval Start Day (Eastern)(Query 2)
- Load Bus Name
- LSE Name(Query 1)
- LSE Name(Query 2)
- Org Name(Query 1)
- Org Name(Query 2)
- Day OATT Sched 1 WD Stlmt: LSE (\$)
- Day RT LSE Load (MWh)
- Day Sched 1 Withdrawal: LSE (MW)
- Day Total DAM Stlmt - LSE (\$)
- Variables

A 'Merge' button is visible next to the 'Load Bus Name' object.

Merge Dimensions from both queries and then pull the merged Dimension into your new report, replacing the previous object.



The screenshot shows the 'Available Objects' window after the merge operation. The search bar still contains 'Type here to filter tree'. Under the 'LSE Example 1' folder, the objects are now:

- Interval Start Day (Eastern) (merged)
- Interval Start Day (Eastern) (Query 1)
- Interval Start Day (Eastern) (Query 2)
- Load Bus Name
- LSE Name(Query 1)
- LSE Name(Query 2)
- Org Name(Query 1)
- Org Name(Query 2)
- Day OATT Sched 1 WD Stlmt: LSE (\$)
- Day RT LSE Load (MWh)
- Day Sched 1 Withdrawal: LSE (MW)
- Day Total DAM Stlmt - LSE (\$)
- Variables

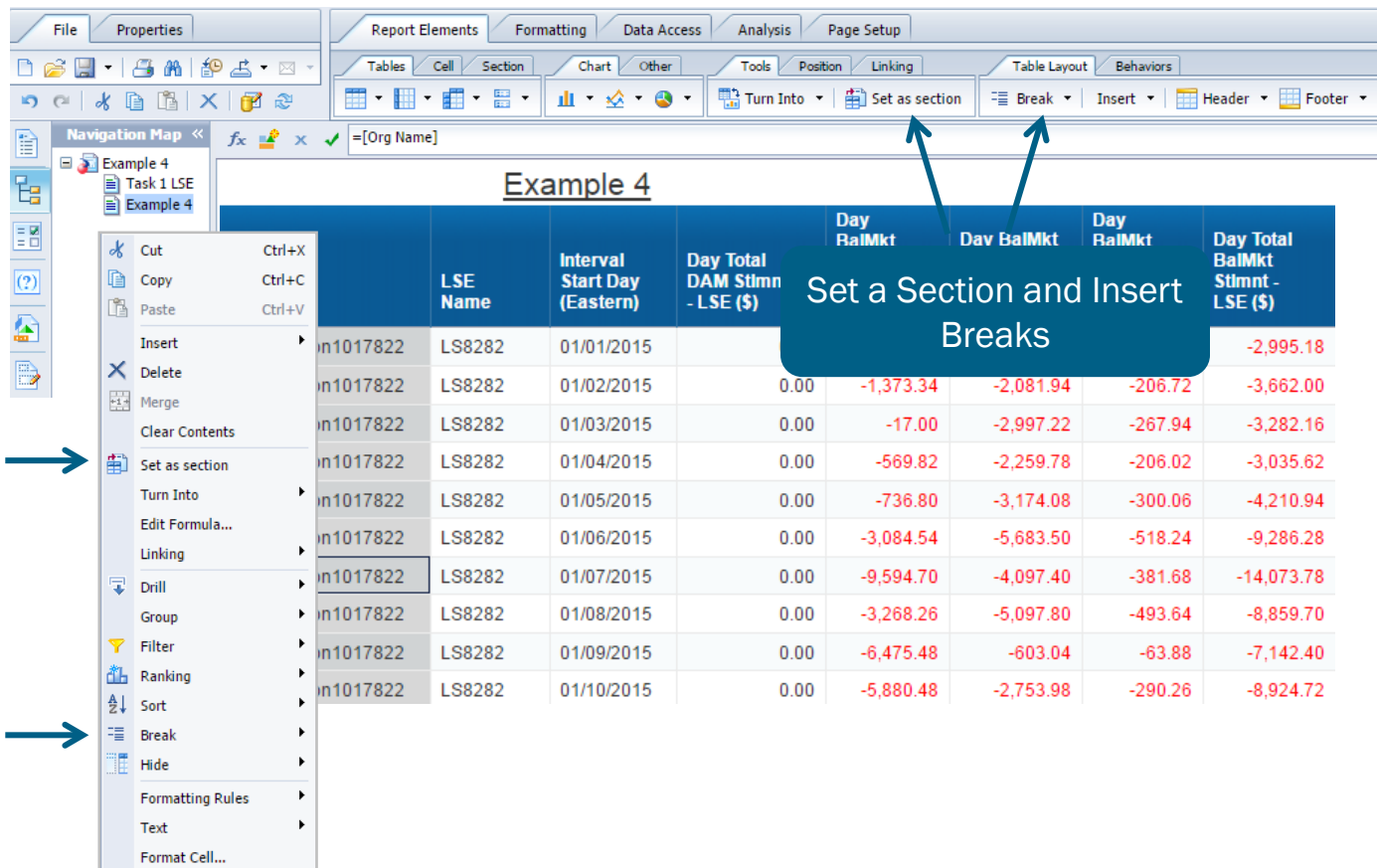
True or False: When managing multiple data providers, they must have a common data object (*i.e. Org name, gen name, date, etc.*)

a) True

b) False

Sections, Breaks, Formulas, & Variables

Report Data



Example 4

	LSE Name	Interval Start Day (Eastern)	Day Total DAM Stimm - LSE (\$)	Day BalMkt	Dav BalMkt	Day BalMkt	Day Total BalMkt Stimm - LSE (\$)
n1017822	LS8282	01/01/2015					-2,995.18
n1017822	LS8282	01/02/2015	0.00	-1,373.34	-2,081.94	-206.72	-3,662.00
n1017822	LS8282	01/03/2015	0.00	-17.00	-2,997.22	-267.94	-3,282.16
n1017822	LS8282	01/04/2015	0.00	-569.82	-2,259.78	-206.02	-3,035.62
n1017822	LS8282	01/05/2015	0.00	-736.80	-3,174.08	-300.06	-4,210.94
n1017822	LS8282	01/06/2015	0.00	-3,084.54	-5,683.50	-518.24	-9,286.28
n1017822	LS8282	01/07/2015	0.00	-9,594.70	-4,097.40	-381.68	-14,073.78
n1017822	LS8282	01/08/2015	0.00	-3,268.26	-5,097.80	-493.64	-8,859.70
n1017822	LS8282	01/09/2015	0.00	-6,475.48	-603.04	-63.88	-7,142.40
n1017822	LS8282	01/10/2015	0.00	-5,880.48	-2,753.98	-290.26	-8,924.72

Set a Section and Insert Breaks

Using Sections and Breaks

Setting Org Name as a Section

Setting LSE Name as a Break

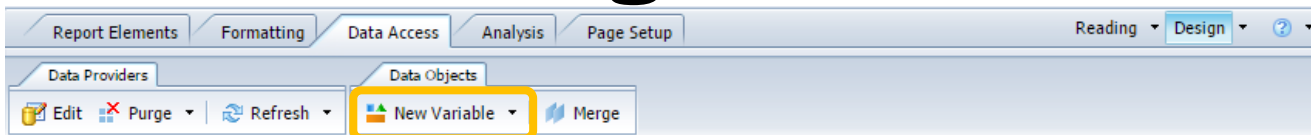
Example 2

Org Name	LSE Name	Interval Start Day (Eastern)	Day Total DAM Stmnt - LSE (\$)	Day BalMkt Cong Stmnt - LSE (\$)	Day BalMkt Energy Stmnt - LSE (\$)	Day BalMkt Loss Stmnt - LSE (\$)	Day Total BalMkt Stmnt - LSE (\$)
Organization1017822	LS8282	01/01/2015	0.00	-1,714.56	-1,171.74	-108.88	-2,995.18
Organization1017822	LS8282	01/02/2015	0.00	-1,373.34	-2,081.94	-206.72	-3,662.00
Organization1017822	LS8282	01/03/2015	0.00	-17.00	-2,997.22	-267.94	-3,282.16
Organization1017822	LS8282	01/04/2015	0.00	-569.82	-2,259.78	-206.02	-3,035.62
Organization1017822	LS8282	01/05/2015	0.00	-736.80	-3,174.08	-300.06	-4,210.94
Organization1017822	LS8282	01/06/2015	0.00	-3,084.54	-5,683.50	-518.24	-9,286.28
Organization1017822	LS8282	01/07/2015	0.00	-9,594.70	-4,097.40	-381.68	-14,073.78
Organization1017822	LS8282	01/08/2015	0.00	-3,268.26	-5,097.80	-493.64	-8,859.70
Organization1017822	LS8282	01/09/2015	0.00	-6,475.48	-603.04	-63.88	-7,142.40
Organization1017822	LS8282	01/10/2015	0.00	-5,880.48	-2,753.98	-290.26	-8,924.72
Organization1038546	LS8702	01/01/2015	-15,284.84	-152.25	-339.66	22.46	-469.45
Organization1038546	LS8702	01/02/2015	-15,753.44	76.79	103.82	53.40	234.01

Another way to do same thing

Example 2

Report Data – Using Variables



Organization1017

LSE Name	Interval Start Day (Eastern)
LS8282	01/01/2015
	01/02/2015
	01/03/2015
	01/04/2015
	01/05/2015
	01/06/2015
	01/07/2015
	01/08/2015
	01/09/2015

Create Variable

Definition

Name: Type:

Qualification:

Formula

$$=[\text{Day BalMkt Energy Stlmnt} \cdot \text{LSE} (\$)] + [\text{Day BalMkt Loss Stlmnt} \cdot \text{LSE} (\$)] + [\text{Day BalMkt Cong Stlmnt} \cdot \text{LSE} (\$)]$$

Available Objects

- Example 4
 - Interval Start Day (Eas)
 - LSE Name
 - Org Name
 - Day BalMkt Cong Stlmnt
 - Day BalMkt Energy Stlmnt
 - Day BalMkt Loss Stlmnt
 - Day Total BalMkt Stlmnt
 - Day Total DAM Stlmnt
 - Variables

Available Functions

- Aggregate
 - Average
 - Count
 - First
 - Interpolation
 - Last
 - Max
 - Median
 - Min
 - Mode
 - Percentage
 - Percentile

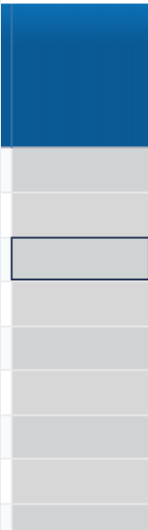
Available Operators

- = < <= > >=
- . + - / * ()
- Values...
- Prompts...
- ;
- {
- }
- After
- All
- And
- Before
- Before After

Description

OK Cancel

Insert Formulas



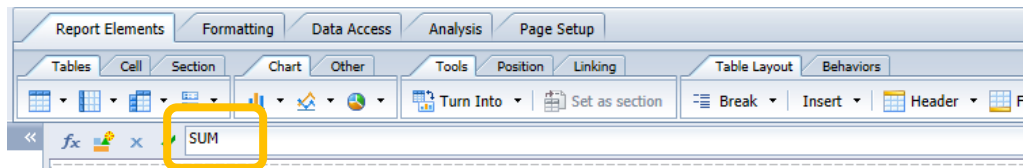
Report Data – Using Variables

The screenshot shows a software interface with a 'Data Access' tab highlighted. A 'New Variable' button is also highlighted. A 'Create Variable' dialog box is open, showing the formula: $\text{=[Day BalMkt Cong Stlmnt - LSE ($) + [Day BalMkt Energy Stlmnt - LSE ($) + [Day BalMkt Loss Stlmnt - LSE ($)}}$. The dialog also shows a list of available objects and functions. The background shows a report for 'Organization1017822' with a table of data.

LSE Name	Interval Start Day (Eastern)	Day Total DAM Stlmnt - LSE (\$)
LS8282	01/01/2015	0.00
	01/02/2015	0.00
	01/03/2015	0.00
	01/04/2015	0.00
	01/05/2015	0.00

Using Formula Line (f_x)

- Select a cell and insert text or formulas in the formula line, similar to Excel



Example 2 (1)

Organization1017822

LSE Name	Interval Start Day (Eastern)	Day Total DAM Stimnt - LSE (\$)	Day BalMkt Cong Stimnt - LSE (\$)	Day BalMkt Energy Stimnt - LSE (\$)	Day BalMkt Loss Stimnt - LSE (\$)	Day Total BalMkt Stimnt - LSE (\$)
LS8282	01/01/2015	0.00	-1,714.56	-1,171.74	-108.88	-2,995.18
	01/02/2015	0.00	-1,373.34	-2,081.94	-206.72	-3,662.00
	01/03/2015	0.00	-17.00	-2,997.22	-267.94	-3,282.16
	01/04/2015	0.00	-569.82	-2,259.78	-206.02	-3,035.62
	01/05/2015	0.00	-736.80	-3,174.08	-300.06	-4,210.94
	01/06/2015	0.00	-3,084.54	-5,683.50	-518.24	-9,286.28
	01/07/2015	0.00	-9,594.70	-4,097.40	-381.68	-14,073.78
	01/08/2015	0.00	-3,268.26	-5,097.80	-493.64	-8,859.70
	01/09/2015	0.00	-6,475.48	-603.04	-63.88	-7,142.40
	01/10/2015	0.00	-5,880.48	-2,753.98	-290.26	-8,924.72
LS8282					SUM	

Report Data – Using Variables

Available Objects

Type here to filter tree

- Example 2
 - Interval Start Day (Eastern)
 - LSE Name
 - Org Name
 - Day BalMkt Cong Stlmnt - LSE (\$)
 - Day BalMkt Energy Stlmnt - LSE (\$)
 - Day BalMkt Loss Stlmnt - LSE (\$)
 - Day Total BalMkt Stlmnt - LSE (\$)
 - Day Total DAM Stlmnt - LSE (\$)
 - Variables
 - Recalc Total BalMkt Stlmnt \$

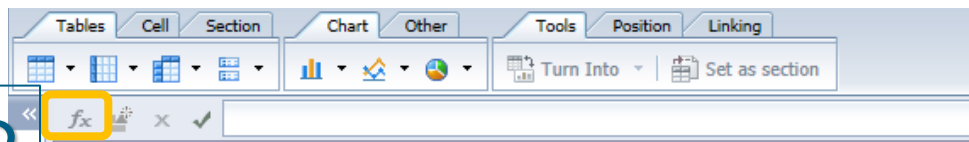
Example 2 (3)

Organization1017822

LSE Name	Interval Start Day (Eastern)	Day Total DAM Stlmnt - LSE (\$)	Day BalMkt Cong Stlmnt - LSE (\$)	Day BalMkt Energy Stlmnt - LSE (\$)	Day BalMkt Loss Stlmnt - LSE (\$)	Day Total BalMkt Stlmnt - LSE (\$)	Recalc Total BalMkt Stlmnt \$
LS8282	01/01/2015	0.00	-1,714.56	-1,171.74	-108.88	-2,995.1	-2,995.18
	01/02/2015	0.00	-1,373.34	-2,081.94	-206.72	-3,662.0	-3,662
	01/03/2015	0.00	-17.00	-2,997.22	-267.94	-3,282.1	-3,282.16
	01/04/2015	0.00	-569.82	-2,259.78	-206.02	-3,035.6	-3,035.62
	01/05/2015	0.00	-736.80	-3,174.08	-300.06	-4,210.9	-4,210.94
	01/06/2015	0.00	-3,084.54	-5,683.50	-518.24	-9,286.2	-9,286.28
	01/07/2015	0.00	-9,594.70	-4,097.40	-381.68	-14,073.7	-14,073.78
	01/08/2015	0.00	-3,268.26	-5,097.80	-493.64	-8,859.7	-8,859.7
	01/09/2015	0.00	-6,475.48	-603.04	-63.88	-7,142.4	-7,142.4
	01/10/2015	0.00	-5,880.48	-2,753.98	-290.26	-8,924.7	-8,924.72
LS8282					SUM	-65,472.7	

Drag the newly added Variable objects into the report

Using Formula Line (f_x)



2

Organization1017822

LSE Name	Interval Start Day (Eastern)	Day Total DAM Stlmnt - LSE (\$)	Day BalMkt Cong Stlmnt - LSE (\$)	Day BalMkt Energy Stlmnt - LSE (\$)	Day BalMkt Loss Stlmnt - LSE (\$)	Day Total BalMkt Stlmnt - LSE (\$)
LS8282	01/01/2015	0.00	-1,714.56	-1,171.74	-108.88	-2,995.18
	01/02/2015	0.00	-1,373.34	-2,081.94	-206.72	-3,662.00
	01/03/2015	0.00	-17.00	-2,997.22	-267.94	-3,282.16
	01/04/2015	0.00	-569.82	-2,259.78	-206.02	-3,035.62
	01/05/2015	0.00	-736.80	-3,174.08	-300.06	-4,210.94
	01/06/2015	0.00	-3,084.54	-5,683.50	-518.24	-9,286.28
	01/07/2015	0.00	-9,594.70	-4,097.40	-381.68	-14,073.78
	01/08/2015	0.00	-3,268.26	-5,097.80	-493.64	-8,859.70
	01/09/2015	0.00	-6,475.48	-603.04	-63.88	-7,142.40
	01/10/2015	0.00	-5,880.48	-2,753.98	-290.26	-8,924.72
LS8282					SUM	-65,472.78

1

3

Formula Editor

Formula: =Sum((Day Total BalMkt Stlmnt - LSE (\$)))

Available Objects: Interval Start Day (Eastern), LSE Name, Org Name, Day BalMkt Cong Stlmnt - LSE (\$), Day BalMkt Energy Stlmnt - LSE (\$), Day Total BalMkt Stlmnt - LSE (\$), Variables

Available Functions: RunningAverage, RunningCount, RunningMax, RunningMin, RunningProduct, RunningSum, StdDev, VarP, All

Available Operators: =, <, <=, <>, >, >=, +, -, /, *, (,)

Values... Prompts... { } After All

Description: Day Total BalMkt Stlmnt - LSE (\$) Total Balancing Market Settlement - Load Serving Entity (\$) is a number representing the BAS-determined amount of a LSE's total balancing energy market settlement; sum of the balancing energy...

OK Cancel

6

5

4

8

7

Charts and Graphs

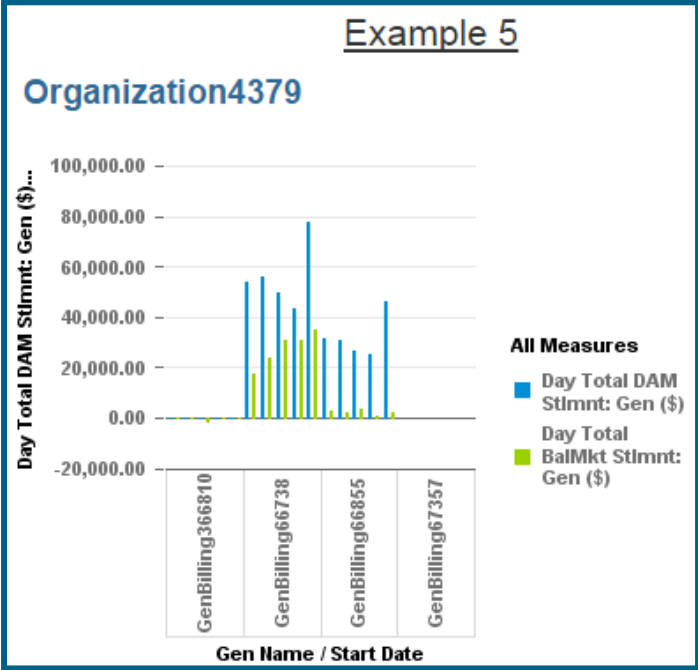
Column Chart

Organization4379

Gen Name	Interval Start Day (Eastern)	Day Total DAM Stmnt: Gen (\$)	Day Total BalMkt Stmnt: Gen (\$)
GenBilling366810	01/01/2015	233.36	33.04
	01/02/2015	242.24	-74.72
	01/03/2015	215.60	-1,014.48
	01/04/2015	186.88	152.08
	01/05/2015	336.72	379.00
GenBilling66738	01/01/2015	53,885.32	17,824.00
	01/02/2015	55,951.64	23,983.00
	01/03/2015	49,753.60	30,588.00
	01/04/2015	43,102.92	30,477.00
	01/05/2015	77,731.72	35,147.28
GenBilling66855	01/01/2015	31,670.40	2,726.28
	01/02/2015	30,565.20	2,216.72
	01/03/2015	26,951.20	3,709.96
	01/04/2015	25,146.44	982.84
	01/05/2015	46,039.84	2,286.56

Context menu actions: 1. Turn Into > Column Chart, 2. Format Cell...

Report data can be displayed in a graphical form such as a bar graph



Stacked Bar Graph

Organization4379

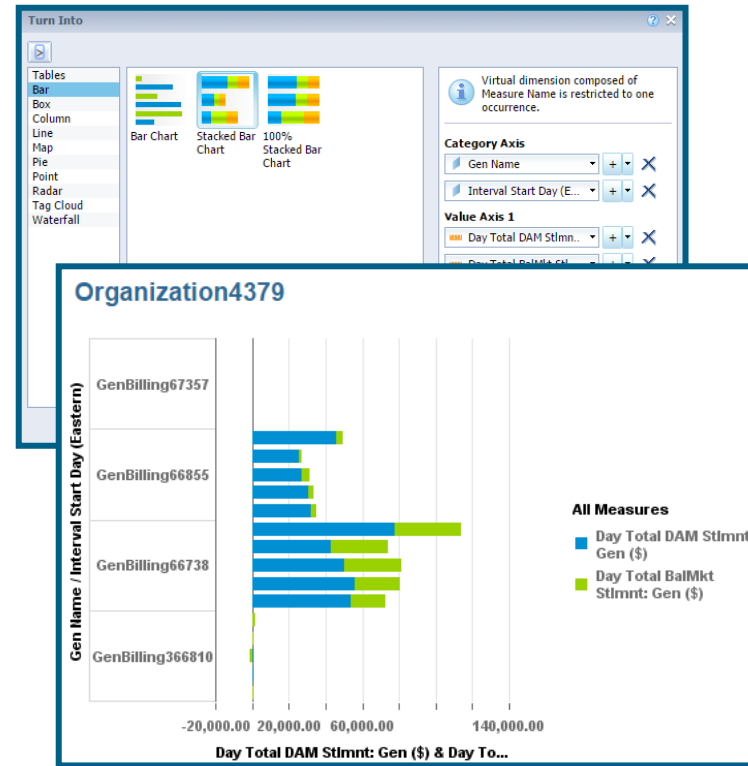
Gen Name	Interval Start Day (Eastern)	Day Total DAM Stlmnt: Gen (\$)	Day Total BalMkt Stlmnt: Gen (\$)
GenBilling366810	01/01/2015	233.36	33.04
	01/02/2015	242.24	-74.72
	01/03/2015	215.60	-1,014.48
	01/04/2015	186.88	152.08
	01/05/2015	336.72	379.28
GenBilling66738	01/01/2015	53,885.32	17,845.32
	01/02/2015	55,951.64	23,983.64
	01/03/2015	49,753.60	30,588.20
	01/04/2015	43,102.92	30,477.32
	01/05/2015	77,731.72	35,147.28

1

2

Turn Into

- Horizontal Table
- Cross Table
- Column Chart
- Line Chart
- Pie Chart
- More Transformations...

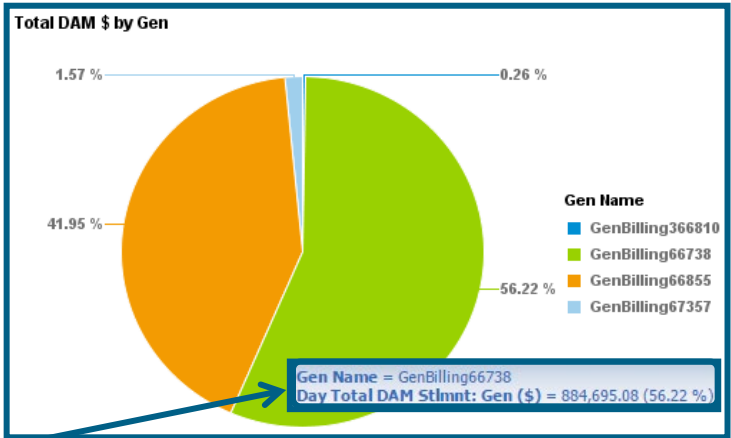


Pie Chart

Gen Name	Interval Start Day (Eastern)	Day Total DAM Stlmnt: Gen (\$)	Day Total DAM Stlmnt: Gen (\$)
GenBilling366810	01/01/2015	233.36	
	01/02/2015	242.24	
	01/03/2015	215.60	-1,014.49
	01/04/2015	186.88	152.08
	01/05/2015	336.72	379.28
	01/06/2015	411.16	181.04
	01/07/2015	722.16	390.64
	01/08/2015	873.52	331.76
	01/09/2015	417.20	135.76
	01/10/2015	382.36	4.40
GenBilling366810	Sum:	4,021.20	518.80

Gen Name	Interval Start Day (Eastern)	Day Total DAM Stlmnt: Gen (\$)	Day Total DAM Stlmnt: Gen (\$)
GenBilling66738	01/01/2015	53,885.32	17,824.84
	01/02/2015	55,951.64	23,983.68
	01/03/2015	49,753.60	30,588.20
	01/04/2015	43,102.92	30,477.32
	01/05/2015	77,731.72	35,147.28
	01/06/2015	94,953.20	52,997.76
	01/07/2015	159,668.08	67,116.24
	01/08/2015	184,573.20	44,452.92
	01/09/2015	92,129.84	15,815.20
	01/10/2015	72,945.56	32,349.84
GenBilling66738	Sum:	884,695.08	307,753.28

Report data can be displayed in a pie chart also



Exporting Data

Exporting Report Data

The screenshot shows a software interface with a top toolbar containing various icons. One icon, representing an export function, is highlighted with a yellow box. An arrow points from this icon to a dropdown menu. The menu has three main items: 'Export Document As', 'Export Current Report As', and 'Export Data to CSV ...'. The 'Export Current Report As' item is expanded, showing a sub-menu with the following options: PDF, Excel 2007, Excel, CSV Archive, and Text.

Below the menu is a table titled "PS Example 1" with the following data:

Org Name	Gen Name	Interval Start Day (Eastern)	Day Total DAM Stimt: Gen (\$)
Organization1017822	GenBilling66728	01/31/2015	0.00
Organization1017822	GenBilling67324	01/31/2015	0.00
Organization1017822	GenBilling67439	01/31/2015	0.00
Organization1017822	GenBilling67440	01/31/2015	0.00
Organization4379	GenBilling366810	01/31/2015	302.88
Organization4379	GenBilling66738	01/31/2015	30,402.30
Organization4379	GenBilling66855	01/31/2015	67,319.01
Organization4379	GenBilling67357	01/31/2015	0.00
Organization6851	GenBilling67197	01/31/2015	34,603.20
Organization6851	GenBilling67221	01/31/2015	170,930.76
Organization6851	GenBilling67236	01/31/2015	0.00

Sending/Receiving Reports

Sending Data via DSS

Last Successful Update Time

Customer Settlements Last Successful Update Time:
Aug 21, 2015 4:29:00 AM

Public Market Data Last Successful Update Time:

You have no ADD Requests.

Navigation

- Home
- Admin Page
- Send To**

Automated Data Delivery Links

- Retrieve Files
- Enter New Request
- View/Modify/Delete Request for Files

Send To

Documents Available to Send

Docs

- Power Suppliers Example

Potential Document Recipients

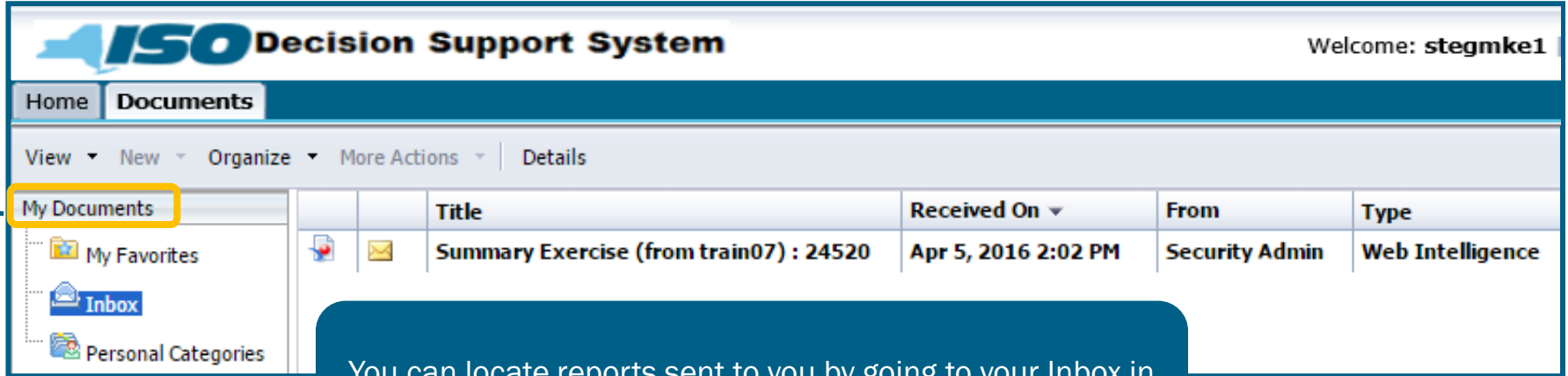
User Id	Name
<input type="checkbox"/> train01	train train
<input type="checkbox"/> train02	train train
<input type="checkbox"/> train03	train train
<input type="checkbox"/> train04	train train
<input type="checkbox"/> train05	train train
<input type="checkbox"/> train06	train train
<input type="checkbox"/> train07	train train

My Orgs NYISO Users All Users



Send

Users can send DSS reports by clicking on the 'Send To' link from the Homepage

Receiving Data via DSS



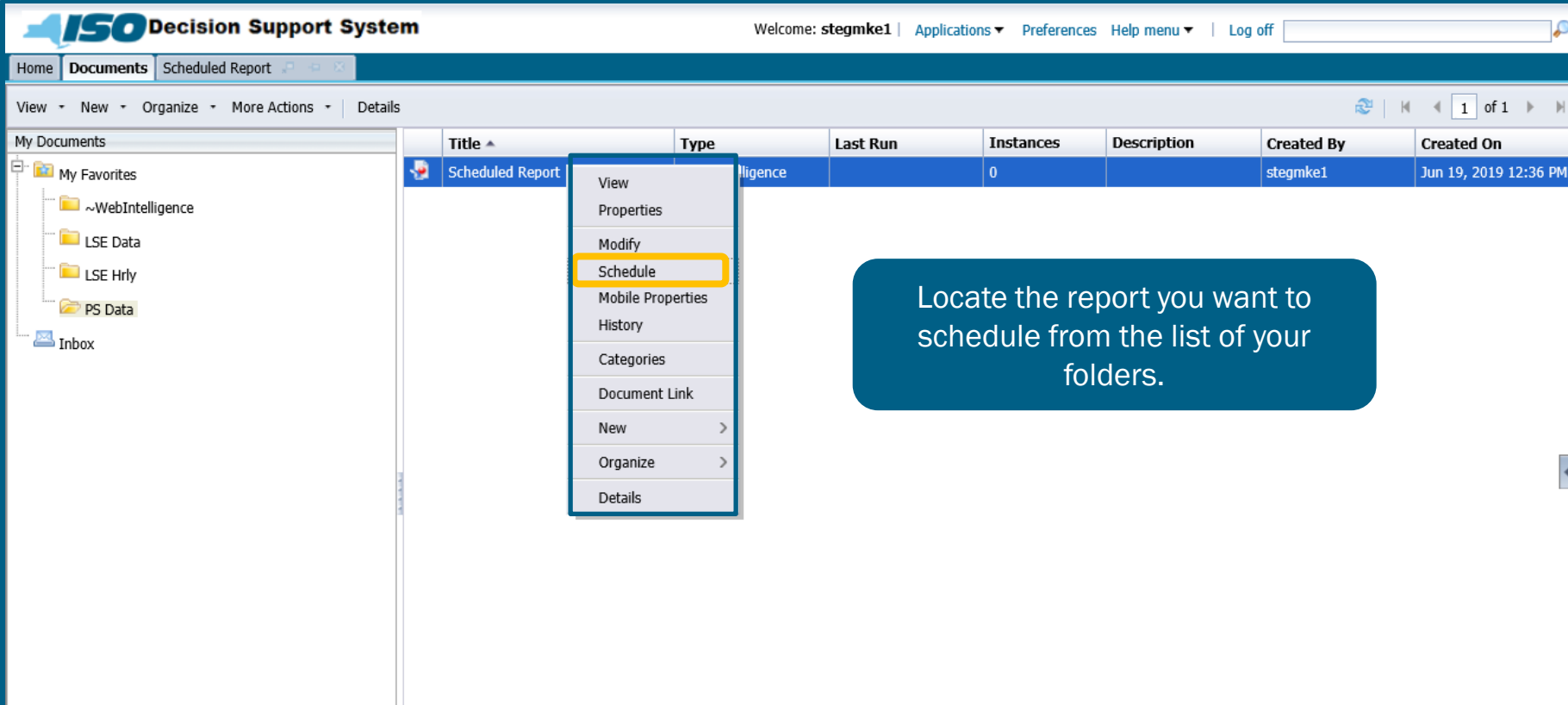
The screenshot shows the ISO Decision Support System interface. The top navigation bar includes 'Home' and 'Documents'. Below this is a menu with 'View', 'New', 'Organize', 'More Actions', and 'Details'. The left sidebar shows a tree view with 'My Documents' highlighted, 'My Favorites', 'Inbox', and 'Personal Categories'. A blue callout box with an arrow points from the 'Inbox' folder to the table below. The table contains one row of data:

		Title	Received On	From	Type
		Summary Exercise (from train07) : 24520	Apr 5, 2016 2:02 PM	Security Admin	Web Intelligence

You can locate reports sent to you by going to your Inbox in the 'My Documents' section

Scheduling Data

Scheduling



The screenshot shows the ISO Decision Support System interface. At the top, there is a navigation bar with 'Home', 'Documents', and 'Scheduled Report' tabs. Below this is a toolbar with 'View', 'New', 'Organize', 'More Actions', and 'Details' options. A table titled 'My Documents' is displayed, showing a list of folders and a 'Scheduled Report' entry. A context menu is open over the 'Scheduled Report' entry, with the 'Schedule' option highlighted. A blue callout box on the right contains the text: 'Locate the report you want to schedule from the list of your folders.'

Title	Type	Last Run	Instances	Description	Created By	Created On
Scheduled Report	Intelligence		0		stegmke1	Jun 19, 2019 12:36 PM

Locate the report you want to schedule from the list of your folders.

Scheduling

1 **Schedule – Scheduled Report**

▼ Schedule

Instance Title

Recurrence

Formats

Caching

Events

Scheduling Server Group

Destinations

Delivery Rules

Recurrence

Run object: ▼

Object will run once every N days.

Days(N) =

Start Date/Time:

End Date/Time:

Now
Once
Hourly
Daily
Weekly
Monthly
Nth Day of Month
1st Monday of Month
Last Day of Month
X Day of Nth Week of the Month
Calendar

2 **History – Scheduled Report**

View | Organize | Send | More Actions

Instance Time	Title	Status	Created By	Type	Parameters
Jun 19, 2019 12:49 PM	Scheduled Report	Recurring	stegmke		
Jun 19, 2019 12:49 PM	Scheduled Report	Recurring	stegmke		

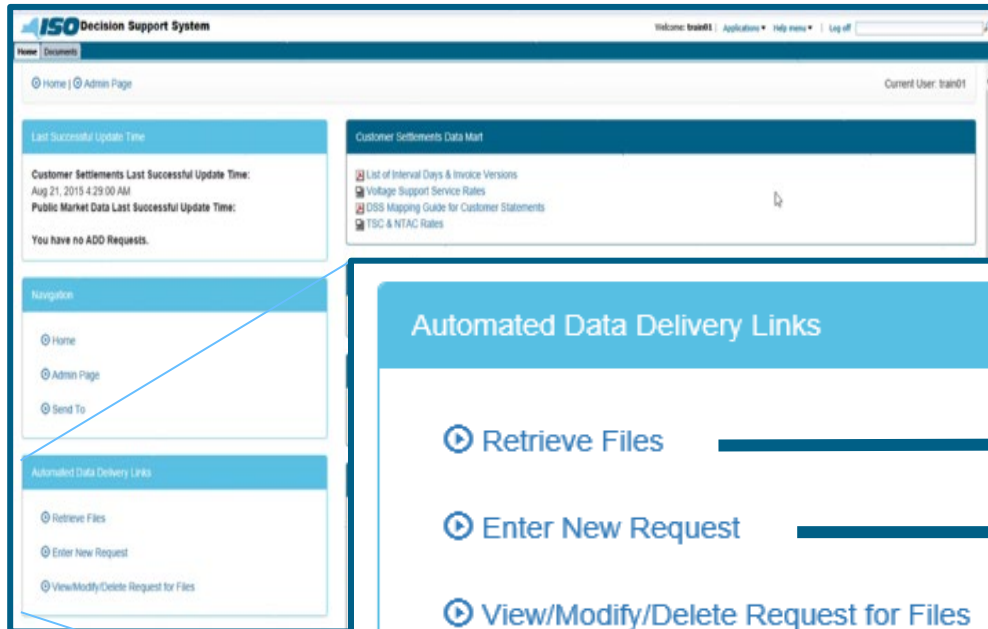
3 **My Documents**

- My Favorites
 - ~WebIntelligence
 - LSE Data
 - LSE Hrly
 - PS Data
- Inbox**

Schedule Cancel

Automated Data Delivery a.k.a. 'Advisory Billing Files'

Automated Data Delivery Links



Request

- Hourly and Daily files
- FERC EQR files
- Invoice Version Manager details

Schedule Frequency

- One time request
- Recurring

Automated Data Delivery Links

Retrieve Files

Obtain ADD files already requested

Enter New Request

Create new ADD report requests

View/Modify/Delete Request for Files

Make changes to ADD file requests

**Refer to Technical Bulletin #127 for details*

Automated Data Delivery

New York ISO Decision Support System

Welcome: **stegmke1** | Applications ▾ | Preferences | Help menu ▾ | Log off

[Home](#) | [Documents](#)

Current User: stegmke1

Select Type for New Request

Format Type	Release	Effective Date
Daily Customer Statement V6.4 Description: Daily Customer Statement Version 6.4 is the Daily Customer Statement file format.	6.4	Oct 23, 2018 8:09:21 PM
Hourly Customer Statement V6.3 Description: Hourly Customer Statement Version 6.3 is the Hourly Customer Statement file format.	6.3	Apr 25, 2017 6:07:45 PM
FERC EQR Transaction File V4.0 Description: FERC EQR Transaction File is a comma separated value file which contains reportable transactions in the Electric Quarterly Report that is filed with the Federal Energy Regulatory Commission. The records in the file are limited to Energy and Ancillary Services transactions where the New York Independent System Operator is the counterparty to the organization requesting the file. The file is uploadable into the FERC EQR software. For more information on the FERC EQR process, please visit FERC.gov. This file corresponds to the FERC EQR Data Dictionary V3.4.	4.0	May 9, 2018 12:00:00 AM
FERC EQR Trans File - Bilat Energy Contracts V3.0 Description: FERC EQR Transaction File for Bilateral Energy Contracts is a comma separated value file which contains transaction details related to Bilateral Energy Contracts. This file is meant to be a starting point for creating transaction files containing all of the reportable details related to Bilateral Energy Contracts. Users requesting this file will need to provide additional details, such as energy prices, and transaction charges to complete the file. Once completed, the file is uploadable into the FERC EQR software. For more information on the FERC EQR process, please visit FERC.gov. This file corresponds to the FERC EQR Data Dictionary V3.4.	3.0	May 9, 2018 12:00:00 AM
Invoice Version Manager V1.0 Description: The Invoice Version Manager contains details on the Invoice Version history for billing days that are invoiced on the date the file is generated in the DSS. For invoiced billing days in the file, it contains the date that the Invoice Version changed from Invoice Version 0, the old Invoice Version number, the new Invoice Version number, and the date the day was loaded into the DSS. This file is designed to provide users with the new Invoice Version number for all days included in a given invoice. This file is able to be scheduled as a recurring request and is generated on the date that Invoice Versions are updated in the DSS.	1.0	May 1, 2005 12:00:00 AM

Automated Data Delivery Links

- [Retrieve Files](#)
- [Enter New Request](#)
- [View/Modify/Delete Request for Files](#)

ADD

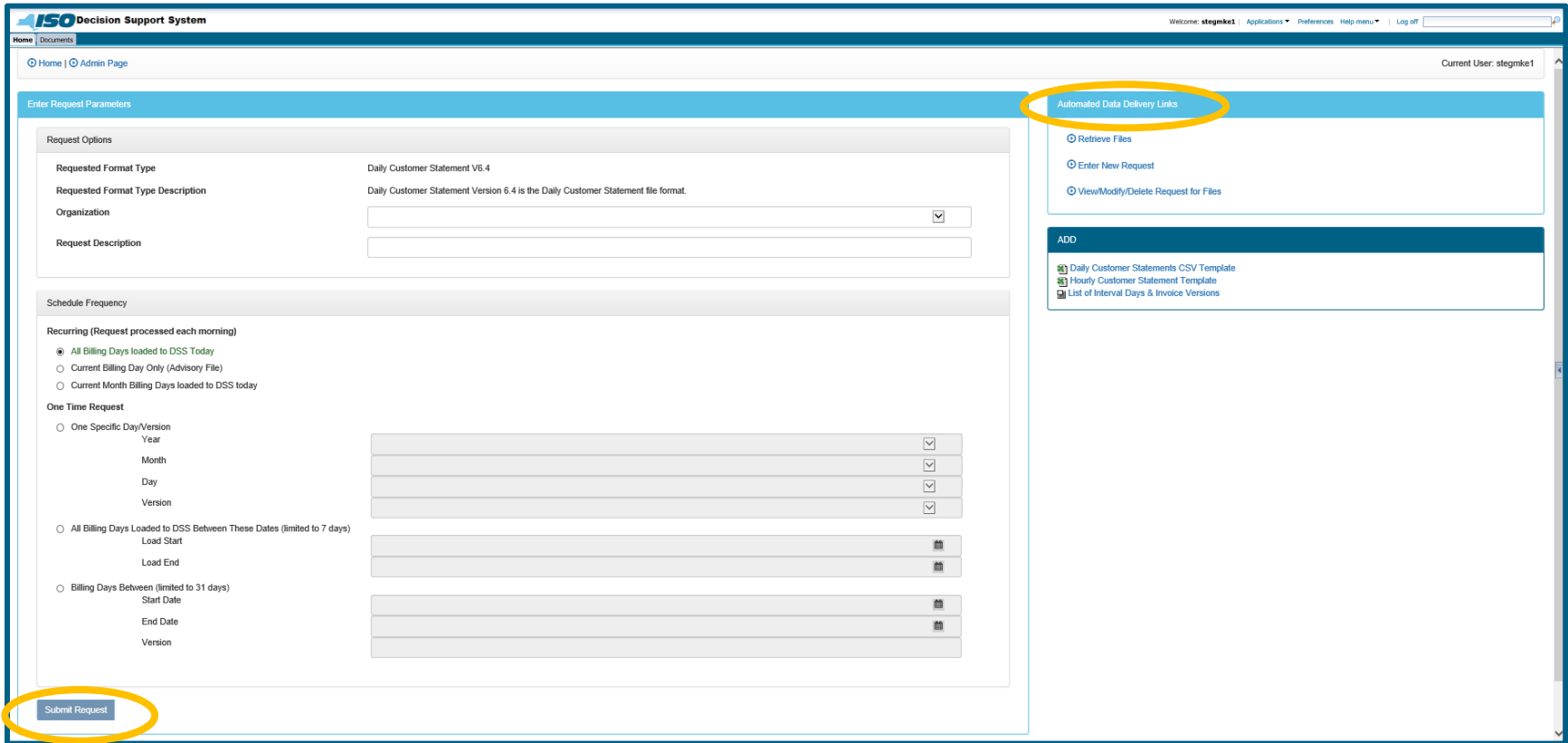
- [Daily Customer Statements CSV Template](#)
- [Hourly Customer Statement Template](#)
- [List of Interval Days & Invoice Versions](#)

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FOR TRAINING PURPOSES ONLY

74


Automated Data Delivery



The screenshot displays the 'ISO Decision Support System' interface. The main content area is titled 'Enter Request Parameters' and contains two sections: 'Request Options' and 'Schedule Frequency'. The 'Request Options' section includes fields for 'Requested Format Type' (set to 'Daily Customer Statement V6.4'), 'Requested Format Type Description' (set to 'Daily Customer Statement Version 6.4 is the Daily Customer Statement file format.'), 'Organization' (with a dropdown arrow), and 'Request Description' (with a text input field). The 'Schedule Frequency' section has two main options: 'Recurring (Request processed each morning)' and 'One Time Request'. Under 'Recurring', there are three radio buttons: 'All Billing Days loaded to DSS Today' (selected), 'Current Billing Day Only (Advisory File)', and 'Current Month Billing Days loaded to DSS today'. Under 'One Time Request', there are three radio buttons: 'One Specific Day/Version' (selected), 'All Billing Days Loaded to DSS Between These Dates (limited to 7 days)', and 'Billing Days Between (limited to 31 days)'. The 'One Specific Day/Version' option has sub-fields for Year, Month, Day, and Version, each with a dropdown arrow. The 'All Billing Days Loaded to DSS Between These Dates' option has sub-fields for Load Start and Load End, each with a calendar icon. The 'Billing Days Between' option has sub-fields for Start Date, End Date, and Version, each with a calendar icon. A 'Submit Request' button is located at the bottom left of the form area. On the right side, there is a sidebar titled 'Automated Data Delivery Links' (circled in yellow) with three links: 'Retrieve Files', 'Enter New Request', and 'View/Modify/Delete Request for Files'. Below this is an 'ADD' section with three links: 'Daily Customer Statements CSV Template', 'Hourly Customer Statement Template', and 'List of Interval Days & Invoice Versions'. The top navigation bar includes 'Home', 'Documents', 'Welcome: stegmke1', 'Applications', 'Preferences', 'Help menu', and 'Log off'. The current user is identified as 'Current User: stegmke1'.

Automated Data Delivery

Retrieve Files

File Name	File Creation Date
 xxxxxx_2017_05_19_v00_Hourly Company Name	May 30, 2017 1:50:00 PM

[Refresh](#) [Delete Selected](#) [Download Checked](#)

Automated Data Delivery Links

- [Retrieve Files](#)
- [Enter New Request](#)
- [View/Modify/Delete Request for Files](#)

ADD

-  Daily Customer Statements CSV Template
-  Hourly Customer Statement Template
-  List of Interval Days & Invoice Versions

Automated Data Delivery

	A	B	C	D	
1	POWER SUPPLIERS				
2	100	200	201	101	
3	Org name	Gen name	Gen Ptid	Start day	Start ho
4	LSE LBMP ENERGY				
5	100	400	401	101	
6	Org name	LSE name	Bus name	Start day	Start ho
7	TRANSACTIONS				
8	100	400	500	101	
9	Org name	LSE name	Trans Id	Start day	Start ho
10	TRANSACTIONS LBMP ENERGY				
11	100	400	500	101	
12	Org name	LSE name	Trans Id	Start day	Start ho
13	ANCILLARY SERVICES				
14	100	400	101	102	
15	Org name	LSE name	Start day	Start hour	Hrly An
16	TCC				
17	100	900	101	102	
18	Org name	TCC Contract ID	Start day	Start hour	Tcc cre
19	DEMAND RESPONSE PROGRAMS				
20	100	2000	2001	101	
21	Org name	Demand Reduction Provider Name	Demand Reduction Provider TPID	Start day	Start ho
22	VIRTUAL BIDDING PROGRAM				
23	100	400	3000	3001	
24	Org name	LSE name	Virtual Bidding Bus Name	Virtual Bidding Bus PTID	Start da
25					
26					

Additional Resources

- **SAP Business Objects Business Intelligence Users Guide Suite 4.0 (Free Download: <http://help.sap.com/bobip>)**
- **Successful Business Intelligence: Unlock the Value of BI and Big Data (by Cindi Howson (Hardcover – Oct 2013))**
- **SAP Business Objects Web Intelligence by Jim Brogden, Heather Sinkwitz, Dallas Marks and Gabriel Orthous (Hardcover – Oct 2014)**
- **SAP Business Objects BI 4.0 Third Edition by Cindy Howson and Elizabeth Newbould (Paperback – 2012)**
- **SAP Business Objects Web Intelligence 4.1 Training Course by Shakil Ahmed (Paperback – 2014)**