

Intermediate DSS

Gina Craan

Manager, Market Training, NYISO

Intermediate Decision Support System Workshop

June 27, 2019 Rensselaer, NY 12144

Intermediate DSS Course



Introductions

Housekeeping

Course Objectives

Course Agenda

Intermediate DSS Course



Introductions

Introduction of Instructor and Support Staff

- Introduction of Attendees
 - Name
 - Organization
 - Purpose for attending workshop

Housekeeping Items



- Wear Photo ID Badge above the waist at all times
 - Be sure to turn badge in and sign out at end of each class day
- Picture taking is <u>not allowed</u> on NYISO Premises, in or outside the building
- Safety Procedures:
 - Fire Alarm
 - Lockdown
- Restroom Locations
- Designated Smoking Area
- Meals and Beverages
- Work Station
 - Materials and Table Top Microphones





Course Objectives



- List four ways to obtain data from DSS
- Create a new Web intelligence report
- Modify an existing report
- Utilize multiple data providers
- Create a graphical representation of report data
- Save and Export report data
- Create folders / Organize DSS reports
- Send and receive reports via the DSS Inbox
- Distinguish between ADD and CADD
- Describe the Public Market Data available and its benefit

Course Agenda



Morning:

- Overview of DSS
 - (Login, Homepage Navigation, Resource Documents and Links, Folder Structure, Corporate Reports)
- Create Custom Queries
- Edit Custom Queries

Afternoon:

- Multiple Data Providers
- Report Data and Functions
 - (Charts, Sending/Receiving Documents, Scheduling)
- Public Market Data

Throughout the Day

Instructor demonstration and participant hands-on tasks



DSS Overview Access, Homepage, Data

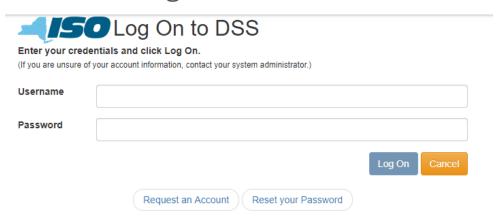


Requires Digital Certificate and DSS account

Account types: Super Administrator, Subject Area Administrator,
 Public Market Data User, Customer Settlement User

Browser compatibility

Mozilla Firefox and Google Chrome



Options for obtaining data from DSS



Customer Settlement Reports

- Corporate or Canned Reports
 - Modify a corporate report
- Custom Report
 - User-created report

Public Market Data

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

Automated Data Delivery (ADD)

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

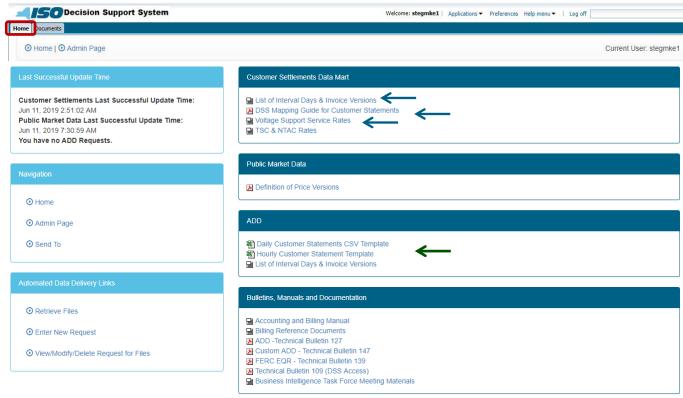
Custom ADD (CADD)

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



Homepage

Links to resource documents





Folder Structure

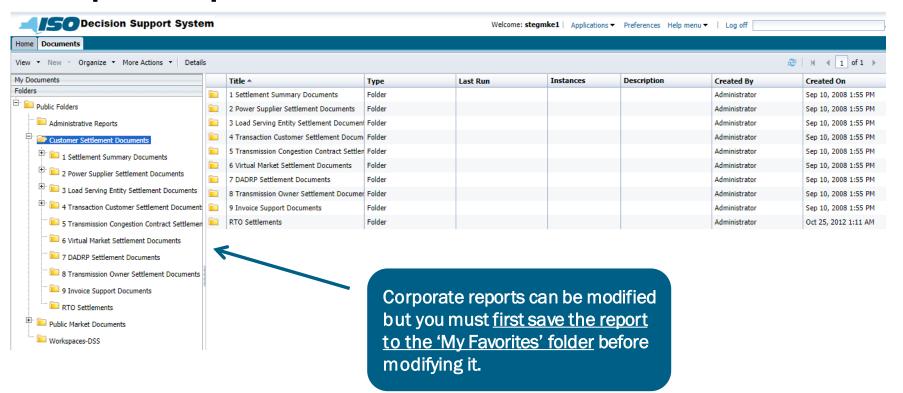
- My Documents
- Public Market Data
- Corporate Reports



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.



Corporate Reports



Let's Review



What is the difference between a corporate report and a custom report?



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 is a dimension?
 - Dimensions 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 StImnt: Gen ($)
```

- Day DAM Loss Stlmnt: Gen (\$)
- Day DAM Cong StImnt: Gen (\$)
- Day Total DAM Stlmnt: Gen (\$)

Create a Web Intelligence Report

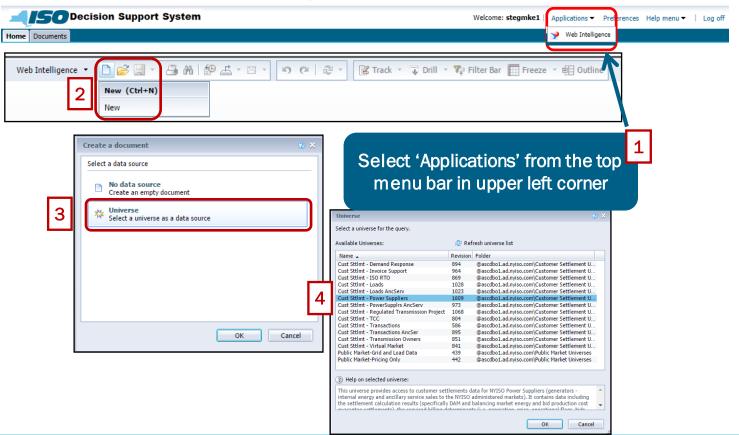


Review of New Report Panel

- Data Manager
 - Consists of data object measures and dimensions
- Results Objects Pane
 - Data objects are brought into this pane for desired report results
- Query Filter Pane
 - Apply Filters and Prompts to capture a specific data set
- Data Preview Pane

Create a Web Intelligence Report







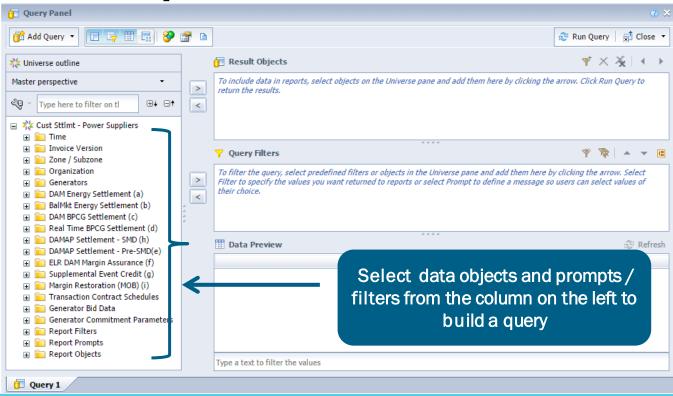
Build Custom Query and Run

- Select Data Objects based on desired report results
 - Drag and drop or double click objects into Report Objects Pane
- Select report filters and or prompts in order to narrow search results
 - Drag and drop or double click objects into Report Objects Pane
- Run Query once all Report Objects, Filters and Prompts have been selected

Create a Web Intelligence Report



Review of New Report Panel



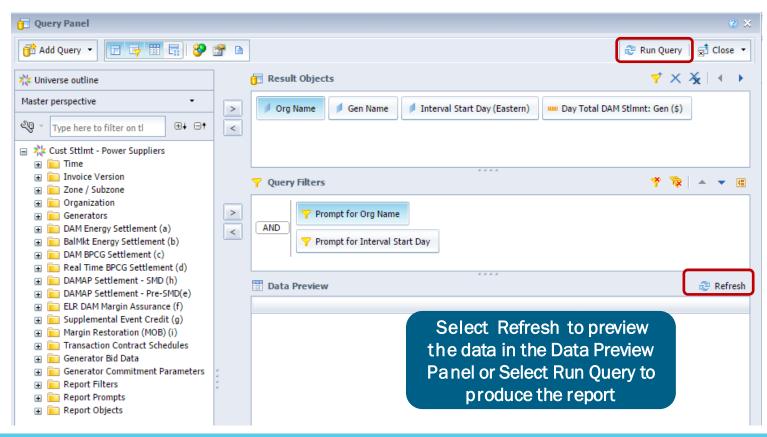


Select Required Prompts

 Select required prompts according to your desired report results, i.e. choosing generator name and date

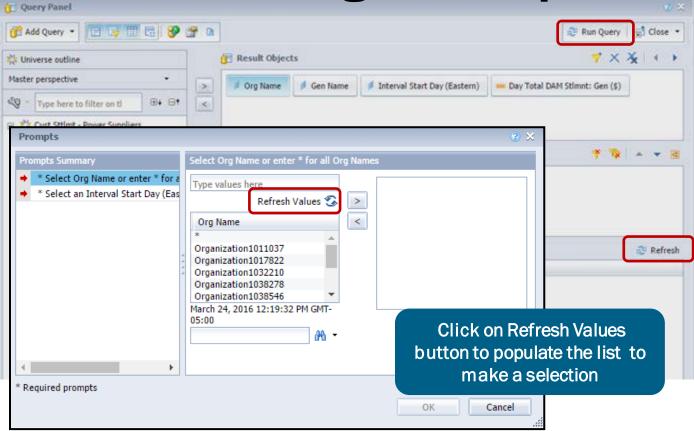
Create a Web Intelligence Report





Create a Web Intelligence Report





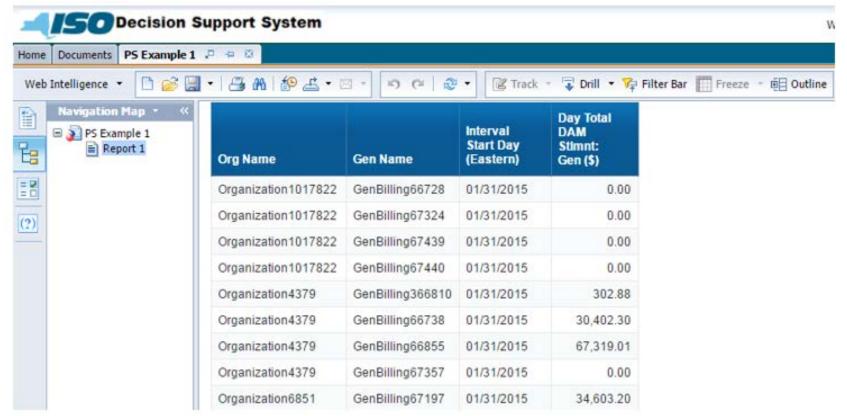


Review Report Results

- 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.

Create a Web Intelligence Report





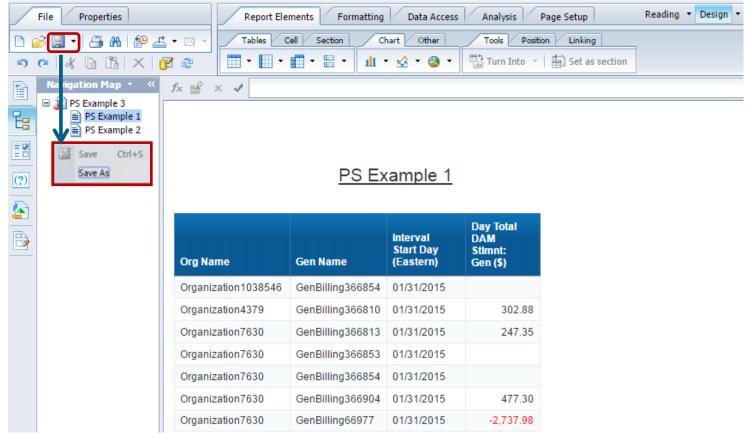


Save Report

- To save a report, select the save icon or the drop down arrow located next to the save icon above Data Manager
- There are three Save options
 - Selecting 'Save' icon will save the report in its current view
 - Selecting 'Save As' will prompt the user to save the report to their Favorites folder in Info View
 - Selecting 'Save to my Computer' will allow user to save the report results to their PC as an Excel or PDF file

Saving Documents





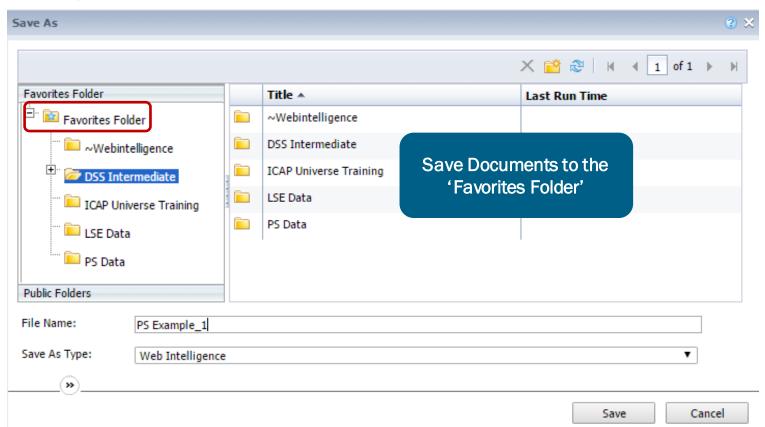


Save Report

- When saving to Favorites...
 - Select Favorites Folder
 - Type in New Report Name
 - Select OK

Saving Documents







Rename Report

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

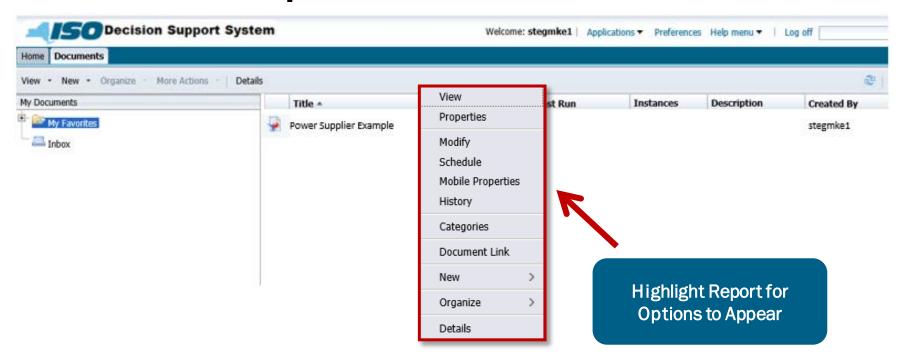


Locate Saved Report

- To locate the saved report in Favorites, select Document List icon
- Next, select My Favorites folder, located in the left panel under 'All' on folder tab

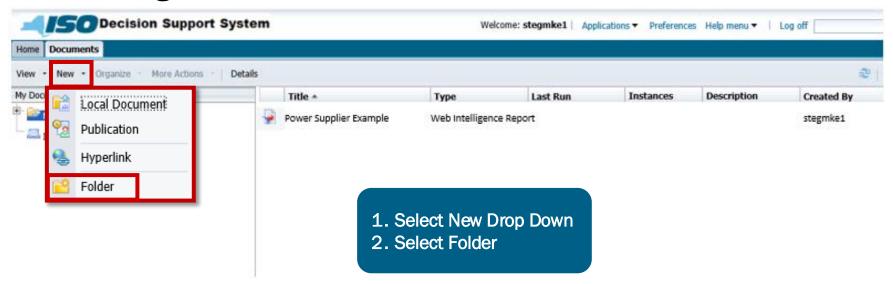


Locate Saved Report



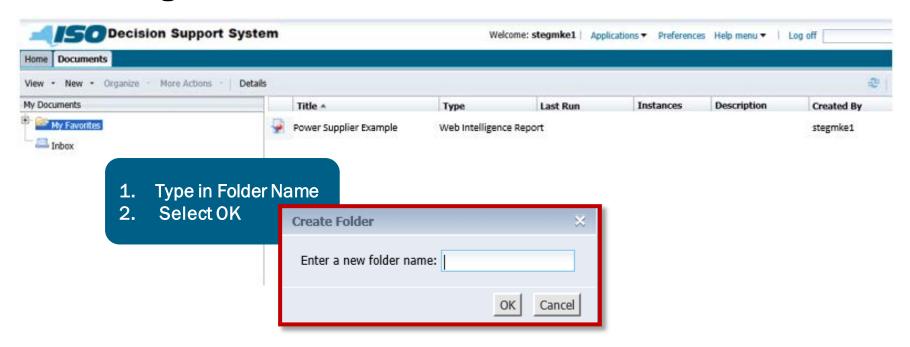


Creating Sub-Folders



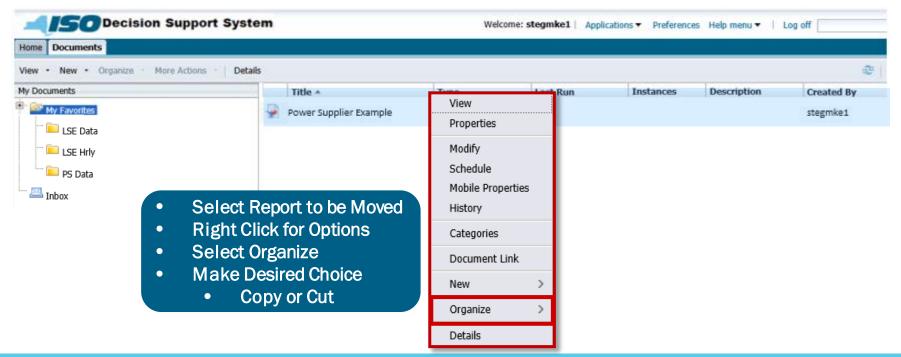


Creating Sub-Folders





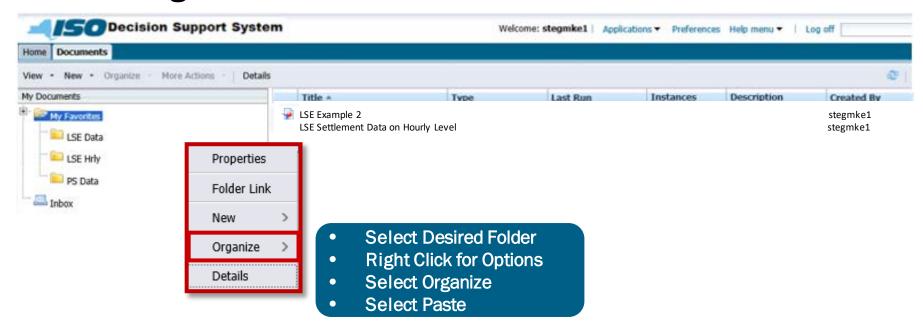
Creating Sub-Folders





Create Custom Queries

Creating Sub-Folders



TASK 1: Create a new Webi report



- Create a new Webi report from the Loads Universe
- Include the following data objects:
 - Org Name
 - LSE Name
 - Interval Start Day
 - Day Total DAM StImnt LSE (\$)
- Select the following Query filters
 - Prompt for Org name
 - Prompt for Interval Start Day

TASK 1 - Continued



- Run the Query select the following prompt values:
 - All Org Names
 - Start Day 01/31/2015

- Rename the report 'Task 1 LSE'
- Save the report as 'Task 1 LSE'

TASK 2: Create a new Webi report



- Create a new Webi report from the Power Supplier Universe
- Include the following data objects:
 - Org Name
 - Gen Name
 - Interval Start Day
 - Day DAM Energy Stlmnt: Gen (\$)
 - Day DAM Loss Stlmnt: Gen (\$)
 - Day DAM Congestion StImnt: Gen (\$)
 - Day Total DAM Stlmnt: Gen (\$)

TASK 2 - Continued



- Select the following query filters
 - Prompt for Org name
 - Prompt for Interval Start Day Range
- Run the Query and select the following prompt values:
 - Org Names: 1017822 & 4379
 - Start Date 07/01/2013
 - End Date 07/31/2013
- Rename the report 'Task 2 PS'
- Save the report as 'Task 2 PS'



What is the difference between a Universe and a Data Object?



What are the three types of Data Objects?



Which data objects can be summed?

- a) Dimensions
- b) Details/Attributes
- c) Measures





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



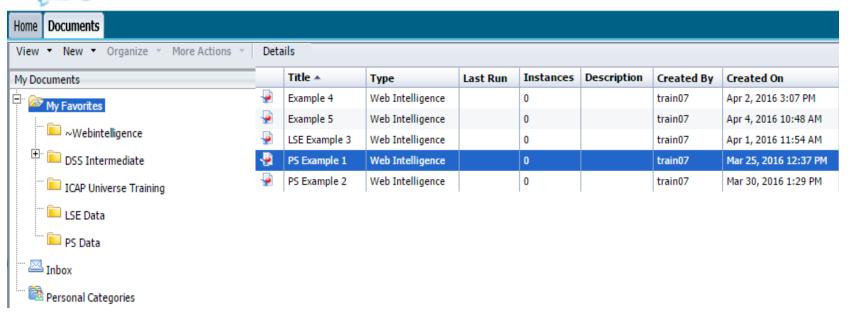
Select Report from Favorites

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



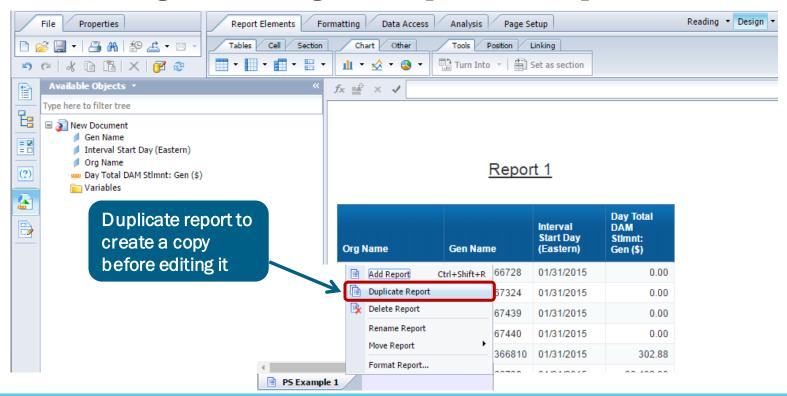


Welcome: stegmke1 | Applications ▼ Preferences Help menu ▼ | Log off





Web Intelligence Design View [Edit Mode]





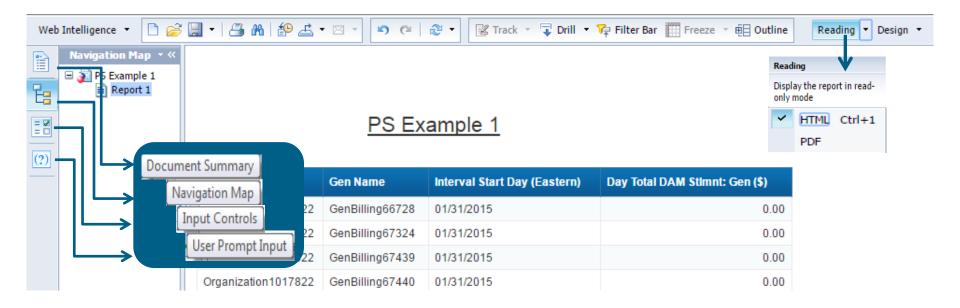
Adding Additional Data Objects

- 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)



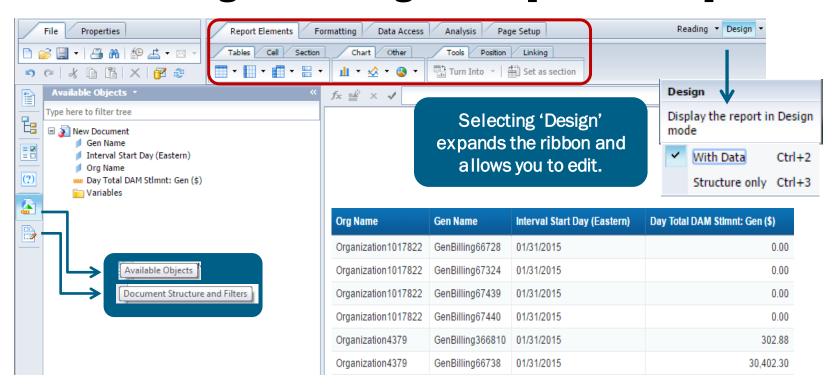
- Adding Additional Data Objects Continued
 - You will then be returned to the Report Results page
 - Your new data objects will appear in the data manager
 - You may then bring them into your table if you choose





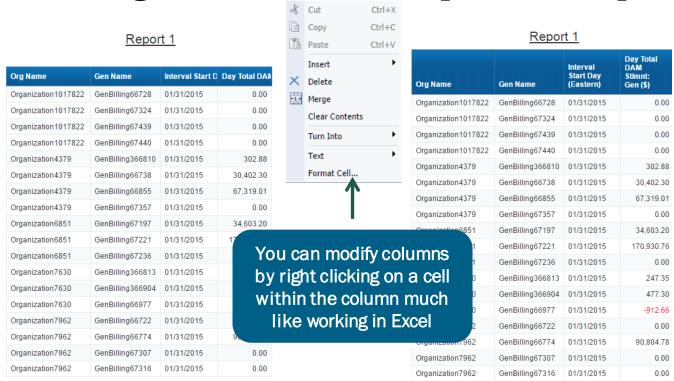


Web Intelligence Design View [Edit Mode]



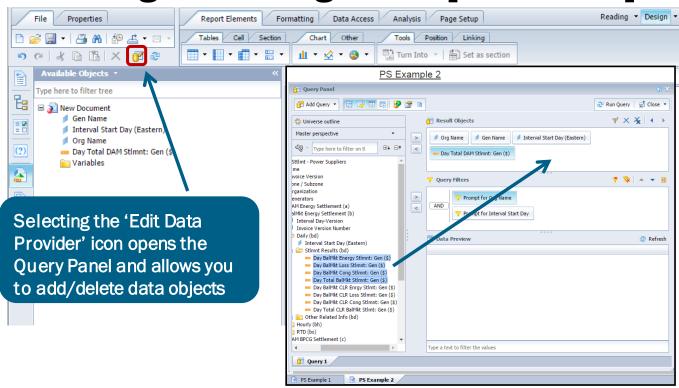


Web Intelligence Design View [Edit Mode]





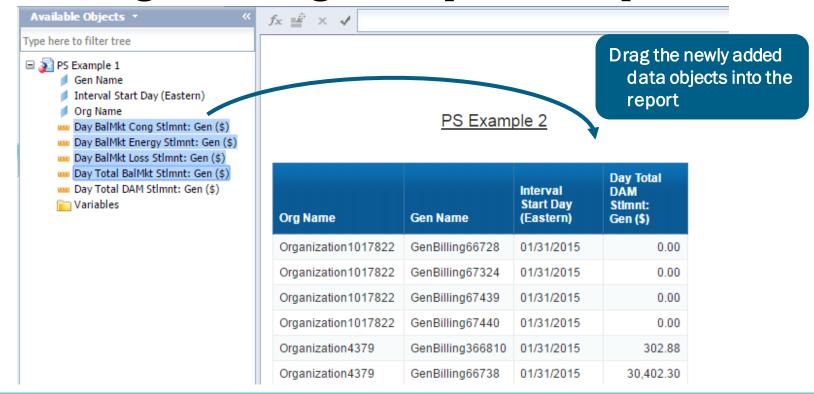
Web Intelligence Design View [Edit Mode]



Add these objects and run query

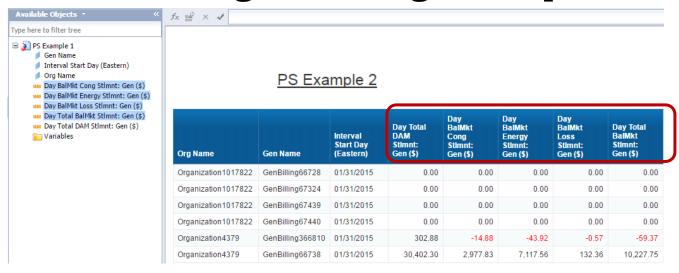


Web Intelligence Design View [Edit Mode]





Web Intelligence Design View [Edit



TASK 3: Modify an existing report



Open the report named 'Task 1 LSE'

Duplicate it and rename the new report 'Task 3 LSE'

- Add the following data objects:
 - Day BalMkt Cong Stlmnt LSE (\$)
 - Day BalMkt Energy Stlmnt LSE (\$)
 - Day BalMkt Loss Stlmnt LSE (\$)
 - Day Total BalMkt StImnt LSE (\$)

TASK 3 - Continued



- Confirm/change the following Query filters
 - Keep prompt for Org name
 - Change prompt to Interval Start Day Range
- Run the Query for all Orgs and all days in January 2015
- View results
 - What do you notice?
 - Bring the new data objects into your report table
- Save the report as 'Task 3 LSE'

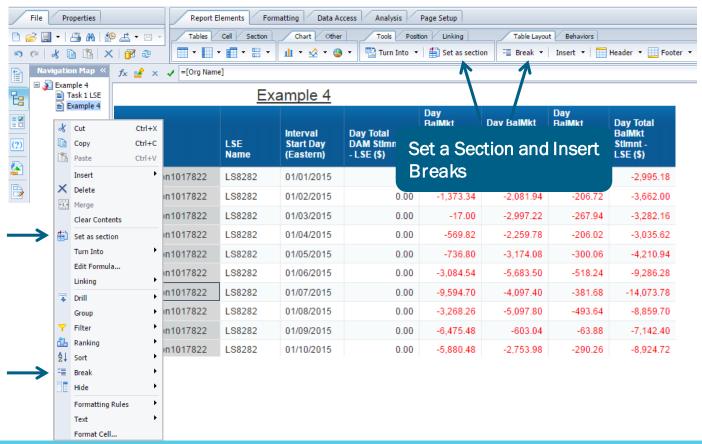


Which option should be selected when you want to edit or modify an existing report?

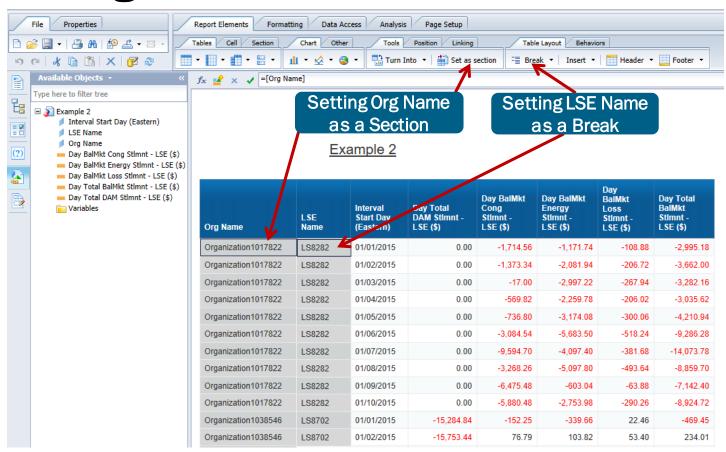
- a) Reading Mode
- b) Design Mode

Report Data



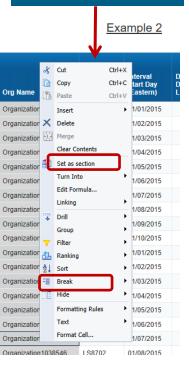


Using Sections and Breaks





Another way to do same thing



Using Sections and Breaks



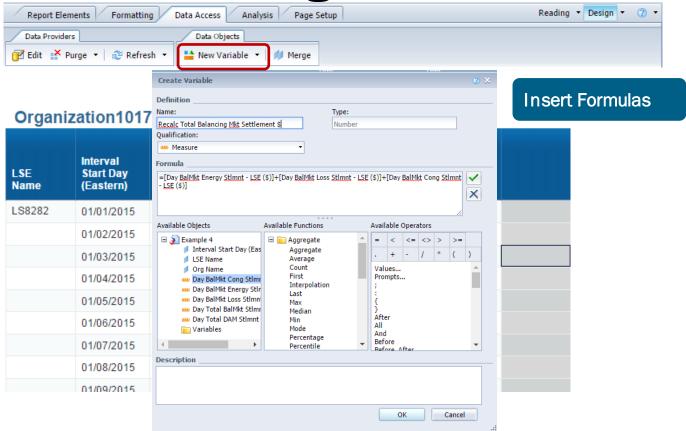
Example 2 (1)

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
L\$8282						

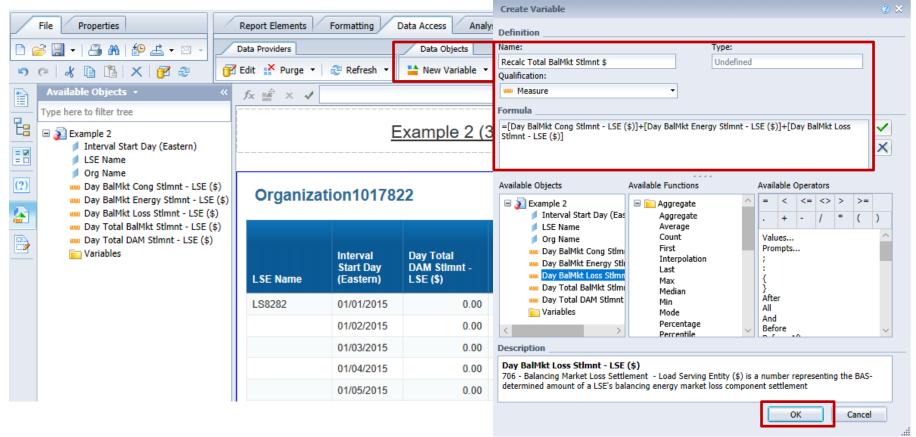
Report Data – Using Variables





Report Data – Using Variables

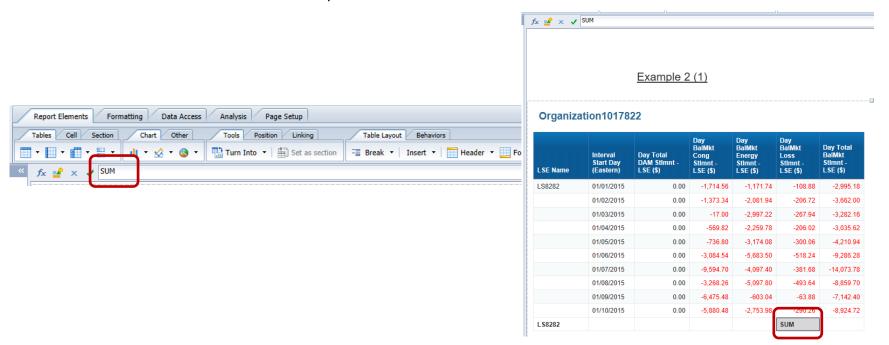




Using Formula Line (f_x)

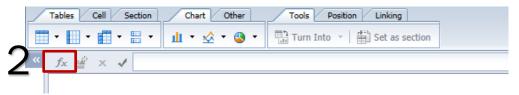


 Select a cell and insert text or formulas in the formula line, similar to Excel



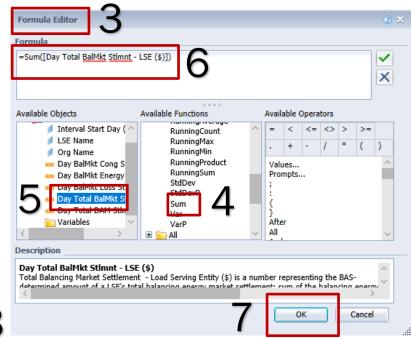
Using Formula Line (f_x)





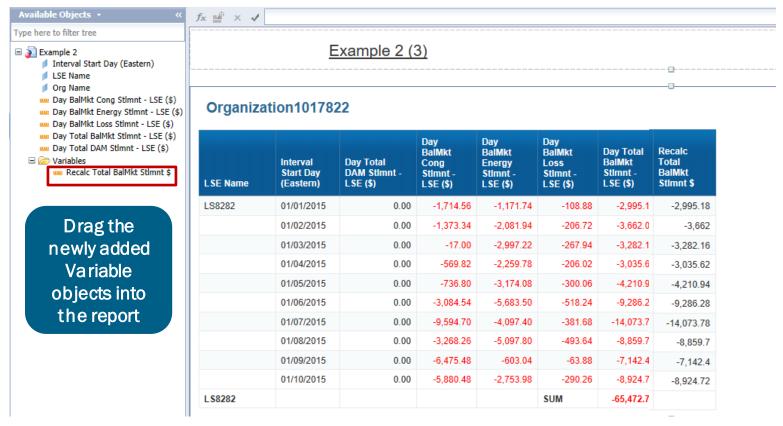
Organization1017822

LSE Name	Interval Start Day (Eastern)	Day Total DAM Stimnt - LSE (\$)	Day BalMkt Cong Stlmnt - 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
L\$8282					SUM	-65,472.78



Report Data – Using Variables







Multiple Data Providers and Merging Universes

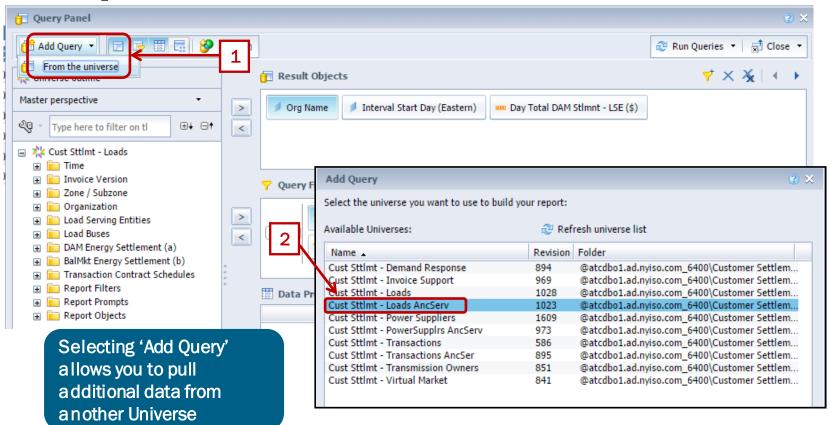
Multiple Data Providers



- Obtain data from two different Universes and bring data into the same report in one of three ways:
 - 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
- Also known as 'Merging Uuniverses'
- Examples
 - Merging data from the Load and Load-Ancillary Service Universes
 - Merging data from the Power Supplier and Transaction Universes

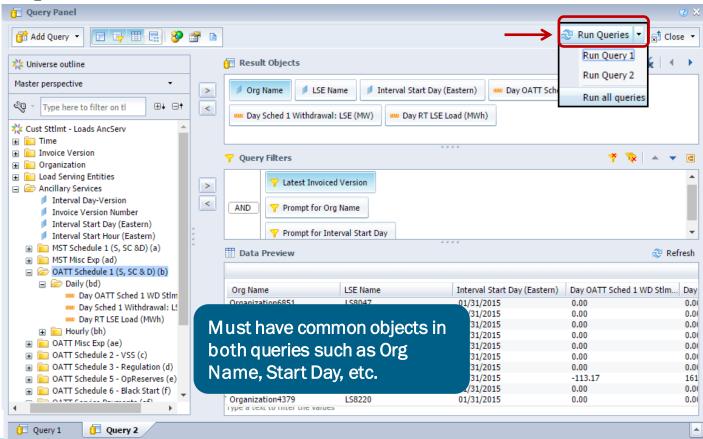
Multiple Data Providers



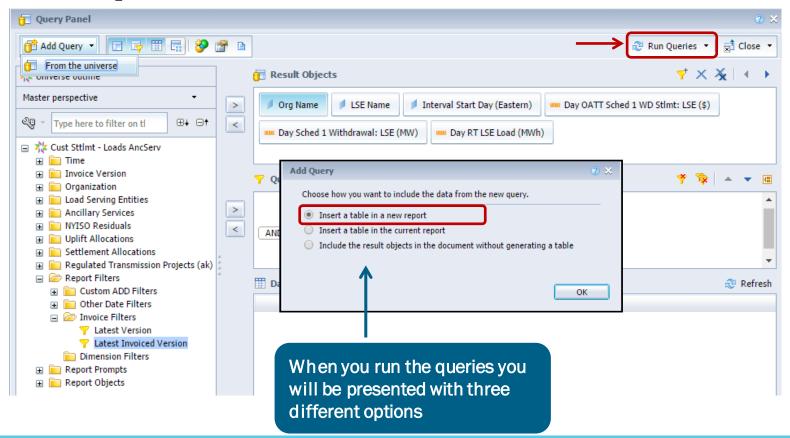


Multiple Data Providers











LSE Example 1

Org Name	LSE Name	Interval Start Day (Eastern)	Day Total DAM Stimnt - LSE (\$)		
Organization1017822	LS8282	01/31/2015	0.00		
Organization1038546	LS8702	01/31/2015	-23,487.12		
Organization1038546	LS8708	01/31/2015	-188,856.48		
Organization4379	LS7994	01/31/2015	-3,562,781.79		
Organization4379	LS8020	01/31/2015	0.00		
Organization4379	LS8220	01/31/2015	0.00		
Organization6851	LS7993	01/31/2015	-6,652,562.70		
Organization7630	LS8714	01/31/2015	-17,362.23		
Organization7962	LS8164	01/31/2015	0.00		
Organization7962	LS8275	01/31/2015	0.00		
Organization7962	LS8306	01/31/2015	0.00		
Organization7962	LS8307	01/31/2015	0.00		
Organization7962	Ontion #1 proptes a				

Option #1 creates a new report tab with the new data from the second Universe

Org Name	LSE Name	Interval Start Day (Eastern)	Day OATT Sched 1 WD Stimt: LSE (\$)	Day Sched 1 Withdrawal: LSE (MW)	Day RT LSE Load (MWh)
Organization1038546	LS8708	01/15/2015	-2,491.79	3,564.1817	3,564.1817
Organization1038546	LS8708	01/16/2015	-2,484.02	3,553.0677	3,553.0677
Organization1038546	LS8708	01/17/2015	-2,474.94	3,540.0787	3,540.0787
Organization1038546	LS8708	01/18/2015	-2,348.71	3,359.5208	3,359.5208
Organization1038546	LS8708	01/19/2015	-2,390.05	3,418.6530	3,418.6530
Organization4379	LS339512	01/08/2015	0.00	0.0000	0.0000
Organization4379	LS339512	01/09/2015	0.00	0.0000	0.0000
Organization4379	LS339512	01/10/2015	0.00	0.0000	0.0000
Organization4379	LS339512	01/11/2015	0.00	0.0000	0.0000
0	1.00000540	04/40/0045	0.00	0.0000	0.000



	LSE Example 1			
Org Name	LSE Name	Interval Start Day (Eastern)	Day Total DAM Stimnt - LSE (\$)	
Organization7962	LS8164	01/31/2015	0.00	
Organization7962	LS8275	01/31/2015	0.00	
Organization7962	LS8306	01/31/2015	0.00	
Organization7962	LS8307	01/31/2015	0.00	
Organization7962	LS8321	01/31/2015	0.00	
Organization7630	LS8714	01/31/2015	-17,362.23	
Organization6851	LS7993	01/31/2015	-6,652,562.70	
Organization4379	LS7994	01/31/2015	-3,562,781.79	
Organization4379				
Organization4379	LS8161	01/31/2015	0.00	
Organization4379	LS8220	01/31/2015	0.00	
Organization103854	LS8702	01/31/2015	-23,487.12	
Organization103854	LS8708	01/31/2015	-188,856.48	
Organization101782	LS8282	01/31/2015	0.00	

Org Name	LSE Name	Interval Start Day (Eastern)	Day OATT Sched 1 WD StImt: LSE (\$)	Day RT LSE Load (MWh)	Day Sched 1 Withdrawal: LSE (MW)
Organization7962	LS8164	01/31/2015	-169.72	242.7569	242.7569
Organization7962	LS8275	01/31/2015	0.00	0.0000	0.0000
Organization7962	LS8306	01/31/2015	0.00	0.0000	0.0000
Organization7962	LS8307	01/31/2015	0.00	0.0000	0.0000
Organization7962	LS8321	01/31/2015	0.00	0.0000	0.0000
Organization7630	LS8714	01/31/2015	-243.03	347.6230	347.6230
Organization6851	LS7993	01/31/2015	-90,494.64	129,440.7761	129,440.7761
Organization4379	LS7994	01/31/2015	-53,443.81	76,444.3969	76,444.3969
Organization4379	LS8220	01/31/2015	0.00	0.0000	0.0000
Organization103854	LS8702	01/31/2015	-325.49	465.5766	465.5766
Organization103854	LS8708	01/31/2015	04	! 0	
Organization101782	LS8282	01/31/2015	Option	#2 create	es a seco

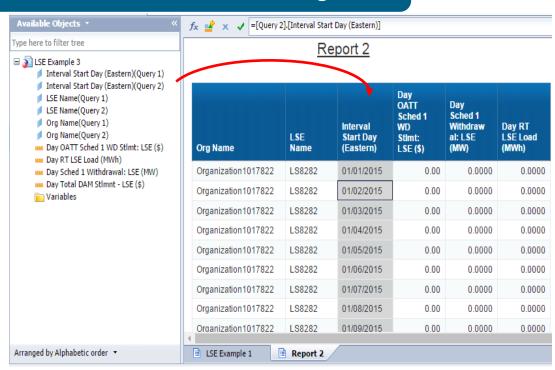
table within the same report.

Data is on the same page in two separate tables.

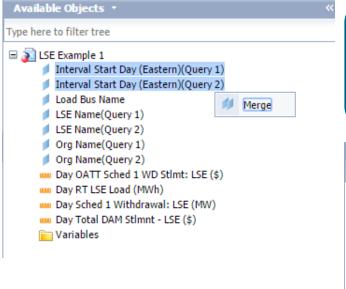


Option #3 requires you to manually drag and drop the data objects into the original report table so that all data from each Universe is in a single table.

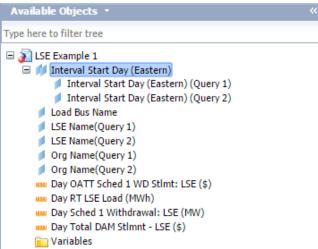
- You must merge the dimensions first in the data manager in order to pull them into the table and to have accurate data values.
- Due to some limited data in the Training Environment, you may have null values in the cells.
- Some data objects from a particular Universe may not be compatible to be pulled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







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



TASK 4: Multiple Data Providers



- Open the report named 'Task 2 PS'
- Create a copy of the report and rename report tab 2 'Task 4 PS'
- Add a query selecting from the 'Power Supplies AncServ' Universe
- Create a new report by adding the following data objects:
 - Org Name
 - Gen name
 - Interval Start Day
 - Day VSS StImnt (\$)

TASK 4 - Continued



Add Report Prompts:

- Prompt for Org name
- Prompt for Interval Start Day Range

Run query and select the following prompt values

- Org Name 1017822
- Interval Start Day 07/01/2013
- Interval End Day 07/10/2013
- Select 'Insert a table in the current report' option
- View results of new query and save as 'Task 4 PS'

TASK 5: Multiple Data Providers



- Create a new Webi Report
- Select the Universe 'Transactions'
- Add the following data objects:
 - TC Org Name
 - TransCnt ID
 - TransCnt Transaction Category
 - Interval Start Day
 - Day DAM Total LBMP StImnt (\$)
 - Day BalMkt Total LBMP Stlmnt (\$)
 - Day Total DAM TUC StImnt (\$)
 - Day Total BalMkt TUC Stlmnt (\$)

TASK 5 - Continued



Add Report Prompts:

- Prompt for TC Org name
- Prompt for Interval Start Day Range

Run Query with the following parameters

- Org Name 4379
- Interval Start Day 07/01/2013
- Interval End Day 07/10/2013

Format columns - wrap text and fit cell contents to width

Save as 'Task 5'

TASK 5 - Continued



 Select Edit Data Provider and add a new query by selecting the Universe 'Transactions AncServ'

Add data objects

- Org Name
- Interval Start Day
- Day OATT Sched 1 WD StImnt: TC (\$)
- Day OATT Sched 1 Inj Stlmnt: TC (\$)

Add Report Prompts:

- Prompt for Org name
- Prompt for Interval Start Day Range

TASK 5 - Continued



- Run Query 2 with the same parameters as Query 1
- Select the 'Include result objects in the document without generating a table" option
- Merge the following dimensions:
 - Interval Start Day (Eastern) (Query 1) and Interval Start Day (Eastern) (Query 2)
 - TC Org Name (Query 1) and Org Name (Query 2)
- Drag the new data objects into the report and replace the newly merged objects with those in the report
- Save as 'Task 5'

Let's Review



What is meant by multiple data providers?

When managing multiple data providers, what is something important to remember when building your reports?

TASK 6



Open the report named 'Task 3 LSE'

- Run Query and change date range to 1/1/2015-1/5/2015
- Insert break on LSE Name column

Set section on Org Name column

TASK 6 - Continued



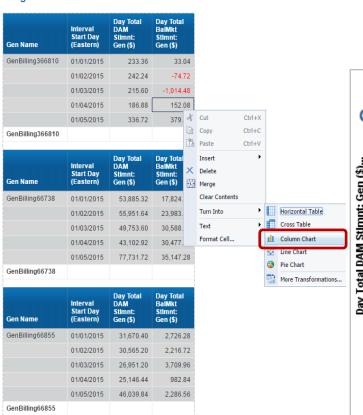
- Sum Day Total Bal Mkt Stlmnt LSE (\$) column
- Create a variable to recalculate the Day Total BalMkt Stlmnt \$
 (Energy + Loss + Congestion)
- Sum this new column; totals should match
- Save as 'Task 6 LSE'



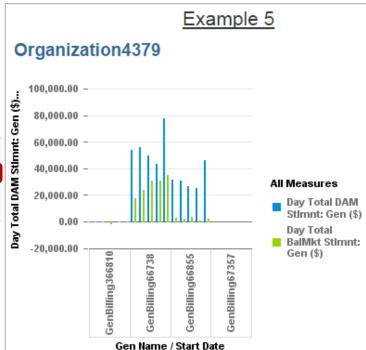
Report Data and Functions



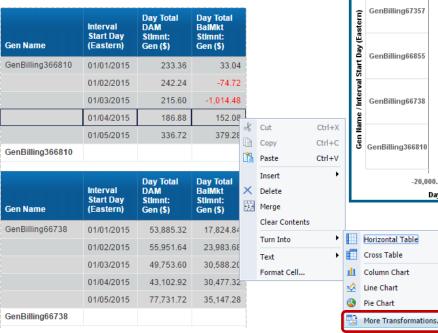
Organization4379



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



Organization4379



Organization4379 GenBilling67357 GenBilling66855 All Measures Day Total DAM Stimnt: Gen (\$) GenBilling66738 Day Total BalMkt Stimnt: Gen (\$) GenBilling366810 -20.000.00 20.000.00 60.000.00 140,000,00 Day Total DAM Stimnt: Gen (\$) & Day To ... **Turn Into**

Tables

Column Line Category Axis Мар Stacked Bar Pie Gen Name Point Radar Tag Cloud Value Axis 1 Waterfall

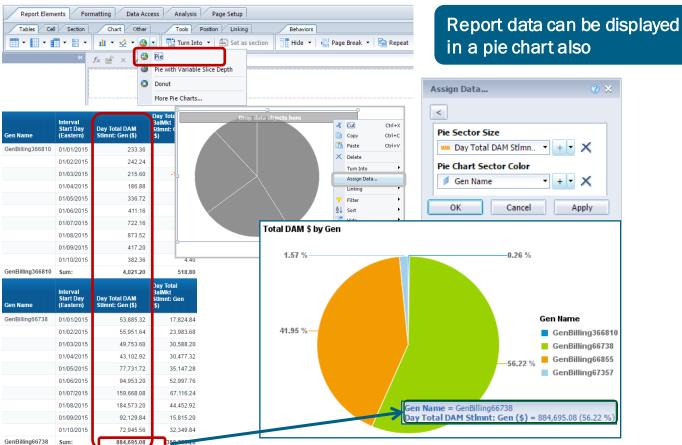
Stacked Bar Chart

A horizontal bar chart that displays data as a series of bars. It is best used for representing three series of data, where each series is represented by a color stacked in a single bar.



Market Training

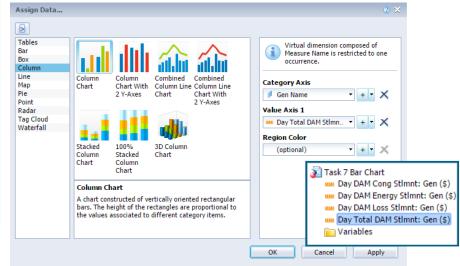






Organization1017822 100,000,000.00 -Day Total DAM Stimnt: Gen (\$) 80.000.000.00 60,000,000.00 -All Measures 40,000,000.00 -Day Total DAM StImnt: Gen (\$) 20.000.000.00 -Geneiling6728 Geneiling67439 Geneiling67440 Gen Name

Report data can be displayed in a graphical form too



TASK 7



- Open the report named 'Task 2 PS'
- Save as 'Task 7 Chart'

- Set Org Name as section
- Edit Data Provider to limit date range to 07/19/2013
- Sum the Day Total DAM Stimnt Gen (\$) Column

TASK 7 - Continued



Use the Day Total DAM Stimnt – Gen (\$) to create a column chart

Convert to a Pie Chart

- Change Title
- Save again (as 'Task 7 Chart')

Let's Review

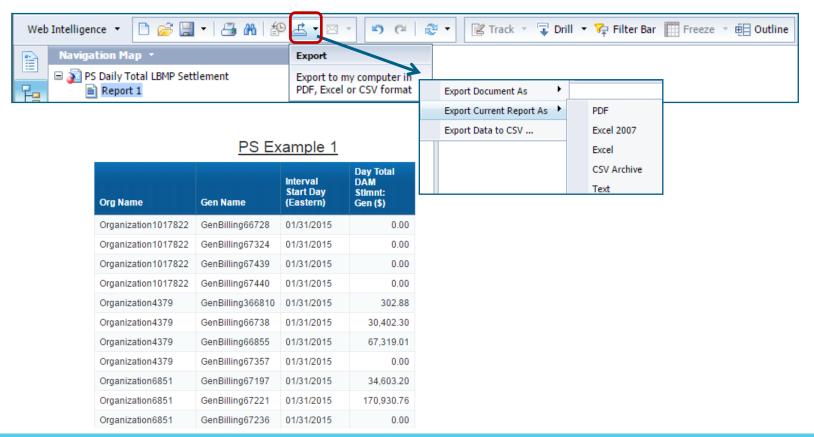


If you are working with multiple generators for example, which function would you use to group or sort the data in the report table?

Which function would you use to create a formula in a table?

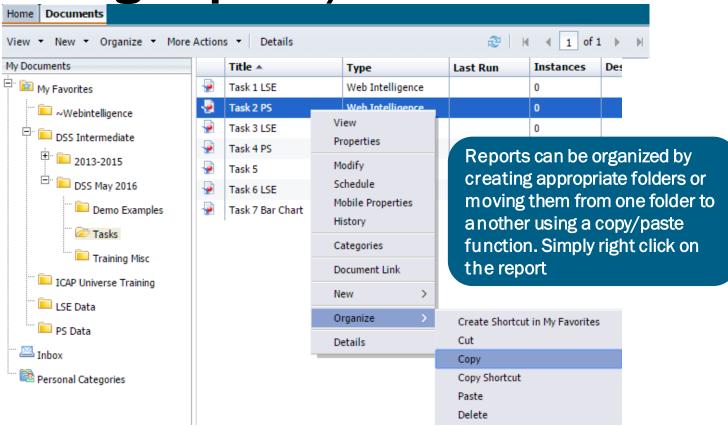
Exporting Report Data





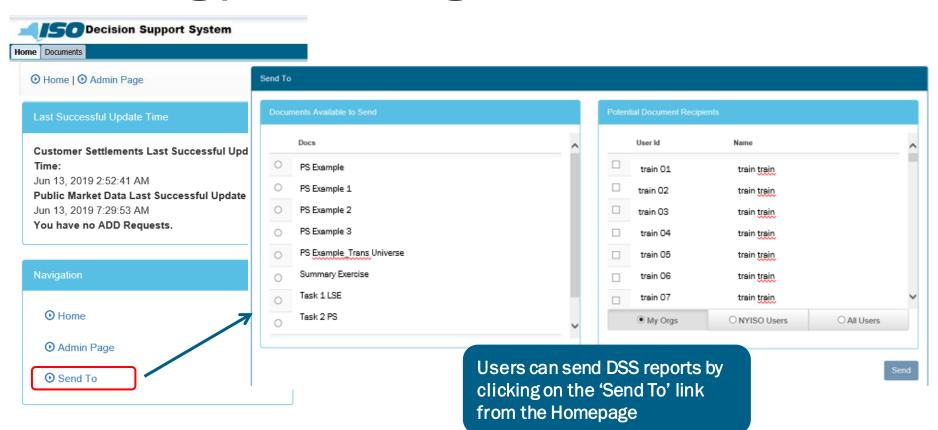
Organizing Reports / Folders





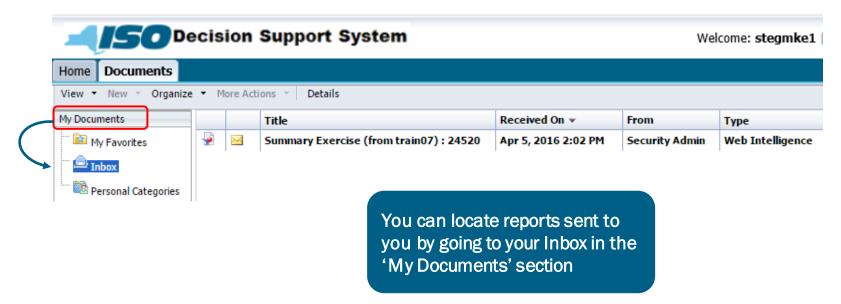
Sending / Receiving Data via DSS





Sending / Receiving Data via DSS





TASK 8



- Create a folder and label it 'DSS April 2018'
- Copy Task 5 LSE and paste it into the new folder
- Send Task 5 file to your neighbor's DSS inbox
- Check your DSS inbox to see that you have received at least one report from another DSS User

Let's Review

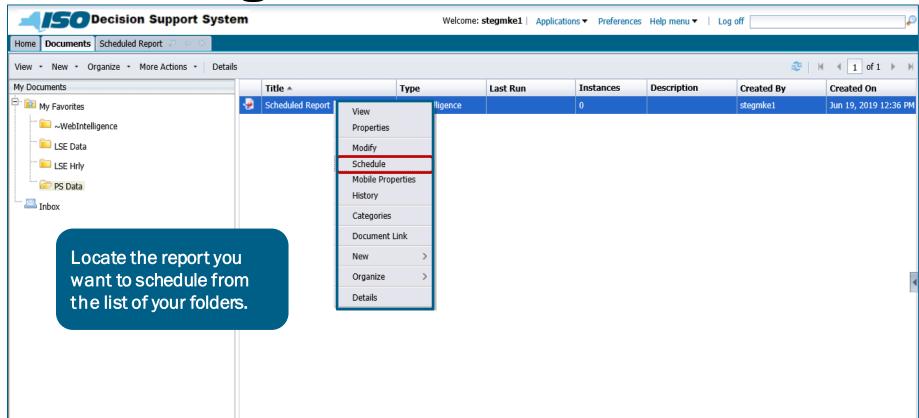


How do you move a report from one folder to another?

Where do you go to send a DSS report to another DSS User?

Scheduling





Scheduling



Schedule - Scheduled Report Recurrence Schedule Run object: Daily Instance Title Object will run once every N days. Days(N) = 1Formats Start Date/Time: 12 00 AM 6/19/2019 Caching End Date/Time: 11 ∨ 59 ∨ PM ∨ 6/21/2019 Events Scheduling Serve History – Scheduled Report Destinations View Organize Send More Actions Delivery Rules Title Туре Instance Time ▼ Status Created By **Parameters** Jun 19, 2019 12:49 PM Scheduled Report Web Intelligence Recurring stegmke1 Jun 19, 2019 12:49 PM Scheduled Report Web Intelligence Recurring stegmke1 3 My Documents My Favorites ~WebIntelligence LSE Data LSE Hrly PS Data Inbox Schedule Cancel



Public Market Data

Public Market Data

1,003.00

969 00

950.00

944 00

949.00

966.00

1,001.00

1,051.00

1.192.00

1.221.00

1.232.00

1.224.00

1,204.00

1,199.00

1 187 00

1,202,00

1,227,00

1.249.00

1.299.00

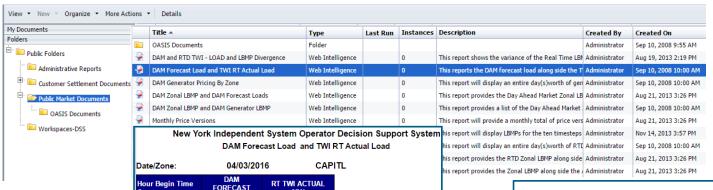
1.342.00

1,268.00

1,176.00

1 100 00





1,038,20

1.001.90

982.30

975.00

982.90

1,017.80

1,066.10

1,188,70

1,250,70

1,279,10

1.300.50

1.299.50

1,296.20

1,282.80

1 284 60

1,308,30

1,356.60

1.438.70

1.450.80

1,363.50

1,265.90

- Non-proprietary data posted on NYISO Public Web site available in a Webi Report
- Access Corporate Reports or Create your own custom report using pricing data or grid and load data

Let's Review



What are the ways to obtain data from DSS?

- 1. Customer Settlement Reports
 - Corporate or Canned Reports
 - User-created Web Intelligence Report
- 2. Public Market Data
 - Corporate or Canned Reports
 - User-created Web Intelligence Report
- 3. Automated Data Delivery (ADD)
- 4. Custom ADD (CADD)

Summary Task

Market Training

- Create a newWebi Report
- Select the Universe 'Virtual Market'

Add the following data objects:

- Interval Start Day (Eastern)
- Org Name
- Day Total DAM VSupply Stlmnt (\$)
- Day Total BalMkt VSupply Stlmnt (\$)
- Day Total DAM VLoad Stlmnt (\$)
- Day Total BalMkt VLoad Stlmnt (\$)

Add Report Prompts:

- Prompt for TC Org name
- Prompt for Interval Start Day Range

Run Query and select the following prompt values

- Org Names: 7962, 4379 and 1038546
- Interval Start Day 07/01/2014
- Interval End Day 07/10/2014



Summary Task - cont'd



- Format table by wrapping text, adjusting column height/width
- Insert a break on the Org Name column
- Insert a column to the right
- Create a New Variable that sums the four DAM and BalMkt VL and VS Settlements.
 Name the variable: Net Daily Virtual Settlement
- Use the 'Sum' function to add a total the new column for each organization
- Change the color of your new column
- Rename the report: Summary Task and save it





Appendix

✓ Let's Review



What is the difference between a corporate report and a custom report?

Corporate reports are canned reports that have been created for NYISO DSS Users using the Web Intelligence application.

Corporate reports can be modified by a DSS User but they must first be saved to the 'Favorites' folder. Alternatively a user can create a custom report.



What is the difference between a Universe and a Data Object?

Universe maps database components to objects. Universes represent the hierarchy of the data structure.

Data objects are elements from the Universe corresponding to data in the database.



What are the three types of Data Objects?

- 1. Dimensions
- 2. Details/Attributes
- 3. Measures



Which data objects can be summed?

- a) Dimensions
- b) Details/Attributes
- c) Measures



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

- a) Reading Mode
- b) Design Mode



What is meant by multiple data providers?

Merging data from more than one Universe

When managing multiple data providers, what is something important to remember when building your reports?

Must have a common data object – ie. Org name, gen name, date, etc.



If you are working with multiple generators for example, which function would you use to group or sort the data in the report table?

Set as a section or insert a break

Which function would you use to create a formula in a table?

Create a Variable



How do you move a report from one folder to another?

Right click on report title > select Organize > Cut/Copy > Paste into appropriate folder

Where do you go to send a DSS report to another DSS User?

Home page - "Send To" button



What are the ways to obtain data from DSS?

- 1. Customer Settlement Reports
 - Corporate or Canned Reports
 - User-created Web Intelligence Report
- 2. Public Market Data
 - Corporate or Canned Reports
 - User-created Web Intelligence Report
- 3. Automated Data Delivery (ADD)
- 4. Custom ADD (CADD)



Appendix

✓ Check your work

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Task 1 LSE should look like this



Task 1 LSE

	LSE Name	Interval Start Day (Eastern)	Day Total DAM Stimnt - LSE (\$)
Organization1017822	LS8282	01/31/2015	0.00
Organization1038546	LS8702	01/31/2015	-23,487.12
Organization1038546	LS8708	01/31/2015	-188,856.48
Organization4379	LS7994	01/31/2015	-3,562,781.79
Organization4379	LS8020	01/31/2015	0.00
Organization4379	LS8059	01/31/2015	0.00
Organization4379	LS8154	01/31/2015	0.00
Organization4379	LS8161	01/31/2015	0.00
Organization4379	LS8220	01/31/2015	0.00
Organization6851	LS7993	01/31/2015	-6,652,562.70
Organization7630	LS8714	01/31/2015	-17,362.23
Organization7962	LS8164	01/31/2015	0.00
Organization7962	LS8275	01/31/2015	0.00
Organization7962	LS8306	01/31/2015	0.00
Organization7962	LS8307	01/31/2015	0.00
Organization7962	LS8321	01/31/2015	0.00

Task 2 should look like this



Task 2 PS

Org Name	Gen Name	Interval Start Day (Eastern)	Day DAM Energy Stimnt: Gen (\$)	Day DAM Loss Stimnt: Gen (\$)	Day DAM Cong Stimnt: Gen (\$)	Day Total DAM Stimnt: Gen (\$)
Organization1017822	GenBilling66728	07/01/2013	0.00	0.00	0.00	0.00
Organization1017822	GenBilling66728	07/02/2013	0.00	0.00	0.00	0.00
Organization1017822	GenBilling66728	07/03/2013	0.00	0.00	0.00	0.00
Organization1017822	GenBilling66728	07/04/2013	0.00	0.00	0.00	0.00
Organization1017822	GenBilling66728	07/05/2013	696,651.72	88,561.44	139,153.08	924,366.24
Organization1017822	GenBilling66728	07/06/2013	767,074.84	96,247.24	40,146.28	903,468.36
Organization1017822	GenBilling66728	07/07/2013	850,114.28	100,014.88	56,758.20	1,006,887.36
Organization1017822	GenBilling66728	07/08/2013	1,380,638.60	160,600.64	340,603.64	1,881,842.88
						598,758.84
Organization1017822	GenBilling66728	07/22/2013	1,011,510.60	114,602.48	16,212.16	1,142,325.24
Organization1017822	GenBilling66728	07/23/2013	938,335.28	106,170.76	22,531.84	1,067,037.88
Organization1017822	GenBilling66728	07/24/2013	616,192.84	78,320.44	55,262.28	749,775.56
Organization1017822	GenBilling66728	07/25/2013	629,824.84	80,525.56	134,769.96	845,120.36
Organization1017822	GenBilling66728	07/26/2013	484,529.24	58,057.64	65,052.60	607,639.48
Organization1017822	GenBilling66728	07/27/2013	235,704.36	27,076.89	12,771.00	275,552.25
Organization1017822	GenBilling66728	07/28/2013	265,758.09	33,007.20	44,928.00	343,693.29
Organization1017822	GenBilling66728	07/29/2013	591,131.94	73,062.15	123,428.88	787,622.97

Task 3 should look like this



Task 3

Org Name	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 (\$)
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

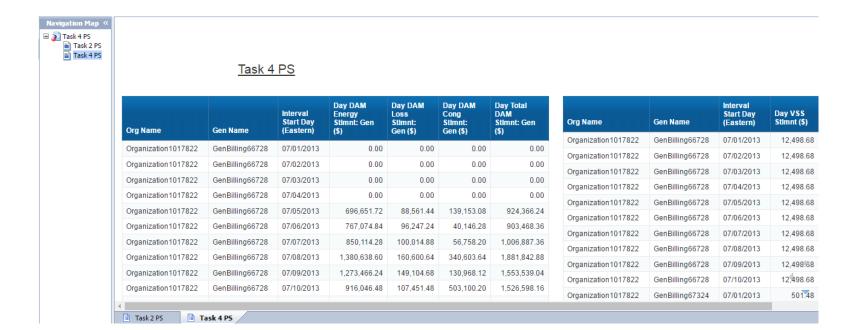
Organization1017822	LS8282	01/24/2015	0.00	-253.06	-3,533.48	-344.20	-4,130.74
Organization1017822	LS8282	01/25/2015	0.00	-388.76	-4,680.22	-427.26	-5,496.24
Organization1017822	LS8282	01/26/2015	0.00	-1,315.52	-3,658.60	-306.92	-5,281.04
Organization1017822	LS8282	01/27/2015	0.00	-2,081.06	-2,776.44	-239.78	-5,097.28
Organization1017822	LS8282	01/28/2015	0.00	-2.526.42	-2.264.06	-212.88	-5.003.36

Task 1 LSE

Task 3

Task 4 should look like this





Task 5 should look like this



Iter tree rval Start Day (Eastern) Interval Start Day (Eastern) (Query 1) Interval Start Day (Eastern) (Query 2) Name	Org Name	TransCnt ID	TransCnt Transaction Category	Interval Start Day (Eastern)	Day DAM Total LBMP Stimnt (\$)	Day BalMkt Total LBMP Stimnt (\$)	Day Total DAM TUC Stimnt (\$)	Day Total BalMkt TUC Stimnt (\$)	Day OATT Sched 1 Inj Stimnt: TC (\$)	Day OATT Sched 1 WD Stimnt: TC (\$)
Org Name (Query 2) TC Org Name (Query 1)	Organization4379	7067341	Export	07/01/2013			-502.88	0.00	-10,671.56	-133.2
tion Category	Organization4379	7067341	Export	07/02/2013			-640.32	0.00	-10,364.93	-133.26
tlmnt (\$)	Organization4379	7067341	Export	07/03/2013			-991.44	0.00	-10,824.87	-133.26
t (\$) nt: TC (\$)	Organization4379	7067341	Export	07/04/2013			-1,108.24	0.00	-11,591.44	-133.26
nt: TC (\$)	Organization4379	7067341	Export	07/05/2013			-1,028.64	0.00	-12,051.39	-133.26
nt (\$) (\$)	Organization4379	7067341	Export	07/06/2013			-568.40	0.00	-12,051.39	-133.26
	Organization4379	7067341	Export	07/07/2013			-844.72	0.00	-12,204.70	-133.26
	Organization4379	7067341	Export	07/08/2013			-1,399.60	0.00	-12,128.05	-133.26
	Organization4379	7067341	Export	07/09/2013			-817.28	0.00	-11,791.19	-133.26
	Organization4379	7067341	Export	07/10/2013			-1,558.72	0.00	-11,208.16	-133.26
	Organization4379	8160807	Import	07/01/2013	1,415,888.00	0.00		0.00	-10,671.56	-133.26
	Organization4379	8160807	Import	07/02/2013	1,451,104.00	0.00		0.00	-10,364.93	-133.26
	Organization4379	8160807	Import	07/03/2013	1,449,456.00	0.00		0.00	-10,824.87	-133.26
	Organization4379	8160807	Import	07/04/2013	1,354,944.00	0.00		0.00	-11,591.44	-133.26
	Organization4379	8160807	Import	07/05/2013	1,631,504.00	0.00		0.00	-12,051.39	-133.26
	Organization4379	8160807	Import	07/06/2013	1,569,888.00	0.00		0.00	-12,051.39	-133.26
	Organization4379	8160807	Import	07/07/2013	1,650,528.00	0.00		0.00	-12,204.70	-133.26
	Organization4379	8160807	Import	07/08/2013	2,044,160.00	0.00		0.00	-12,128.05	-133.26
	Organization4379	8160807	Import	07/09/2013	1,960,480.00	0.00		0.00	-11,791.19	-133.26
	Organization4379	8160807	Import	07/10/2013	1,858,912.00	0.00		0.00	-11,208.16	-133.26
	Organization4379	11061107	Import	07/01/2013	0.00	40,550.48		0.00	-10,671.56	-133.26
	Organization4379	11063601	Import	07/03/2013	0.00	75,770.48		0.00	-10,824.87	-133.26
	Organization4379	11064945	Import	07/04/2013	0.00	221,472.20		0.00	-11,591.44	-133.26
	Organization4379	11066153	Import	07/05/2013	0.00	364,087.40		0.00	-12,051.39	-133.26
	Organization4379	11067343	Import	07/06/2013	0.00	336,920.52		0.00	-12,051.39	-133.26
	Organization4379	11068625	Import	07/07/2013	0.00	604,875.80		0.00	-12,204.70	-133.26
	Organization4379	11069607	Import	07/08/2013	0.00	560,002.80		0.00	-12,128.05	-133.26
	Organization4379	11071211	Import	07/09/2013	0.00	227,780.12		0.00	-11,791.19	-133.26
	Organization4379	11072423	Import	07/10/2013	0.00	174,226.04		0.00	-11,208.16	-133.26

Task 6 should look like this



Organization1017822

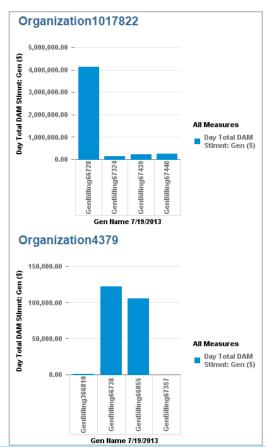
LSE Name	Interval Start Day (Eastern)	Day Total DAM Stimnt - LSE (\$)	Day BalMkt Cong Stlmnt - LSE (\$)	Day BalMkt Energy Stimnt - LSE (\$)	Day BalMkt Loss Stimnt - LSE (\$)	Day Total BalMkt Stimnt - LSE (\$)	Recalculate Day Total Balancing Market Settlement
LS8282	01/01/2015	0.00	-1,714.56	-1,171.74	-108.88	-2,995.18	-2,995.18
	01/02/2015	0.00	-1,373.34	-2,081.94	-206.72	-3,662.00	-3,662
	01/03/2015	0.00	-17.00	-2,997.22	-267.94	-3,282.16	-3,282.16
	01/04/2015	0.00	-569.82	-2,259.78	-206.02	-3,035.62	-3,035.62
	01/05/2015	0.00	-736.80	-3,174.08	-300.06	-4,210.94	-4,210.94
L\$8282					Sum:	-17,185.90	-17,185.9
					Sum:	-17,185.90	-17,185.9

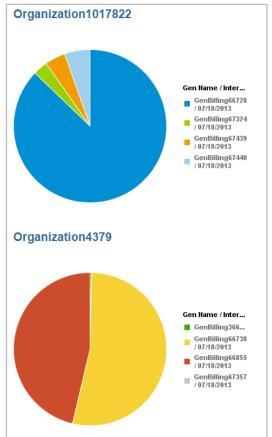
Organization1038546

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 (\$)	Recalculate Day Total Balancing Market Settlement
LS8702	01/01/2015	-15,284.84	-152.25	-339.66	22.46	-469.45	-469.45
	01/02/2015	-15,753.44	76.79	103.82	53.40	234.01	234.01
	01/03/2015	-13,442.04	-0.32	-1,148.01	58.02	-1,090.31	-1,090.31
	01/04/2015	-12,363.36	-55.49	-584.14	66.14	-573.49	-573.49
	01/05/2015	-22,736.88	-295.73	1,177.34	92.13	973.74	973.74
L\$8702					Sum:	-925.50	-925.5
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 (\$)	Recalculate Day Total Balancing Market Settlement
LS8708	01/01/2015	-101,096.00	-1,047.89	-541.18	-45.41	-1,634.48	-1,634.48
	01/02/2015	-110,759.96	762.74	1,605.75	166.36	2,534.85	2,534.85
	01/03/2015	-91,206.68	1.80	-1,432.09	-109.16	-1,539.45	-1,539.45
	01/04/2015	-76,991.12	221.12	-64.48	-14.04	142.60	142.6

Task 7 should look like this







Summary Task should look like this



Summary Task

Interval Start Day (Eastern)	Org Name	Day Total DAM VSupply Stimnt (\$)	Day Total BaiMkt VSupply Stimnt (\$)	Day Total DAM VLoad Stimnt (\$)	Day Total BalMkt VLoad Stimnt (\$)	Net Daily Virtual Settlement
07/01/2014	Organization4379	15,360.88	-10,824.96	0.00	0.00	4,535.92
07/02/2014		15,861.84	-11,626.64	0.00	0.00	4,235.2
07/03/2014		12,005.52	-11,109.04	0.00	0.00	896.48
07/04/2014		9,437.72	-3,584.88	0.00	0.00	5,852.84
07/05/2014		8,035.48	-1,118.48	0.00	0.00	6,917
07/06/2014		7,816.04	-4,279.96	0.00	0.00	3,536.08
07/07/2014		11,578.44	-12,542.68	0.00	0.00	-964.24
07/08/2014		12,927.80	-10,644.40	0.00	0.00	2,283.4
07/09/2014		0.00	0.00	0.00	0.00	0
07/10/2014		0.00	0.00	0.00	0.00	0
	Organization4379				Sum:	27,292.68

Interval Start Day (Eastern)	Org Name	Day Total DAM VSupply Stimnt (\$)	Day Total BalMkt VSupply Stimnt (\$)	Day Total DAM VLoad Stimnt (\$)	Day Total BalMkt VLoad Stimnt (\$)	Net Daily Virtual Settlement
07/01/2014	Organization7962	0.00	0.00	-337,644.00	267,229.64	-70,414.36
07/02/2014		0.00	0.00	-832,472.00	867,183.12	34,711.12
07/03/2014		292,021.00	-252,186.00	-661,488.00	574,324.44	-47,328.56
07/07/2014		0.00	0.00	-301,072.00	289,472.00	-11,600
07/08/2014		0.00	0.00	-312,360.00	291,993.00	-20,367
07/09/2014		0.00	0.00	-286,588.00	216,836.00	-69,752
	Organization7962				Sum:	-184,750.8
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					Sum:	-157,458.12

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 BusinessObjects BI 4.0 Third Edition by Cindy Howson and Elizabeth Newbould (Paperback – 2012)
- SAP BusinessObjects Web Intelligence 4.1 Training Course by Shakil Ahmed (Paperback – 2014)