

# DSS 201

## Intermediate Decision Support System

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E-Learning Module 1: Creating Custom Queries

# DSS 201

## COURSE OBJECTIVES: Participants will be able to

### Module 1: Creating Custom Queries

- Understand icons and naming conventions within the DSS environment
- Understand how to create a new Web Intelligence Report
- Save report data
- Create subfolders to organize reports

### Module 2: Editing Custom Queries

- Learn how to edit a custom Web Intelligence Report

### Module 3: Multiple Data Providers and Merging Universes

- Utilize multiple data providers

### Module 4: Utilizing Report Data

- Learn how to create a graphical representation of report data
- Send and receive reports via the DSS inbox

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# Getting Started

# 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 (\$)

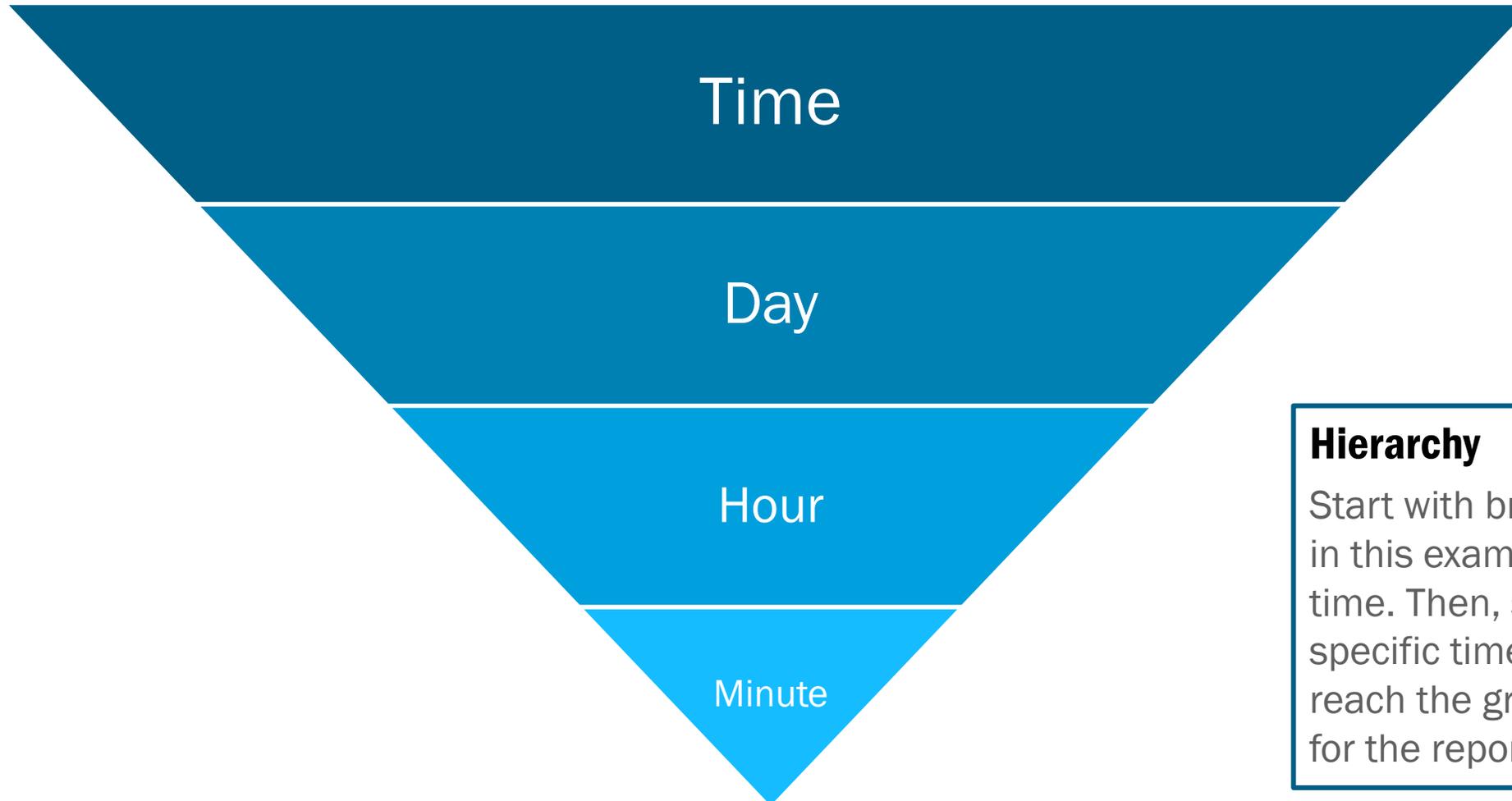
 Day DAM Loss Stlmnt: Gen (\$)

 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.

# Creating Custom Queries

# DSS Home Page

**NYISO Decision Support System** Welcome: **train01** | Applications ▾ | Help menu ▾ | Log off

**Home** | Documents

Home | Admin Page Current User: train01

#### 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.**

#### Customer Settlements Data Mart

- List of Interval Days & Invoice Versions
- Voltage Support Service Rates
- DSS Mapping Guide for Customer Statements
- TSC & NTAC Rates

#### Public Market Data

- Definition of Price Versions

#### ADD

- Daily Customer Statements CSV Template (11k)
- Hourly Customer Statement CSV Template (15k)

#### Bulletins, Manuals and Documentation

- Technical Bulletin 109 (DSS Access) (525k)
- Accounting and Billing Manual
- Billing Reference Documents
- ADD - Technical Bulletin 127 (93k)
- Custom ADD - Technical Bulletin 147 (159K)
- FERC EQR - Technical Bulletin 139 (165k)
- Business Intelligence Task Force Meeting Materials

#### Training

- Training Schedule

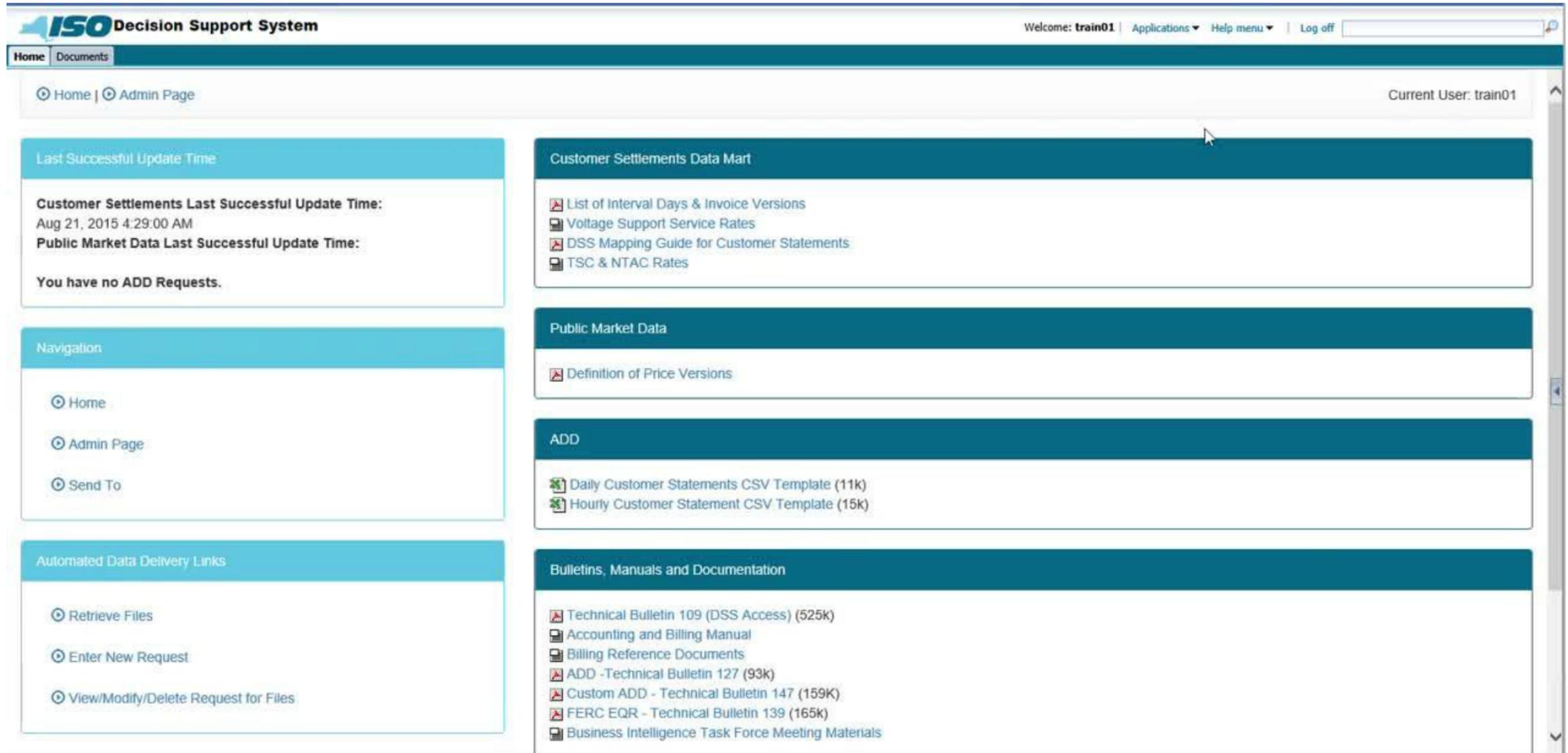
#### Navigation

- Home
- Admin Page
- Send To

#### Automated Data Delivery Links

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

# Create a Web Intelligence Report



The screenshot shows the ISO Decision Support System web interface. The header includes the ISO logo and the text "Decision Support System". On the right, it says "Welcome: train01" and has links for "Applications", "Help menu", and "Log off". Below the header, there are navigation tabs for "Home" and "Documents". A breadcrumb trail shows "Home | Admin Page". The current user is identified as "train01".

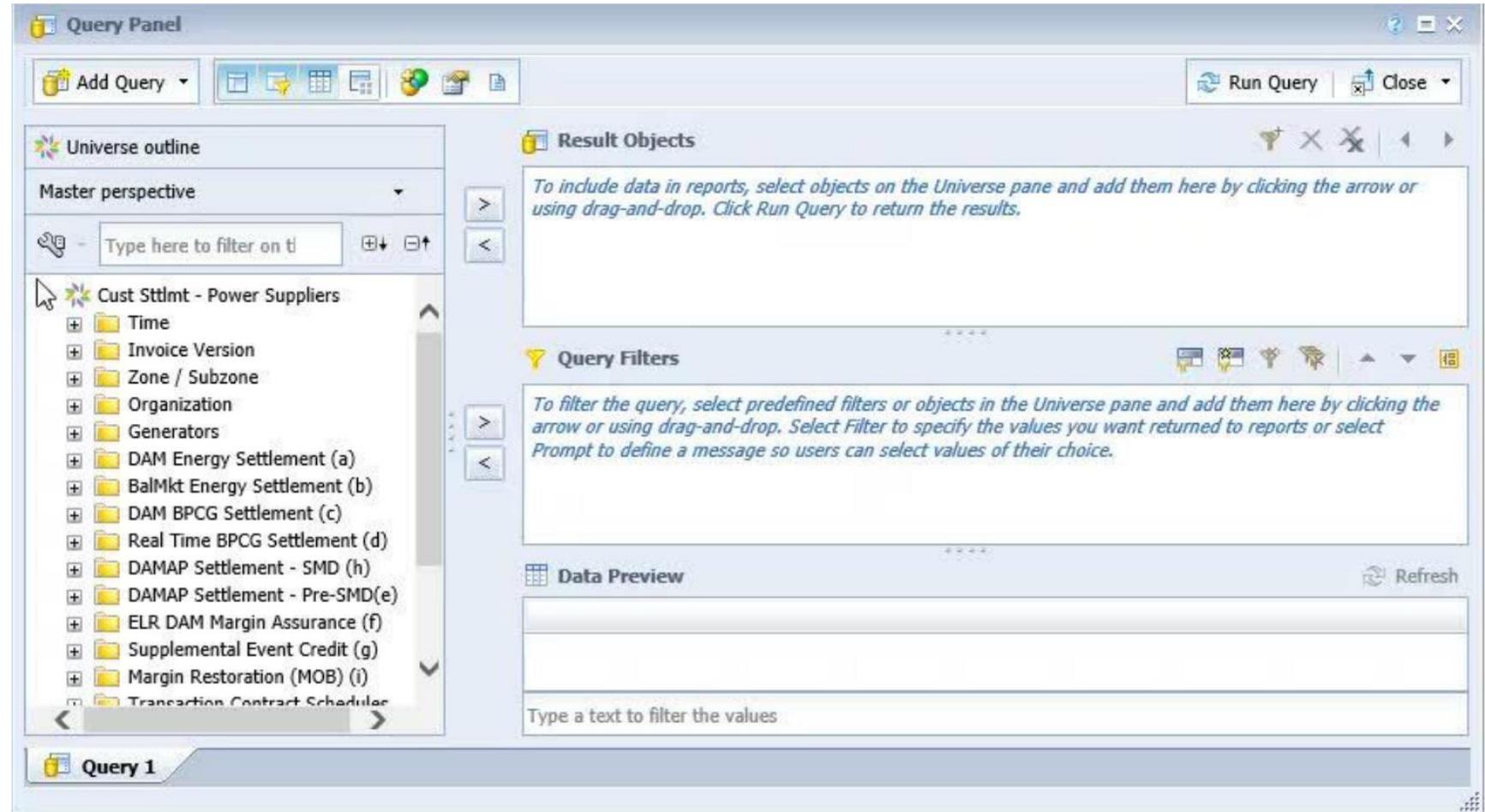
The main content area is divided into several sections:

- Last Successful Update Time:** Displays "Customer Settlements Last Successful Update Time: Aug 21, 2015 4:29:00 AM" and "Public Market Data Last Successful Update Time:". Below this, it states "You have no ADD Requests."
- Customer Settlements Data Mart:** Contains links for "List of Interval Days & Invoice Versions", "Voltage Support Service Rates", "DSS Mapping Guide for Customer Statements", and "TSC & NTAC Rates".
- Public Market Data:** Contains a link for "Definition of Price Versions".
- ADD:** Contains links for "Daily Customer Statements CSV Template (11k)" and "Hourly Customer Statement CSV Template (15k)".
- Bulletins, Manuals and Documentation:** Contains links for "Technical Bulletin 109 (DSS Access) (525k)", "Accounting and Billing Manual", "Billing Reference Documents", "ADD - Technical Bulletin 127 (93k)", "Custom ADD - Technical Bulletin 147 (159K)", "FERC EQR - Technical Bulletin 139 (165k)", and "Business Intelligence Task Force Meeting Materials".

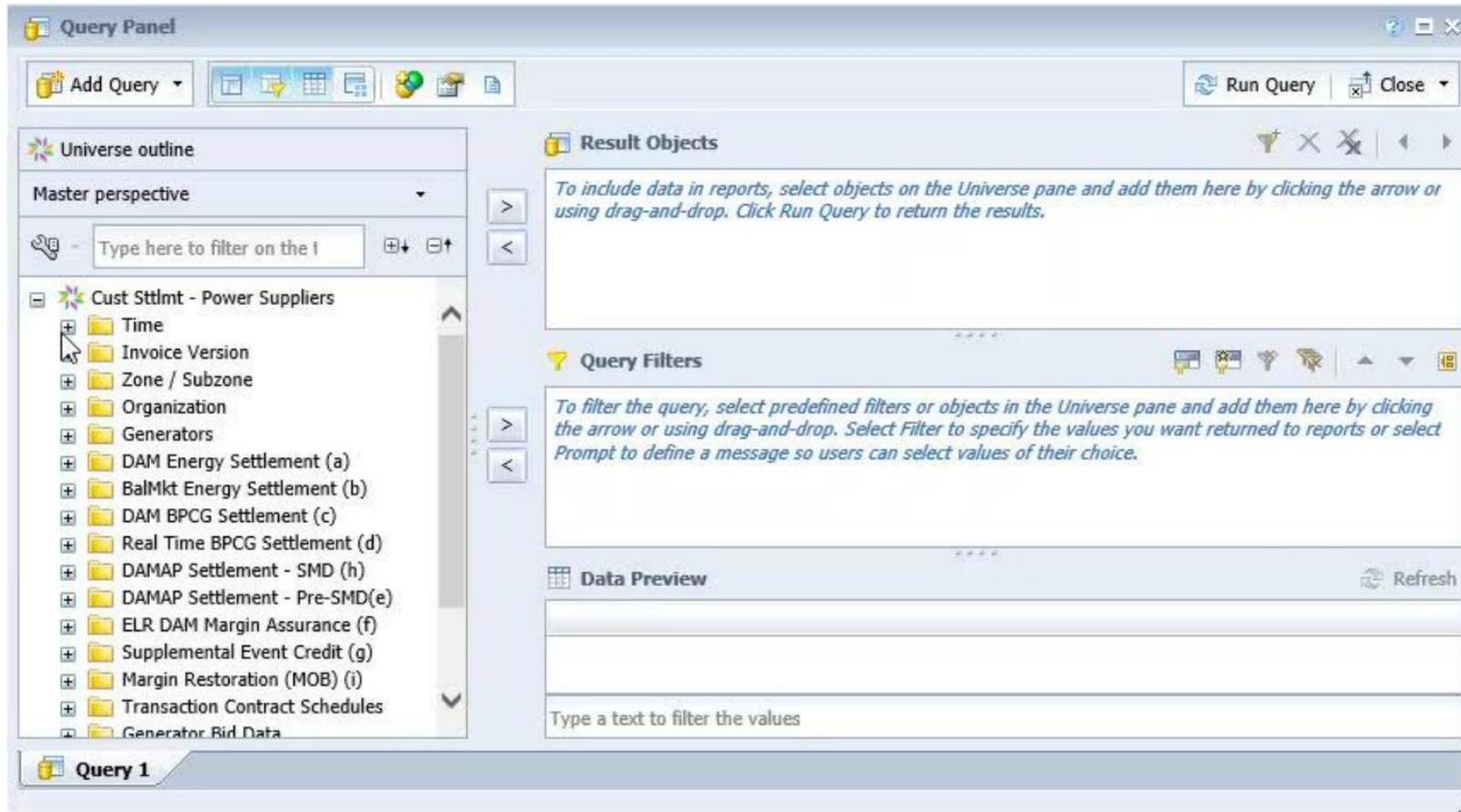
On the left side, there is a "Navigation" section with links for "Home", "Admin Page", and "Send To". Below that is an "Automated Data Delivery Links" section with links for "Retrieve Files", "Enter New Request", and "View/Modify/Delete Request for Files".

# Data Manager

**Data Manager**  
Consists of data object measures and dimensions to build query



# Results Objects Pane



## 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

# Query Filters Pane

The screenshot displays the 'Query Panel' interface. On the left is the 'Universe outline' showing a tree structure under 'Master perspective' with categories like 'Cust Stlmt - Power Suppliers', 'Time', 'Invoice Version', 'Zone / Subzone', 'Organization', 'Generators', and various settlement types. The main area is divided into 'Result Objects' (containing 'Org Name', 'Gen Name', 'Interval Start Day (Eastern)', and 'Day Total DAM Stlmt: Gen (\$)') and 'Query Filters' (with a text box for instructions). Below is a 'Data Preview' section with a 'Refresh' button and a filter input field.

## 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

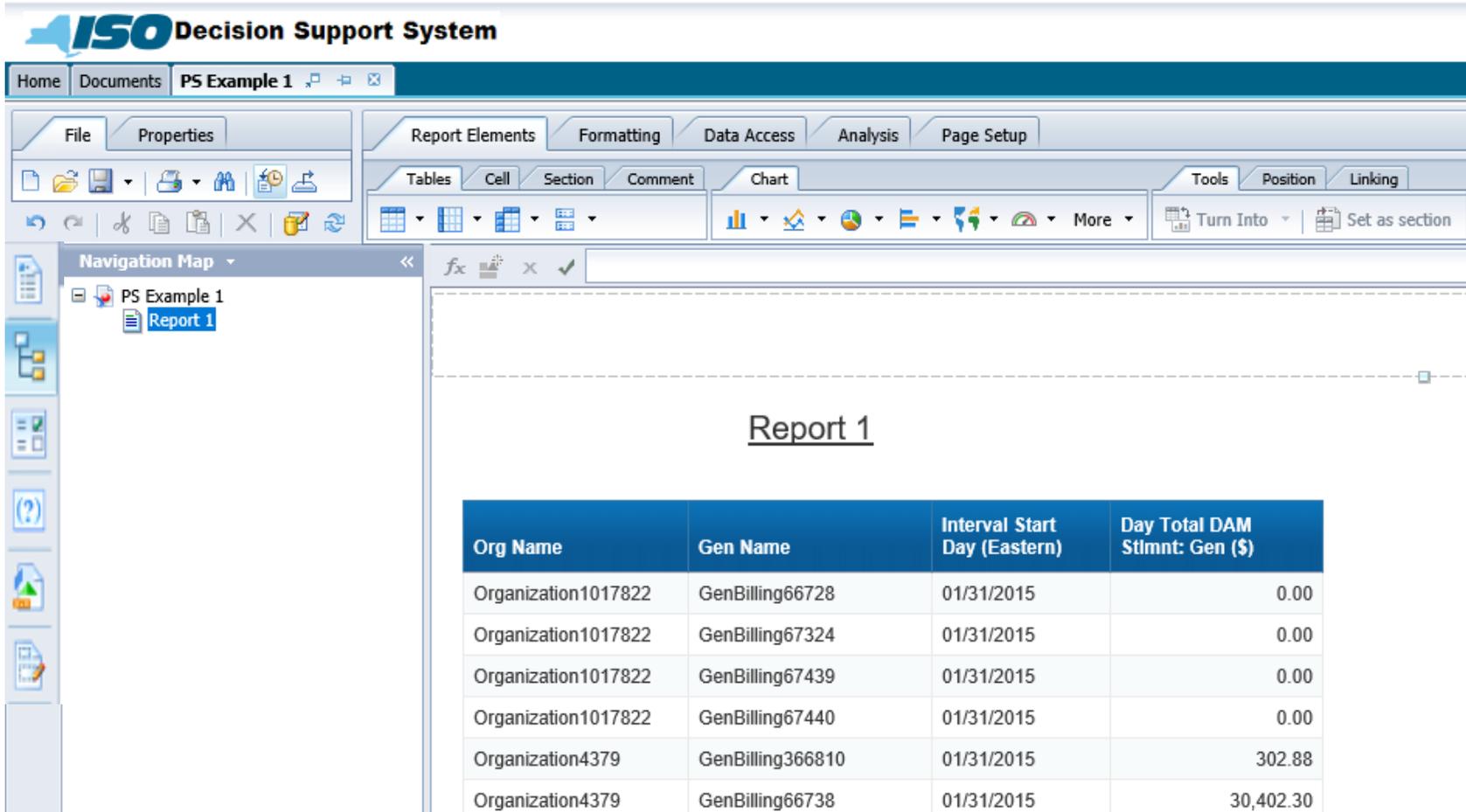
# Run Query

The screenshot shows the 'Query Panel' interface. On the left is the 'Universe outline' with a tree view of data categories. The main area is divided into three sections: 'Result Objects', 'Query Filters', and 'Data Preview'. The 'Result Objects' section contains 'Org Name', 'Gen Name', 'Interval Start Day (Eastern)', and 'Day Total DAM Stimt: Gen (\$)'. The 'Query Filters' section shows 'AND' followed by 'Prompt for Org Name' and 'Prompt for Interval Start Day'. The 'Data Preview' section shows a table with the following data:

Org Name	Gen Name	Interval Start Day (Eastern)	Day Total D...
Organization6851	GenBilling67236	01/31/2015	0.00
Organization1017822	GenBilling66728	01/31/2015	0.00

Run Query once all Objects, Filters and Prompts have been selected

# Review Report Results



The screenshot shows the NYISO Decision Support System interface. The main window displays a report titled "Report 1" with the following data table:

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

- 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 Custom Query Reports

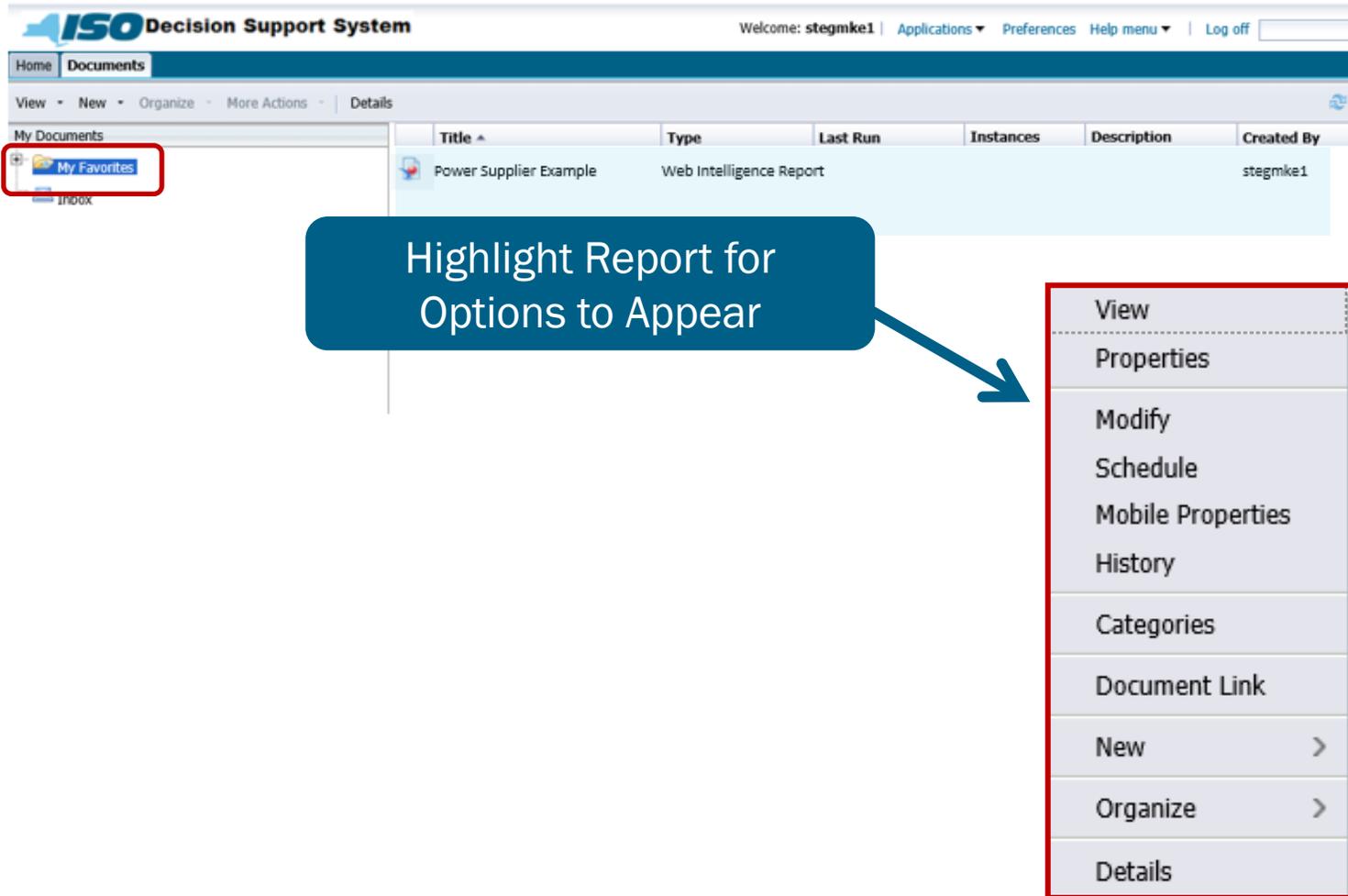
# Saving Documents

The screenshot shows the ISO Decision Support System interface. The main window displays a report titled "Report 1" with a table of data. The table has four columns: "Org Name", "Gen Name", "Interval Start", and "Day Total DA". The data is as follows:

Org Name	Gen Name	Interval Start	Day Total DA
Organization1	GenBilling667	01/31/2015	0.00
Organization1	GenBilling673	01/31/2015	0.00
Organization1	GenBilling674	01/31/2015	0.00
Organization1	GenBilling674	01/31/2015	0.00
Organization4	GenBilling366	01/31/2015	302.88
Organization4	GenBilling667	01/31/2015	30,402.30
Organization4	GenBilling668	01/31/2015	67,319.01
Organization4	GenBilling673	01/31/2015	0.00
Organization6	GenBilling671	01/31/2015	34,603.20
Organization6	GenBilling672	01/31/2015	170,930.76
Organization6	GenBilling672	01/31/2015	0.00
Organization7	GenBilling366	01/31/2015	247.35
Organization7	GenBilling366	01/31/2015	477.30

- 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. The user is logged in as 'stegmke1'. The 'Documents' tab is active. In the left-hand 'My Documents' panel, the 'My Favorites' folder is highlighted with a red box. The main table displays a report titled 'Power Supplier Example' of type 'Web Intelligence Report', created by 'stegmke1'. A blue callout box with the text 'Highlight Report for Options to Appear' has an arrow pointing to a context menu that is open over the report. The context menu, outlined in red, contains the following options: View, Properties, Modify, Schedule, Mobile Properties, History, Categories, Document Link, New >, Organize >, and Details.

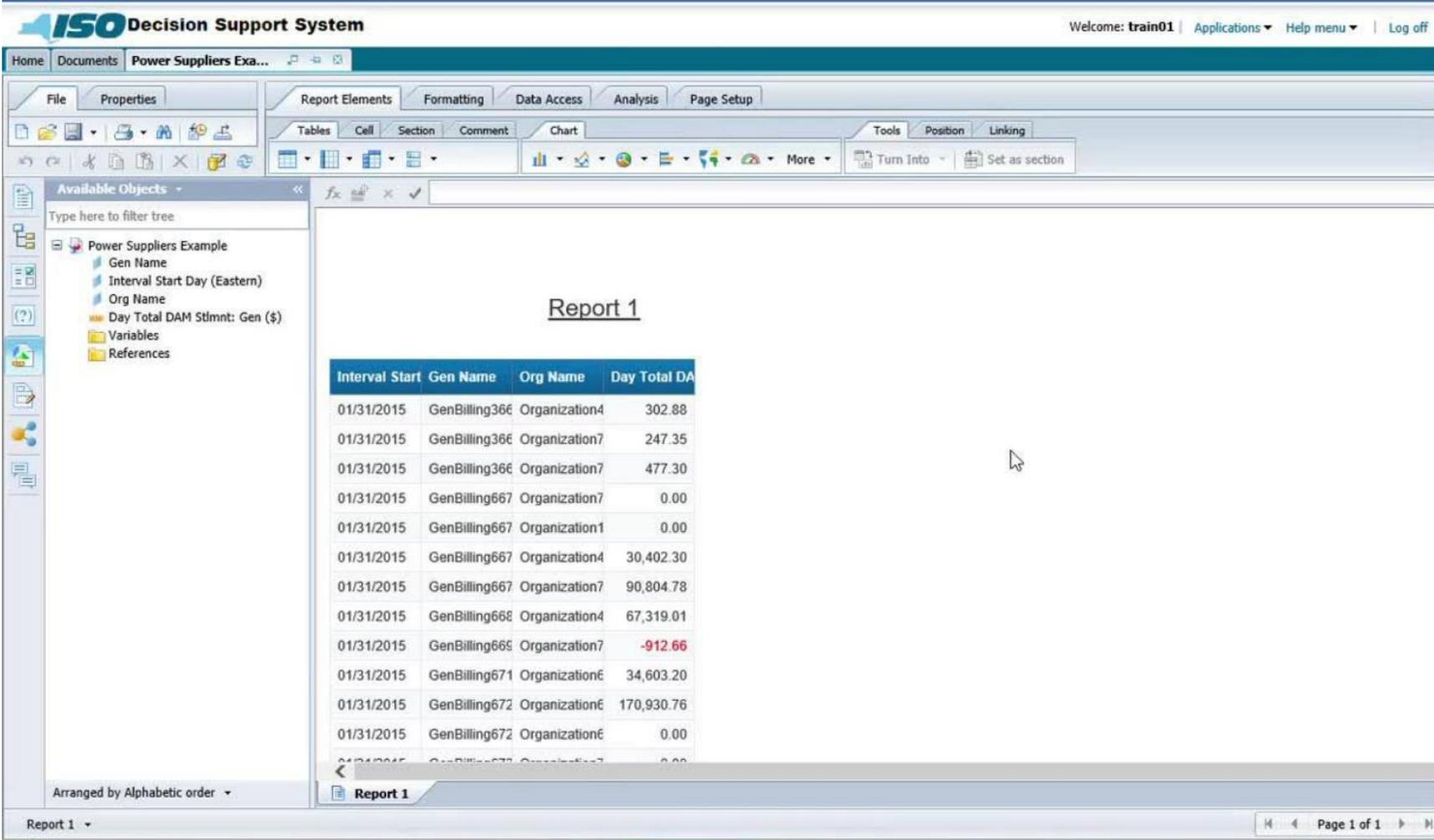
Title	Type	Last Run	Instances	Description	Created By
Power Supplier Example	Web Intelligence Report				stegmke1

- View
- Properties
- Modify
- Schedule
- Mobile Properties
- History
- Categories
- Document Link
- New >
- Organize >
- Details

- To locate the saved report in Favorites, select Document List icon
- Next, select My Favorites folder, located in the left panel

# 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



The screenshot shows the ISO Decision Support System interface. The title bar reads "ISO Decision Support System" and "Welcome: train01 | Applications | Help menu | Log off". The main window displays a report titled "Report 1" with a data table. The table has the following columns: Interval Start, Gen Name, Org Name, and Day Total DA. The data rows are as follows:

Interval Start	Gen Name	Org Name	Day Total DA
01/31/2015	GenBilling366	Organization4	302.88
01/31/2015	GenBilling366	Organization7	247.35
01/31/2015	GenBilling366	Organization7	477.30
01/31/2015	GenBilling667	Organization7	0.00
01/31/2015	GenBilling667	Organization1	0.00
01/31/2015	GenBilling667	Organization4	30,402.30
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01/31/2015	GenBilling671	Organization6	34,603.20
01/31/2015	GenBilling672	Organization6	170,930.76
01/31/2015	GenBilling672	Organization6	0.00
01/31/2015	GenBilling673	Organization7	0.00

The interface also shows a left-hand pane with "Available Objects" including "Power Suppliers Example", "Gen Name", "Interval Start Day (Eastern)", "Org Name", "Day Total DAM Stmt: Gen (\$)", "Variables", and "References". The bottom status bar shows "Report 1" and "Page 1 of 1".

# Creating Sub-Folders

The screenshot shows the 'ISO Decision Support System' interface. The 'Documents' tab is active. A red box labeled '1' highlights the 'New' dropdown menu. The dropdown menu is open, showing options: 'Local Document', 'Publication', 'Hyperlink', and 'Folder'. The 'Folder' option is highlighted with a red box. The main content area shows a table with columns: Title, Type, Last Run, Instances, Description, and Created By. A single row is visible with the title 'Power Supplier Example' and type 'Web Intelligence Report'.

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

- Select New Drop Down
- Select Folder

The screenshot shows a 'Create Folder' dialog box. It has a title bar with a close button. The main area contains the text 'Enter a new folder name:' followed by an empty text input field. At the bottom, there are 'OK' and 'Cancel' buttons. A red box labeled '2' highlights the entire dialog box.

- Type in Folder Name
- Select OK

# Moving Files

**ISO Decision Support System** Welcome: stegmke1 | Applications ▾ | Preferences | Help menu ▾ | Log off

Home Documents

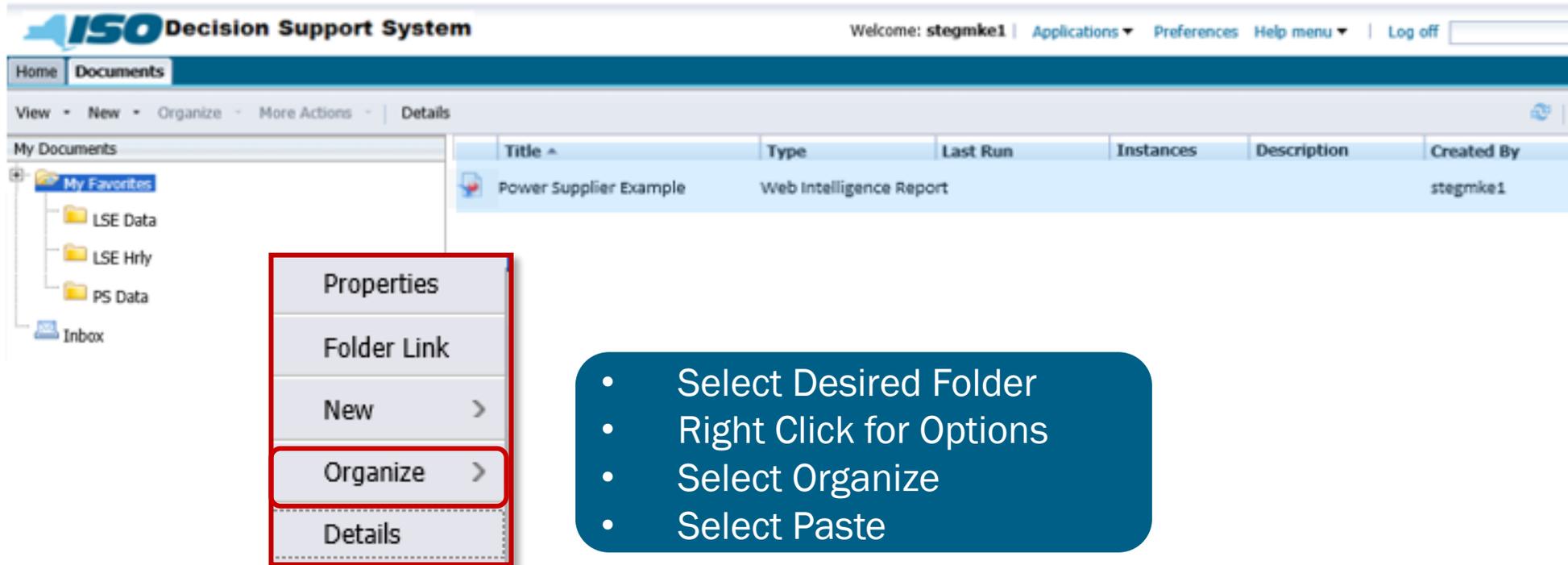
View ▾ New ▾ Organize ▾ More Actions ▾ | Details

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

- View
- Properties
- Modify
- Schedule
- Mobile Properties
- History
- Categories
- Document Link
- New >
- Organize >
- Details

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

# Moving Files



The screenshot shows the ISO Decision Support System interface. The top navigation bar includes "Home" and "Documents". Below it, a menu bar contains "View", "New", "Organize", "More Actions", and "Details". The main content area is divided into two sections: "My Documents" on the left and a table on the right. The "My Documents" section shows a tree view with "My Favorites" containing folders for "LSE Data", "LSE Hrly", and "PS Data", and an "Inbox" folder. The table on the right has columns for "Title", "Type", "Last Run", "Instances", "Description", and "Created By". A single row is visible with the title "Power Supplier Example", type "Web Intelligence Report", and created by "stegmike1". A context menu is overlaid on the "My Documents" section, with the "Organize" option highlighted by a red box. To the right of the context menu is a blue rounded rectangle containing a list of instructions.

Title ^	Type	Last Run	Instances	Description	Created By
Power Supplier Example	Web Intelligence Report				stegmike1

- Select Desired Folder
- Right Click for Options
- Select Organize
- Select Paste

# Supporting Documentation

# Business Objects Supporting Documentation

- **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)**

# DSS 201

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E-Learning Module 2: Editing Custom Queries

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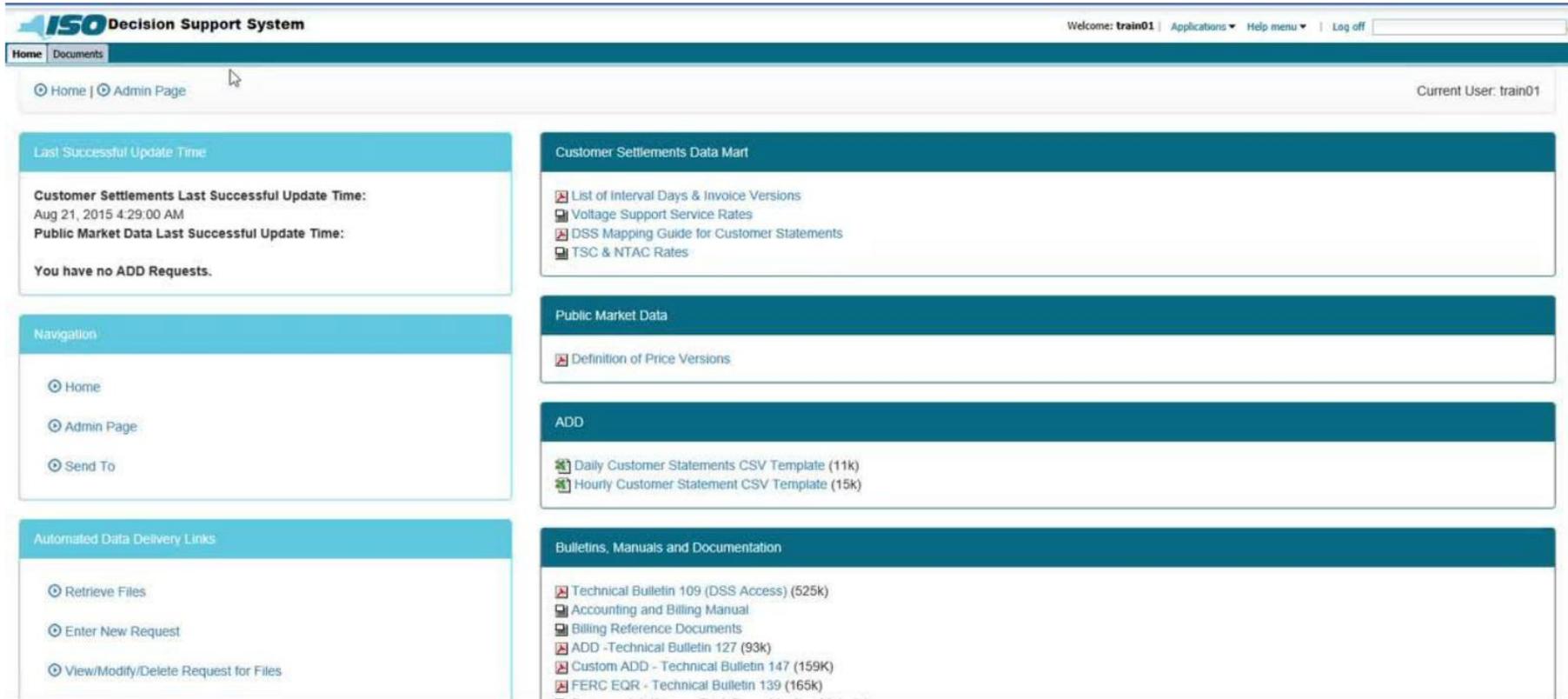
- Learn how to create a graphical representation of report data
- Send and receive reports via the DSS inbox

# Editing Custom Queries

# Getting Started

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

# Modify an existing report



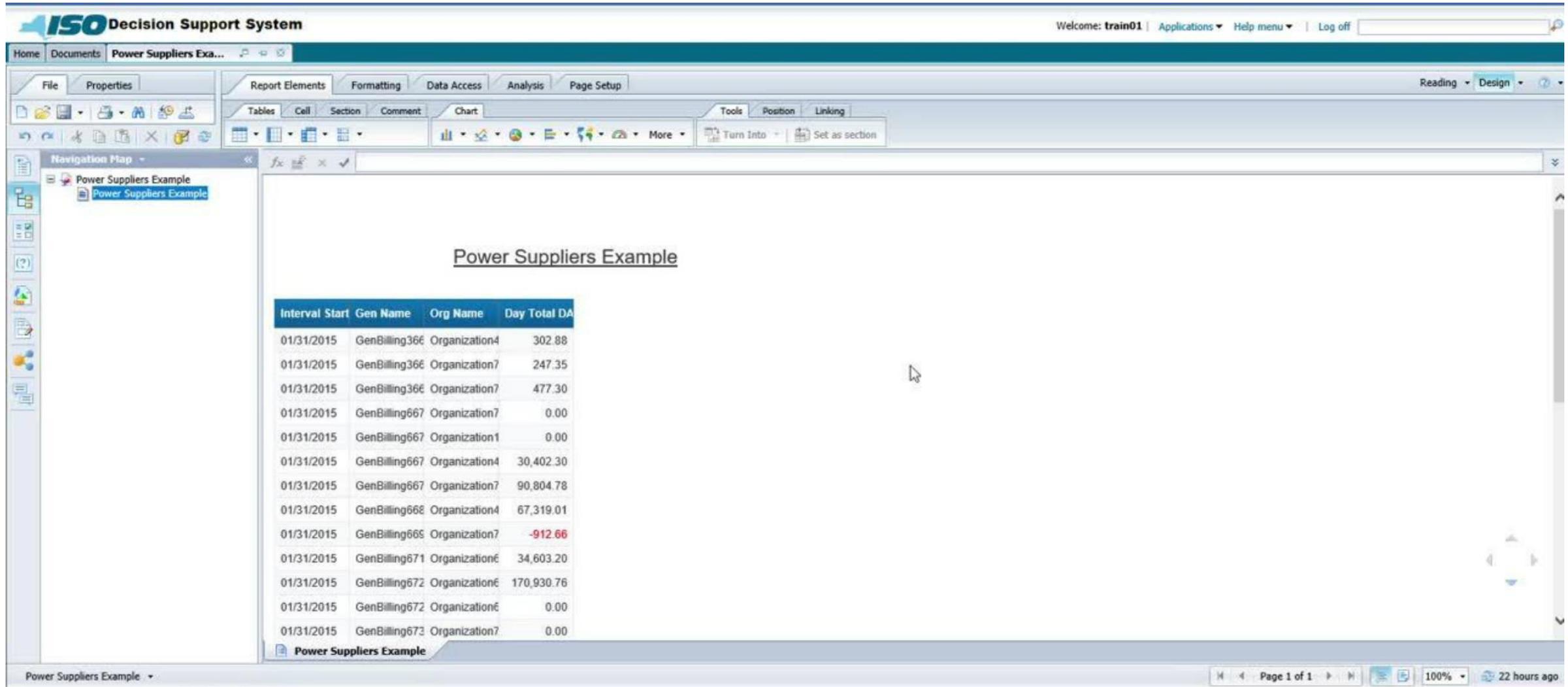
The screenshot displays the ISO Decision Support System interface. At the top, the header includes the ISO logo, the text "Decision Support System", and a user welcome message "Welcome: train01" with navigation options for "Applications", "Help menu", and "Log off". Below the header, there are navigation tabs for "Home" and "Documents", and a breadcrumb trail "Home | Admin Page". The main content area is divided into several sections:

- Last Successful Update Time:** A summary box showing "Customer Settlements Last Successful Update Time: Aug 21, 2015 4:29:00 AM" and "Public Market Data Last Successful Update Time: Aug 21, 2015 4:29:00 AM". It also states "You have no ADD Requests."
- Customer Settlements Data Mart:** A list of reports including "List of Interval Days & Invoice Versions", "Voltage Support Service Rates", "DSS Mapping Guide for Customer Statements", and "TSC & NTAC Rates".
- Public Market Data:** A list of reports including "Definition of Price Versions".
- ADD:** A list of reports including "Daily Customer Statements CSV Template (11k)" and "Hourly Customer Statement CSV Template (15k)".
- Bulletins, Manuals and Documentation:** A list of reports including "Technical Bulletin 109 (DSS Access) (525k)", "Accounting and Billing Manual", "Billing Reference Documents", "ADD - Technical Bulletin 127 (93k)", "Custom ADD - Technical Bulletin 147 (159K)", and "FERC EQR - Technical Bulletin 139 (165k)".

On the left side, there is a "Navigation" section with links for "Home", "Admin Page", and "Send To". Below that is an "Automated Data Delivery Links" section with links for "Retrieve Files", "Enter New Request", and "View/Modify/Delete Request for Files".

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

# Duplicate Report

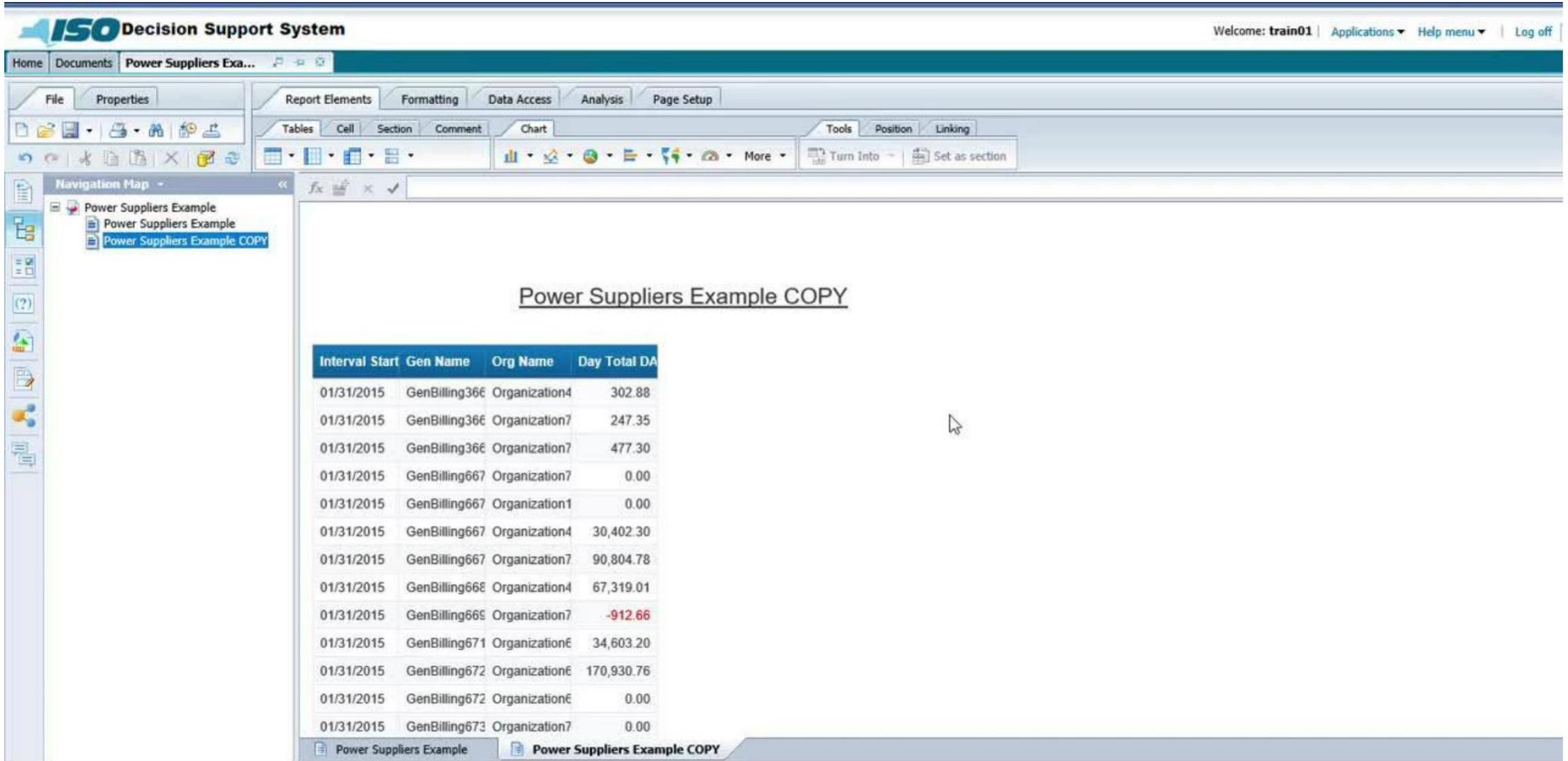


The screenshot displays the ISO Decision Support System interface. The main window shows a report titled "Power Suppliers Example" with a table of data. The table has four columns: Interval Start, Gen Name, Org Name, and Day Total DA. The data is as follows:

Interval Start	Gen Name	Org Name	Day Total DA
01/31/2015	GenBilling366	Organization4	302.88
01/31/2015	GenBilling366	Organization7	247.35
01/31/2015	GenBilling366	Organization7	477.30
01/31/2015	GenBilling667	Organization7	0.00
01/31/2015	GenBilling667	Organization1	0.00
01/31/2015	GenBilling667	Organization4	30,402.30
01/31/2015	GenBilling667	Organization7	90,804.78
01/31/2015	GenBilling668	Organization4	67,319.01
01/31/2015	GenBilling668	Organization7	-912.66
01/31/2015	GenBilling671	Organization6	34,603.20
01/31/2015	GenBilling672	Organization6	170,930.76
01/31/2015	GenBilling672	Organization6	0.00
01/31/2015	GenBilling673	Organization7	0.00

The interface includes a navigation map on the left, a toolbar at the top, and a status bar at the bottom indicating "Page 1 of 1" and "22 hours ago".

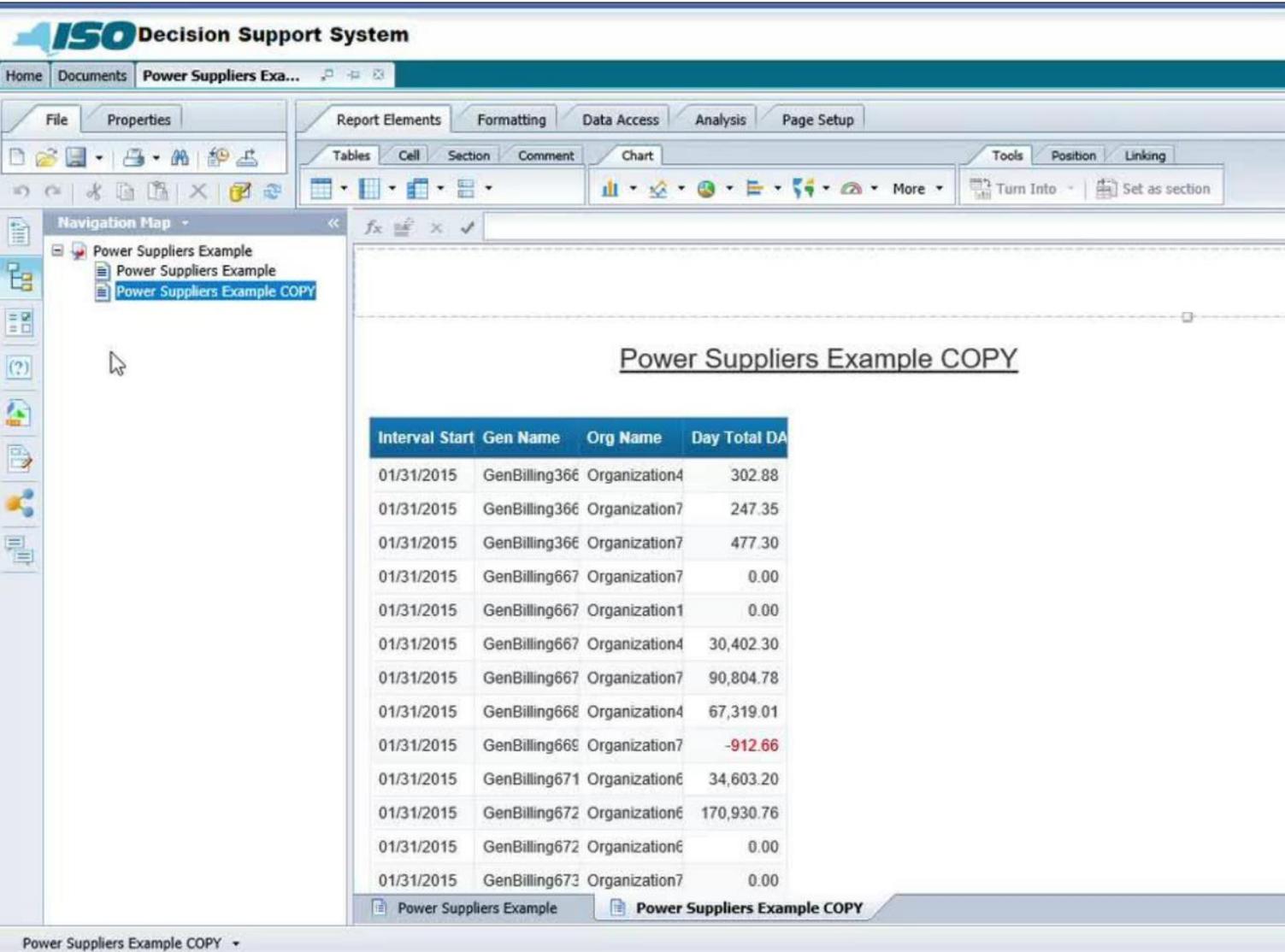
# Adding Additional Data Objects



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

Interval Start	Gen Name	Org Name	Day Total DA
01/31/2015	GenBilling366	Organization4	302.88
01/31/2015	GenBilling366	Organization7	247.35
01/31/2015	GenBilling366	Organization7	477.30
01/31/2015	GenBilling667	Organization7	0.00
01/31/2015	GenBilling667	Organization1	0.00
01/31/2015	GenBilling667	Organization4	30,402.30
01/31/2015	GenBilling667	Organization7	90,804.78
01/31/2015	GenBilling668	Organization4	67,319.01
01/31/2015	GenBilling669	Organization7	-912.66
01/31/2015	GenBilling671	Organization6	34,603.20
01/31/2015	GenBilling672	Organization6	170,930.76
01/31/2015	GenBilling672	Organization6	0.00
01/31/2015	GenBilling673	Organization7	0.00

# Report Results

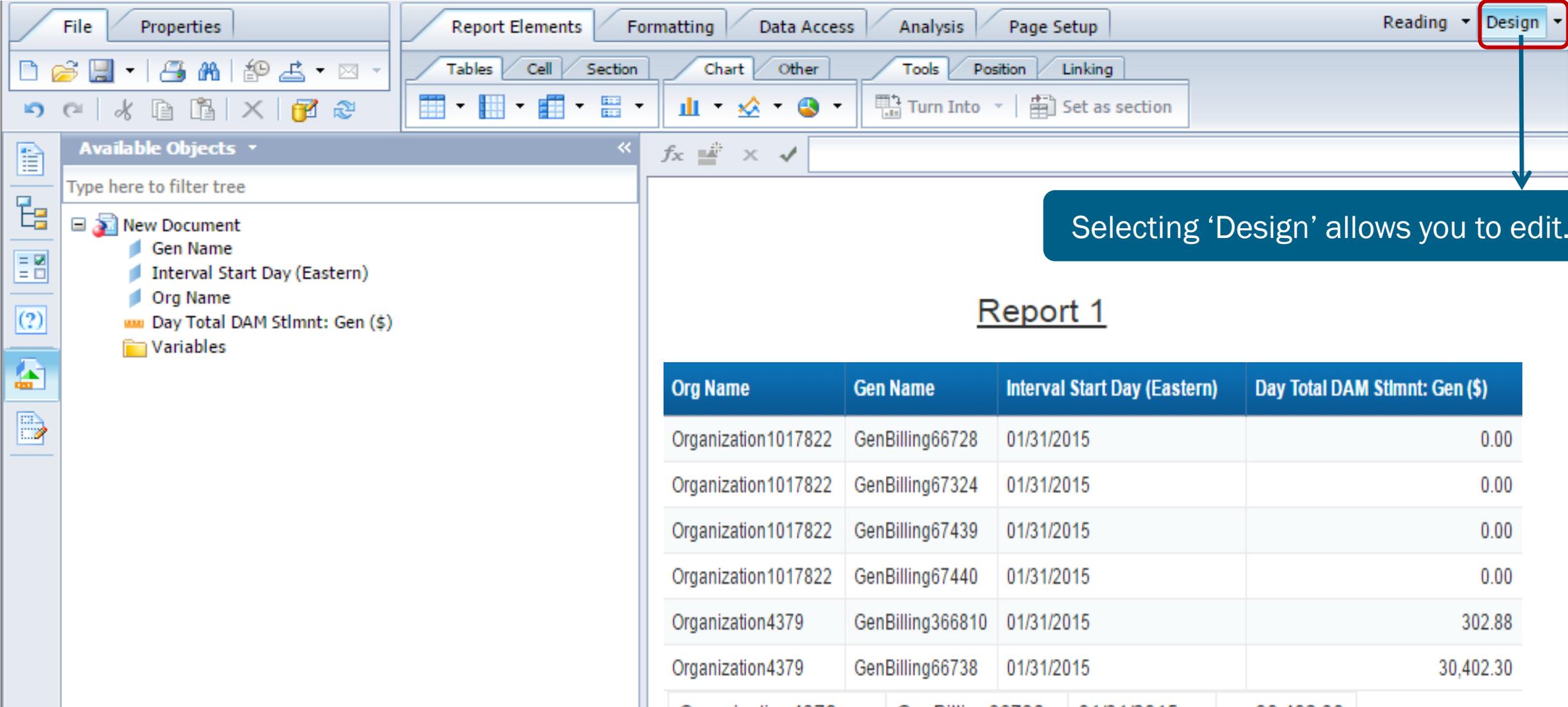


The screenshot shows the NYISO Decision Support System interface. The main window displays a report titled "Power Suppliers Example COPY". The report contains a table with the following data:

Interval Start	Gen Name	Org Name	Day Total DA
01/31/2015	GenBilling366	Organization4	302.88
01/31/2015	GenBilling366	Organization7	247.35
01/31/2015	GenBilling366	Organization7	477.30
01/31/2015	GenBilling667	Organization7	0.00
01/31/2015	GenBilling667	Organization1	0.00
01/31/2015	GenBilling667	Organization4	30,402.30
01/31/2015	GenBilling667	Organization7	90,804.78
01/31/2015	GenBilling668	Organization4	67,319.01
01/31/2015	GenBilling668	Organization7	-912.66
01/31/2015	GenBilling671	Organization6	34,603.20
01/31/2015	GenBilling672	Organization6	170,930.76
01/31/2015	GenBilling672	Organization6	0.00
01/31/2015	GenBilling673	Organization7	0.00

You will then be returned to the Reports Results page

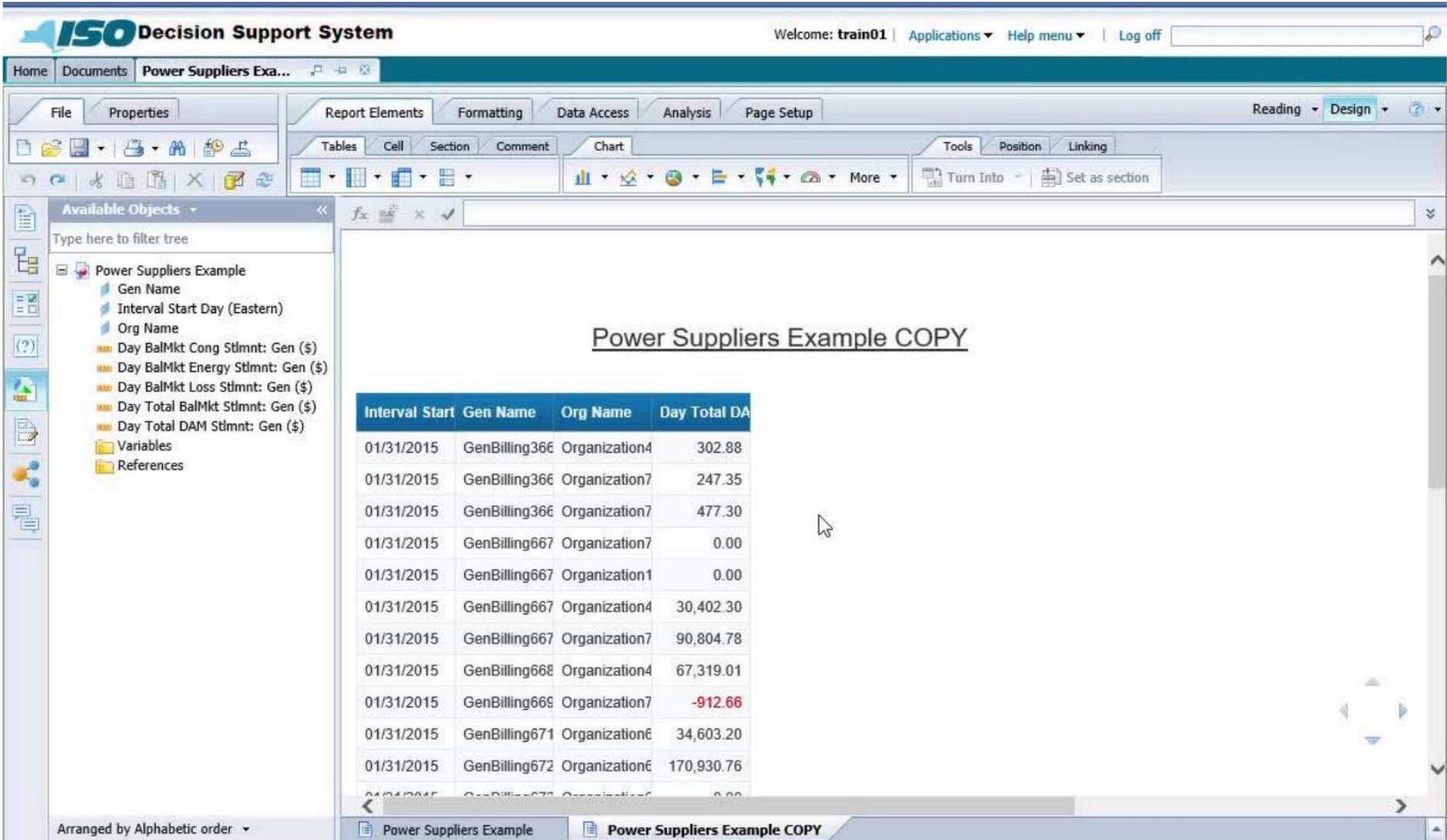
# Reminder: Design View [Edit Mode]



The screenshot shows the Microsoft Word ribbon with the 'Design' tab selected in the 'View' group. A blue callout box points to the 'Design' tab with the text "Selecting 'Design' allows you to edit." The 'Available Objects' pane on the left lists: New Document, Gen Name, Interval Start Day (Eastern), Org Name, Day Total DAM Stlmnt: Gen (\$), and Variables. The main content area displays a table titled "Report 1".

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

# Updating Report Results



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

Interval Start	Gen Name	Org Name	Day Total DA
01/31/2015	GenBilling366	Organization4	302.88
01/31/2015	GenBilling366	Organization7	247.35
01/31/2015	GenBilling366	Organization7	477.30
01/31/2015	GenBilling667	Organization7	0.00
01/31/2015	GenBilling667	Organization1	0.00
01/31/2015	GenBilling667	Organization4	30,402.30
01/31/2015	GenBilling667	Organization7	90,804.78
01/31/2015	GenBilling668	Organization4	67,319.01
01/31/2015	GenBilling668	Organization7	-912.66
01/31/2015	GenBilling671	Organization6	34,603.20
01/31/2015	GenBilling672	Organization6	170,930.76
01/31/2015	GenBilling673	Organization6	0.00

The interface includes a menu bar with options like File, Properties, Report Elements, Formatting, Data Access, Analysis, and Page Setup. A left-hand pane shows "Available Objects" with a tree view containing items like "Power Suppliers Example", "Gen Name", "Interval Start Day (Eastern)", "Org Name", and various "Day BalMkt" and "Day Total" items. The bottom status bar shows "Arranged by Alphabetic order" and two open document tabs: "Power Suppliers Example" and "Power Suppliers Example COPY".

# Formatting

# Design View

ISO Decision Support System

Welcome: train01 | Applications | Help menu | Log off

Home Documents Power Suppliers Exa...

Web Intelligence | Track | Drill | Filter Bar | Freeze | Outline | Reading | Design

Navigation Map

- Power Suppliers Example
- Power Suppliers Example
- Power Suppliers Example COPY

### Power Suppliers Example COPY

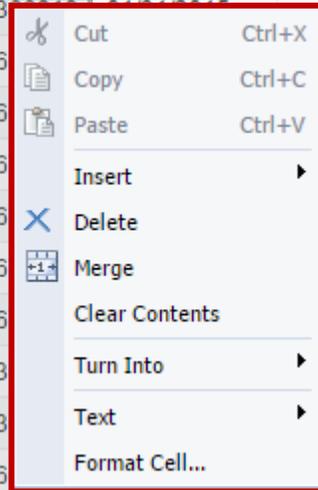
Interval Start	Gen Name	Org Name	Day Total DA	Day BalMkt E	Day BalMkt L	Day BalMkt C	Day Total Ba
01/31/2015	GenBilling366	Organization4	302.88	-43.92	-0.57	-14.88	-59.37
01/31/2015	GenBilling366	Organization7	247.35	152.10	-8.10	30.96	174.96
01/31/2015	GenBilling366	Organization7	477.30	-241.65	13.35	-37.65	-265.95
01/31/2015	GenBilling667	Organization7	0.00	237,212.58	23,946.21	236,541.00	497,699.79
01/31/2015	GenBilling667	Organization1	0.00	0.00	0.00	0.00	0.00
01/31/2015	GenBilling667	Organization4	30,402.30	7,117.56	132.36	2,977.83	10,227.75
01/31/2015	GenBilling667	Organization7	90,804.78	12,917.88	-1,001.58	1,557.00	13,473.30
01/31/2015	GenBilling668	Organization4	67,319.01	-6,766.89	-653.55	-10,198.56	-17,619.00
01/31/2015	GenBilling669	Organization7	-912.66	-1,921.41	92.25	-197.04	-2,026.20
01/31/2015	GenBilling671	Organization6	34,603.20	-461.13	0.33	-185.82	-646.62
01/31/2015	GenBilling672	Organization6	170,930.76	-35,148.12	-3,584.10	-49,261.05	-87,993.27
01/31/2015	GenBilling672	Organization6	0.00	0.00	0.00	0.00	0.00
01/31/2015	GenBilling673	Organization7	0.00	0.00	0.00	0.00	0.00
01/31/2015	GenBilling673	Organization7	0.00	0.00	0.00	0.00	0.00
01/31/2015	GenBilling673	Organization1	0.00	0.00	0.00	0.00	0.00

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

# Modify an existing report

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	GenBilling3	01/31/2015	302.88
Organization4379	GenBilling6	01/31/2015	30,402.30
Organization4379	GenBilling6	01/31/2015	67,319.01
Organization4379	GenBilling6	01/31/2015	0.00
Organization6851	GenBilling6	01/31/2015	34,603.20
Organization6851	GenBilling6	01/31/2015	70,930.76
Organization6851	GenBilling6	01/31/2015	0.00
Organization7630	GenBilling3	01/31/2015	247.35
Organization7630	GenBilling3	01/31/2015	477.30
Organization7630	GenBilling6	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

# Setting Sections

ISO Decision Support System

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Home Documents Power Suppliers Exa...

File Properties Report Elements Formatting Data Access Analysis Page Setup

Tables Cell Section Comment Chart Tools Position Linking Table Layout Behaviors

Insert Section Turn Into Set as section Break Insert Header Footer

Available Objects: fx =NameOf([Interval Start Day (Eastern)])

Type here to filter tree

- Power Suppliers Example
  - Gen Name
  - Interval Start Day (Eastern)
  - Org Name
  - Day BalMkt Cong Stmnt: Gen (\$)
  - Day BalMkt Energy Stmnt: Gen (\$)
  - Day BalMkt Loss Stmnt: Gen (\$)
  - Day Total BalMkt Stmnt: Gen (\$)
  - Day Total DAM Stmnt: Gen (\$)
  - Variables
  - References

Power Suppliers Example COPY

Interval Start C	Gen Name	Org Name	Day Total DA	Day BalMkt E	Day BalMkt I	Day BalMkt C	Day Total Ba
01/31/2015	GenBilling366810	Organization4	302.88	-43.92	-0.57	-14.88	-59.37
01/31/2015	GenBilling366813	Organization7	247.35	152.10	-8.10	30.96	174.96
01/31/2015	GenBilling366904	Organization7	477.30	-241.65	13.35	-37.65	-265.95
01/31/2015	GenBilling66722	Organization7	0.00	237,212.58	23,946.21	236,541.00	497,699.79
01/31/2015	GenBilling66728	Organization1	0.00	0.00	0.00	0.00	0.00
01/31/2015	GenBilling66738	Organization4	30,402.30	7,117.56	132.36	2,977.83	10,227.75
01/31/2015	GenBilling66774	Organization7	90,804.78	12,917.88	-1,001.58	1,557.00	13,473.30
01/31/2015	GenBilling66855	Organization4	67,319.01	-6,766.89	-653.55	-10,198.56	-17,619.00
01/31/2015	GenBilling66977	Organization7	-912.66	-1,921.41	92.25	-197.04	-2,026.20
01/31/2015	GenBilling67197	Organization6	34,603.20	-461.13	0.33	-185.82	-646.62
01/31/2015	GenBilling67221	Organization6	170,930.76	-35,148.12	-3,584.10	-49,261.05	-87,993.27
01/31/2015	GenBilling67236	Organization6	0.00	0.00	0.00	0.00	0.00
01/31/2015	GenBilling67307	Organization7	0.00	0.00	0.00	0.00	0.00
01/31/2015	GenBilling67316	Organization7	0.00	0.00	0.00	0.00	0.00
01/31/2015	GenBilling67324	Organization1	0.00	0.00	0.00	0.00	0.00
01/31/2015	GenBilling67357	Organization4	0.00	0.00	0.00	0.00	0.00
01/31/2015	GenBilling67439	Organization1	0.00	0.00	0.00	0.00	0.00
01/31/2015	GenBilling67440	Organization1	0.00	0.00	0.00	0.00	0.00

# Inserting Breaks

ISO Decision Support System

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Home Documents Power Suppliers Exa...

File Properties Report Elements Formatting Data Access Analysis Page Setup

Tables Cell Section Comment Chart Tools Position Linking

Insert Section Turn Info Set as section

Available Objects

Type here to filter tree

- Power Suppliers Example
  - Gen Name
  - Interval Start Day (Eastern)
  - Org Name
  - Day BalMkt Cong Stmnt: Gen (\$)
  - Day BalMkt Energy Stmnt: Gen (\$)
  - Day BalMkt Loss Stmnt: Gen (\$)
  - Day Total BalMkt Stmnt: Gen (\$)
  - Day Total DAM Stmnt: Gen (\$)
  - Variables
  - References

Power Suppliers Example COPY

Interval Start	Gen Name	Org Name	Day Total DA	Day BalMkt E	Day BalMkt L	Day BalMkt C	Day Total Ba
01/31/2015	GenBilling366810	Organization4	302.88	-43.92	-0.57	-14.88	-59.37
01/31/2015	GenBilling366813	Organization7	247.35	152.10	-8.10	30.96	174.96
01/31/2015	GenBilling366904	Organization7	477.30	-241.65	13.35	-37.65	-265.95
01/31/2015	GenBilling66722	Organization7	0.00	237,212.58	23,946.21	236,541.00	497,699.79
01/31/2015	GenBilling66728	Organization1	0.00	0.00	0.00	0.00	0.00
01/31/2015	GenBilling66738	Organization4	30,402.30	7,117.56	132.36	2,977.83	10,227.75
01/31/2015	GenBilling66774	Organization7	90,804.78	12,917.88	-1,001.58	1,557.00	13,473.30
01/31/2015	GenBilling66855	Organization4	67,319.01	-6,766.89	-653.55	-10,198.56	-17,619.00
01/31/2015	GenBilling66977	Organization7	-912.66	-1,921.41	92.25	-197.04	-2,026.20
01/31/2015	GenBilling67197	Organization6	34,603.20	-461.13	0.33	-185.82	-646.62
01/31/2015	GenBilling67221	Organization6	170,930.76	-35,148.12	-3,584.10	-49,261.05	-87,993.27
01/31/2015	GenBilling67236	Organization6	0.00	0.00	0.00	0.00	0.00
01/31/2015	GenBilling67307	Organization7	0.00	0.00	0.00	0.00	0.00
01/31/2015	GenBilling67316	Organization7	0.00	0.00	0.00	0.00	0.00
01/31/2015	GenBilling67324	Organization1	0.00	0.00	0.00	0.00	0.00
01/31/2015	GenBilling67357	Organization4	0.00	0.00	0.00	0.00	0.00
01/31/2015	GenBilling67439	Organization1	0.00	0.00	0.00	0.00	0.00
01/31/2015	GenBilling67440	Organization1	0.00	0.00	0.00	0.00	0.00

# Using Sections and Breaks

Another way to do the same thing

Example 4

Org Name	LSE Name	Interval Start Day (Eastern)	Day Total DAM Stmnt - LSE (\$)	Day BalMkt	Day BalMkt	Day BalMkt	Day Total BalMkt Stmnt - 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

Example 2

Org Name	LSE Name	Interval Start Day (Eastern)	Day Total DAM Stmnt - LSE (\$)	Day BalMkt	Day BalMkt	Day BalMkt	Day Total BalMkt Stmnt - LSE (\$)
Organization		01/01/2015					
Organization		01/02/2015					
Organization		01/03/2015					
Organization		01/04/2015					
Organization		01/05/2015					
Organization		01/06/2015					
Organization		01/07/2015					
Organization		01/08/2015					
Organization		01/09/2015					
Organization		01/10/2015					
Organization		01/01/2015					
Organization		01/02/2015					
Organization		01/03/2015					
Organization		01/04/2015					
Organization		01/05/2015					
Organization		01/06/2015					
Organization		01/07/2015					
Organization		01/08/2015					
Organization		01/09/2015					
Organization		01/10/2015					
Organization		01/01/2015					
Organization		01/02/2015					
Organization		01/03/2015					
Organization		01/04/2015					
Organization		01/05/2015					
Organization		01/06/2015					
Organization		01/07/2015					
Organization		01/08/2015					
Organization1038546	LS8702	01/08/2015					

# Using Variables and Formulas

# Report Data – Using Variables

**Insert Formulas**

**Create Variable**

Definition

Name: Recalc Total BalMkt Stlmnt \$

Type: Undefined

Qualification: Measure

Formula

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

Available Objects

- 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

Available Functions

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

Available Operators

= < <= <> > >=

. + - / \* ( )

Values... Prompts... ; : { } After All And Before

Description

**Day BalMkt Loss Stlmnt - LSE (\$)**

706 - Balancing Market Loss Settlement - Load Serving Entity (\$) is a number representing the BAS-determined amount of a LSE's balancing energy market loss component settlement

OK Cancel

**Example 2 (3)**

**Organization1017822**

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

# 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**

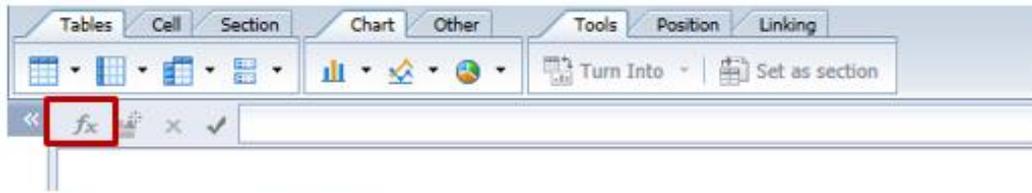
LSE Name	Interval Start Day (Eastern)	Day Total DAM Stlmnt - LSE (\$)	Day BalMkt Cong Stlmnt - LSE (\$)	Day BalMkt Energy Stlmnt - LSE (\$)	Day BalMkt Loss Stlmnt - LSE (\$)	Day Total BalMkt Stlmnt - LSE (\$)	Recalc Total BalMkt Stlmnt \$
LS8282	01/01/2015	0.00	-1,714.56	-1,171.74	-108.88	-2,995.1	-2,995.18
	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
<b>LS8282</b>					<b>SUM</b>	<b>-65,472.7</b>	

Drag the newly added Variable objects into the report

# Using Formula Line ( $f_x$ )

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

2

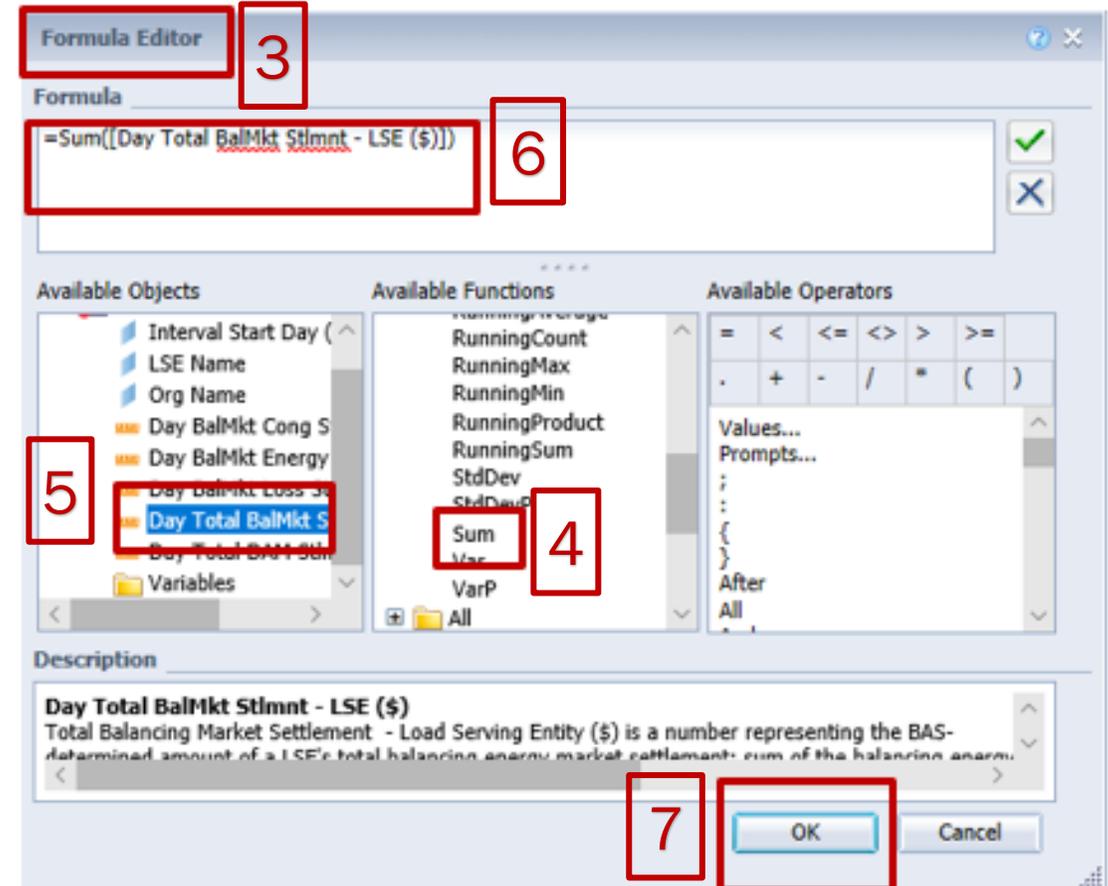


Organization1017822

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	-1,753.90	-290.20	-8,924.72
LS8282					SUM	-65,472.78

1

8



3

6

5

4

7

# DSS 201

## Intermediate Decision Support System

---

E-Learning Module 3: Multiple Data Providers and Merging Universes

# DSS 201

## COURSE OBJECTIVES: Participants will be able to

### Module 1: Creating Custom Queries

- Understand icons and naming conventions within the DSS environment
- Understand how to create a new Web Intelligence Report
- Save report data
- Create subfolders to organize reports

### Module 2: Editing Custom Queries

- Learn how to edit a custom Web Intelligence Report

### Module 3: Multiple Data Providers and Merging Universes

- Utilize multiple data providers

### Module 4: Utilizing Report Data

- Learn how to create a graphical representation of report data
- Send and receive reports via the DSS inbox

# DSS 201

## COURSE OBJECTIVES: Participants will be able to

### Module 1: Creating Custom Queries

- Understand icons and naming conventions within the DSS environment
- Understand how to create a new Web Intelligence Report
- Save report data
- Create subfolders to organize reports

### Module 2: Editing Custom Queries

- Learn how to edit a custom Web Intelligence Report

### Module 3: Multiple Data Providers and Merging Universes

- Utilize multiple data providers

### Module 4: Utilizing Report Data

- Learn how to create a graphical representation of report data
- Send and receive reports via the DSS inbox

# Multiple Data Providers and Merging Universes

# Getting Started

- **Obtain data from two or more 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 using ‘Multiple Data Providers’**
  
- **Examples**
  - Incorporating data from both Load and Load-Ancillary Service Universes into one report
  - Incorporating data from both Power Supplier and Transaction Universes into one report

# Multiple Data Providers

1

2

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

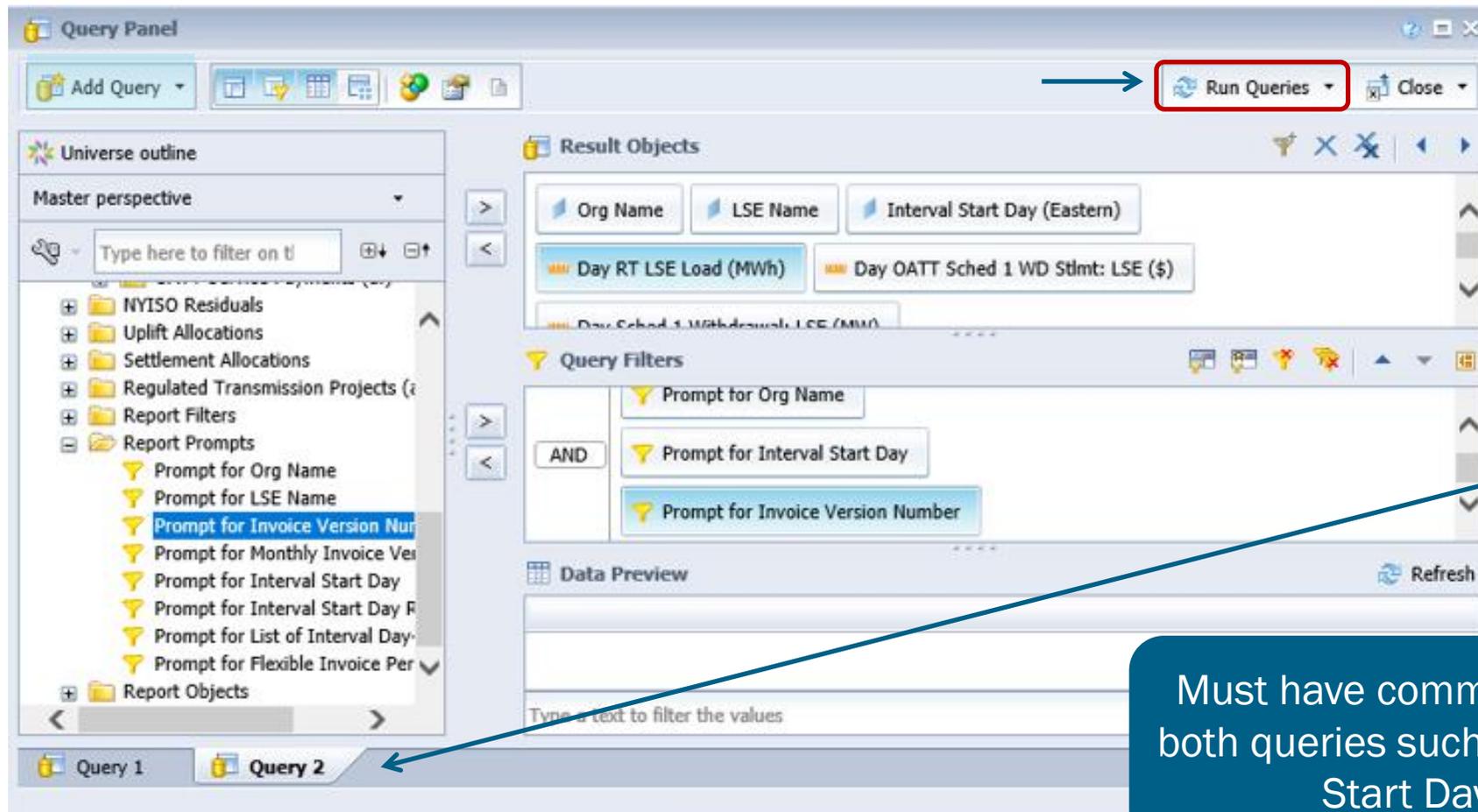
**Add Query**

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 Settle...
Cust Sttlmt - Invoice Support	969	@atcdbo1.ad.nyiso.com_6400\Customer Settle...
Cust Sttlmt - Loads	1028	@atcdbo1.ad.nyiso.com_6400\Customer Settle...
<b>Cust Sttlmt - Loads AncServ</b>	1023	@atcdbo1.ad.nyiso.com_6400\Customer Settle...
Cust Sttlmt - Power Suppliers	1609	@atcdbo1.ad.nyiso.com_6400\Customer Settle...
Cust Sttlmt - PowerSupplrs AncServ	973	@atcdbo1.ad.nyiso.com_6400\Customer Settle...
Cust Sttlmt - Transactions	586	@atcdbo1.ad.nyiso.com_6400\Customer Settle...
Cust Sttlmt - Transactions AncSer	895	@atcdbo1.ad.nyiso.com_6400\Customer Settle...
Cust Sttlmt - Transmission Owners	851	@atcdbo1.ad.nyiso.com_6400\Customer Settle...
Cust Sttlmt - Virtual Market	841	@atcdbo1.ad.nyiso.com_6400\Customer Settle...

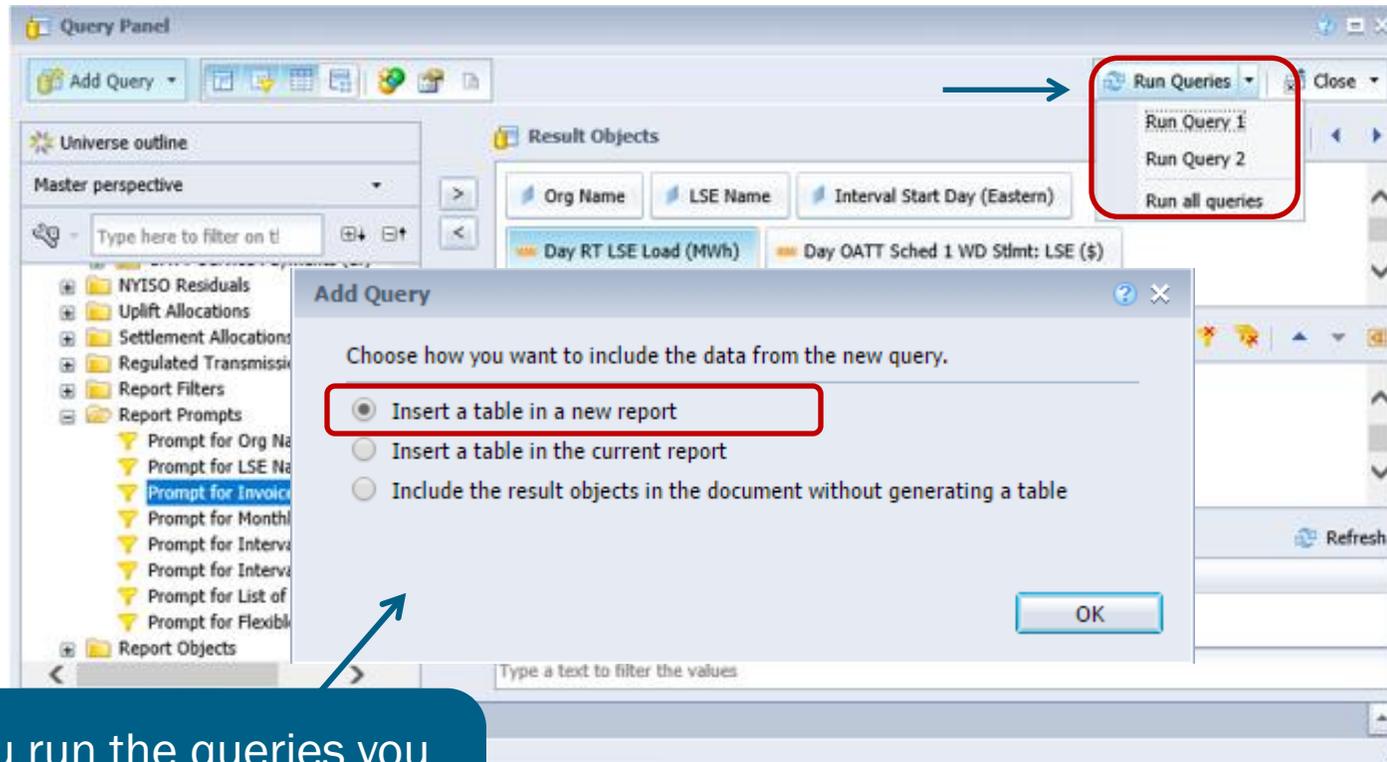
# Multiple Data Providers



- Right click on the existing query name and type in the new name
- Hit enter and the new name will appear

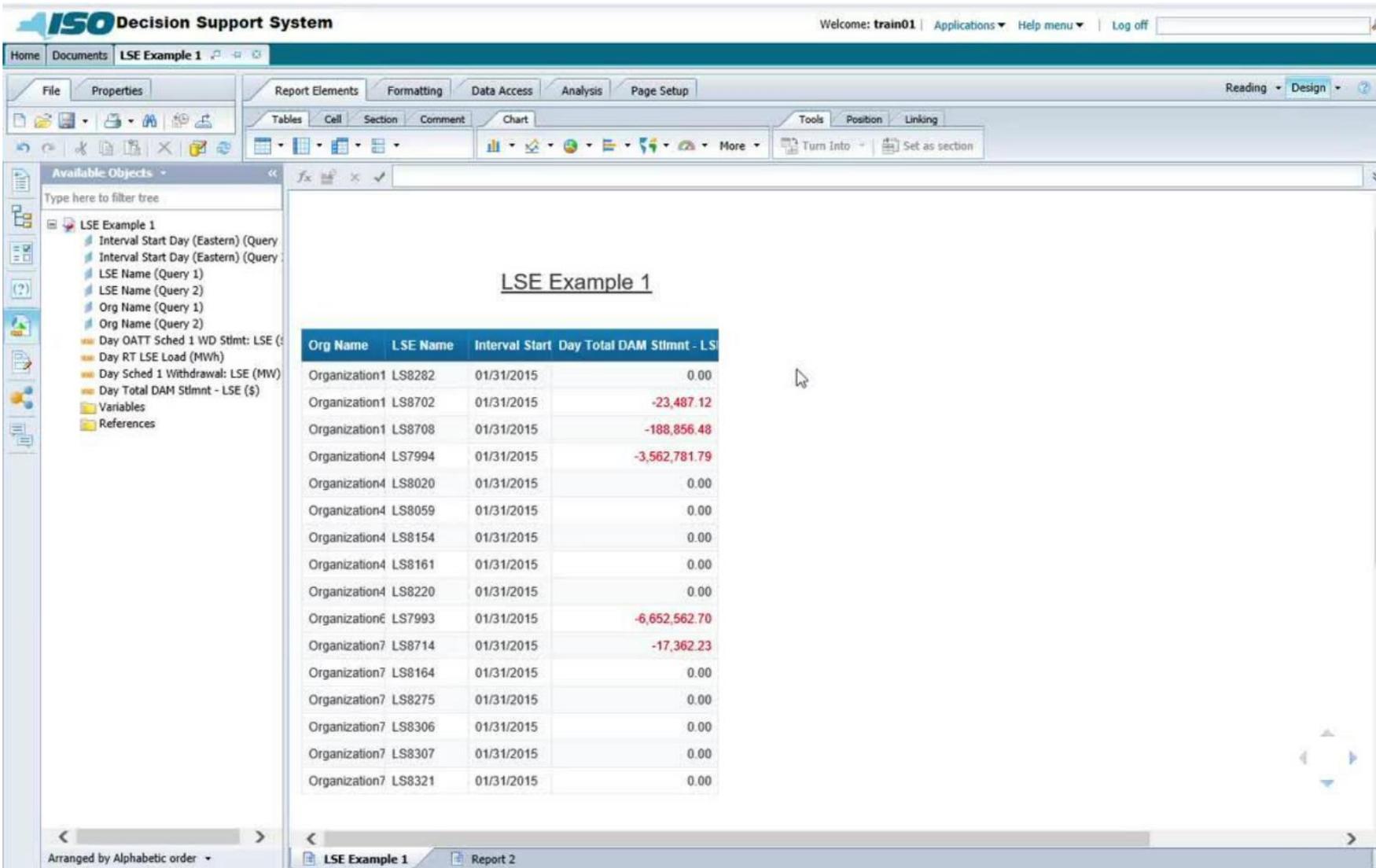
Must have common objects in both queries such as Org Name, Start Day, etc.

# Multiple Data Providers



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

# Multiple Data Providers

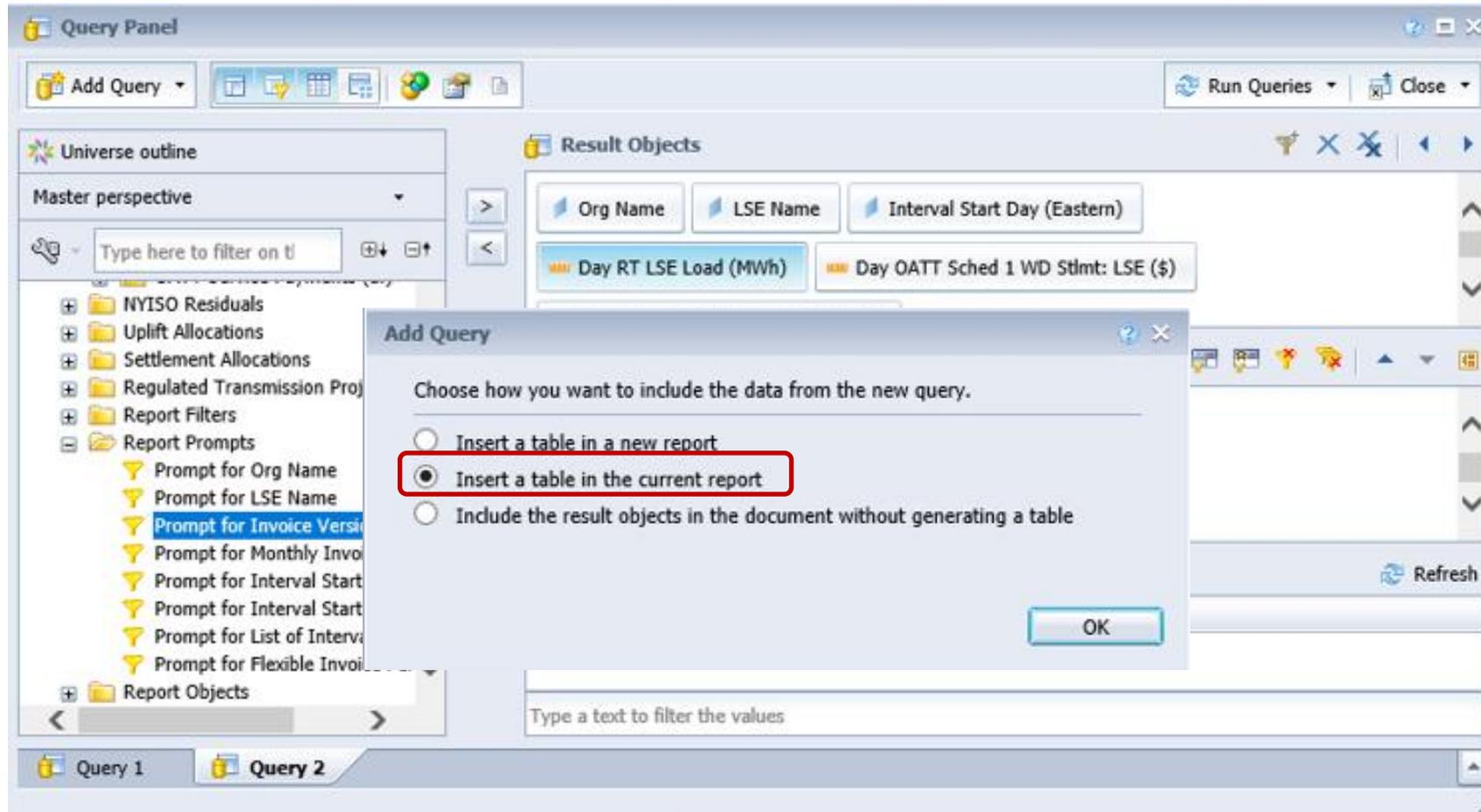


The screenshot shows the ISO Decision Support System interface. The main window displays a report titled "LSE Example 1" with a table of data. The table has the following columns: Org Name, LSE Name, Interval Start, Day Total DAM Stlmnt - LSE, and Day Total DAM Stlmnt - LSE (\$). The data is as follows:

Org Name	LSE Name	Interval Start	Day Total DAM Stlmnt - LSE	Day Total DAM Stlmnt - LSE (\$)
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

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

# Multiple Data Providers



# Multiple Data Providers

**ISO Decision Support System** | Welcome: train01 | Applications | Help menu | Log off

Home Documents LSE Example 1

File Properties | Report Elements | Formatting | Data Access | Analysis | Page Setup | Reading | Design

Tables | Cell | Section | Comment | Chart | Tools | Position | Linking | Table Layout | Behaviors

Available Objects: LSE Example 1, Interval Start Day (Eastern) (Query), LSE Name (Query 1), Org Name (Query 1), Day OATT Sched 1 WD Stlmt: LSE (\$), Day RT LSE Load (MWh), Day Sched 1 Withdrawal: LSE (MW), Day Total DAM Stlmt - LSE (\$), Variables, References

Formula Bar: =NameOf([Day RT LSE Load (MWh)])

### LSE Example 1

Org Name	LSE Name	Interval Start	Day Total DAM Stlmt - LSE (\$)	Org Name	LSE Name	Interval Start	Day OATT Sc	Day Sched 1 Withdra	Day RT LSE Load (MWh)
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

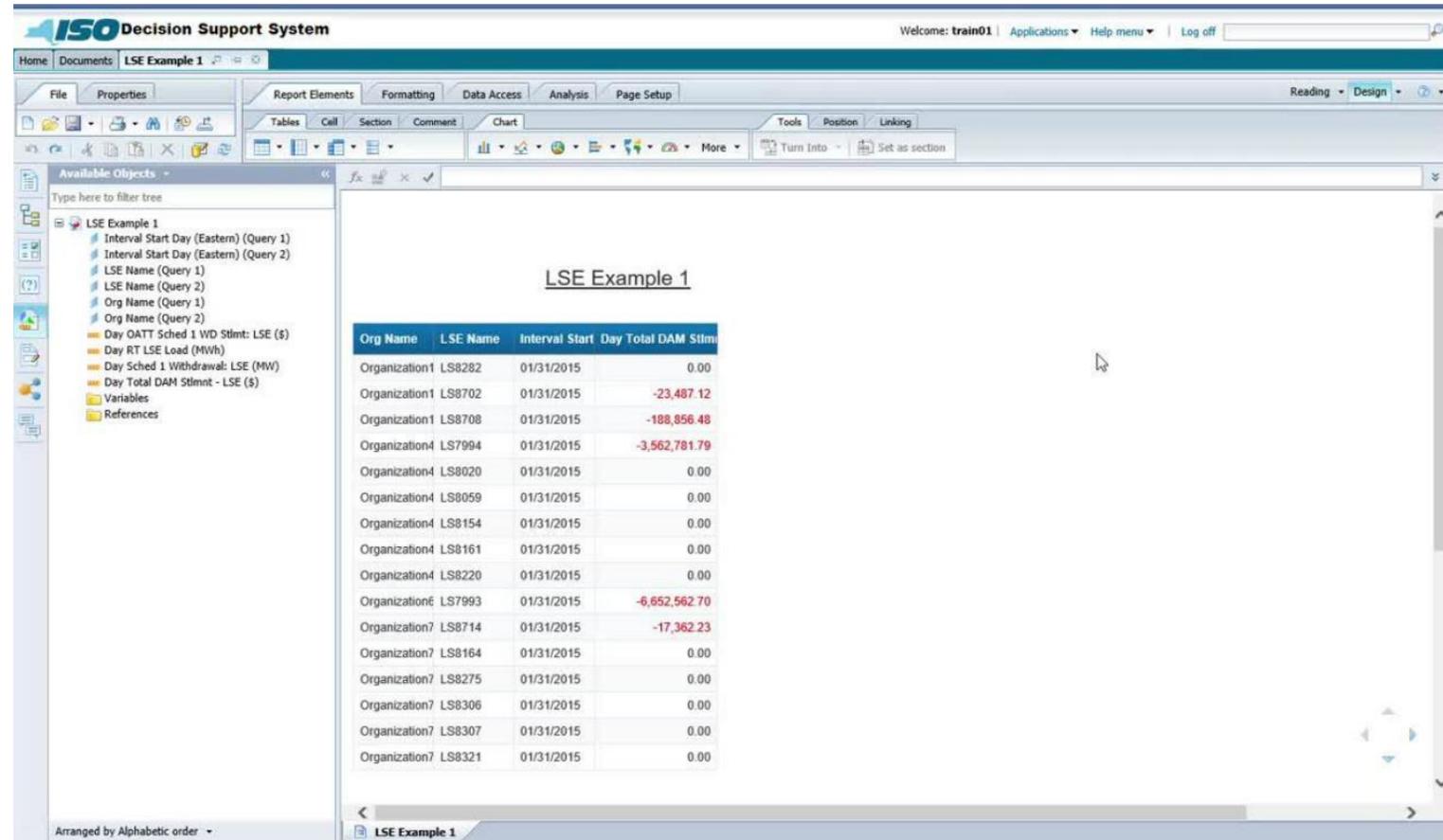
Option #2 creates a second table within the same report. Data is on the same page in two separate tables.

# Multiple Data Providers

The screenshot displays the 'Query Panel' application window. On the left is the 'Universe outline' tree view showing a hierarchy of folders like 'NYISO Residuals', 'Uplift Allocations', and 'Report Objects'. The main area shows a 'Result Objects' list with items like 'Org Name', 'LSE Name', and 'Interval Start Day (Eastern)'. An 'Add Query' dialog box is open in the foreground, titled 'Add Query'. It contains the instruction 'Choose how you want to include the data from the new query.' and three radio button options: 'Insert a table in a new report', 'Insert a table in the current report', and 'Include the result objects in the document without generating a table'. The third option is selected and highlighted with a red rectangle. The dialog also features an 'OK' button and a 'Refresh' button.

# Multiple Data Providers

- You must merge the dimensions first in the data manager in order to pull them into the table and to have accurate data values.
- 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" with a table of data. The table has columns for "Org Name", "LSE Name", "Interval Start", "Day", "Total DAM", and "Stlmnt". The data is sorted by "Total DAM" in descending order.

Org Name	LSE Name	Interval Start	Day	Total DAM	Stlmnt
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	

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.

# DSS 201

## Intermediate Decision Support System

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### E-Learning Module 4: Utilizing Report Data

# DSS 201

## COURSE OBJECTIVES: Participants will be able to

### Module 1: Creating Custom Queries

- Understand icons and naming conventions within the DSS environment
- Understand how to create a new Web Intelligence Report
- Save report data
- Create subfolders to organize reports

### Module 2: Editing Custom Queries

- Learn how to edit a custom Web Intelligence Report

### Module 3: Multiple Data Providers and Merging Universes

- Utilize multiple data providers

### Module 4: Utilizing Report Data

- Learn how to create a graphical representation of report data
- Send and receive reports via the DSS inbox

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### Module 4: Utilizing Report Data

- Learn how to create a graphical representation of report data
- Send and receive reports via the DSS inbox

# Charts & Graphs

# Column Chart

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

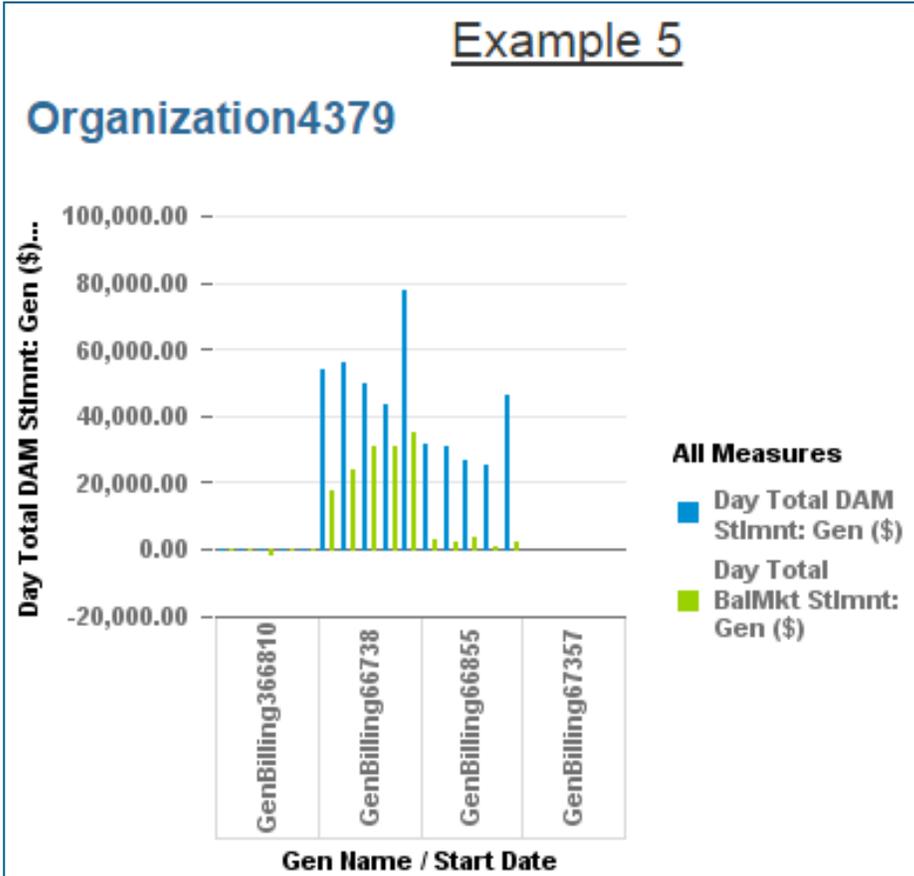
Organization4379

Gen Name	Interval Start Day (Eastern)	Day Total DAM Stimnt: Gen (\$)	Day Total BalMkt Stimnt: 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
GenBilling366810			
Gen Name	Interval Start Day (Eastern)	Day Total DAM Stimnt: Gen (\$)	Day Total BalMkt Stimnt: Gen (\$)
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
GenBilling66738			
Gen Name	Interval Start Day (Eastern)	Day Total DAM Stimnt: Gen (\$)	Day Total BalMkt Stimnt: Gen (\$)
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
GenBilling66855			

1

2

- Cut Ctrl+X
- Copy Ctrl+C
- Paste Ctrl+V
- Insert
- Contents
- Turn Into
  - Horizontal Table
  - Cross Table
  - Column Chart
  - Line Chart
  - Pie Chart
  - More Transformations...
- Text
- Format Cell...

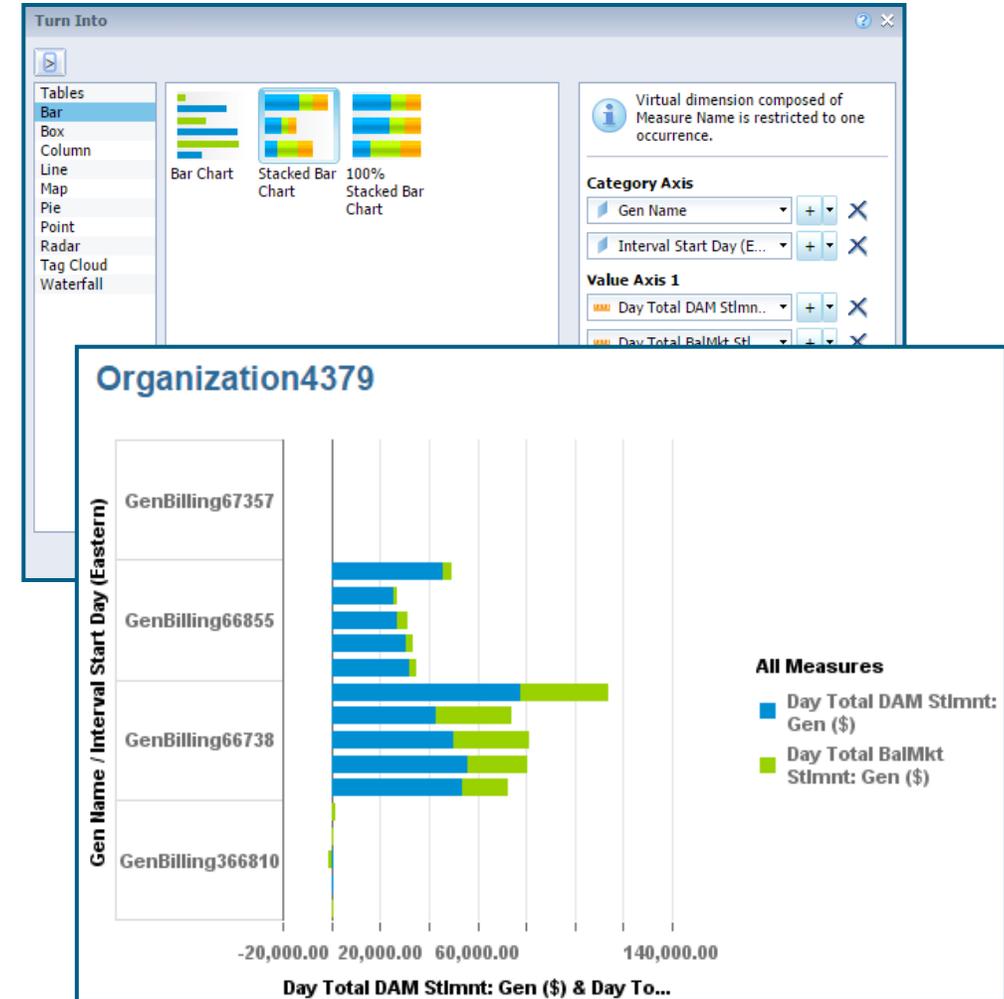


# Stacked Bar Graph

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
GenBilling366810	01/04/2015	186.88	152.08
	01/05/2015	336.72	379.28
GenBilling366810			
Gen Name	Interval Start Day (Eastern)	Day Total DAM Stlmnt: Gen (\$)	Day Total BalMkt Stlmnt: Gen (\$)
GenBilling66738	01/01/2015	53,885.32	17,824.89
	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
GenBilling66738			

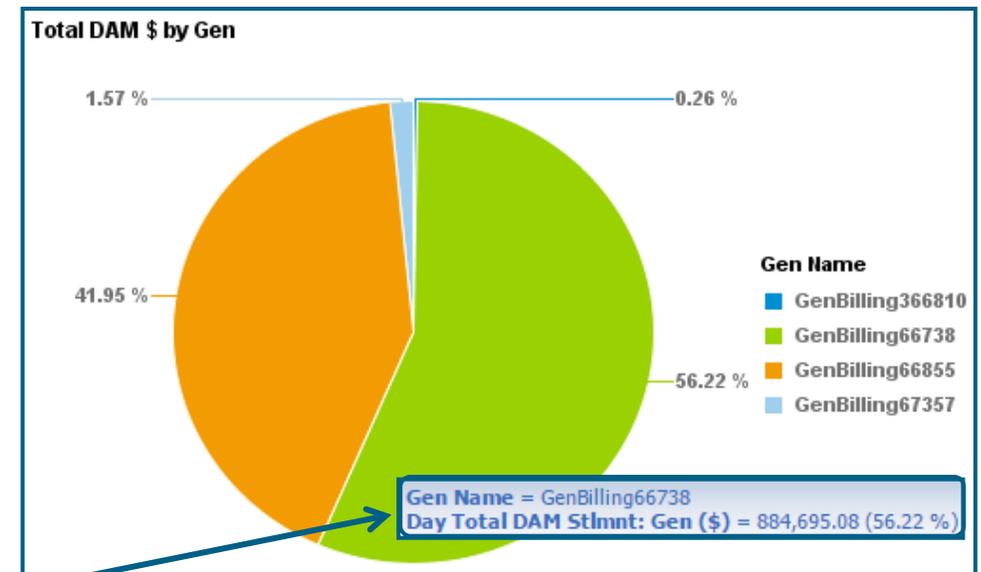
Context menu options: Cut, Copy, Paste, Insert, Delete, Merge, Clear Contents, Turn Into (Horizontal Table, Cross Table, Column Chart, Line Chart, Pie Chart, More Transformations...), Text, Format Cell...



# Pie Chart

Gen Name	Interval Start Day (Eastern)	Day Total DAM Stmnt: Gen (\$)	Day Total BalMkt Stmnt: Gen (\$)
GenBilling366810	01/01/2015	233.36	-1,014.49
	01/02/2015	242.24	
	01/03/2015	215.60	
	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
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	258,753.28

Report data can be displayed in a pie chart also



# Exporting Data

# Exporting Report Data

Web Intelligence | Navigation Map | PS Daily Total LBMP Settlement Report 1 | Export | Export to my computer in PDF, Excel or CSV format

- Export Document As
- Export Current Report As
  - PDF
  - Excel 2007
  - Excel
  - CSV Archive
  - Text
- Export Data to CSV ...

## PS Example 1

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
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 Data

# 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
<input type="radio"/> 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

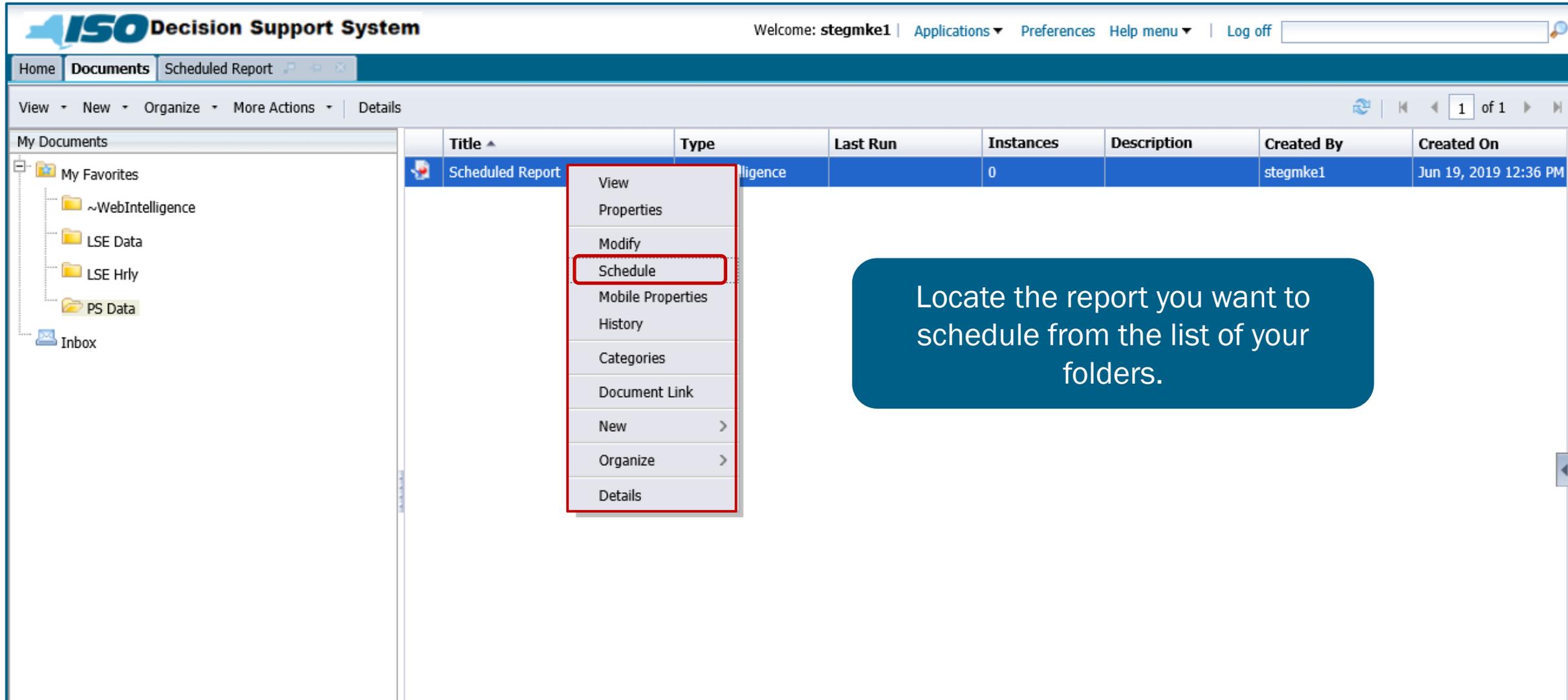
The screenshot shows the ISO Decision Support System interface. At the top, the logo and name 'ISO Decision Support System' are on the left, and 'Welcome: stegmke1' is on the right. Below this is a navigation bar with 'Home' and 'Documents' tabs. A menu bar contains 'View', 'New', 'Organize', 'More Actions', and 'Details'. The 'My Documents' section is highlighted with a red box and a blue arrow. It contains a list of folders: 'My Favorites', 'Inbox', and 'Personal Categories'. The 'Inbox' folder is selected. To the right, a table displays the contents of the inbox.

		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 NYISO 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. The main content area displays a table of scheduled reports. The first row is selected, and a context menu is open over it, with the 'Schedule' option highlighted. The table has columns for Title, Type, Last Run, Instances, Description, Created By, and Created On.

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

My Documents

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

View New Organize More Actions Details

1 of 1

View Properties Modify Schedule Mobile Properties History Categories Document Link New Organize Details

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

# Scheduling

The screenshot shows two overlapping windows from a software interface. The top window is titled "Schedule - Scheduled Report" and the bottom window is titled "History - Scheduled Report".

**Annotation 1:** A red box highlights the "Recurrence" option in the left-hand navigation pane of the "Schedule" window.

**Annotation 2:** A red box highlights the "History - Scheduled Report" window title bar.

**Annotation 3:** A red box highlights the "Inbox" folder in a "My Documents" file explorer window that is open over the "History" window.

**Recurrence Settings (from "Schedule" window):**

- Run object:
- Object will run once every N days.
- Days(N) =
- Start Date/Time:
- End Date/Time:

**History Table (from "History" window):**

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		

# Questions?

For any future assistance, please contact NYISO Stakeholder Services at [stakeholder\\_services@nyiso.com](mailto:stakeholder_services@nyiso.com) or by phone at (518) 356-6060