



User Guide for Submitting Peak Contribution Values using the Submit Peak Contribution User Interface

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Preface

Purpose

This user guide is a reference document created for the specific purpose of transacting business associated with Peak Contribution values within the ISO New England (ISO-NE) Standard Market Design (SMD) marketplace. The application used for submitting Peak Contributions is the “Submit Peak Contribution” User Interface (UI). This Peak Contribution user guide first provides general concepts for using the Submit Peak Contributions UI. The remainder of the document goes into greater detail for specific tasks using the Submit Peak Contribution UI. In most instances, web page screen captures have been used to illustrate the explanations.

Assumptions

An assumption has been made that the reader is familiar with using ISO New England’s SMD Applications web-based applications and web-browser navigation. The market system user should have a good understanding of ISO-NE Market Rules, Manuals, and other governing documents to properly use the Submit Peak Contribution UI to complete desired business transactions. Reference should also be made to any web-based training tools provided by ISO New England which are intended as extensions of SMD Application User Guides.

Change Summary

Revision	Date	Comments
1.0	6/2010	Updated for FCM.

1. Overview

SMD Applications Web Access

The SMD Applications Home Page is accessed through Internet facilities with the following web browser:

- Internet Explorer 6.x or greater supporting SSL 3.0 secured 128-bit encryption

Additional software and hardware requirements for accessing the ISO-NE SMD Applications Home Page are listed on the ISO-NE web page at:

<http://www.iso-ne.com>

Users need to register with the Customer Support department within ISO in order to submit, search for, and use the Submit Peak Contribution UI for the intention and purpose of taking part in the ISO SMD Marketplace.

Market system user registration and access begins by following instructions detailed in Section I of the Customer and Asset Management System (CAMS) User Guide available on the ISO web page at: http://www.iso-ne.com/support/user_guides/index.html.

Once registered, market system users will be provided with the link to access the SMD Applications Home Page, which will then allow direct access to Submit Peak Contribution UI.

Access to the ISO Sandbox will be restricted to registered market system users only. Questions or inquires about market system access should be addressed to the Customer Support department at ISO at custserv@iso-ne.com.

Business Rules and Timeline

The associated business rules and timeline can be found in *Market Rule 1* and the ISO New England Manuals.

Logging In

Once you have navigated to the SMD Applications Home Page, select the Submit Peak Contributions UI and the digital certificate that allows access to the SMD applications. From there you can work with the Submit Peak Contribution UI.

The following web page displays once the user has successfully navigated to the SMD Applications Home Page:

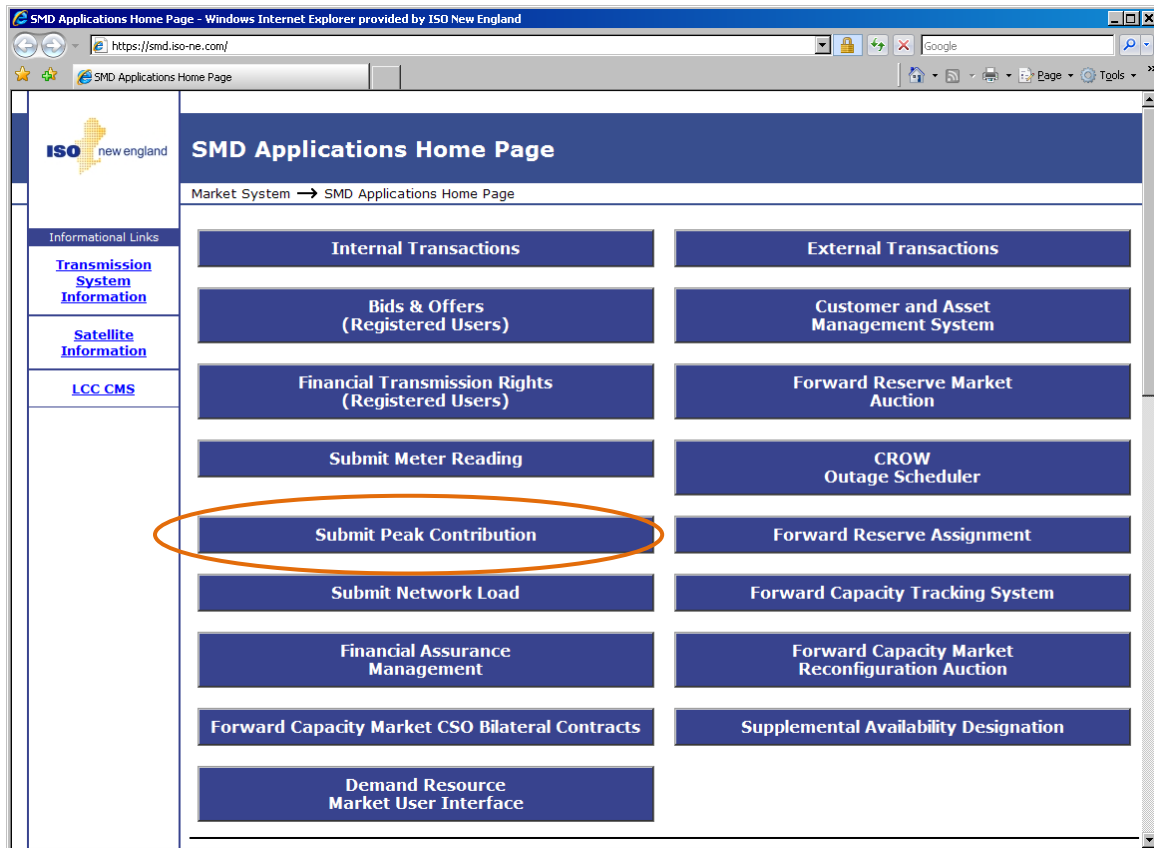


Figure 1 – External User Interface Homepage

1. Click the **Submit Peak Contribution** button to proceed to the default Peak Contribution homepage.

2. Submit Peak Contribution UI Layout

The screenshot shows the Submit Peak Contribution User Interface. It includes a form with the following fields and buttons:

- f**: Resp. Party:
- e**: Begin Date:
- End Date:
- Category:
- b**: File Upload button
- d**: Retrieve button
- a**: Load Facilities table
- c**: Please select an asset to view/enter Peak Contributions data.
- g**: Please select an asset to view/enter Peak Contributions data.

Load Facilities		
Id	Asset Name	Ret. Date
291	Unmetered Load at Domain 504	06/01/2009

Figure 2 – Default Display of the Submit Peak Contribution User Interface

There are 3 text fields, 4 buttons, and 1 drop down menu on the main Peak Contribution page.

2. The Drop down menu is:

a. **Category**

i. **All** – Lists all Load Facilities

ii. **Missing Peak Contributions** – Filters for assets with missing peak contributions.

3. Buttons include

b. **File Upload** - Launches the Peak Contributions File Upload Screen (see below).

- c. **Retrieve** – Queries stored results for matching selection criteria (**Date and Category**).
- d. Ellipsis buttons open the **Calendar** for the following text fields:
 - i. **Begin Date** – The desired begin date to search for assets with specified **Category** (see below).
 - ii. **End Date** - The desired end date for which to search for assets with specified **Category** (see below).
- 4. Text fields are provided for manual entry of the following items:
 - e. **Begin Date** – The desired begin date to search for assets with specified Reading Type and **End Date** - The desired end date for which to search for assets with specified Reading Type.
 - f. **Resp. Party** – Value of login digital certificate
- 5. Hyper Links sort the results of retrieved Peak Contribution data.
 - g. **ID, Asset Name, Ref. Date**

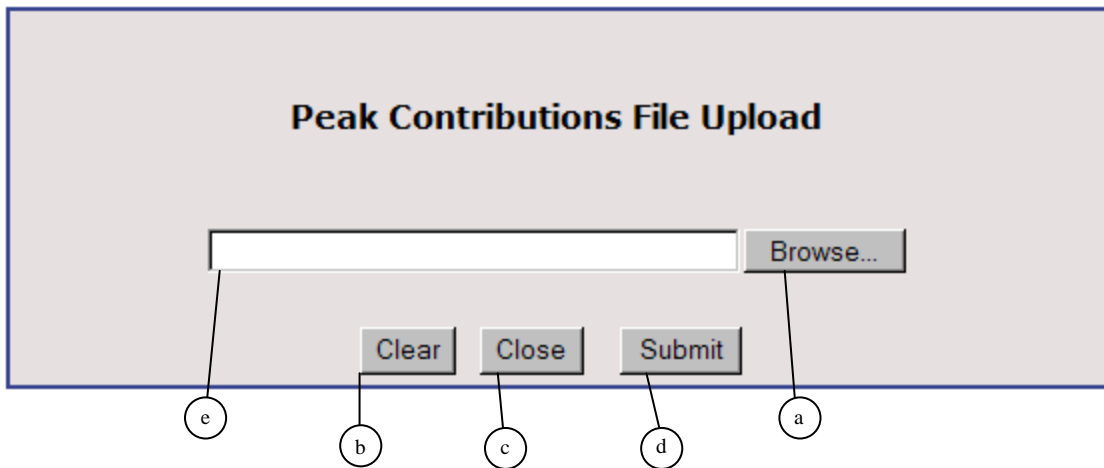


Figure 3 – Peak Contribution File Upload Screen

There are 4 buttons and 1 text field on the Peak Contribution File Upload Page.

- 6. Buttons include:
 - a. **Browse** – Launches the Choose File Screen (see below).
 - b. **Clear** – Clears any text from the **Browse Text Box**
 - c. **Close** – Closes the Peak Contribution Values File Upload Page
 - d. **Submit** – “Saves” the selected upload file.
- 7. Text fields include:
 - e. **Browse Text Box** – holds the path of the selected upload file

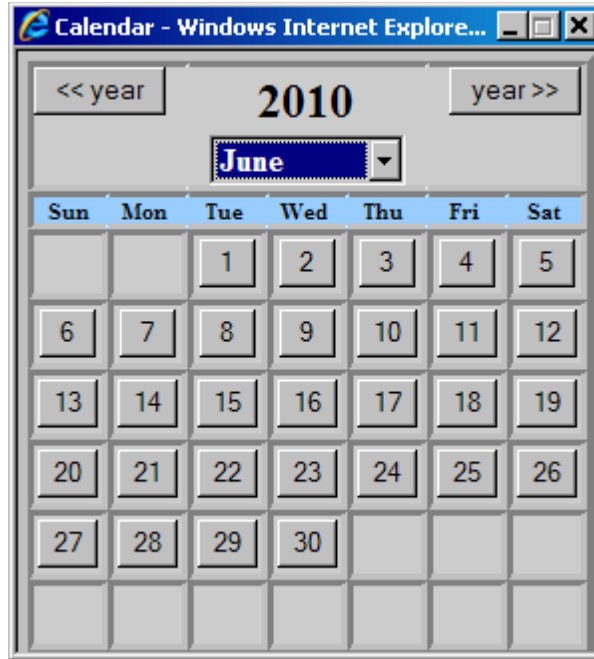


Figure 4 – Calendar Dialogue Box

There are 2 buttons (**year** forward and **year** back) and one dropdown box (**Month**) on the Calendar, in addition to one button for every day of the current month/year.

File Upload

Resp. Party: LSE1

Begin Date: 05/01/2010

End Date: 05/01/2010

Category: All

Retrieve

Load Facilities		
Id	Asset Name	Ref. Date
293	Unmetered Load at Domain 503	05/01/2010

Asset Id: 293
Asset Name: Unmetered Load at Domain 503
Tag Date: 05/01/2010

Capacity Commitment Period	Peak Date	Peak Contribution (MWh)
06/01/2009 - 05/31/2010	01/01/2008 11:00	-100
06/01/2010 - 05/31/2011	06/01/2009 12:00	-100

Reset Submit

a

b

c

d

e

Figure 5 – Display of the Peak Contribution User Interface Showing MWh Values.

Clicking on any of the hyperlinks in the **Asset Name** column of the Assets window loads the **Peak Contribution** window into the Peak Contribution UI. There are 2 buttons within the Peak Contributions window, as well as 4 text fields (2 of which are display only), as well as 2 drop down boxes.

8. The text boxes include:
 - a. A space for **Peak Contribution** values (**MWh**)
 - b. A **Peak Date** Text Field also exists (which displays the value of the peak date/time for each **Capacity Commitment Period**).
 - c. **Capacity Commitment Period**. For the month of May, **Peak Contribution** values may be submitted for two **Capacity Commitment Periods**– the current period and the upcoming period. For all other months, only the **Capacity Commitment Period** applicable to the date for which the **Peak Contribution** value is submitted will appear.
9. Buttons include:
 - d. **Reset** – Clears **Peak Contribution (MWh)** values entered into test field, which are yet to be submitted.
 - e. **Submit** – “Saves” entered **Peak Contribution (MWh)** values to the ISO-NE database.

3. Task Guide

Scenario 1: Enter Peak Contributions

File Upload

Resp. Party: LSE1

Begin Date: 06/01/2010

End Date: 06/02/2010

Retrieve

Category: Missing Peak Contributions

All

Missing Peak Contributions

Id	Asset Name	Ref. Date
293	Unmetered Load at Domain 503	06/01/2010

Please select an asset to view/enter Peak Contributions data.

Figure 6 – Selecting the Category Type

1. Click and choose the **Category** from the drop-down (in this example, “Missing Peak Contributions”), and the begin and end dates. Continue by clicking on the **Retrieve** button to filter listed assets to only Load Facilities with missing peak contributions in the range of days selected.

File Upload

Resp. Party: LSE1

Begin Date: 06/01/2010

End Date: 06/02/2010

Category: Missing Peak Contributions

Retrieve

Load Facilities Peak Contributions		
Id	Asset Name	Ref. Date
293	Unmetered Load at Domain 503	06/01/2010
293	Unmetered Load at Domain 503	06/02/2010

Please select an asset to view/enter Peak Contributions data.

Figure 7 – Peak Contribution Screen with Load Facilities Missing Peak Contribution values.

- Click and chose the **Load Facility** from the list (in this example, “Unmetered Load at Domain 503”).

File Upload

Resp. Party: LSE1

Begin Date: 06/01/2010

End Date: 06/02/2010

Category: Missing Peak Contributions

Retrieve

Load Facilities Peak Contributions		
Id	Asset Name	Ref. Date
293	Unmetered Load at Domain 503	06/01/2010
293	Unmetered Load at Domain 503	06/02/2010

Asset Id: 293
 Asset Name: Unmetered Load at Domain 503
 Tag Date: 06/01/2010

Capacity Commitment Period	Peak Date	Peak Contribution (MWh)
06/01/2010 - 05/31/2011	06/01/2009 12:00	

Reset Submit

Figure 8 – Peak Contribution UI Screen with Peak Contribution window displayed.

- Click in, and type the proposed **Peak Contribution (MWh)** value (in this example, “-50”).

File Upload

Resp. Party:

Begin Date:

End Date:

Category:

Asset Id: 293
 Asset Name: Unmetered Load at Domain 503
 Tag Date: 06/01/2010

Capacity Commitment Period	Peak Date	Peak Contribution (MWh)
06/01/2010 - 05/31/2011	06/01/2009 12:00	-50

Load Facilities Peak Contributions		
Id	Asset Name	Ref. Date
293	Unmetered Load at Domain 503	06/01/2010
293	Unmetered Load at Domain 503	06/02/2010

Figure 9 – Peak Contribution Screen with Peak Contribution values displayed.

- Click the **Submit** button to save the **Peak Contribution (MWh)** value.

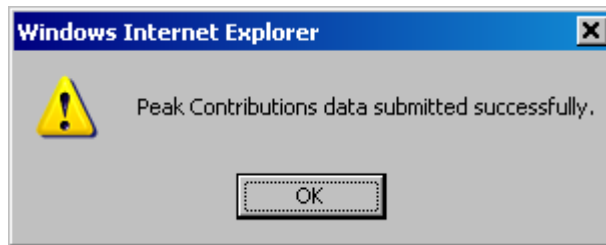


Figure 10 – Peak Contribution Submittal Confirmation Screen

- A message will be received indicating the **Peak Contribution (MWh)** value submittal **succeeded**.
- Clicking the **OK** button returns the UI to the following screen (notice **Unmetered Load at Domain 503** for 06/01/2010 no longer appears in the list of Load Facilities with missing Peak Contribution values).

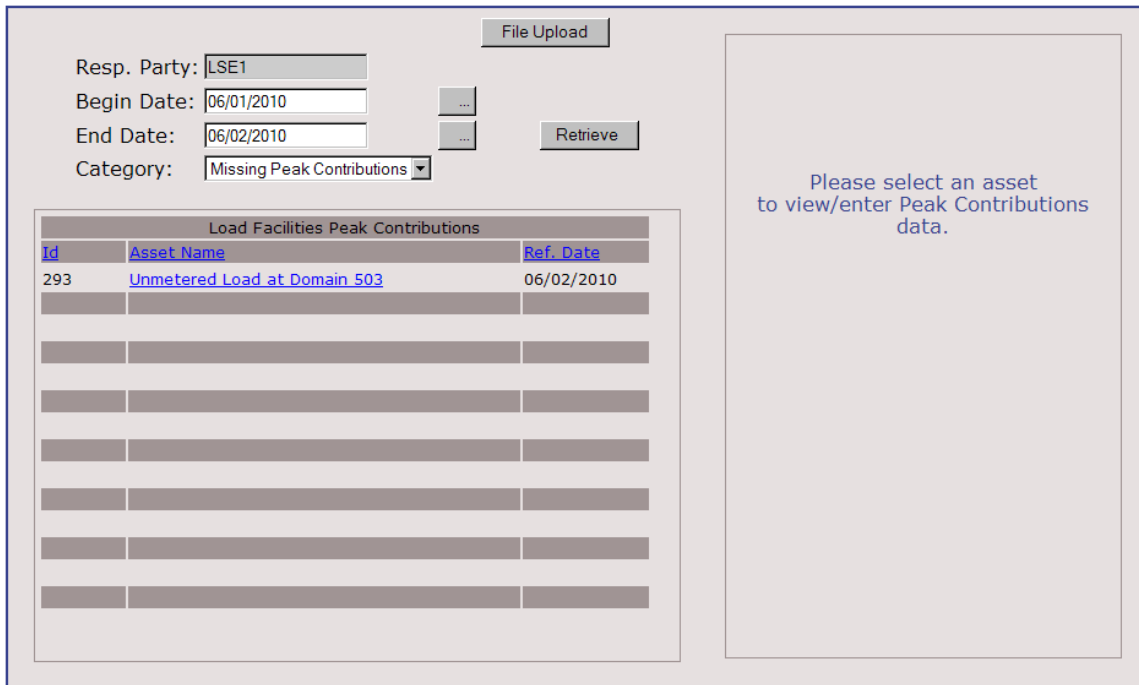


Figure 11 – Load Facilities with missing Peak Contribution values.

Scenario 2: Retrieve/Edit Peak Contributions

1. Click and chose the ellipses (“...”) next to the **Begin Date** text field.



Figure 12 – Calendar display

2. The **Calendar** Screen is displayed.
3. Click and choose the Date from the **Calendar** (in this example, “06/01/2010”). Click and choose the **Category** from the drop-down (in this example, “All”). Continue by clicking on the **Retrieve** button to retrieve all Load Facilities for 06/01/2010.

File Upload

Resp. Party: VIU1

Begin Date: 06/01/2010

End Date: 06/01/2010

Category: All

Retrieve

Load Facilities		
Id	Asset Name	Ref. Date
201	Metered Load at Domain 502	06/01/2010
292	Unmetered Load at Domain 502	06/01/2010
294	Unmetered Load at Domain 501	06/01/2010
295	Unmetered Load at Domain 505	06/01/2010

Please select an asset to view/enter Peak Contributions data.

Figure 13 – Peak Contributions Screen with All Load Facilities

- Click and chose the **Load Facility** from the list (in this example, “**Metered Load at Domain 502**”).
- The new screen to manually enter Peak Contributions is displayed.

File Upload

Resp. Party: VIU1

Begin Date: 06/01/2010

End Date: 06/01/2010

Category: All

Retrieve

Load Facilities		
Id	Asset Name	Ref. Date
201	Metered Load at Domain 502	06/01/2010
292	Unmetered Load at Domain 502	06/01/2010
294	Unmetered Load at Domain 501	06/01/2010
295	Unmetered Load at Domain 505	06/01/2010

Asset Id: 201
 Asset Name: Metered Load at Domain 502
 Tag Date: 06/01/2010

Capacity Commitment Period	Peak Date	Peak Contribution (MWh)
06/01/2010 - 05/31/2011	06/01/2009 12:00	-20

Reset Submit

Figure 14 – Peak Contributions Screen with Peak Contribution values displayed.

6. Click in, and change the proposed Peak Contribution (MWh) value (in this example, “-20”).
7. Click the **Submit** button to save the Peak Contribution values.

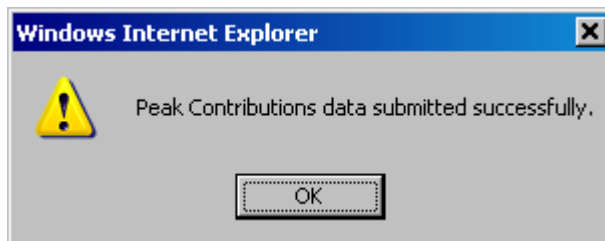


Figure 15 – Peak Contribution Values Submittal Confirmation Screen

8. The Peak Contribution submittal *succeeded*.

Scenario 3: Upload Peak Contributions

1. Click on the **File Upload** button to upload a file containing peak contribution values.

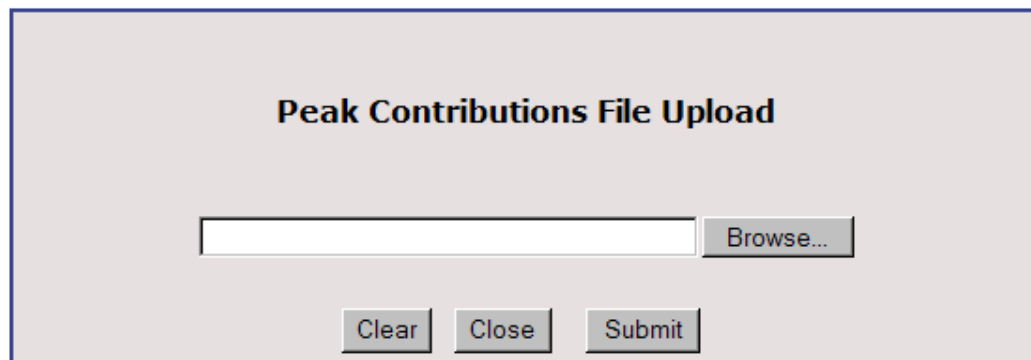


Figure 16 – Peak Contributions File Upload Screen

2. The new screen to browse for the upload file is displayed.
3. Click on the **Browse** button to upload a file containing new set of peak contribution values.
4. The new screen to browse the client computer for the upload file is displayed. Navigate to the appropriate path/file and select the file of choice. Click the **Open** button.

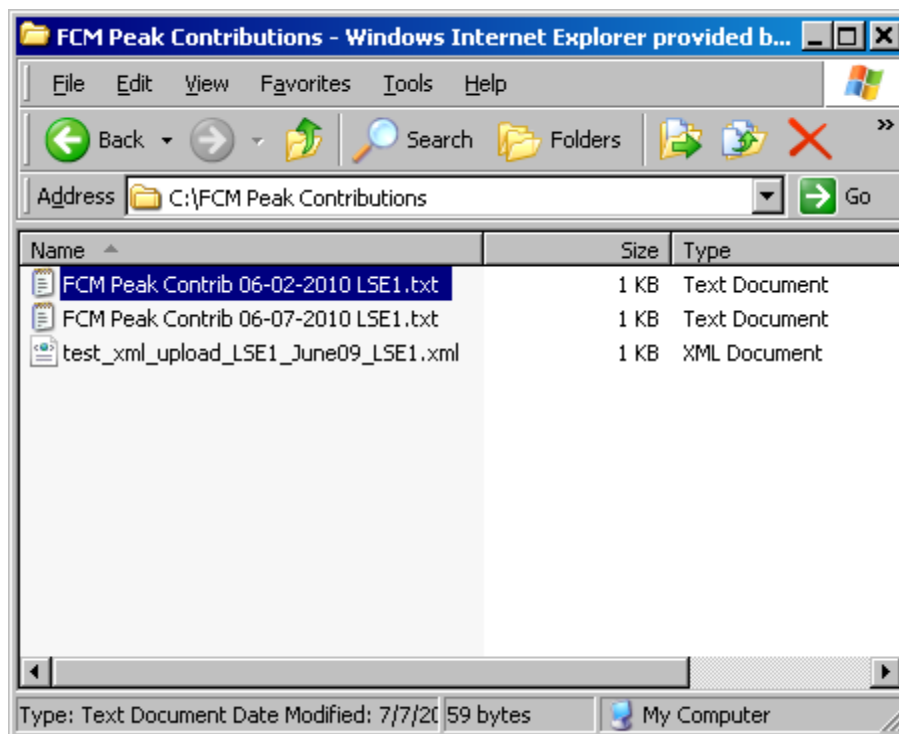


Figure 17 – Default “Choose file” screen

- The new screen appears with the text box containing the chosen upload path/file. Click the **Submit** button to upload the peak contribution file to the NE-ISO server.

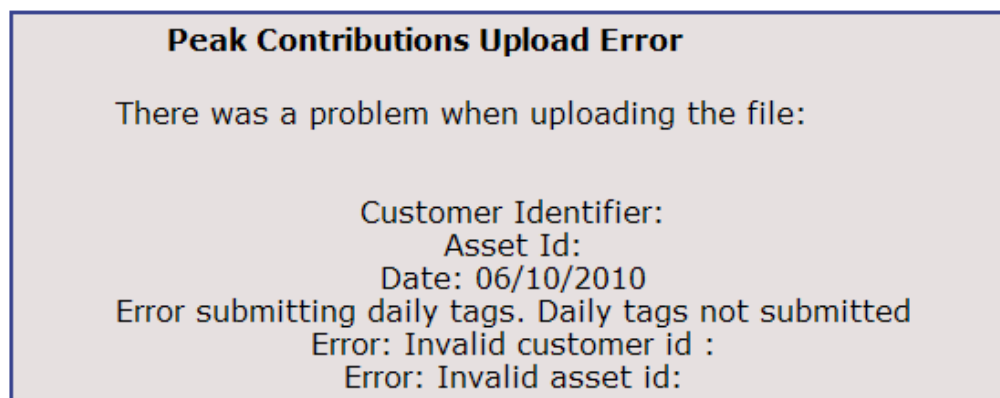


Figure 18 – Peak Contribution File Upload Screen with Error Message

- In this case, the uploaded file did **not** meet the upload file standards set forth; therefore the validation of the submitted file **failed**, and an error was created (the file was not uploaded).

7. In order to meet the Peak Contribution Values upload standards in this scenario, files must adhere to the following formats (CSV/XML – See the *FCM Peak Contribution Upload File Formats* document for further details).

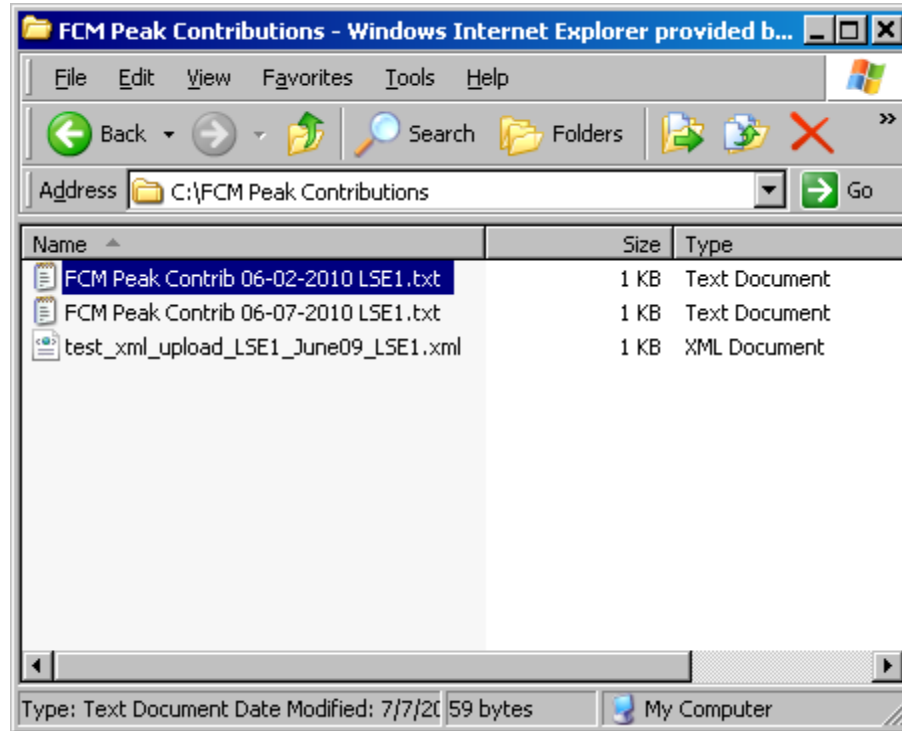


Figure 19 – Default “Choose file” screen

8. This time a file with proper formatting is chosen.

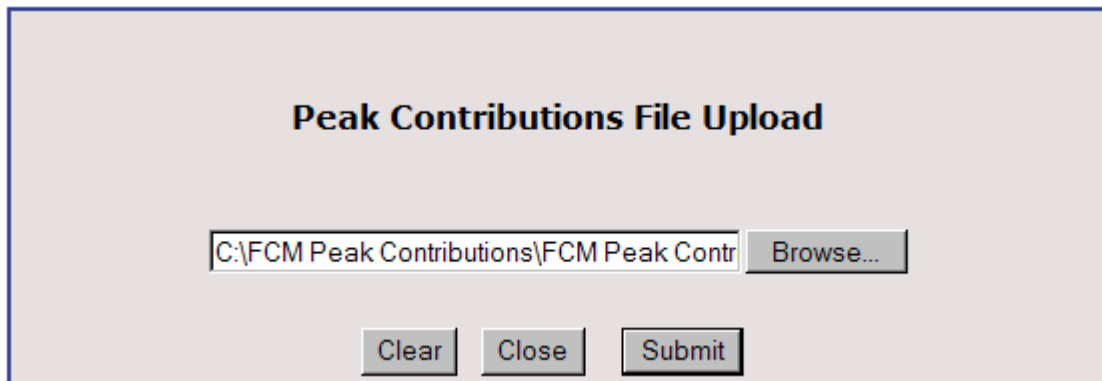


Figure 20 – Peak Contribution File Upload Screen

- The new screen to browse the client computer for the upload file is displayed. Navigate to the appropriate path/file and select the .csv file of choice.

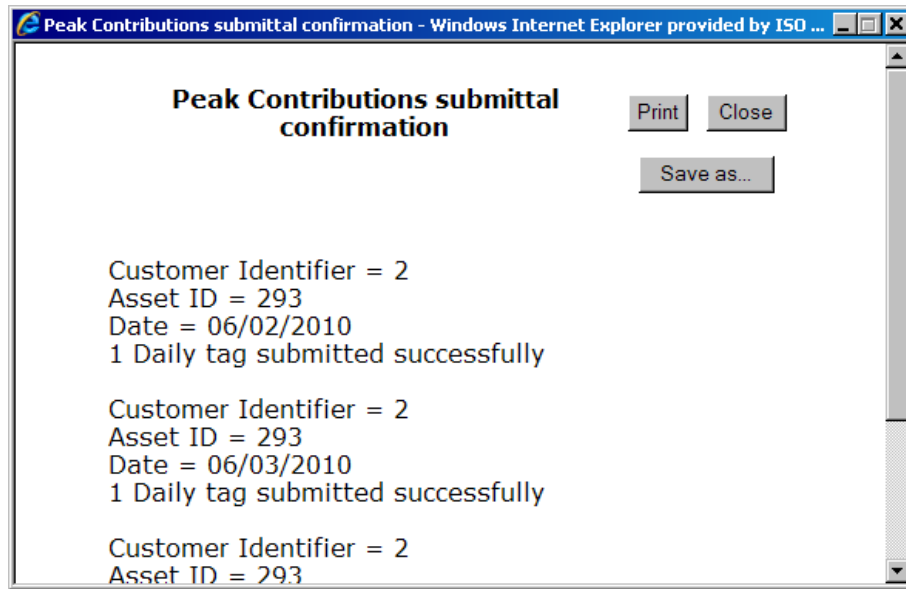


Figure 21 – Peak Contribution Submittal Confirmation Screen

- In this case, the uploaded file **did** meet the upload file standards set forth (the file was uploaded) and the success message “Peak Contributions submittal confirmation” is displayed. The customer has the option to print or save the confirmation, or to close the confirmation screen.

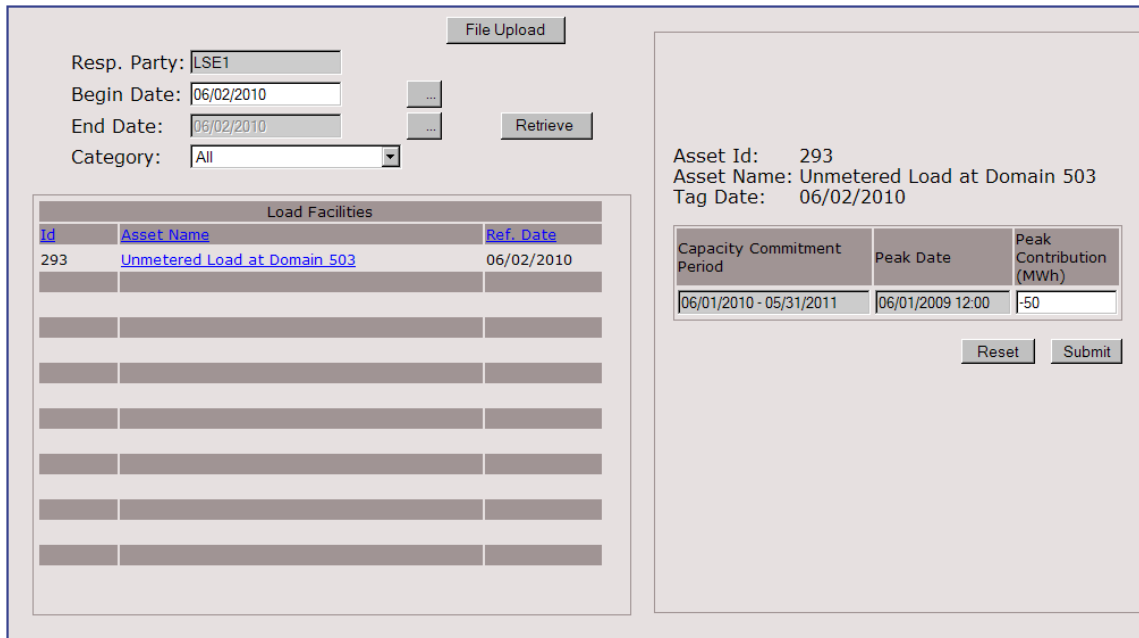


Figure 22 – Peak Contribution Screen with Peak Contribution (MWh) values displayed.

4. Error Processing

Error 1: Uploading a Peak Contribution File with Incorrect File Format

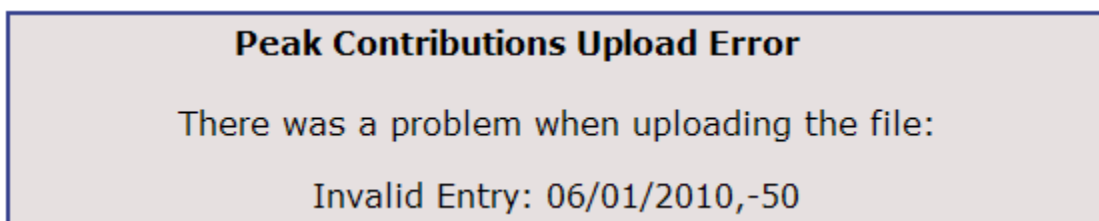


Figure 23 – Peak Contribution Upload Error.

Error 2: Peak Contribution UI Times Out.

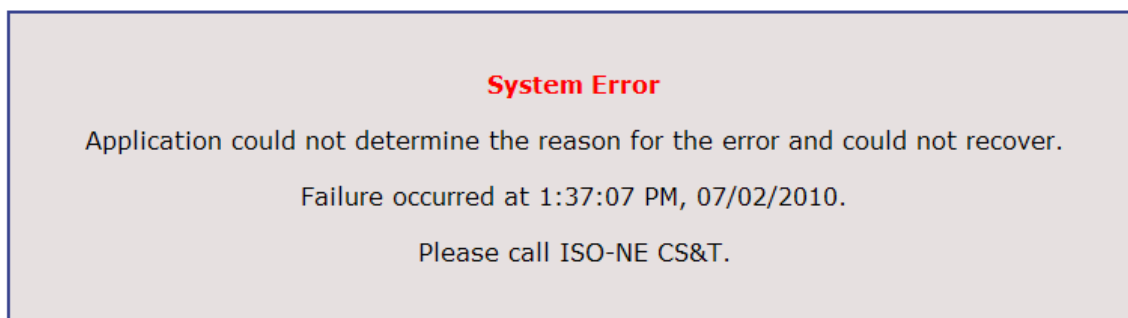


Figure 24 – Peak Contribution Error Page

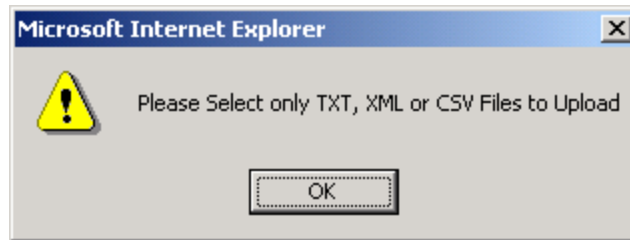
Error 3: Uploading an Incorrect File Type.

Figure 25 – File Type Validation Error

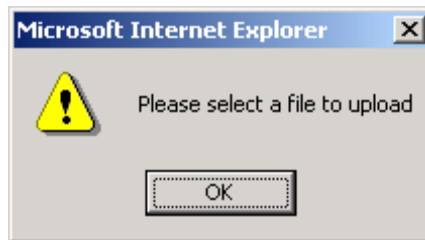
Error 4: Submitting an Peak Contribution File (No File Selected).

Figure 26 – File Upload Validation Error

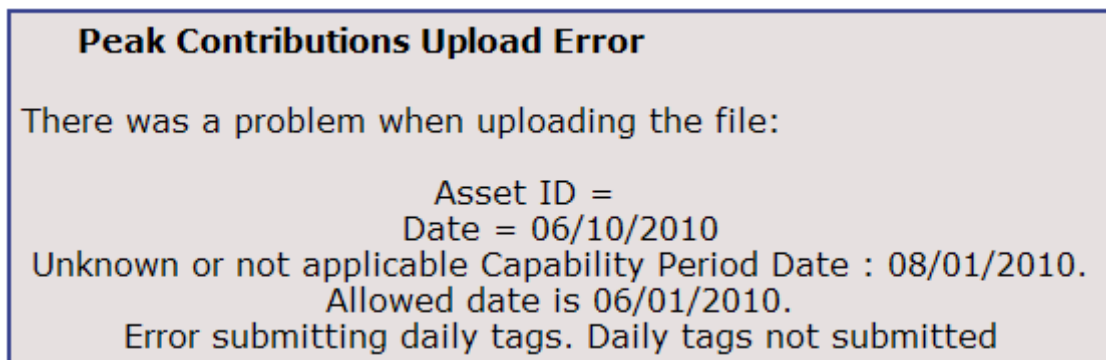
Error 5: Uploading Peak Contributions (Incorrect Capability Periods).

Figure 27 – Peak Contribution Submittal Confirmation with Error Message