FEBRUARY 04, 2015 I WEBINAR



Energy Efficiency Measure Database (EEM)

Customer Training Webinar

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Disclaimer for Customer Training

ISO New England (ISO) provides training to enhance participant and stakeholder understanding.

Because not all issues and requirements are addressed by the training, participants and other stakeholders should not rely solely on this training for information but should consult the effective <u>Transmission, Markets and Services Tariff</u> ("Tariff") and the relevant <u>Market Manuals</u>, <u>Operating Procedures</u> and <u>Planning Procedures</u> ("Procedures"). Training examples are provided for illustrative purposes only. Company names and numerical values used are fictitious.

In case of a discrepancy between training provided by ISO and the Tariff or Procedures, the meaning of the Tariff and Procedures shall govern.

Before We Begin

Today's presentation is available on the ISO website (www.iso-ne.com) at: Participate > Training > Training Materials Document Title: Energy Efficiency Measure Database Presentation

- WebEx recording of this session will be posted to the same location within 5 business days
- Questions & Answers
- Evaluation

Objectives

At the completion of this training, you will be able to use EEM to:

- Understand data elements & validations
- Enter new data
- Update existing data
- Generate reports



Agenda

- Overview
- Security and application access
- Measure detail concepts
- Data fields and validations
- User interface
- Web services
- Cutover and implementation considerations



ENERGY EFFICIENCY MEASURE DATABASE

Overview



What is EEM?

EEM

Dictionar

EEM is a database that contains detailed measure level data for On-Peak and Seasonal Peak Demand Resources participating in FCM with energy efficiency.

EEM Data Utilization by ISO

- Performance verification
- Existing capacity qualification
- Auditing
- Trending and analysis
- System planning
- Market monitoring
- Participant data needs

Tariff References

- Section I General Terms and Conditions
- Section I.2.2 Definitions
- Section III.13 Forward Capacity Market
 - III.13.1.4.3.1 Measurement and Verification Documents Applicable to On-Peak Demand Resources, and Seasonal Peak Demand Resources.
 - III.13.1.4.3.1.4 Record Requirement of Retail Customers Served.



Manual References



Relevant ISO New England Manuals are located at:

http://www.iso-ne.com/participate/rules-procedures/manuals

- M-MVDR Measurement and Verification of Demand Reduction Value from Demand Resources
 - Section 12.2 (1) and (2) contain specific data requirements
 - EEM data may support the monthly supporting documentation requirements in Section 13.2 (5)
- M-RPA Registration and Performance Auditing
- M-20 Forward Capacity Market (FCM)
- M-28 Market Rule 1 Accounting

Interactions With EEM

Lead participants access EEM to interact with energy efficiency measure data such as:

- Entering new data
- Updating existing data
- Generating reports



Connecting to EEM

- Two methods:
 - User interface
 - Web services
- Documentation for both interfaces:
 - <u>http://www.iso-ne.com/static-</u>
 <u>assets/documents/2015/01/eem_database_user_guide.pdf</u>
 - <u>http://www.iso-ne.com/participate/support/upload-download</u>



Questions





SECURITY & APPLICATION ACCESS

EEM



Accessing EEM Overview

Contact your company's Security Administrator (SA)

SA assigns you an EEM role

SA issues digital certificate

Install digital certificate

Go to Sandbox or SMD EEM

Application Access



- Managed through Customer and Asset Management System (CAMS)
- Lead Participant's Security Administrator (SA):
 - Assigns roles (detailed next)
 - Issues digital certificates to users that don't already have one



EEM, CAMS, and other User Guides: http://www.iso-ne.com/participate/support/user-guides

User Roles

Viewer	Maintainer
Read-only access	 Read-write access
 View information 	 Create, edit, view measure info
User interface	User interface
Web services	Web services

There are separate Viewer and Maintainer roles available for both the Sandbox and Production EEM.

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Environments

Sandbox https://sandboxsmd.iso-ne.com	Production https://smd.iso-ne.com					
Available now	Available Feb 24, 2015					
Used for:	Used for:					
Testing code	 System of record 					
 Employee training 	 Use with validated code only 					



All measure details installed after June 16, 2006 whose measure lives have not expired as of June 1, 2015 are required.

Questions





MEASURE DETAIL CONCEPTS

EEM



Measure Detail Overview

- Underlie existing On-Peak or Seasonal Peak Measures registered in the Customer and Asset Management System
- Contains detailed measure level data for a single measure or an allowed aggregation of measures such as:
 - Installation date
 - Measure life
 - Summer and winter savings, etc.
- If a measure detail needs to be changed, a new version is created
 - This occurs after ISO review of the change if the change requires ISO review

Versioning



Only one version of a Measure Detail is effective at any given time.

- *Record Begin Date* is set to the system time when a Measure Detail record is created, updated, or approved.
- *Record End Date* is the end of the effective period for that set of data.
- When an update is performed, the *Record End Date* for the existing record is set to the *Record Begin Date* of the new set of Measure Detail data. This versioning scheme provides the ability to store a searchable history of changes to a Measure Detail.

First Month in Market

- First possible month the Measure Detail can be included in the CAMS monthly performance value for an asset
- Determined by the EEM system at the time of Measure Detail creation by taking the later of:
 - First of the month following the Installation Date
 - Date found by subtracting 70 days from the current system time and taking the first of the month within which this date falls.

Calculations model data submission deadlines from M-28.

Measure Expiration Month

- Last month that a Measure Detail can be included in the CAMS monthly performance value for the asset
- Determined by EEM via the following process:
 - Convert the entered measure life value to months and truncate fractional month to a whole number.

For example: 1.6 years x 12 = 19.2 = 19 month life.

- Add the calculated month value to the installation date, and round down to the first of the month.
- Measure Expiration Date and the First Month in Market may be recalculated if a user modifies the installation date or measure life.
 - May trigger ISO review of the change



Market Participation Date Range

Example 1

Measure installed June 5, 2015 with a 5 year life, and reported in EEM on October 1, 2015.

then:

- July 2015 is first month in market
 - Measure installed prior to July 2015
 - July 2015 data correction deadline had *not* passed as of October 1 2015.
- June 2020 is measure expiration month
 - Measure expiration date is June 5, 2020
- 5 years in market

Example 2

Measure installed on June 5, 2015 with a 5 year life, and reported in EEM on November 1, 2016.

then:

- August 2016 is first month in market
 - Measure installed prior to July 2015
 - August 2016 data correction deadline had *not* passed as of November 1, 2016.
- *June 202*0 is measure expiration month
 - Reporting date does not change expiration month
- 3 years, 11 months in market
 - Due to lag between installation and reporting

No Deleting of a Measure Level Detail

- Once submitted or approved it *cannot be deleted* from the database.
- If erroneously added, it can be modified so that it will *not* affect future reporting.
 For example: Both the Summer and Winter kW could be set to zero
- This is a function of the system architecture as well as the need for an audit trail.

Questions





DATA FIELDS AND VALIDATIONS

EEM







The EEM User Guide goes into more detail about data fields and validations. Here's the link:



http://www.iso-ne.com/participate/support/user-guides

Field	Definition	Rules
Lead Participant ID	Customer Name and ID for user.	Not Editable. System generated.
ISO Measure Detail ID	Each ISO Measure Detail ID is unique throughout the EEM.	Not Editable . System generated after successful creation of Measure Detail.
LP Measure Detail ID	Provides participant with key field to match with their database.	Required . Alphanumeric values accepted. Limited to 100 characters. Must be unique to Lead Participant.
Record Begin Date	Date the version of the data set for a Measure Detail became effective.	System generated using the system date and time at the point that the version of the data was written to the database.
Record End Date	Date the version of the data set for a Measure Detail expired.	System generated.
Measure Detail Name	Name of Measure Detail installed.	Optional . Alphanumeric values accepted. Limited to 100 characters.
Distribution Company ID	ID of distribution company where Measure Detail is located.	Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter >= 10kW. Only numeric values accepted.
Installation Date	Date Measure Detail was installed.	Required . Must be a valid date in MM/DD/YYYY format, after June 16, 2006 and prior to the current system date. If more than three years prior to the current system date, the new Measure Detail will be put into Pending and will require ISO review before being applied.

Field	Definition	Rules
First Month in Market	First month savings can be	Derived by the system based on Measure
	reported for the Measure	Installation Date and the initial
	Detail.	performance month resettlement date.
		Always the first day of a month.
Measure Life	Measure Detail life in years.	Required . Must be numeric, with at most
		one decimal place. Cannot be greater than
		ISO defined maximum (currently 30 years).
Measure Expiration	Month, day and year the	Not editable. System calculated using
Date	Measure Detail will have	Installation Date and Measure Life.
	reached its end of useful life.	
Program Name	Name of the program in which	Required. Alphanumeric values accepted.
	the Measure Detail belongs.	Limited to 100 characters.
Sector	Sector applicable to measure	Required . Alphanumeric values accepted.
	detail.	
End Use	Describes type of measure.	Required. Alphanumeric values accepted.
		Custom measure option for each sector.
Custom End Use	Used when Custom End Use is	Required if a "Custom Measure" option is
	chosen or for elaboration of	chosen for End Use. Limited to 100
	non-custom Measure Details.	characters.
Aggregation	Flag that indicates if multiple	Required . Limited to "Y" and "N".
	end uses are aggregated into a	
	single Measure Detail.	

Field	Definition	Rules
Number of	Number of end uses aggregated	Required. Only editable if Aggregation
Aggregation	into a single Measure Detail.	value is "Y". Must be greater than zero.
(Aggregation Count)		Defaults to 1 if Aggregation = "N".
		Rounded to the nearest whole number
		using standard rounding rules.
		Limited to seven digits.
Monthly kW Summer	Calculated kW savings from	Required. Only numeric values accepted.
	Measure Detail for a summer	If Aggregation value is "Y", the kW value
	month.	divided by Number of Aggregation must
		be less than 10kW.
		Rounded to three decimal places using
		standard rounding rules.
Monthly kW Winter	Calculated kW savings from	Required. Only numeric values accepted.
	Measure Detail for a winter	If Aggregation value is "Y", the kW value
	month.	divided by Number of Aggregation must
		be less than 10kW.
		Rounded to three decimal places using
		standard rounding rules.
CAMS Measure ID	CAMS Measure ID used to	Required . Alphanumeric values accepted.
	represent full set of Measure	Must be an On-Peak or Seasonal Peak
	Details.	CAMS measure that belongs to Lead
		Participant entering measure detail.

Field	Definition	Rules
Asset	CAMS Asset associated with the Measure Detail.	
Resource	CAMS Resource associated with the asset.	Not editable. System generated based on value chosen for CAMS Measure ID.
Load Zone	Load Zone where the resource is located.	
Retail Customer Name	Name of retail customer for Measure Detail.	Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter >= 10kW. Alphanumeric values accepted. Limited to 100 characters.
Street	Street address where the Measure Detail is located.	Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW
City	City where the Measure Detail is located.	Winter >= 10kW. Alphanumeric values accepted. Limited to 50 characters.
State	State where the Measure Detail is located.	Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter >= 10kW. Limited to the six New England states.
Zip Code	Zip code where the Measure Detail is located.	Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter >= 10kW. Five digits.

Field	Definition	Rules
Reference Document	Name and version of the	Required. Alphanumeric values accepted.
Name	document from which Measure	Limited to 100 characters.
	Detail savings and measure life	
	information is taken.	
Measure Reference	Code for Measure Detail as it	Required . Alphanumeric values accepted.
Code	appears in reference document	Limited to 100 characters.
	cited.	
Updated Date	Date that this version of the	Not Editable. System generated.
	Measure Detail was created.	
Updated By	The user that created this version	Not editable. Generated using the name
	of the Measure Detail's data.	associated with the certificate of the user.
Comments	Free form field for Lead	Required if the Measure Detail is closed
	Participant comment entry. The	and a change was made to Installation
	main purpose of this field is	Date, Measure Life (yrs), Monthly kW
	expected to be for descriptions of	Summer, Monthly kW Winter, or
	why an update is being done.	Measure.
		Limited to 4,000 characters.

Questions





USER INTERFACE

EEM





ISO new england

SMD Applications Home Page

Market System \rightarrow SMD Applications Home Page

Informational Links <u>Transmission</u>	Internal Transactions	External Transactions
System Information Satellite Information	Bids & Offers (Registered Users)	Customer and Asset Management System
LCC CMS	Financial Transmission Rights (Registered Users)	Forward Reserve Market Auction
Learning	Submit Meter Reading	CROW Outage Scheduler
	Submit Peak Contribution	Forward Reserve Assignment
	Submit Monthly Regional Network Load	Forward Capacity Tracking System
	Financial Assurance Management	Forward Capacity Market Reconfiguration Auction
	Forward Capacity Market CSO Bilateral Contracts	Supplemental Availability Designation
	Demand Resource Market User Interface	NX Application (NX-9 and NX-12D)
	Claimed Capability Auditing Tool	Energy Efficiency Measure Database (EEM)
	DR Audit and Testing Tool	38

User Interface – Default View

Energy Efficiency Measure Database

Search Add Measure Detail Pending

Search Criteria					
As Of Date:	01/27/2015	Retail Customer Name:	Program Name:	Market Month:	
ISO Measure Detail ID:		Asset ID:	Reference Code:	Min Installation:	
Lead Participant:	~	Resource ID:	City:	Max Installation:	
LP Measure Detail ID:		Load Zone ID:	State:	Min Expiration:	
Sector/End Use:	~			Max Expiration:	
L			Search Reset		

Search Results															
Lead Participant(ID)	Measure Detail ID	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expiration Date	Summer kW	Winter kW	Load Zone(IC	Resource(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pending Change
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View Detail CSV

Add Measure Detail

Energy Efficiency Measure Database

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Lead Partic	ipant:		Resource ID:					City:			Max I	installation:		
LP Measure Deta	ail ID:										Min	Expiration:		
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Search Results														
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Energy Efficiency Measure Database

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LP Measure Detail ID:				Resource:	
Measure Detail Name:				Load Zone:	
Distribution Company:			– Retail Customer –		
Installation Date:	•		Retail Cu	stomer Name:	
First Month in Market:	-			Street:	
Measure Life (yrs):				City:	
Measure Expiration Date:				State:	*
Program Name:				Zip:	
Sector/End Use:		~	Reference Docum	nentation	
Custom End Use:			Reference Do	cument Name:	
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Monthly kW Winter:	Sc	ome CAMS	fields are	Updated By:	
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Validation Errors

Energy Efficiency Measure Database

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Measure Detail Name:		Load Zone:	
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Measure Life (yrs):	ОК	City:	
Measure Expiration Date:		State:	~
Program Name:		Zip:	
Sector/End Use:	×	Reference Documentation	
Custom End Use:		Reference Document Name:	
Aggregation:	N 👻	Measure Reference Code:	

Successful Entry of Measure Details

Energy Efficiency Measure Database

Search Add Measure Detail Pending

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Search

Energy Efficiency Measure Database

Search Add Measure Detail Pending

Search Criteria					
As Of Date:	01/27/2015	Retail Customer Name:	Program Name:	Market Month:	
ISO Measure Detail ID:		Asset ID:	Reference Code:	Min Installation:	
Lead Participant:	~	Resource ID:	City:	Max Installation:	1
LP Measure Detail ID:		Load Zone ID:	State:	Min Expiration:	
Sector/End Use:	~			Max Expiration:	
			Search Reset		

Search Results Measure Retail Lead Measure Installation First Month Summer Winter Program Pending Measure Life Expiration Load Zone(IC Resource(ID) Asset(ID) End Use Customer Change Participant(ID) Detail Name Date in Market kW kW Name Detail ID Date Name ---- CO. 1000 Totals: 26759.... 35278.... View Detail CSV

Search Filters

Energy Efficiency Measure Database

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Lead Participant(ID)	Measure Detail ID	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expiration Date	Summer kW	Winter kW	Load Zone(ID	Resource(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pendin Change
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Search Filter Descriptions

Name	Description
Market Month	Records with a First Month in Market date that is prior or equal to the month chosen as a search criterion that have not reached their expiration date
Min Installation	Records with an Installation Date that is later than or equal to the date chosen as a search criterion
Max Installation	Records with an Installation Date that is earlier than or equal to the date chosen as a search criterion
Min Expiration	Records with a Measure Expiration Date that is later than or equal to the date chosen as a search criterion
Max Expiration	Records with a Measure Expiration Date that is earlier than or equal to the date chosen as a search criterion

Measure Detail Search

				Sea	rcl	h Resi	ults									
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Sources in the second		201 BOTHER 188 / W.	1007017001	-9109178930	181		10110-1-	101109.2	- 19933	+ 187	1997	1000-0	100-01	1201012	1959	1000
Sources in the second	-001	tannesi becalle P	807617801	0000178841		101120-1100-00	11110-01	0.082	- 19931	1.187	100	1.000	AND VEHICLE	1201012	1959	1000
Sources in the second	001	SHORE BRIDE	807617801	-010901700010		1011701701010	111681	11108	- 19933	1.187	1981	1.000	and relation	- appendie	1959	10000
10000							81781.13	1017011	e:							

Selecting Details to View



Measure Detail CSV

Energy Efficiency Measure Database

rch Criteria					
As Of Date:	01/28/2015	Retail Customer Name:	Program Name:	Market Month:	
SO Measure Detail ID:		Asset ID:	Reference Code:	Min Installation:	
Lead Participant:	~	Resource ID:	City:	Max Installation:	
P Measure Detail ID:		Load Zone ID:	State:	Min Expiration:	
Sector/End Use:	*			Max Expiration:	

Searc	h Results															
Lead Partici	aant/ID)	Measur	e Measure Distail Name	Installation	First Month	Life	Measure Expiration Date	Summer kW	Winter kW	Load Zone(IE	Resource(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pending Change
1.000					ALC: NO.	100	100/01/2010	0.2	(6)1123	((71 ((66843))	12 Count	120000-121	INNALL R.	(Approxy)	SECONARIES.	(Sallar)
6999	Clic	k on	h the CSV b	outtor	ALCONO.	5	1779111 (201128)	6.00	(8)183	(71(06694))	GMP-Ga.	0.00107	1000	Lighting	18/74	(fuller)
Gam					178330	5	000/01/20110	(6.13370)	10.1000	(7(0684)	GMP-GR.	0.001	NUM LANS	(ighting)	18676	(faller)
(Sam	to g	ene	rate a file		1/2110	+	HF/911/811/8117	(6)(03)	10.1528	(71(06845)	G187-Ga.	GMP(7	185.97	i dell'Alego	18674	(Miles)
15444				_	10110	6	mphay james	(6)(94)	16.1579	((7)(06895)	G18P-Ga.,	0.00107	165.97	(ighting)	18674	(Salar)
E	con	tain	ing the cu	rrent	ig.contam	111		- Hotelin	1000		COMPT CO.			1 - Alexandrian (1467	-
1,910					1004		10709378591	11108	10.000		COMP (SK)		1870 B	1100	18070	(Seller)
-tem	sea	rcn	results.		1000		107/01/0301	(818)	111080		0.00	1.000	1871-187	A STREET	18070	(1004)
300					1000		1019017007	0.088	0.000		ENF (b).	1.00	1851-187	No. (Resta	1611	10000
1999	Concession in concession of the local		An other second and the second			181	10,001,70036	(6181)	10.0022		ERP (St.	1.00117	1851-87	Lanting	18511	10000
10000	Geogri Aggeli ano	(694)	THE REPORT OF THE PARTY OF T	(Rec14)/#61			10104170141	(1))689	101000		1.00	1.000	(RISELAND)	Lantena	18010	(1000)
1,000	etari tapli m	18931	Terrorial Torocants/ IT	B03317837	10030170344			1012040	101208		640 (6).	1000	reservagels.	Lapiena	18070	1999
Totals:								26759	35278							
							View Deta	il C	sv							
14 4	Page 1	of 4342	と 対 総											D	isplaying 1 - 1	2 of 52094

View a Selected Measure Detail

Energy Efficiency Measure Database

h Criteria					
As Of Date:	01/28/2015	Retail Customer Name:	Program Name:	Market Month:	
) Measure Detail ID:		Asset ID:	Reference Code:	Min Installation:	
Lead Participant:	~	Resource ID:	City:	Max Installation:	
Measure Detail ID:		Load Zone ID:	State:	Min Expiration:	
Sector/End Use:	~			Max Expiration:	

Search Results													
Lead Participant(ID)	Measure Detail ID	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expiration Date	Summer kW	Winter kW	Load Zone(IE	Resource(II		Retail	ding nge
billial Roomaling (10003	LEUPTIME	1007111/00112	1000003/000000	100	10/01/10/00	6.2	(8) 11223	((71((068843))	OD COMPL	1	Porform the search	
Connection (pph) and	144642	New Converse (Special)	HARPONE FRANCE	and the part of the second	5	1779114 (191128)	(6)(6)	0.181	(71(06694))	GAMP-GA	1.	Perform the search	
Connection Light an	1446420	Here (Encoured) Specially	APPRAL (MAL)	apply press	5	000/01/20110	0.00	121200	(71(06894)	GMP-GA			
Connectical Light on	10000	000000-0000	10001032/00320	CARDING PRESS		H/WH/HRH?	(6)(0)	10.1096	(71(06884))	G187-G1.	2.	Highlight the desired	
Connectical Light on.	16805	(6194) Three adds (810)	677014/89103	sauray janam	8	mides (Jacco	0.096		(This sector)			Measure Detail	
Communities at coget on		Here (Corrected) Telesciant		NUMBER OF STREET	100		-0.005					incusure betain	
Commission of Capito and	104907	01/00/07/101	100101/001-		100	-010917859	111100	100.00		12280 1281			
Connections Light on	10000	10100/0010010	801117011-	6(00170000	8	10/04/78591	10.100	111080		(E187-15);	3.	Click on the View	
Connections: Laple an	10000	10000/211	000117017	6(09)70946	4	1010017007	00,680	0.000		1.000		Detail button	
Summerite an Lastin an	18980	(0.01) Thereaddle \$401,500	94645178512	-699337054	181	10,00170086	16116-11	1000		100			
Connections' Lands and	16941	Second Records 7	1001017001		8	10149170591	11110-00	11100	200	1200 120			
Termetical labitory	18931	Second Speciality P	101017001		8	status (dans)	101208	1999	100311	(EX87.155).**	CONTRACTOR	sensitive renter and sur-	
Totals:							26759						
						View Detai	i c	sv					
14 4 Page 1	of 4342	b bi 22										Displaying 1 - 12 of 5	0094

View and Update a Measure Detail

- From the Search Results screen, the version of the Measure Detail displayed is the version selected in the Search Results;
 i.e., if a search was done with an *As Of Date* in the past, the version that was effective on that date will be displayed.
- After adding or updating a Measure Detail, the version of the Measure Detail displayed is the version just created or updated.



Edit button:

- Only available to users with the EEM Maintainer role
- Only available when viewing the most recent version of the Measure Detail
- Makes the fields editable for update

Energy Efficiency Measure Database

Search Add Measure Detail Pending

Measure Detail Pending	History		
Basic		CAMS Fields	
Lead Participant:		Measure:	• • • • • • • • • • • • • • • • • • •
ISO Measure Detail ID:	Inside at other layer, I	Asset:	
LP Measure Detail ID:	Connection 1998 and Bose Consump. Th	Resource:	
Measure Detail Name:	Committee (1991 and Frank Company, 3	Load Zone:	
Distribution Company:	Localitat spir and how Tarana, 1	Retail Customer	
Installation Date:		Retail Customer Name:	
First Month in Market:		Street:	
Measure Life (yrs):	Constituting and these Congress, 7	City:	
Measure Expiration Date:		State:	×
Program Name:	Connection (1997 and Prove Company, 1)	Zip:	
Sector/End Use:		Reference Documentation	
Custom End Use:	Connection (1991) and (Young Company, 7).	Reference Document Name:	
Aggregation:	Constitution of these Constants II.	Measure Reference Code:	
Number of Aggregation:	Constituting and these Constants, T	Misc	
Monthly kW Summer:	Langing off and free Longing, T	Date Updated:	
Monthly kW Winter:	Security of an family and security.	Updated By:	
H. E.		Comments:	

Energy Efficiency Measure Database

Search Add Measure Detail Pending

Measure Detail Pending History		
Basic	CAMS Fields	
Lead Participant:	Measure:	• • • • • • • • • • • • • • • • • • •
ISO Measure Detail ID:	Asset:	
LP Measure Detail ID:	Resource:	
Measure Detail Name:	Load Zone:	
Distribution Company:	Retail Customer	
Installation Date:	Retail Customer Name:	
First Month in Market:	Street:	
Measure Life (yrs):	City:	
Measure Expiration Date:	State:	~
Program Name:	Zip:	
	 Reference Documentation 	
Click on the Edit button at the	Reference Document Name:	
bottom of the page.	Measure Reference Code:	
	- Misc	
Submit Button will appear.	Date Updated:	eu) 🖸
Some fields can be edited	Updated By:	
Some neus can se cancea.	Comments:	
	E-DA	53

Pending Status

Changes to the following may change the status to Pending:

- Installation Date
- CAMS Measure
- Measure Life (years)
- Monthly kW Summer
- Monthly kW Winter

ISO review is required before changes are applied.

Measure Detail Modification State

OPEN

Data correction deadline for the First Month in Market has **not** passed.

CLOSED

Data correction deadline for its First Month in Market has passed.



Any changes that impact a *closed* month require an explanatory comment and ISO review.

Measure Details in Pending Status

- When in pending status:
 - No further edits can be made
 - Must be reviewed before the changes become effective
 - Users may view and cancel changes
- Measure Level Details cancelled by the LP or rejected by ISO are *not saved* to the database and *not recorded* in the Measure Level Detail History.
- ISO notifies the LP of the disposition of the change (approved/rejected).

Examples of modifications subject to ISO review

- Installation Date is more than three years prior to the date of Measure Detail entry (this will be suspended during cutover.)
- Monthly kW winter values are being modified for a Measure Detail that is *closed*

View Pending Changes

Energy Efficiency Measure Database

Search Add Measure Detail Pending

Pending Measure Details											
	Status	Lead Participant(ID)	Measure Detail ID	Installation Date	First Month in Market	Measure Life	Measure Expiration Da	Summer kW	Winter kW	Measure(ID)	Submitted Date
⊟ M D	☐ Measure Detail ID:										
	PENDING	100000000000000000000000000000000000000	X0000	10000000	10000000	30000	10000000	X0000	30000	100000000000000000000000000000000000000	12/10/2014
	CURRENT	100000000000000000000000000000000000000	30000	10000000	10000000	30000	X0000000	30000	30000	100000000000000000000000000000000000000	11/07/2014
⊟ M D	Measure Detail ID:										
	PENDING	100000000000000000000000000000000000000	30000	10000000	10000000	30000	10000000	30000	30000	100000000000000000000000000000000000000	12/10/2014
	CURRENT	100000000000000000000000000000000000000	30000	X0000000	10000000	30000	10000000	30000	30000	100000000000000000000000000000000000000	11/07/2014
Measure Detail ID:											
	PENDING	100000000000000000000000000000000000000	X0000	X0000000	10000000	30000	X0000000	X0000	30000	100000000000000000000000000000000000000	12/11/2014
	Cancel										

View Measure Detail History

Energy Efficiency Measure Database



Measure Detail History Example

Energy Efficiency Measure Database

earch Add Measure Detail Pending

Moscure Detail Banding History																	
Measure Detail History																	
Measure Detail ID	Record Begin Date	Record End Date	Status	LP Measure Detail ID	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expiration Da	Summer kW	Winter kW	Measure (ID)	Program Name	End Use	Retail Customer Name	Aggregat Count	Updated By
32010	02/02/2015		CURRENT	ggggggggg	•	02/01/2015	03/01/2015	3.1	03/01/2018	1	2	407140-80	light	Lighting		1	loopii 34.
331111	02/02/2015	02/02/2015	CURRENT	9999999999		02/01/2015	03/01/2015	3	01/01/2018	1	2	817161-81	light	Lighting		1	Resplication.

Questions





WEB SERVICES

EEM



Web Services Overview

- Certificate holders with access to the user interface have the same access rights to web services
- Web services accessible to authorized participants through an ISO New England published URL
- Client application that accesses EEM can be written in nearly any modern enterprise technology and language such as Java
- ISO New England gives limited support for Java by providing sample implementations

Web Services Data Exchange Specification



- Purpose is to help market participants:
 - Develop interfaces that interact and exchange market data with EEM web services
 - Comprehend and construct the market data messages essential for data exchange with EEM
- Explains how to access the EEM web services
- Lays out the format and construction of messages used to exchange data
- Describes authentication and authorization methods used to ensure security
- Contains examples of how to:
 - Code to connect to the web services with a certificate
 - Retrieve the list of Measure Details associated with the company ID the certificate is from

Questions





CUTOVER CONSIDERATIONS

EEM



Data Cutover Considerations

- All measures installed since June 16, 2006 that still contribute to CAMS monthly performance values (MPV) must be input into EEM.
- ISO intends to use EEM for reviewing the June 2015 MPV's.
- To the extent that cutover can be completed earlier, it will be useful to compare EEM reporting with other data submitted for the 2015 Existing Capacity Qualification
 - EEM intended to be used for future ExCap qualification cycles
- All web services code should be tested in the EEM Sandbox environment prior to its use with the production system.



Measures installed more than 3 years before the current system date will be set to Pending which may slow the transfer rate and require ISO review to become effective.

Post-Cutover Expectations

Participants

- Provide Measure Details in EEM on the same schedule as MPV data is submitted in CAMS
- Report EEM data as it becomes available
 - EEM does not have date-driven restrictions for data entry

ISO

- Approve or reject pending measures
- Notify participants of actions taken on pending Measure Detail changes
- Compare approved EEM data to CAMS MPV and supporting documents



ISO will **not** use EEM data as a substitute for CAMS MPV submissions.

Questions





Customer Support

Ask ISO (preferred)

- Self-service interface for submitting inquiries
- Accessible through the SMD Applications Homepage
- Requires a valid digital certificate with the role of Ask ISO/External User (Contact your security administrator for assistance)

Other Methods of Contacting Customer Support								
Method	Contact Information	Availability						
Email	<u>custserv@iso-ne.com</u>	Anytime						
Phone*	(413) 540-4220	Monday through Friday 8:00 a.m. to 5:00 p.m. (EST)						
Pager (emergency inquiries)	(877) 226-4814	Outside of regular business hours						

* *Recorded/monitored conversations*



Evaluations



