Generator Survey System in AskISO User Guide
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Introduction

ISO New England (ISO) has initiated the usage of a new generator survey platform. This platform will be replacing the previously used method of excel and emails. The platform will be located within the Ask ISO website, being a new extension to the site.

This new platform is going to be utilized by ISO to obtain the data that is laid out in Operating Procedure No. 21, Operational Surveys, Energy Forecasting & Reporting and Actions During an Energy Emergency (OP-21). There are two surveys within OP-21 for generating resources, being the Fuel Inventory and Emissions Survey and the Winter Readiness Survey.

With the new platform, there is now the ability to utilize a multitude of devices to submit the surveys. Previous it was required to use a computer to submit the surveys, now there is the functionality to use a smart phone or tablet to submit or view surveys.

The purpose of this survey platform is to create a more simple survey process, as well as creating a more secure system. The Ask ISO website will assist in creating an additional security measure.

Gaining Access to Survey Platform

Gaining access to the survey platform is done through CAMS by your company’s security manager. Contact your own Security Manager to gain the correct app group to have access to the survey platform.

There will be two app groups available. The first is the submitter role, which will be the app group given to any individual who will be submitting or altering the surveys, and the second is the viewer role, which will only give the user access to view previously submitted values.

For more information regarding the access to Ask ISO in general, please review the Ask ISO User Guide.

Survey Notification

When a new survey is requested by ISO, each individual who has survey submission access for the requested type of units will receive an email request for the submission of the survey. This survey may come from a number of different ISO employees as it is dependent on the employee who initiates the survey, however, it will always come from an ISO-NE email address. This email will also contain a link to the survey directly, or the survey can be accessed by navigating to it through the Ask ISO website.
In addition, on the date that the survey is due, another reminder email will be sent out to all units that have not yet submitted a survey. In the event that a survey has already been submitted and a reminder email is received, it is likely that complications occurred with the original submittal and another attempt is required.

A single survey will contain all generating assets assigned to the same Lead Market Participant. If you are an assigned submitter for multiple Lead Market Participants, you will receive a survey for each Lead Market Participant.

Survey Location

Once the correct app group has been given by your company’s security manager, there will be an option in the header of the page that will show the “My Surveys”. This is the link to the new survey platform.

Once at the survey location, the initial pinned view will be the “Recently Viewed” surveys. For new users, this will always be empty. By changing the view from recent to “Surveys Open” in the drop down list, the open surveys will be viewable. The other option is “Surveys Closed”, which will show all closed surveys. There is a pin next to the drop down list that will allow for the currently open view to become the default view that is shown whenever the page is opened.
Any open surveys will be viewable through this location. A status of “New” means that the survey has been requested and has not yet been submitted by any submitters for the Lead Market Participant. Click on the “Launch Survey” hyperlink to open the survey form.

**Survey Submission**

Once the desired survey has been filled out, there is a “Submit” option at the bottom of the page. Clicking this will submit the response to ISO.

If there are issues with the survey, such as required fields not being filled out, there will be a warning that will appear and inform the submitter to continue filling it out. The survey will not be able to be submitted until this has been resolved.

Once the survey has been submitted properly, there will be an email receipt sent to the submitter. This receipt will contain the responses that were submitted, as well as a PDF attachment that also contains the responses.

Within the list of surveys, the status will change to “Submitted”. The survey response can still be altered after the initial submission as long as it is shown in the Surveys Open list. Just open the survey back up through the same “Launch Survey” link, and the option to submit the survey will still be available. This will be an option until it closes which will typically be a day or two following the Due Date.

**View Previous Surveys**

In order to view previously submitted survey responses, open Ask ISO and navigate to the “My Surveys” location. Select “Surveys Closed” as the drop down view. This will show all of the closed surveys that are available to view. Select the desired survey, and it will open with the responses that were submitted most recently for that survey. All fields will not be editable and the submit button will not be visible at the bottom of the survey, but everything else should be exactly the same as the survey was upon submission. This option will remain for seven years, when the ISO document retention policy expires.

**Who to Contact for Help**
Submit an AskISO Ticket for the issue that is currently being seen. This way, the correct individuals will be able to get in contact through an official means. An alternative method is to send an email to the ISO Participant Support, AskIso@iso-ne.com, that includes a summary of the issue you are experiencing. Either method will facilitate a fast response by ISO staff.

Revision History

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