



Submit Monthly Regional Network Load User Manual

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Preface

Purpose

This user guide is a reference document created for the specific purpose of submitting Monthly Regional Network Load within the ISO New England (ISO) marketplace. This user guide is divided into three sections.

- Overview section provides general concepts for using the SMD applications.
- Layout section provides information about the specific items within the User Interface (UI).
- Task section goes into greater detail for completing specific tasks through the UI.

In most instances, web page screen captures have been used to illustrate the explanations. The SMS application is mapped to the SMD Market database.

Assumptions

An assumption has been made that the reader is familiar with using web-based applications and web-browser navigation. The market system user should have a good understanding of ISO Market Rules, Manuals, and other governing documents to properly use the SMS application to complete desired business transactions.

Change Summary

Revision	Transmittal #	Date	Comments
1.0	None	04/20/2006	Original
2.0	None	10/31/2007	October 2007 Maintenance Release
3.0	None	03/19/2013	Change to Regional Network Load UI

Submit Monthly Regional Network Load User Manual

1. Overview

1.1 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 Monthly Regional Network Load 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 the CAMS User Guide for Company and Affiliate Maintenance available on the ISO-NE 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 Monthly Regional Network Load UI.

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

1.2 Log into SMD Application

- 1. Select **Submit Monthly Regional Network Load** from the SMD Applications Home Page



Figure 1 – SMD Applications Home Page

2. The Submit Monthly Regional Network Load UI is displayed for users with valid access.

Customer VIU4(4)
Month February 2013 ... File Upload
Local Network All Local Networks

Monthly Regional Network Load Values				
ID	Regional Network Load	DUNS Number	DUNS Name	Value (KW)
4	MP4	00-779-7982	VIU4	<input type="text"/>
5	MP5	00-779-7984	LSE3	<input type="text"/>
6	MP6	00-779-7984	LSE3	<input type="text"/>
7	MP7	00-779-7985	Marketer 1	<input type="text"/>

Total
Reset Submit

Figure 2 – Submit Monthly Regional Network Load UI

2. Submit Monthly Regional Network Load UI Layout

The Submit Monthly Regional Network Load UI Layout has the following sections:

1. Main Monthly Regional Network Load UI Layout
2. Calendar Dialog Box
3. Local Network Roll Down Menu
4. File Upload Dialog Box

2.1 Main Monthly Regional Network Load UI

The Main Monthly Regional Network Load UI displays the following information:

The screenshot shows the main interface for submitting monthly regional network load values. It includes a header area with customer and month information, a table of load values, and a summary section with a total value and submission buttons.

Callout letters and their corresponding elements:

- a: Customer (VIU4(4))
- b: Month (February 2013)
- c: Local Network (All Local Networks)
- d: File Upload button
- e: ID column header
- f: Regional Network Load column header
- g: DUNS Number column header
- h: DUNS Name column header
- i: Value (KW) column header
- j: Value (KW) input field
- k: Reset button
- l: Submit button

Monthly Regional Network Load Values				
ID	Regional Network Load	DUNS Number	DUNS Name	Value (KW)
4	MP4	00-779-7982	VIU4	<input type="text"/>
5	MP5	00-779-7984	LSE3	<input type="text"/>
6	MP6	00-779-7984	LSE3	<input type="text"/>
7	MP7	00-779-7985	Marketer 1	<input type="text"/>

Total:

Buttons: Reset, Submit

Figure 3 – Submit Monthly Regional Network Load UI Layout

- a. **Customer** – Identifies the Customer logged into the Submit Monthly Regional Network Load UI
- b. **Month** – Displays Month and Year selected

- c. **Local Network** – Allows user to select all Local Networks or a specific Local Network. The default display is “All Local Networks”
- d. **File Upload** – Allows Customer to upload a CSV or XML file containing their Regional Network Load data.
- e. **ID** – Regional Network Load ID
- f. **Regional Network Load** – Regional Network Load Name
- g. **DUNS Number** – DUNS Number of the Company associated to the Regional Network Load
- h. **DUNS Name** – DUNS Name of the Company
- i. **Total** – Displays the sum of the Value (KW) column
- j. **Value (KW)** – Allows for the entry of a Monthly Regional Network Load value in KW
- k. **Reset** – Sets the Value (KW) fields to blank if no data has been submitted to SMS; if data is stored in SMS, it resets the Value (KW) field to the previously submitted values
- l. **Submit** – Stores the Value (KW) values in the SMS

Note: All the headers are displayed as hyperlinks and by single clicking on a particular heading the associated column will be sorted in ascending order. By clicking again on the header, the column will be sorted in descending order. Example, if you click on the (ascend sorted) ID header it will sort ID in descending order (see Figure 4).

Customer: VIU4(4)
 Month: February 2013
 Local Network: All Local Networks

File Upload

Monthly Regional Network Load Values				
ID	Regional Network Load	DUNS Number	DUNS Name	Value (KW)
4	MP4	00-779-7982	VIU4	33
5	MP5	00-779-7984	LSE3	50
6	MP6	00-779-7984	LSE3	444
7	MP7	00-779-7985	Marketer 1	100

Total: 627
 Reset Submit

Figure 4 – Submit Monthly Regional Network Load UI Layout: Sorting functions

2.2 Calendar Dialog Box

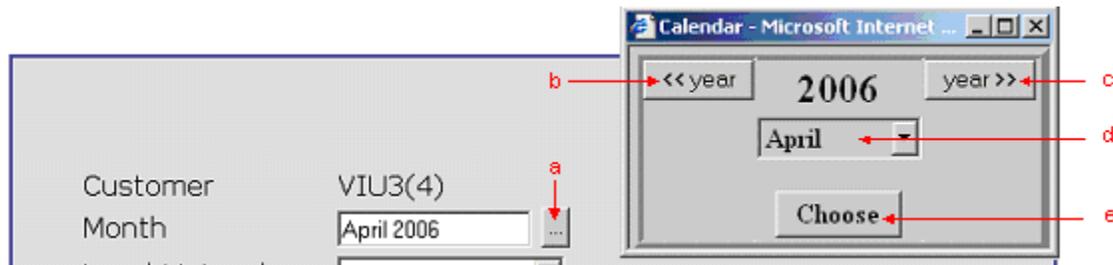


Figure 5 – Calendar Dialog Box

- a. **“...”Ellipsis Button** – Click to go the Calendar Dialog Box
- b. **“<< year” Button** – Click to select a previous year
- c. **“year >>” Button** – Click to select a subsequent year
- d. **Month Drop Down Box** – Click to select month
- e. **“Choose” Button** – Confirms selection of year and month and closes the dialog box

2.3 Local Network Drop Down Box

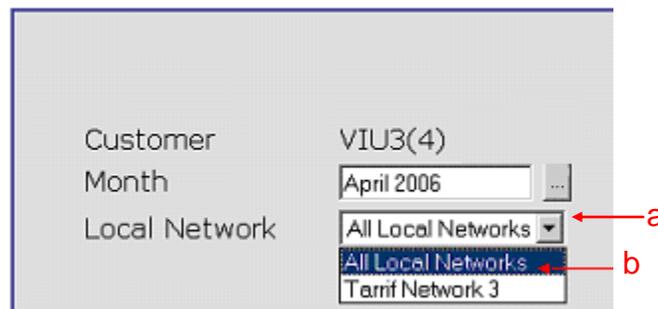


Figure 6 – Local Network Drop Down Box

- a. **▼ Button** – Click to display values in drop-down box
- b. **Drop Down Box** – Click to select item

2.4 File Upload Dialog Box

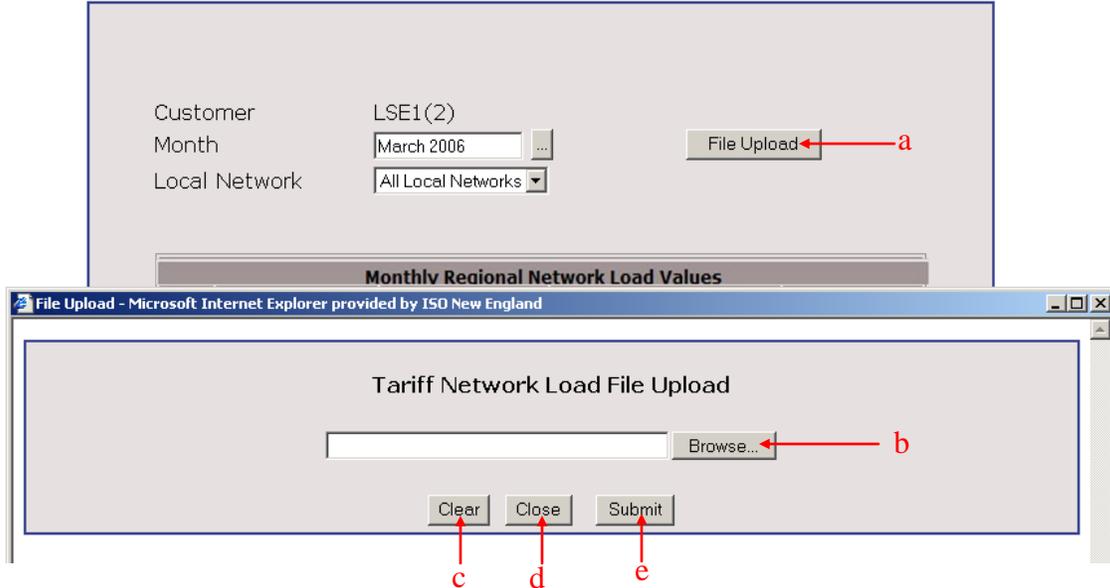


Figure 7 – File Upload Dialog Box

- a. **“File Upload” Button** – Click to display File Upload Dialog Box
- b. **“Browse...” Button** – Click to select location of the file to upload. The path will be displayed in the box to the left of the **Browse...** button
- c. **“Clear” Button** – Clears the selected path to file upload
- d. **“Close” Button** – Closes the File Upload Dialog Box
- e. **“Submit” Button** – Uploads file into to SMS

3. Tasks

3.1 Security Roles

There are two types of Security Roles:

- Read Only Security Role** – Allows the Customer to only view their associated Regional Network Load information.
- Read and Write Security Role** – Allows the Customer to view and submit their associated Regional Network Load information.

3.2 Retrieving Monthly Regional Network Load Values through the UI

Customer: VIU3(4)

Month: April 2006

Local Network: All Local Networks

ID	Regional Network Load	DUNS Number	DUNS Name	Value (KW)
4	MP4	00-779-7982	VIU4	33
5	MP5	00-779-7984	LSE3	50
6	MP6	00-779-7984	LSE3	444
7	MP7	00-779-7985	Marketer 1	100

Total: 600

Reset Submit

Figure 8 – Submit Monthly Regional Network Load UI: Date & Local Network Selection

To retrieve Monthly Regional Network Load values use the following steps:

Note: Regardless of how Monthly Regional Network Load values are submitted (UI or File Upload), these values can be retrieved through the User Interface. If no information has been submitted for a period the **Value (KW)** will be blank.

- Click on the **Ellipsis** button
- Select button to decrease **Year**
- Select button to increase **Year**
- Select **Month** from the dropdown box
- Click on the **Choose** button.

- The screen is refreshed based upon the new Month and Year selected
- f. Select a Local Network from the drop down box. In order to view all Local Networks associated to your Company, select: “All Local Networks”
 - The screen is refreshed based upon the Local Network(s) selected.

Note: Monthly Regional Network Load values can be retrieved back to March 1, 2003.

3.3 Print User Interface Information

3.3.1 Printing the User Interface with Internet Explorer

- a. From the main Monthly Regional Network Load UI screen, select the print button on the Internet Explorer toolbar.
- b. Select Print Preview to make changes to the Print Settings.

3.4 Entering Monthly Regional Network Load Values through the UI

3.4.1 Enter new Monthly Regional Network Load Values

- a. Click on the **Value (KW)** field
- b. Enter the Monthly Regional Network Load Value expressed in KW
- c. Enter a value for all rows
- d. Click on the **Submit** button
 - A confirmation dialogue box will appear with the message *Changes Were Saved*, when the Monthly Regional Network Load values have been correctly entered.

3.4.2 Updating Existing Monthly Regional Network Load Values

To change an existing value select the **Value (KW)** field, enter a new value and click the **Submit** button to save the changes.

- Again, a confirmation dialogue box will appear with the message *Changes Were Saved*, when the Monthly Regional Network Load values have been correctly updated.

3.4.3 Error Messages

Error Message	Cause
duns number on line # is missing a load value	The user attempted to submit Monthly Regional Network Load values but a value was not entered for line #
load value X on line # must be a whole number	The user attempted to enter a non numeric character in the Value (KW) data field

3.5 Entering Monthly Regional Network Load Values through a File Upload

3.5.1 Entering Monthly Regional Network Load Values through a File Upload

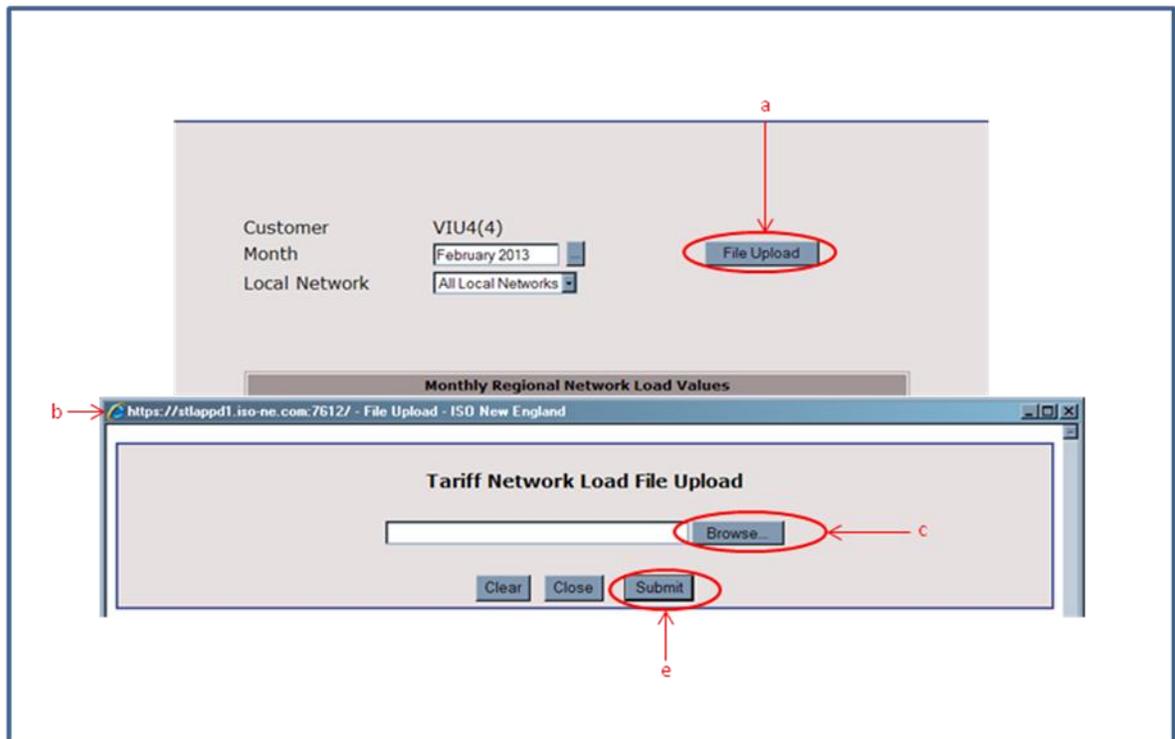


Figure 9 – Submitting a File Upload

To upload the Monthly Regional Network Load values using either a CSV or XML file use the following steps:

- a. Click the **File Upload** button
- b. A new File Upload window will appear
- c. Click on the **Browse...** button
- d. Select the file to upload
- e. Click on the **Submit** button

Note: For more information on the File Upload formats reference http://www.iso-ne.com/support/tech/file_formats/up_dwn_frmts/index.html

3.5.2 Updating Existing Values

To update existing Monthly Regional Network Load values using the file upload, you would need to resubmit a new file with the changes.

Note: It is not necessary to resubmit all Monthly Regional Network Load values, only those values that have changed.

3.5.3 Print and Save Messages through a File Upload

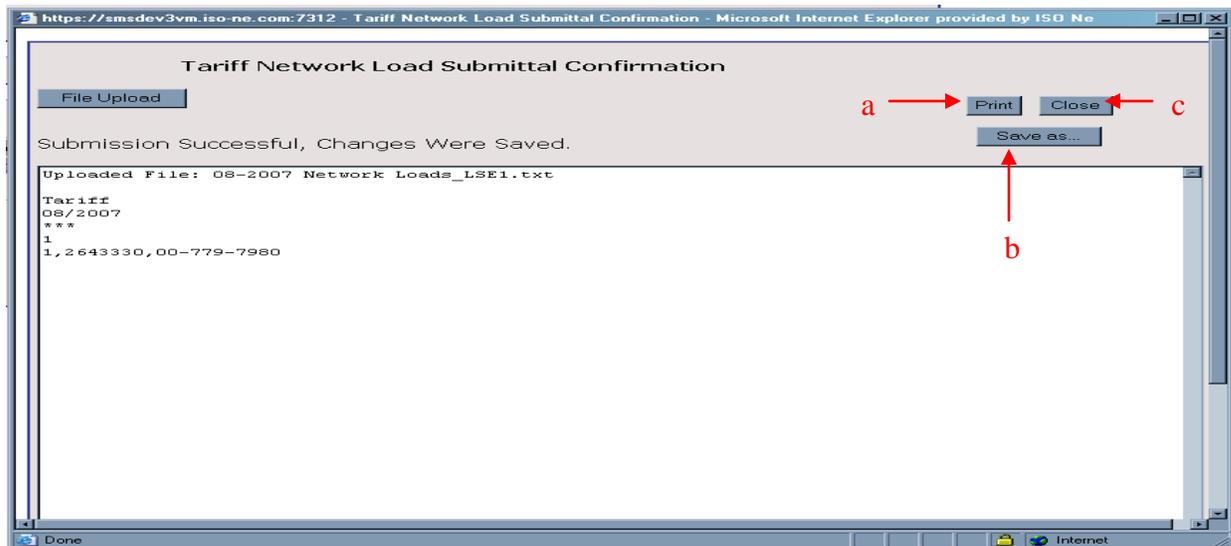


Figure 10 – Print and Save Dialogue Box for File Upload Confirmation

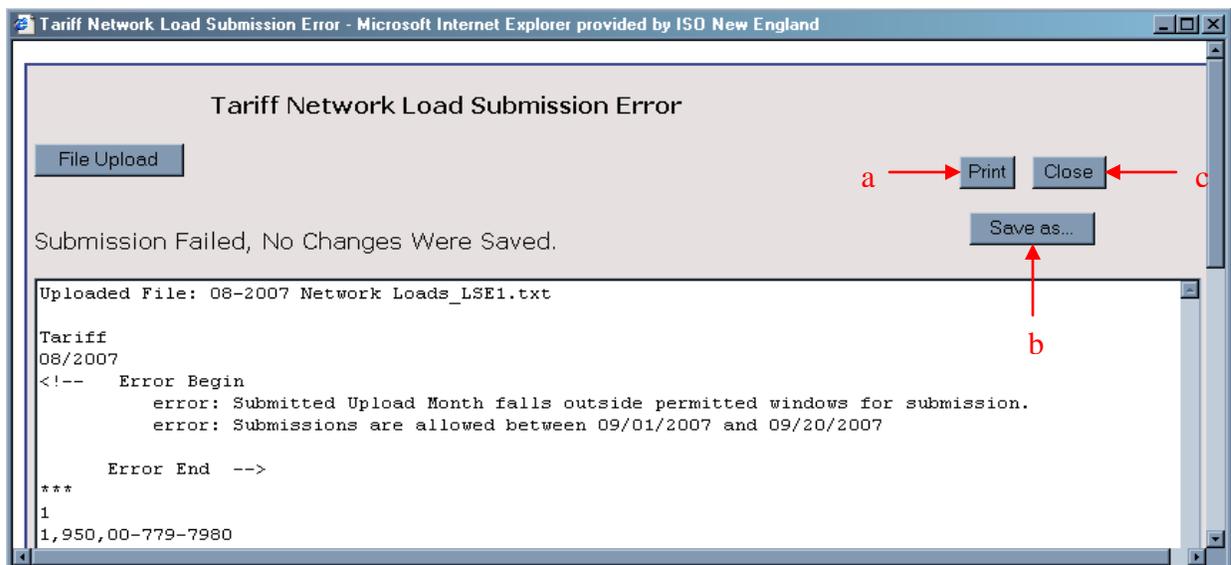


Figure 11 – Print and Save Dialogue Box for File Upload Error Message

To print confirmation and data submittal error messages, use the following steps:

- a. Click the **Print** button

- A new **Print** window will appear. Click on the **Print** button.

To save confirmation and data submittal error messages, use the following steps:

- b. Click the **Save as ...** button

- A new **File Download** window will appear. Click on the **Save** button and save as prompted.

To close confirmation and data submittal error messages, use the following step:

- c. Click the **Close** button.

3.5.4 Error Messages

Error Message	Cause	File Type
Please Select only CSV, TXT or XML Files to Upload	The user has attempted to upload an incorrect file type	
Only files with Component = "TARIFF" may be processed	Error in the first line of the file	CSV
"Component" with value " " must have a value from the list "(TARIFF)"	Error in line 4 where the Customer Data Component must = TARIFF	XML
Invalid format pattern = MM/yyyy	Invalid date format was submitted, date format must be in the form MM/yyyy	CSV and XML
Network load values can only be entered for prior months	The date specified is for the present or a future month and data cannot be submitted	CSV and XML
Invalid Network Load Id. It belongs to Local Network Id: #	Incorrect Regional Network Load to Local Network relationship	CSV and XML
Invalid Network Load Id Invalid networkLoadId Found Invalid networkLoadId encountered	1. The Regional Network Load is not active for the date specified 2. The Regional Network Load ID was not recognized by the system	CSV and XML
Invalid integer format	There are invalid characters in either the Regional Network Load Id or Value (KW) field	CSV and XML
Invalid Duns Number	The DUNS Number is incorrect for the Regional Network Load	CSV and XML
Missing Duns Number for Network Load ID	The Regional Network Load DUNS Number is missing	CSV and XML
Invalid Network Load Id	Regional Network Load ID is not recognized by the system	CSV and XML
Incorrect file format Expected the third line to have the value *** Value found: **	This describes a file format problem	CSV
The following line does not contain all necessary values	Displayed when either Regional Network Load ID, KW value or Responsible DUNS # is missing	CSV
Required field not populated	Missing Value (KW)	XML

Error Message	Cause	File Type
Duns Number is required	Missing DUNS number where the Responsible DUNS = " "	XML
Errors in field kw_Value	A non-numeric integer was found in the Value (KW) field	CSV and XML
Submitted Upload Month falls outside permitted windows for submission	Submission occurred outside of a defined submission window as specified in the Metering and Resettlement Deadlines calendar.	CSV and XML

Displayed below are typical Error Messages generated by the Monthly Regional Network Load User Interface due to invalid file contents.

```

Tariff Network Load Submission Error
Submission Failed, No Changes Were Saved.
Uploaded File: alpha 2 - NetworkLoadExternalCustomer.csv
TARIFF
03/2006
***
1
1,250,00-779-7980
<!-- Error Begin
      Errors In Field kw_Value:
          error: Invalid integer format
      Error End -->
***
2
2,44,00-779-7980
3,22,00-779-7980
***
3
5,50,00-779-7982
6,33,00-779-7982
7,4,00-779-7982
    
```

```

Tariff Network Load Submission Error
Submission Failed, No Changes Were Saved.
Uploaded File: char_NetworkLoadExternalCustomerData.xml
<NetworkLoadData Component="TARIFF" Month="03/2006" >
<LocalNetwork LocalNetworkId="3" >
  <NetworkLoadValue NetworkLoadId="4" Value="4,000" ResponsibleDUNS="00-779-7982" />
<!-- Error Begin
      Errors In Field kw_Value:
          error: Invalid integer format
      Error End -->
  <NetworkLoadValue NetworkLoadId="5" Value="555" ResponsibleDUNS="00-779-7982" />
  <NetworkLoadValue NetworkLoadId="6" Value="666" ResponsibleDUNS="00-779-7982" />
</LocalNetwork>
</NetworkLoadData>
    
```

Figure 12 – CSV and XML File Upload Errors as Displayed

4. Submission Questions or Problems

In the case, where a Customer is unable to submit their Regional Network Load information on their own, ISO New England's Customer Support department should be contacted. The ISO will submit the information on behalf of the Customer and provide the confirmation of the submittal.

Customer Support can be contacted at: <http://www.iso-ne.com/support/custsvc/contact/index.html>