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# New England External Transaction Tool (NEXTT)

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## *User Interface*

**Cheryl Mendrala & Tianna Wrona**  
Operations Analysis & Integration



*Presentation updated 7/30/2019. Affected slides are: 5, 18, 50, 51*



# Acronyms

Acronym	Description
<b>CAMS</b>	Customer Asset Management System
<b>CSO</b>	Capacity Supply Obligation
<b>DAM</b>	Day-ahead Market
<b>MP</b>	Market Participant
<b>RTM</b>	Real-time Market
<b>SS</b>	Self Schedule
<b>UI</b>	user interface
<b>XML</b>	eXtensible Markup Language

# Topics and Objectives

- NEXTT project timeline
- NEXTT Navigation
- NEXTT Organizer
- Viewing historical transactions
- Submitting transactions
- Resolving non-Approved statuses



# What is the timeline?

TIMING OR DEADLINE	SYSTEM	ACTION OR EVENT
<b>August 1, 2019</b>	<b>NEXTT Sandbox</b>	<ul style="list-style-type: none"><li>• Users will be able to submit, modify and retrieve transactions via the GUI and programmatically</li></ul>
<b>October 23, 2019</b>	<b>NEXTT</b>	<ul style="list-style-type: none"><li>• The current EES software will convert over to NEXTT</li><li>• All existing transactions will be converted to the new system</li><li>• Upon cutover, users will be able to use NEXTT to submit, modify and retrieve transactions via the GUI and programmatically</li></ul>

# User Access to NEXTT

- Application name has changed from EES to NEXTT in CAMS
  - Both Sandbox and production application continue to exist
  - Conversion to NEXTT in CAMS will be done by ISO during cutover

The screenshot shows the 'SMD Applications Home Page' for ISO New England. The page features a navigation menu on the left with links for 'Transmission System Information', 'Satellite Information', 'LCC Vision Learning', and 'ASK ISO'. The main content area is a grid of application buttons: 'Internal Transactions', 'External Transactions', 'Bids & Offers (Registered Users)', 'Customer and Asset Management System', 'Financial Transmission Rights (Registered Users)', 'Forward Reserve Market Auction', 'Submit Meter Reading', and 'CROW'. A green callout box with the text 'No change to SMD Homepage' points to the 'External Transactions' button, which is also highlighted with a green border.

- User Roles are unchanged
  - Read/Write access is required to submit transactions
  - Only Read access is required to query transactions

# Summary of Business and Process Changes

## Get more information on business changes:

- Project page
- The XML presentation
- Touched on during this webinar

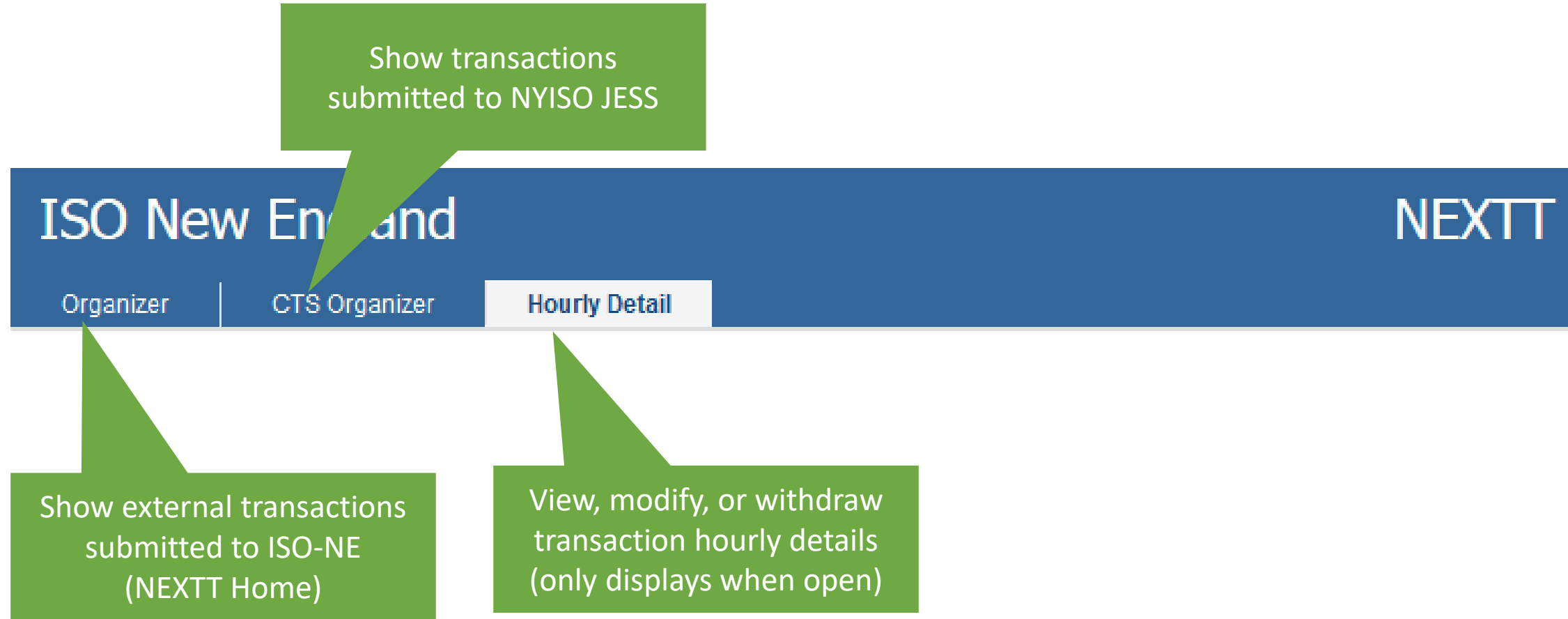
	Subject	Current EES	New System (NEXTT)
<b>A</b>	<b>Timing of RTM validation results</b>	If all validations are successful, status = Pre-Approved and ISO-NE moves to APPROVED	If all validations are successful, status of APPROVED is returned to customer
<b>B</b>	<b>eTag status for ISO automated validation</b>	On initial submittal, transaction will reach Pre-Approved while eTag status is only Pending	Automated validations will only set the status to APPROVED based on comparison with an eTag status of Confirmed.
<b>C</b>	<b>Granularity of validation</b>	One status for the overall transaction	Each hour is evaluated separately so a transaction can have more than one status
<b>D</b>	<b>eTag and OASIS Required at submittal</b>	Transactions can be submitted without eTag and OASIS information and added upon future submittal	If an eTag ID or OASIS is required, that information must be entered in order to submit the transaction
<b>E</b>	<b>eTag validation</b>	eTag MW must MATCH transaction MW	eTag MW must be greater than transaction MW
<b>F</b>	<b>RTM Modifications after Initial Submittal</b>	Modifications do not impact a previously APPROVED transaction until the modification becomes APPROVED	Upon submittal, the new data replaces the previously submitted data, regardless of the status
<b>G</b>	<b>Modifying header data</b>	Once RT status is APPROVED Options cannot be changed	Header data, Options and OASIS data, can be modified until the SS market deadline
<b>H</b>	<b>Market deadline enforcement</b>	ISO-NE monitors for e-Tag changes that can become confirmed after the market deadline	Any transaction that is not APPROVED by the market deadline will be denied

# NEXTT UI Basics

- *NEXTT navigation*
- *Organizer capabilities*
- *CTS Organizer tab*

# NEXTT Navigation

*These tabs are the NEXTT user interface*





# NEXTT Organizer Tab

ISO New England
NEXTT
Welcome Jane Doe 12345

Organizer
CTS Organizer

Create New

Create from eTag

Create from XML

Search by Criteria

From

To

Direction

Interface

Options

DA Type

RT Type

RT Status

Search by ID

ID Type

ID Value

Include Date Range

From

To

ISO-NE ID	Start	Stop	DA	RT	RT Status	Dir	Source	Sink	eTag ID	OASIS	Last Updated Time	Outside Name
4510304	07/24/2019 00:00	07/25/2019 00:00		SS	P	T	.I.SALBRYNB345 1	.I.ROSETON 345 1	NBSO_ISNETHROUGH1_ISNE		07/23/2019 09:15:45	Thru
4510303	07/24/2019 00:00	07/25/2019 00:00	P	P	P	I	.I.SALBRYNB345 1		NBSO_ISNEIMP2345_ISNE		07/23/2019 09:15:43	Import9
4510302	07/24/2019 00:00	07/25/2019 00:00	P	P	A	I	.I.SALBRYNB345 1		NBSO			
4510301	07/24/2019 00:00	07/25/2019 00:00	P	P	A/P/W	E		.I.HQHIGATE120 2	ISNE			
4510300	07/24/2019 00:00	07/25/2019 00:00	P	P	P	I	.I.HQ_P1_P2345 5		NYIS			N
4510299	07/24/2019 00:00	07/25/2019 00:00	P	P	D/P	E		.I.NRTHPORT138 5	ISNE_ISNETEST113_NYS		07/23/2019 09:15:36	JustTest2
4510298	07/24/2019 00:00	07/25/2019 00:00	P	P	P	E		.I.HQHIGATE120 2	ISNE_ISNESHOW124_HQT		07/23/2019 09:15:34	MoreTest2
4510297	07/24/2019 00:00	07/25/2019 00:00	P	P	P	I	.I.SALBRYNB345 1		NBSO_ISNECLM4333_ISNE		07/23/2019 09:15:33	Import6
4510296	07/24/2019 00:00	07/25/2019 00:00		SS	W	I	.I.HQHIGATE120 2		NBSO_ISNEDAM1115_ISNE		07/23/2019 10:10:08	RTOnly5
4510295	07/24/2019 00:00	07/25/2019 00:00	SS			I	.I.SALBRYNB345 1		NBSO_ISNEDAM1115_ISNE			
4510294	07/24/2019 06:00	07/24/2019 13:00	P	P	P	I	.I.HQ_P1_P2345 5		HQT_ISNESHOW23_ISNE	56455		
4510293	07/24/2019 00:00	07/25/2019 00:00		SS	P	I	.I.HQHIGATE120 2		NBSO_ISNEDAM1114_ISNE			
4510292	07/24/2019 00:00	07/25/2019 00:00	U			I	.I.SALBRYNB345 1		NBSO_ISNEDAM1114_ISNE			
4510291	07/24/2019 00:00	07/25/2019 00:00	P	P	P	E		.I.SALBRYNB345 1	ISNE_ISNESHOW126_NBSO			
4510290	07/24/2019 00:00	07/25/2019 00:00	P	P	P	I	.I.HQ_P1_P2345 5		HQT_ISNESHOW25_ISNE	13213	07/23/2019 09:15:20	Import4
4510289	07/24/2019 00:00	07/25/2019 00:00		SS	P	I	.I.HQHIGATE120 2		NBSO_ISNEDAM1113_ISNE		07/23/2019 09:15:19	RTOnly3

Total Records: 25

This is what you see when you first log into NEXTT

Scroll right to see additional default fields

# Components of the NEXTT Organizer Tab

ISO New England NEXTT Welcome Jane Doe 12345

Organizer CTS Organizer ← Navigate displays

Create transactions

Create New

Create from eTag

Create from XML

Search transactions (filter)

Search by Criteria

From: 07/24/2019 To: 07/24/2019

Direction: [ ] DA Type: [ ] ID Type: [ ]

Interface: [ ] Options: [ ]

Include Date Range

From: [ ] To: [ ]

Reset Search

ISO-NE ID	Start	Stop	DA	RT	RT Status	Dir	Source	Sink	eTag ID	OASIS	Last Updated Time	Outside Name
4510304	07/24/2019 00:00	07/25/2019 00:00		SS	P	T	.I.SALBRYNB345 1	.I.ROSETON 345 1	NBSO_ISNETHROUGH1_ISNE		07/23/2019 09:15:45	Thru
4510303	07/24/2019 00:00	07/25/2019 00:00	P	P	P	I	.I.SALBRYNB345 1		NBSO_ISNEIMP2345_ISNE		07/23/2019 09:15:43	Import9
4510302	07/24/2019 00:00	07/25/2019 00:00	P	P	A	I	.I.SALBRYNB345 1		NBSO_ISNEIMP1234_ISNE		07/23/2019 09:15:41	Import8
4510301	07/24/2019 00:00	07/25/2019 00:00	P	P	A/P/W	E		.I.HQHIGATE120 2	ISNE_ISNESHOW125_HQT		07/23/2019 10:10:36	JustTest3
4510300	07/24/2019 00:00	07/25/2019 00:00	P	P	P	I	.I.HQ_P			54654	07/23/2019 09:15:38	Import7
4510299	07/24/2019 00:00	07/25/2019 00:00	P	P	D/P	E					07/23/2019 09:15:36	JustTest2
4510298	07/24/2019 00:00	07/25/2019 00:00	P	P	P	E					07/23/2019 09:15:34	MoreTest2
4510297	07/24/2019 00:00	07/25/2019 00:00	P	P	P	I					07/23/2019 09:15:33	Import6
4510296	07/24/2019 00:00	07/25/2019 00:00		SS	W	I					07/23/2019 10:10:08	RTOnly5
4510295	07/24/2019 00:00	07/25/2019 00:00	SS			I	.I.SALB				07/23/2019 09:15:29	DAOnly5
4510294	07/24/2019 06:00	07/24/2019 13:00	P	P	P	I	.I.HQ_P1_345 5		HQT_ISNESHOW23_ISNE	56455	07/23/2019 09:15:27	Import5
4510293	07/24/2019 00:00	07/25/2019 00:00		SS	P	I	.I.HQHIGATE120 2		NBSO_ISNEDAM1114_ISNE		07/23/2019 09:15:26	RTOnly4
4510292	07/24/2019 00:00	07/25/2019 00:00	U			I	.I.SALBRYNB345 1		NBSO_ISNEDAM1114_ISNE		07/23/2019 09:15:24	DAOnly4
4510291	07/24/2019 00:00	07/25/2019 00:00	P	P	P	E		.I.SALBRYNB345 1	ISNE_ISNESHOW126_NBSO		07/23/2019 09:15:22	Export2
4510290	07/24/2019 00:00	07/25/2019 00:00	P	P	P	I	.I.HQ_P1_P2345 5		HQT_ISNESHOW25_ISNE	13213	07/23/2019 09:15:20	Import4
4510289	07/24/2019 00:00	07/25/2019 00:00		SS	P	I	.I.HQHIGATE120 2		NBSO_ISNEDAM1113_ISNE		07/23/2019 09:15:19	RTOnly3

Total Records: 25

Search Results

To save space on the display, abbreviations are used

# Components of the NEXTT Organizer Tab (continued)

ISO New England
NEXTT
Welcome Jane Doe 12345

Organizer
CTS Organizer

Create New

Search by Criteria

Search by ID

Direction

Interface

Options

DA Type

RT Type

RT Status

Reset
Search

ID Type

ID Value

Include Date Range

From

To

Reset
Search

ISO-NE ID	Start	Stop	DA	RT	RT Status	Dir	Source	Sink	eTag ID	OASIS	Last Updated Time	Outside Name
4510304	07/24/2019 00:00	07/25/2019 00:00		SS	P	T	.I.SALBRYNB345 1	.I.ROSETON 345 1	NBSO_ISNETHROUGH1_ISNE		07/23/2019 09:15:45	Thru
4510303	07/24/2019 00:00	07/25/2019 00:00	P	P	P	I	.I.SALBRYNB345 1		NBSO_ISNEIMP2345_ISNE		07/23/2019 09:15:43	Import9
4510302	07/24/2019 00:00	07/25/2019 00:00	P	P	A	I	.I.SALBRYNB345 1		NBSO_ISNEIMP1234_ISNE		07/23/2019 09:15:41	Import8
4510301	07/24/2019 00:00	07/25/2019 00:00	P	P	A/P/W	E		.I.HQHIGATE120 2	ISNE_ISNESHOW125_HQT		07/23/2019 10:10:36	JustTest3
4510300	07/24/2019 00:00	07/25/2019 00:00	P	P	P	I	.I.HQ_P1_P2345 5		NYIS_ISNECLM4333_ISNE	54654	07/23/2019 09:15:38	Import7
4510299	07/24/2019 00:00	07/25/2019 00:00	P	P	D/P	E		.I.NRTHPORT138 5	ISNE_ISNETEST13_NYIS		07/23/2019 09:15:36	JustTest2
4510298	07/24/2019 00:00	07/25/2019 00:00	P	P	P	E		.I.HQHIGATE120 2	ISNE_ISNESHOW124_HQT		07/23/2019 09:15:34	MoreTest2
4510297	07/24/2019 00:00	07/25/2019 00:00	P	P	P	I	.I.SALBRYNB345 1		NBSO_ISNECLM4333_ISNE		07/23/2019 09:15:33	Import6
4510296	07/24/2019 00:00	07/25/2019 00:00		SS	W	I	.I.HQHIGATE120 2		NBSO_ISNEDAM1115_ISNE		07/23/2019 10:10:08	RTOnly5
4510295	07/24/2019 00:00	07/25/2019 00:00	SS			I	.I.SALBRYNB345 1		NBSO_ISNEDAM1115_ISNE		07/23/2019 09:15:29	DAOnly5
4510294	07/24/2019 06:00	07/24/2019 13:00	P	P	P	I	.I.HQ_P1_P2345 5		HQT_ISNESHOW23_ISNE	56455	07/23/2019 09:15:27	Import5
4510293	07/24/2019 00:00	07/25/2019 00:00		SS	P	I	.I.HQHIGATE120 2		NBSO_ISNEDAM1114_ISNE		07/23/2019 09:15:26	RTOnly4
4510292	07/24/2019 00:00	07/25/2019 00:00	U			I	.I.SALBRYNB345 1		NBSO_ISNEDAM1114_ISNE		07/23/2019 09:15:24	DAOnly4
4510291	07/24/2019 00:00	07/25/2019 00:00						.I.SALBRYNB345 1	ISNE_ISNESHOW126_NBSO		07/23/2019 09:15:22	Export2
4510290	07/24/2019 00:00	07/25/2019 00:00					45 5		HQT_ISNESHOW25_ISNE	13213	07/23/2019 09:15:20	Import4
4510289	07/24/2019 00:00	07/25/2019 00:00					20 2		NBSO_ISNEDAM1113_ISNE		07/23/2019 09:15:19	RTOnly3

Total Records: 25

- Export transactions
- Show/Hide columns

Open Hourly Detail display to view, modify or withdraw a transaction

# Sort Organizer Records

ISO New England
NEXTT
Welcome Jane Doe 12345

Organizer
CTS Organizer

Search by Criteria

Create New

Create from e

Create from >

Search by ID

ID Type

ID Value

Include Date Range

From

To

DA Type

RT Type

RT Status

Reset

Search

Click the name of any column to sort by it

ISO-NE ID	Start	Stop	DA	RT	RT Status	Dir	Source	Sink	eTag ID	OASIS	Last Updated Time	Outside Name
4510304	07/24/2019 00:00	07/25/2019 00:00		SS	P	T	.I.SALBRYNB345 1	.I.ROSETON 345 1	NBSO_ISNETHROUGH1_ISNE		07/23/2019 09:15:45	Thru
4510303	07/24/2019 00:00	07/25/2019 00:00	P	P	P	I	.I.SALBRYNB345 1		NBSO_ISNEIMP2345_ISNE		07/23/2019 09:15:43	Import9
4510302	07/24/2019 00:00	07/25/2019 00:00	P	P	A	I	.I.SALBRYNB345 1		NBSO_ISNEIMP1234_ISNE		07/23/2019 09:15:41	Import8
4510301	07/24/2019 00:00	07/25/2019 00:00	P	P	A/P/W	E		.I.HQHIGATE120 2	ISNE_ISNESHOW125_HQT		07/23/2019 10:10:36	JustTest3
4510300	07/24/2019 00:00	07/25/2019 00:00	P	P	P	I	.I.HQ_P1_P2345 5		NYIS_ISNECLM4333_ISNE	54654	07/23/2019 09:15:38	Import7
4510299	07/24/2019 00:00	07/25/2019 00:00	P	P	D/P	E		.I.NRTHPORT138 5	ISNE_ISNETEST13_NYIS		07/23/2019 09:15:36	JustTest2
4510298	07/24/2019 00:00	07/25/2019 00:00	P	P	P	E		.I.HQHIGATE120 2	ISNE_ISNESHOW124_HQT		07/23/2019 09:15:34	MoreTest2
4510297	07/24/2019 00:00	07/25/2019 00:00	P	P	P	I	.I.SALBRYNB345 1		NBSO_ISNECLM4333_ISNE		07/23/2019 09:15:33	Import6
4510296	07/24/2019 00:00	07/25/2019 00:00		SS	W	I	.I.HQHIGATE120 2		NBSO_ISNEDAM1115_ISNE		07/23/2019 10:10:08	RTOnly5
4510295	07/24/2019 00:00	07/25/2019 00:00	SS			I	.I.SALBRYNB345 1		NBSO_ISNEDAM1115_ISNE		07/23/2019 09:15:29	DAOnly5
4510294	07/24/2019 06:00	07/24/2019 13:00	P	P	P	I	.I.HQ_P1_P2345 5		HQT_ISNESHOW23_ISNE	56455	07/23/2019 09:15:27	Import5
4510293	07/24/2019 00:00	07/25/2019 00:00		SS	P	I	.I.HQHIGATE120 2		NBSO_ISNEDAM1114_ISNE		07/23/2019 09:15:26	RTOnly4
4510292	07/24/2019 00:00	07/25/2019 00:00	U			I	.I.SALBRYNB345 1		NBSO_ISNEDAM1114_ISNE		07/23/2019 09:15:24	DAOnly4
4510291	07/24/2019 00:00	07/25/2019 00:00	P	P	P	E		.I.SALBRYNB345 1	ISNE_ISNESHOW126_NBSO		07/23/2019 09:15:22	Export2
4510290	07/24/2019 00:00	07/25/2019 00:00	P	P	P	I	.I.HQ_P1_P2345 5		HQT_ISNESHOW25_ISNE	13213	07/23/2019 09:15:20	Import4
4510289	07/24/2019 00:00	07/25/2019 00:00		SS	P	I	.I.HQHIGATE120 2		NBSO_ISNEDAM1113_ISNE		07/23/2019 09:15:19	RTOnly3

Total Records: 25

# Customize Organizer Columns

ISO New England

NEXTT

Welcome Jane Doe 12345

Click the context menu and select **Show Hide Columns**



- Export to CSV
- XML Export (all intervals)
- XML Export (intervals in date range)
- Show Hide Columns

Show/Hide Columns

- Start
- Stop
- DA
- RT
- RT Status
- Dir
- Source
- Sink
- eTag ID
- OASIS
- Last Updated Time
- Outside Name
- Outside ID
- Imp Res ID
- GIS ID
- Opt
- Subaccount

Search by ID

ID Type

ID Value

Include Date Range

From

To

	eTag ID	OASIS	Last Updated Time	Outside Name
45 1	NBSO_ISNETHROUGH1_ISNE		07/23/2019 09:15:45	Thru
	NBSO_ISNEIMP2345_ISNE		07/23/2019 09:15:43	Import9
	NBSO_ISNEIMP1234_ISNE		07/23/2019 09:15:41	Import8
20 2	ISNE_ISNESHOW125_HQT		07/23/2019 10:10:36	JustTest3
	NYIS_ISNECLM4333_ISNE	54654	07/23/2019 09:15:38	Import7
138 5	ISNE_ISNETEST13_NYIS		07/23/2019 09:15:36	JustTest2
20 2	ISNE_ISNESHOW124_HQT		07/23/2019 09:15:34	MoreTest2
	NBSO_ISNECLM4333_ISNE		07/23/2019 09:15:33	Import6
	NBSO_ISNEIMP1115_ISNE		07/23/2019 10:10:00	Import5

1. All columns are selected by default
2. Deselect to hide
3. Click save
  - Changes are saved in browser
  - Clearing cache requires reselecting

Total Records: 25

Save

# CTS Organizer Shows Transactions Submitted to NYISO JESS

ISO New England

Organizer

CTS Organizer

Exact match not required

Date: 04/15/2019

Direction:

eTag ID:

Search

Customer	eTag ID	ISONE ID	JESS ID	GIS ID	Direction	Hour Begin	Bid MW				Cleared MW			
							00	15	30	45	00	15	30	45
ISNE_	12_NYIS				EXPORT	04/15/2019 13	30	30	30	30	0	0	0	0
ISNE_	13_NYIS				EXPORT	04/15/2019 14	30	30	30	30	30	30	30	30
ISNE_	14_NYIS				EXPORT	04/15/2019 15	30	30	30	30	0	0	0	0
					EXPORT	04/15/2019 16	30	30	30	30	0	0	0	0
					EXPORT	04/15/2019 17	30	30	30	30	0	0	0	0
					EXPORT	04/15/2019 18	30	30	30	30	0	0	0	30
					EXPORT	04/15/2019 19	30	30	30	30	30	30	30	30
ISNE_	19_NYIS				EXPORT	04/15/2019								
ISNE_	20_NYIS				EXPORT	04/15/2019								
ISNE_	23_NYIS				EXPORT	04/15/2019								
ISNE_	24_NYIS				EXPORT	04/15/2019 23	30			30	30	30	0	30
ISNE_	25_NYIS				EXPORT	04/15/2019 24	30			30	30	0	0	0
NYIS_	15_ISNE				IMPORT	04/15/2019 08	32			32	32	32	32	32
NYIS_	15_ISNE				IMPORT	04/15/2019 10	50			50	50	50	50	50

- Click on any column to sort
- Default sort = eTag ID, Hour Begin

Data is not available until after the operating day

If data for yesterday is not presented the data has not yet been finalized.

Total Records: 39

# Searching (Filtering) with the NEXTT Organizer



# Two Ways to Search Existing Transactions

ISO New England NEXTT Welcome Jane Doe 12345

Organizer CTS Organizer

Create New  
Create from eTag  
Create from XML

Search existing transactions by criteria

Search by Criteria

From:  To:

Direction:   
Interface:   
Options:

DA Type:   
RT Type:   
RT Status:

Reset Search

Search existing transactions by known ID

Search by ID

ID Type:   
ID Value:

Include Date Range  
From:   
To:

Reset Search

ISO-NE ID	Start	Stop	DA	RT	RT Status	Dir	Source	Sink	eTag ID	OASIS	Last Updated Time	Outside Name
4510304	07/24/2019 00:00	07/25/2019 00:00		SS	P	T	.I.SALBRYNB345 1	.I.ROSETON 345 1	NBSO_ISNETHROUGH1_ISNE		07/23/2019 09:15:45	Thru
4510303	07/24/2019 00:00	07/25/2019 00:00	P	P	P	I	.I.SALBRYNB345 1		NBSO_ISNEIMP2345_ISNE		07/23/2019 09:15:43	Import9
4510302	07/24/2019 00:00	07/25/2019 00:00	P	P	A	I	.I.SALBRYNB345 1		NBSO_ISNEIMP1234_ISNE		07/23/2019 09:15:41	Import8
4510301	07/24/2019 00:00	07/25/2019 00:00	P	P	A/P/W	E		.I.HQHIGATE120 2	ISNE_ISNESHOW125_HQT		07/23/2019 10:10:36	JustTest3
4510300	07/24/2019 00:00	07/25/2019 00:00	P	P	P	I	.I.HQ_P1_P2345 5		NYIS_ISNECLM4333_ISNE	54654	07/23/2019 09:15:38	Import7
4510299	07/24/2019 00:00	07/25/2019 00:00	P	P	D/P	E		.I.NRTHPORT138 5	ISNE_ISNETEST13_NYIS		07/23/2019 09:15:36	JustTest2
4510298	07/24/2019 00:00	07/25/2019 00:00	P	P	P	E		.I.HQHIGATE120 2	ISNE_ISNESHOW124_HQT		07/23/2019 09:15:34	MoreTest2
4510297	07/24/2019 00:00	07/25/2019 00:00	P	P	P	I	.I.SALBRYNB345 1		NBSO_ISNECLM4333_ISNE		07/23/2019 09:15:33	Import6
4510296	07/24/2019 00:00	07/25/2019 00:00		SS	W	I	.I.HQHIGATE120 2		NBSO_ISNEDAM1115_ISNE		07/23/2019 10:10:08	RTOnly5
4510295	07/24/2019 00:00	07/25/2019 00:00	SS			I	.I.SALBRYNB345 1		NBSO_ISNEDAM1115_ISNE		07/23/2019 09:15:29	DAOnly5
4510294	07/24/2019 06:00	07/24/2019 13:00	P	P	P	I	.I.HQ_P1_P2345 5		HQT_ISNESHOW23_ISNE	56455	07/23/2019 09:15:27	Import5
4510293	07/24/2019 00:00	07/25/2019 00:00		SS	P	I	.I.HQHIGATE120 2		NBSO_ISNEDAM1114_ISNE		07/23/2019 09:15:26	RTOnly4
4510292	07/24/2019 00:00	07/25/2019 00:00	U			I	.I.SALBRYNB345 1		NBSO_ISNEDAM1114_ISNE		07/23/2019 09:15:24	DAOnly4
4510291	07/24/2019 00:00	07/25/2019 00:00	P	P	P	E		.I.SALBRYNB345 1	ISNE_ISNESHOW126_NBSO		07/23/2019 09:15:22	Export2
4510290	07/24/2019 00:00	07/25/2019 00:00	P	P	P	I	.I.HQ_P1_P2345 5		HQT_ISNESHOW25_ISNE	13213	07/23/2019 09:15:20	Import4
4510289	07/24/2019 00:00	07/25/2019 00:00		SS	P	I	.I.HQHIGATE120 2		NBSO_ISNEDAM1113_ISNE		07/23/2019 09:15:19	RTOnly3

Total Records: 25

Search presents up to 1,000 records



# Search by Criteria

- Default is today
- Search by a single date or by a date range

*Note: If the **From** date is changed, NEXTT will automatically update the **To** date equal to the **From** date*

ISO New England

Organizer CTS Organizer

Welcome Jane Doe 12345

- Create New
- Create from eTag
- Create from XML

## Search by Criteria

From: 07/30/2019  
To: 07/30/2019

Direction: [Dropdown]  
Interface: [Dropdown]  
Options: [Dropdown]

DA Type: [Dropdown]  
RT Type: [Dropdown]  
RT Status: [Dropdown]

Reset Search

- EXPORT
- IMPORT
- THROUGH

- .I.HQHIGATE120 2
- .I.HQ\_P1\_P2345 5
- .I.SALBRYNB345 1
- .I.SHOREHAM138 99
- .I.ROSETON 345 1
- .I.NRTHPORT138 5

- EET or SET
- Grandfathered
- Import Resource
- GIS
- Non CSO Export

- PRICED
- SELF SCHEDULED
- UPTO CONGESTION

- PRICED
- SELF SCHEDULED

- APPROVED
- DENIED
- ISO REVIEW
- PENDING ACTION
- WITHDRAWN

4510296	07/24/2019 00:00	07/25/2019 07:00	SS	W	.I.HQHIGATE120 2	NBSO_ISNEDAM1115_ISNE	
4510295	07/24/2019 00:00	07/25/2019 07:00	SS	W	.I.HQ_P1_P2345 5	NBSO_ISNEDAM1115_ISNE	
4510294	07/24/2019 06:00	07/25/2019 07:00	SS	W	.I.SALBRYNB345 1	NBSO_ISNEDAM1114_ISNE	56455
4510293	07/24/2019 00:00	07/25/2019 07:00	SS	W	.I.SHOREHAM138 99	NBSO_ISNEDAM1114_ISNE	
4510292	07/24/2019 00:00	07/25/2019 07:00	SS	W	.I.ROSETON 345 1	NBSO_ISNEDAM1113_ISNE	13213
4510291	07/24/2019 00:00	07/25/2019 07:00	SS	W	.I.NRTHPORT138 5	NBSO_ISNEDAM1113_ISNE	
4510290	07/24/2019 00:00	07/25/2019 07:00	SS	W			
4510289	07/24/2019 00:00	07/25/2019 07:00	SS	W			

Total Records: 25

# Search by Criteria Tips

## Increasing filters decreases the number of results

### Example:

DA Type = Priced and RT Type = Priced

The image shows two filter dropdown menus. The first is labeled 'DA Type' and has three options: 'PRICED' (checked), 'SELF SCHEDULED' (unchecked), and 'UPTO CONGESTION' (unchecked). The second is labeled 'RT Type' and has two options: 'PRICED' (checked) and 'SELF SCHEDULED' (unchecked).

Gives only those transactions with:

- both DA **AND** RT priced; not transactions with either one or the other

## For some fields, selecting *ALL* filters is not the same as selecting *none* of the filters

### Example:

RT Type = empty

The image shows an 'RT Type' dropdown menu with the text 'RT Type' to its left. The dropdown is open, showing two options: 'PRICED' (unchecked) and 'SELF SCHEDULED' (unchecked).

Gives transactions with:

- RT Type = Priced **or** Self Scheduled
- and also those with no RT MW

RT Type = Priced **and** Self Scheduled

The image shows an 'RT Type' dropdown menu with the text 'RT Type' to its left. The dropdown is open, showing the text 'All selected (2) -' at the top, followed by two options: 'PRICED' (checked) and 'SELF SCHEDULED' (checked).

Gives only those transactions with:

- RT MW

# Search by ID

The screenshot shows the 'Search by ID' interface in the NEXTT system. The interface includes a header for 'ISO New England' and 'NEXTT', a 'Search by Criteria' section with date and direction filters, and a 'Search by ID' section with dropdowns for 'ID Type' and 'ID Value', an 'Include Date Range' checkbox, and 'From'/'To' date fields. A 'Reset' and 'Search' button are at the bottom. A table of search results is visible in the background.

**1. Choose from a list of ID Types**

**2. Set the ID Value**

**3. (optional) Include date range to minimize transactions**

**4. Click Search**

All ID Types searches are exact match, except the eTag ID field, which uses a 'like' match search

Top	DA	RT	RT Status	Dir	ID Type	ID Value	Search Results
9 00:00		SS	P	T			.INRTHPORT138 5
9 00:00	P	P	P	I			.I.HQHIGATE120 2
9 00:00	P	P	A	I			ISNE_ISNETEST13_NYIS
9 00:00	P	P	APW	E			ISNE_ISNESHOW124_HQT
9 00:00	P	P	P	I			NBSO_ISNECLM4333_ISNE
9 00:00							NBSO_ISNEDAM1115_ISNE
9 00:00							NBSO_ISNEDAM1115_ISNE
9 00:00							HQT_ISNESHOW23_ISNE
9 13:00							56455
9 00:00							07/23/2019 09:15:27
9 00:00							Import5
9 00:00							07/23/2019 09:15:26
9 00:00							RTOnly4
9 00:00							07/23/2019 09:15:24
9 00:00							DAOnly4
9 00:00							07/23/2019 09:15:22
9 00:00	P	P	P	E			Export2
9 00:00	P	P	P	I			07/23/2019 09:15:20
9 00:00							Import4
9 00:00		SS	P	I			07/23/2019 09:15:19
9 00:00							RTOnly3

# Exporting Data from NEXTT



# Exporting Data from the Organizer

ISO New England NEXTT Welcome Jane Doe 12345

Organizer CTS Organizer

Export data from the context menu

by Criteria

07/24/2019

07/24/2019

Dir

ion

Interface

Options

Search by ID

ID Type

Include Date Range

From

To

Reset

Search

ISO-NE ID

Start

Stop

Export to CSV

XML Export (all intervals)

XML Export (intervals in date range)

Show Hide Columns

DA

RT

DA Type

RT Status

ID Type

OASIS

Last Updated Time

Outside Name

SS

P

I

.I.SALBRYNB345 1

.I.ROSETON 345 1

NBSO\_ISNETHROUGH1\_ISNE

07/23/2019 09:15:45

Thru

P

P

I

.I.SALBRYNB345 1

NBSO\_ISNEIMP2345\_ISNE

07/23/2019 09:15:43

Import9

P

P

P

.I.SALBRYNB345 1

NBSO\_ISNEIMP1234\_ISNE

07/23/2019 09:15:41

Import8

P

P

P

.I.SALBRYNB345 1

.I.HQ\_GATE120 2

ISNE\_ISNESHOW125\_HQT

07/23/2019 10:10:36

JustTest3

P

P

P

.I.SALBRYNB345 1

.I.HQ\_GATE120 2

ISNE\_ISNESHOW125\_HQT

07/23/2019 09:15:36

JustTest2

P

P

P

.I.SALBRYNB345 1

.I.HQ\_GATE120 2

ISNE\_ISNETEST13\_NYS

07/23/2019 09:15:36

JustTest1

P

P

P

.I.SALBRYNB345 1

.I.HQ\_GATE120 2

ISNESHOW124\_HQT

07/23/2019 09:15:34

MoreTest2

P

P

P

.I.SALBRYNB345 1

.I.SALBRYNB345 1

NBSO\_ISNECLM4333\_ISNE

07/23/2019 09:15:33

Import6

P

P

P

.I.SALBRYNB345 1

.I.HQ\_GATE120 2

HQT\_ISNESHOW25\_ISNE

30433

07/23/2019 09:15:27

Import5

P

P

P

.I.SALBRYNB345 1

.I.HQ\_GATE120 2

NBSO\_ISNEDAM1114\_ISNE

07/23/2019 09:15:26

RTOnly4

P

P

P

.I.SALBRYNB345 1

.I.SALBRYNB345 1

NBSO\_ISNEDAM1114\_ISNE

07/23/2019 09:15:24

DAOnly4

P

P

P

P

E

.I.SALBRYNB345 1

ISNE\_ISNESHOW126\_NBSO

07/23/2019 09:15:22

Export2

P

P

P

P

I

.I.HQ\_P1\_P2345 5

HQT\_ISNESHOW25\_ISNE

13213

07/23/2019 09:15:20

Import4

P

P

P

SS

P

I

.I.HQ\_GATE120 2

NBSO\_ISNEDAM1113\_ISNE

07/23/2019 09:15:19

RTOnly3

Total Records: 25

**CSV**

- Exports data as displayed in table
- Can export up to 1000 records

**XML Export**

- Exports details for all records in table
- Can only export up to 300 records

**XML Export (all intervals)**

- Exports ALL intervals for transactions in list, even if only one day is selected

**XML Export (intervals in date range)**

- Exports ONLY intervals within selected date range for transactions in list



**DEMO**

# Reviewing Historical Transactions in NEXTT



# View Historical Transactions with the Hourly Detail Display

ISO New England
NEXTT
Welcome Jane Doe 12345

Organizer
CTS Organizer

Create New

Create from eTag

Create from XML

Search by Criteria

From  To

Search by ID

ISO New England
NEXTT
Welcome Jane Doe 12345

Organizer
CTS Organizer
Hourly Detail

ISO-NE ID: 4414085

Customer:

Direction: IMPORT

Source/Sink: J.SALBRYNB345 1

Up-to Location:

Last Modified:

eTag ID:

OASIS ID:

DA Type:

RT Type:

Outside Name:

Outside ID:

Subaccount:

Import Resource:

Options:

Reset

Withdraw

Submit

Total MWh	DA Submitted			DA Results		RT Submitted			RT Results	
	HE	MW	Price	MW	LMP	MW	Price	*	Status	MW
6048 / 6048				2939.3		6048 / 6048				4536.000
	01	252	21	0	17.72	252	21		APPROVED	252
	02	252	21	0	15.86	252	21		APPROVED	252
	03	252	21	0	12.16	252	21		APPROVED	252
	04	252	21	0	11.63	252	21		APPROVED	0
	05	252	21	0	13	252	21		APPROVED	0
	06	252	21	0	16.44	252	21		APPROVED	0
	07	252	21	252	21.01	252	21		APPROVED	252
	08	252	21	252	24.75	252	21		APPROVED	252
	09	252	21	34.4	21	252	21		APPROVED	252

Total Records: 25

Select an ISO-NE ID to open the Hourly Detail display



# Hourly Detail Tab

## General overview

ISO New England NEXTT Jane Doe 12345

Organizer | CTS Organizer | **Hourly Detail**

Header data

Buttons to take action on transaction (reset, withdraw, or submit)

ISO-NE ID: 4510301	Last Modified: Jane Doe, 07/23/2019 10:10:36	Outside Name: JustTest3
Customer: AESH - An Energy Shop	eTag ID: ISNE_ISNESHOW125_HQT	Outside ID: <input type="text"/>
Direction: EXPORT	OASIS ID: <input type="text"/>	Subaccount: <input type="text"/>
Source/Sink: .I.HQHIGATE120 2	DA Type: PRICED	Import Resource: <input type="text"/>
Up-to Location: <input type="text"/>	RT Type: PRICED	Options: <input type="text"/>

Reset

Withdraw

Submit



Menu to add or compare data

Grid data

Total MWh		DA Submitted		DA Results		RT Submitted			RT Results		
Date	HE	MW	Price	MW	LMP	MW	Price	*	Status	MW	Reason
07/24/2019	01	44	33			44	33		<a href="#">PENDING ACTION</a>		
07/24/2019	02	44	33			0	33		<a href="#">WITHDRAWN</a>		
07/24/2019	03	44	33			44	33		<a href="#">APPROVED</a>		
07/24/2019	04	44	33			44	33		<a href="#">APPROVED</a>		
07/24/2019	05	44	33			44	33		<a href="#">APPROVED</a>		
07/24/2019	06	44	33			44	33		<a href="#">APPROVED</a>		

# Hourly Detail Tab

ISO-NE ID: 4510301      Last Modified: Jane Doe, 07/23/2019 10:10:36      Outside Name:

Customer: AESH - An Energy Shop      eTag ID: ISNE\_ISNESHOW125\_HQT      Outside ID:

Direction: EXPORT      OASIS ID:      Subaccount:

Source/Sink: .I.HQHIGATE120 2      DA Type: PRICED      Import Resource:

Up-to Location:      RT Type: PRICED      Options:

Click on status to view history for every hour separately

Total MWh		DA Submitted		DA Results		RT Submitted		RT Results	
6048 / 6048		6048 / 6048		2939.3		6048 / 6048		4536.000	
Date	HE	MW	Price	MW	LMP	MW	Price	*	Sta
05/22/2019	01	252	21	0	17.72	252	21		<a href="#">APPROVED</a>
05/22/2019	02	252	21	0	15.86	252	21		<a href="#">APPROVED</a>
05/22/2019	03	252	21	0	12.16	252	21		<a href="#">APPROVED</a>
05/22/2019	04	252	21	0	11.63	252	21		<a href="#">APPROVED</a>
05/22/2019	05	252	21	0	13	252	21		<a href="#">APPROVED</a>
05/22/2019	06	252	21	0	16.44	252	21		<a href="#">APPROVED</a>

MW	Reason
252	Scheduling Algorithm, Restore
252	Scheduling Algorithm, Restore
252	Scheduling Algorithm, Restore
0	Scheduling Algorithm, Economics
0	Scheduling Algorithm, Economics
0	Scheduling Algorithm, Economics

Shows submitted data and results for every interval separately

Reason provided when RT Results less than submitted

# Total MWh Details

ISO-NE ID: 4510301

Last Modified: 05/01/2019 10:00:00 AM

Outside Name: JustTest

Outside ID:

Subaccount:

Import Resource:

Options:

Total MWh provides totals for entire duration of transaction

MWh that have cleared the DAM

MWh that were scheduled in the RTM

Total MWh		DA Submitted		DA Results			RT Submitted		RT Results		
40176 / 40176		40176 / 40176		40176.0			40176 / 40176		39420.000		
Date	HE	MW	Price	MW	LMP	MW	Price	*	Status	MW	Reason
05/01/2019	01	54		54	20.89	54			<a href="#">APPROVED</a>	54	
05/01/2019	02	54		54	19.87	54			<a href="#">APPROVED</a>	54	
05/01/2019	03	54		54	18.46	54			<a href="#">APPROVED</a>	54	
05/01/2019	04	54		54	18.46	54					

**First value** = MWh as currently presented on the display  
**Second value** = MWh that have been submitted

**First value** = MWh as currently presented on the display  
**Second value** = MWh that have an Approved status; if a submitted MW value is changed the status is no longer approved and this value is updated

# Viewing the Daily Summary

(replaces graphical view)

ISO New England

NEXTT

Welcome Jane Doe 12345

Organizer

CTS Organizer

Hourly Detail

View the Daily Summary from the context menu



- Hide empty hours
- Export to CSV
- Append New Day
- Clone Bid Data
- Daily Summary**
- Compare eTag
- Compare OASIS
- Compare Options

Daily Summary 3193826

× close

	DA Submitted	DA Results	RT Approved	RT Results
Total MWh	110707	71371	110707	68619.066
Date	MWh	MWh	MWh	MWh
03/01/2018	3576	3576	3576	3576.000
03/02/2018	3576	3576	3576	3576.000
03/03/2018	3576	3576	3576	3576.000
03/04/2018	3576	3576	3576	3576.000
03/05/2018	3576	3576	3576	3576.000
03/06/2018	3576	3576	3576	3576.000
03/07/2018	3576	3576	3576	3576.000
03/08/2018	3576	3576	3576	3108.733
03/09/2018	3576	3576	3576	3576.000
03/10/2018	3576	3576	3576	3576.000
03/11/2018	3427	3427	3427	3427.000
03/12/2018	3576	3576	3576	3576.000
03/13/2018	3576	3576	3576	3576.000
03/14/2018	3576	3576	3576	3377.333
03/15/2018	3576	3576	3576	3576.000
03/16/2018	3576	3576	3576	3576.000

Reset

Withdraw

Submit

RT Results

0.000

atus

MW

Reason

CTION

N

# Filtering Historical Transactions by Date

Use an Excel-like filter to present only specific days in a transaction

ISO New England NEXTT Welcome Jane Doe 12345

Organizer | CTS Organizer | **Hourly Detail**

ISO-NE ID: 4510301    Last Modified: Jane Doe, 07/23/2019 10:10:36    Outside Name: JustTest3      
Customer: AESH - An Energy Shop    eTag ID: ISNE\_ISNESHOW125\_HQT    Outside ID:       
Direction: EXPORT    OASIS ID:     Subaccount:       
Source/Sink:    DA Type: PRICED    Import Resource:     Options:   
Up-to Location:    RT Type: PRICED

**Click the Date dropdown to filter by value**

Date	HE	MW	Price	DA Results		RT Submitted			RT Results		
				MW	LMP	MW	Price	*	Status	MW	Reason
05/01/2019		54	20.89	54		54			APPROVED	54	
05/01/2019		54	19.87	54		54			APPROVED	54	
05/01/2019		54	18.46	54		54			APPROVED	54	
05/01/2019		54	18.43	54		54			APPROVED	54	
05/01/2019		54	18.97	54		54			APPROVED	54	
05/01/2019		54	22.98	54		54			APPROVED	54	
05/01/2019		54	30.67	54		54			APPROVED	54	
05/01/2019		54	33.88	54		54			APPROVED	54	
05/01/2019		54	27.64	54		54			APPROVED	54	
05/01/2019		54	28.97	54		54			APPROVED	54	

**You CANNOT use date filters when modifying data**

# Submitting New Transactions in NEXTT

- *Create using GUI*
- *Create using eTag*
- *Create using XML*

# Submitting New Transactions

ISO New England      NEXTT      Welcome Jane Doe 12345

Organizer    CTS Organ

Search by Criteria      Search by ID

Create New  
Create from eTag  
Create from XML

Create new transaction using the GUI  
Create new transaction using data from an eTag  
Create new transaction by uploading from an XML file

Include Date Range  
From  
To  
Reset    Search

Click one of the buttons to get started

ISO-NE ID	Start	Stop	OASIS	Last Updated Time	Outside Name
4510304	07/24/2019 00:00	07/25/2019 00:00		07/23/2019 09:15:45	Thru
4510303	07/24/2019 00:00	07/25/2019 00:00		07/23/2019 09:15:43	Import9
4510302	07/24/2019 00:00	07/25/2019 00:00		07/23/2019 09:15:41	Import8
4510301	07/24/2019 00:00	07/25/2019 00:00		07/23/2019 10:10:36	JustTest3
4510300	07/24/2019 00:00	07/25/2019 00:00	P	07/23/2019 09:15:38	Import7
4510299	07/24/2019 00:00	07/25/2019 00:00	P	07/23/2019 09:15:36	JustTest2
4510298	07/24/2019 00:00	07/25/2019 00:00	P	07/23/2019 09:15:34	MoreTest2
4510297	07/24/2019 00:00	07/25/2019 00:00	P	07/23/2019 09:15:33	Import6
4510296	07/24/2019 00:00	07/25/2019 00:00		07/23/2019 10:10:08	RTOnly5
4510295	07/24/2019 00:00	07/25/2019 00:00		07/23/2019 09:15:29	DAOnly5
4510294	07/24/2019 06:00	07/24/2019 13:00	P	07/23/2019 09:15:27	Import5
4510293	07/24/2019 00:00	07/25/2019 00:00		07/23/2019 09:15:26	RTOnly4
4510292	07/24/2019 00:00	07/25/2019 00:00	U	07/23/2019 09:15:24	DAOnly4
4510291	07/24/2019 00:00	07/25/2019 00:00	P	07/23/2019 09:15:22	Export2
4510290	07/24/2019 00:00	07/25/2019 00:00	P	07/23/2019 09:15:20	Import4
4510289	07/24/2019 00:00	07/25/2019 00:00		07/23/2019 09:15:19	RTOnly3

Total Records: 25

# Submit New Transaction from XML

1. Click Browse
2. Select XML file to upload
3. Click Submit

Create from XML

File to upload:  
 generic test.xml

Press here to upload the file!

*Note: Each browser looks different*

Create from XML

File to upload:

Press here to upload the file!

## View results

### File Upload Results

You successfully uploaded file 'C:\Users\cmendrala\Desktop\generic test.txt'

ISO-NE ID	Submittal Status
4510305	ACCEPTED WITH ERROR

eTag ID	Outside Name	Outside ID	Source	Sink
NBSO_ISNECLM4333_ISNE	Import6		.I.SALBRYNB345 1	

### Transaction Issues

Type	Message
ERROR	eTag ID referenced does not exist at OATI

### Interval Issues

No Interval Issues were found

Responses can be downloaded



# Create New Transaction from eTag

Create Transaction From eTag

eTag ID

DA Type

DA Price

Up-to Location

RT Type

RT Price

Enter eTag ID or click pencil to select your eTag from a list

Price entered will apply for entire transaction

DA Type or RT Type is required

Up-to Location required for DA Type = **Up-to Congestion**

Retrieves path, MW profile, and OASIS from eTag

# Hourly Detail Form

Your transaction does not exist until you submit this form and an ISO-NE ID exists

ISO-NE ID:  
 Customer: AESH - An Energy Shop  
 Direction: IMPORT  
 Source/Sink: .I.SALBRYNB345 1  
 Up-to Location:

Last Modified:  
 eTag ID:   
 OASIS ID:   
 DA Type:   
 RT Type:

Outside Name:   
 Outside ID:   
 Subaccount:   
 Import Resource:   
 Options:

Total MWh		DA Submitted			RT Submitted			RT Results		
Date	HE	MW	Price	MW	LMP	MW	Price	*	Status	MW
07/26/2019	01	100	15.31			100	0			
07/26/2019	02	100				100	0			
07/26/2019	03	100				100	0			
07/26/2019	04	100				100	0			
07/26/2019	05	100	15.31			100	0			
07/26/2019	06	100	15.31			100	0			
07/26/2019	07	100	15.31			100	0			
07/26/2019	08	100	15.31			100	0			
07/26/2019	09	100	15.31			100	0			
07/26/2019	10	100	15.31			100	0			
07/26/2019	11	100	15.31			100	0			
07/26/2019	12	100	15.31			100	0			

Details are filled in from previous display and eTag

# Create New Transaction from within NEXTT

## Create New Transaction

Start Date

Direction

Source

Sink

DA Type

Up-to Location

RT Type

- Defaults to today
- Cannot set to the past

Dynamic logic between dropdown menus

If Direction:	Then
= Import	Source is required; Sink is null
= Export	Sink is required; Source is null
= Through	Source and Sink are both required

Up-to Location required for DA Type = **Up-to Congestion**

Click the Next button to open the Hourly Detail display

Once transaction is created, Direction, Source and Sink cannot be modified

DA Type or RT Type is required

Reset

Next >

# Hourly Detail Form

ISO-NE ID:

Customer: AESH - An Energy Shop

Direction: IMPORT

Source/Sink: .I.SALBRYNB345 1

Up-to Location:

Last Modified:

eTag ID:

OASIS ID:

DA Type: PRICED

RT Type: PRICED

Outside Name:

Outside ID:

Subaccount:

Import Resource:

Options:

Reset

Withdraw

Submit

Details are filled in from previous display

DA/RT Type can be changed until submitted

Populates a blank row for every hour of selected start date

		DA Submitted					RT Submitted			RT Results	
		0 / 0					0 / 0			0.000	
			LMP	MW	Price	*	Status		MW		
08/01/2019	02										
08/01/2019	03										
08/01/2019	04										
08/01/2019	05										
08/01/2019	06										
08/01/2019	07										
08/01/2019	08										
08/01/2019	09										
08/01/2019	10										
08/01/2019	11										
08/01/2019	12										

# Hourly Detail Form

ISO-NE ID:  
Customer: AESH - An Energy Shop  
Direction:  
Source/Sink:  
Up-to Location:

Last Modified:  
eTag ID:   
S ID:   
DA Type: PRICED  
RT Type: PRICED

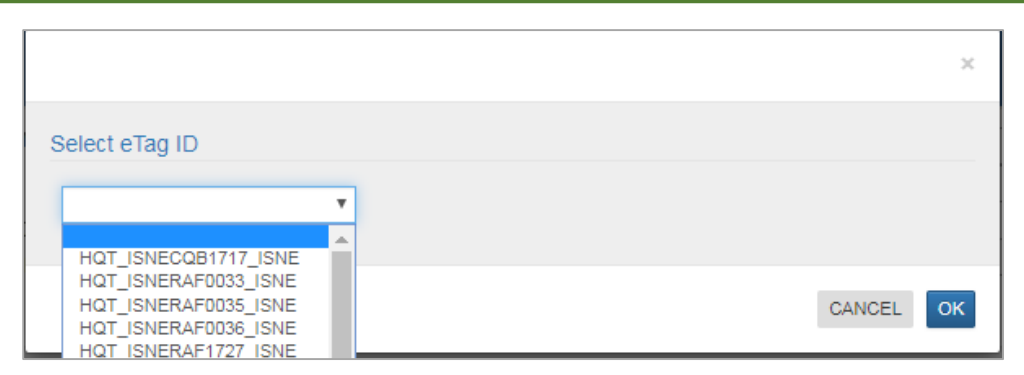
Outside Name:   
Outside ID:   
Subaccount:   
Import Resource:   
Options:

Reset  
Withdraw  
Submit

eTag ID can be typed or pasted



Pencil opens dropdown containing all your company's tags



Total MWh		DA Submitted			DA Results	
0 / 0		0 / 0			0.0	
Date	HE	MW	Price	MW	LMP	
08/01/2019	01					
08/01/2019	02					
08/01/2019	03					
08/01/2019	04					
08/01/2019	05					
08/01/2019	06					
08/01/2019	07					
08/01/2019	08					
08/01/2019	09					
08/01/2019	10					
08/01/2019	11					
08/01/2019	12					

# Hourly Detail Form

ISO New England

NEXTT

We

Organizer

CTS Organizer

Hourly Detail

ISO-NE ID:

Customer: AESH - An Energy Shop

Direction: IMPORT

Source/Sink: .I.SALBRYNB345 1

Up-to Location:

Last Modified:

eTag ID:

OASIS ID:

DA Type: PRICED

RT Type: PRICED

Outside Name:

Outside ID:

Subaccount:

Import Resource:

Options:

Reset

Withdraw

Submit

Total MWh		DA Submitted	
Date	HE	MW	Price
08/01/2019	01		
08/01/2019	02		
08/01/2019	03		
08/01/2019	04		
08/01/2019	05		
08/01/2019	06		
08/01/2019	07		
08/01/2019	08		
08/01/2019	09		
08/01/2019	10		
08/01/2019	11		
08/01/2019	12		

Pencil opens display to enter OASIS IDs

OASIS Reservation IDs

Add

1234500 ✕

5454500 ✕

6547800 ✕

Order added is the order they are processed against transaction MW

CANCEL OK

# Hourly Detail Form

ISO New England

NEXTT

Organizer

CTS Organizer

Hourly Detail

ISO-NE ID:

Customer: AESH - An Energy Shop

Direction: IMPORT

Source/Sink: .I.SALBRYNB345 1

Up-to Location:

Last Modified:

eTag ID:

OASIS ID:

DA Type:

RT Type:

Outside Name:

Outside ID:

Subaccount:

Import Resource:

Options:

Reset

Withdraw

Submit



Total MWh		DA Submitted		DA
Date	HE	MW	Price	MW
08/01/2019	01			
08/01/2019	09			
08/01/2019	10			
08/01/2019	11			
08/01/2019	12			

- Check box and add details
- See Manual 11 for more information on these fields

Pencil opens RT Options

RT Options

- Emergency Energy Transaction
- Security Energy Transaction
- GIS
- Grandfathered
- Non-CSO Export
- LSCC Export
- Unconstrained Export

CANCEL OK

# Hourly Detail Form

ISO New England

NEXTT

We

Organizer

CTS Organizer

Hourly Detail

ISO-NE ID:

Customer: AESH - An Energy Shop

Direction: IMPORT

Source/Sink: .I.SALBRYNB345 1

Up-to Location:

Last Modified:

eTag ID:

OASIS ID:

DA Type:

RT Type:

Outside Name:

Outside ID:

Subaccount:

Import Resource:

Options:

Reset

Withdraw

Submit

		DA Submitted		DA Results		RT Submitted			RT Results	
Total MWh		0 / 0		0.0		0 / 0			0.000	
Date		Price	MW	LMP	MW	Price	*	Status	MW	
08/01/2019										
08/01/2019										
08/01/2019										
08/01/2019	04									
08/01/2019	05		56	13.25						
08/01/2019	06		54	11.21						
08/01/2019	07		59	15.32						
08/01/2019	08		57	15.32						
08/01/2019	09									
08/01/2019	10									
08/01/2019	11									
08/01/2019	12									

Edited fields will be yellow

## Table functions like Excel

- Copy and paste single columns
  - Using CTRL-C and CTRL-V
  - Right click does not show copy/paste
- Drag multiple columns



# Hourly Detail Context Menu

ISO-NE ID:  
Customer: AESH - An Energy Shop  
Direction: IMPORT  
Source/Sink: .I.SALBRYNB345 1  
Up-to Location:

Last Modified:  
eTag ID:   
OASIS ID:   
DA Type:   
RT Type:

Outside Name:   
Outside ID:   
Subaccount:   
Import Resource:   
Options:

	DA Submitted	DA Results	RT Submitted	RT Results
				0.000
			*	Status MW
	01			
	02			
	03			
08/01/2019	04			
08/01/2019	05			
08/01/2019				
08/01/2019	09			
08/01/2019	10			
08/01/2019	11			
08/01/2019	12			

- ☰
- Hide empty hours
- Export to CSV
- Append New Day
- Clone Bid Data
- Daily Summary

Adds a blank row for every hour on the NEXT calendar day

- Allows a single day to be copied to one or more continuous days
- Discontinuous days require cloning for each instance

Data will be blank until transaction is submitted

# Hourly Detail Form Submittal

ISO-NE ID:  
Customer: AESH - An Energy Shop  
Direction: IMPORT  
Source/Sink: .I.SALBRYNB345 1  
Up-to Location:

Last Modified:  
eTag ID:   
OASIS ID:   
DA Type:   
RT Type:

Outside Name:   
Outside ID:

Your transaction does not exist until you submit this form and an ISO-NE ID is created

Total MWh		DA Submitted		DA Results		2400 / 0		0.0		2400 / 0		0.000		RT Results	
Date	HE	MW	Price	MW	LMP	MW	Price	*	Status	MW					
07/26/2019	01	100	15.31			100	0								
07/26/2019	02	100	15.31			100	0								
07/26/2019	03	100	15.31			100	0								
07/26/2019	04	100	15.31			100	0								
07/26/2019	05	100	15.31			100	0								
07/26/2019	06	100	15.31			100	0								
07/26/2019	07	100	15.31			100	0								
07/26/2019	08	100	15.31			100	0								
07/26/2019	09	100	15.31			100	0								
07/26/2019	10	100	15.31			100	0								
07/26/2019	11	100	15.31			100	0								
07/26/2019	12	100	15.31			100	0								

Validations defined in user guide are performed upon submittal



**DEMO**

# Transaction Statuses

*Approved and non-Approved statuses*



# Transaction Validation Statuses

## Day-ahead

DA does not have status

**Submitted = in the market**

## Real-time

Every RT interval has its own status

RT Status	Description
<b>APPROVED</b>	No action required
<b>PENDING ACTION</b>	Customer action is required
<b>DENIED</b>	Does not occur on submittal <ul style="list-style-type: none"><li>• Manual ISO Action</li><li>• Any interval in Pending status at market deadline (5-minute process)</li></ul>

# Transaction Validation History

ISO-NE ID: 4510301  
 Customer: AESH - An Energy Shop  
 Direction: EXPORT

Last Modified: Jane Doe, 07/23/2019 10:10:36  
 eTag ID:   
 OASIS ID:

Outside Name:

Outside ID:

Subaccount:

Import Resource:

Options:

**Typical causes for Status = PENDING ACTION**

- eTag is Pending (not Confirmed)
- eTag MW < transaction MW
- OASIS reservation MW < transaction MW

RT Submitted			RT Results	
1012 / 968			0.000	
Price	*	Status	MW	Reason
44	33	<a href="#">PENDING ACTION</a>		
0	33	<a href="#">WITHDRAWN</a>		
44	33	<a href="#">APPROVED</a>		
44	33	<a href="#">APPROVED</a>		
44	33	<a href="#">APPROVED</a>		
44	33	<a href="#">APPROVED</a>		

Status Change History: 4510301, 07/24/2019 HE 04 x close

Date	Status	Reason	User
07/23/2019 10:08	APPROVED		ISONE
07/23/2019 09:15	PENDING	eTag ID referenced does not exist at OATI	Jane Doe

# Transaction Validation Analysis

ISO-NE ID: 4510303      Last Modified: Jane Doe, 07/23/2019 09:15:43      Outside Name:

Customer: AESH - An Energy Shop      eTag ID:        Outside ID:

Direction: IMPORT      OASIS ID:        Subaccount:

Source/Sink: .I.SALBRYNB345 1      DA Type:        Import Resource:

Up-to Location:       RT Type:        Options:

Use these compare tools to help determine why an interval's Status = PENDING ACTION

						RT Submitted			RT Resu	
						1080 / 0			0.000	
						MW	Price	*	Status	MW
						45	-150		<a href="#">PENDING ACTION</a>	
						45	-150		<a href="#">PENDING ACTION</a>	
						45	-150		<a href="#">PENDING ACTION</a>	
						45	-150		<a href="#">PENDING ACTION</a>	
						45	-150		<a href="#">PENDING ACTION</a>	
07/24/2019						45	-150		<a href="#">PENDING ACTION</a>	

- Hide empty hours
- Export to CSV
- Append New Day
- Clone Bid Data
- Daily Summary
- Compare eTag**
- Compare OASIS
- Compare Options

# Transaction Validation Analysis, Compare eTag

## Transaction Headers

ISO-NE ID	4509302
Customer	[REDACTED]
Start Date	07/09/2019 15:00:00
End Date	07/09/2019 21:00:00
Direction	IMPORT
Source	.I.NRTHPORT138 5
Sink	

## eTag Headers

eTag ID	NYIS_ISNECLMTST5_ISNE
Status	PENDING
Last Action	PENDING
Begin	07/09/2019 15:00:00
End	07/10/2019 00:00:00

## eTag Physical Segments

CA	TP	POR	POD	OASIS
NYIS				
	NYIS	NYIS	NY-1385	
	ISNE	NY.NNC	ISNE.PTF	
ISNE				

Date	HE	RT Bid MW	eTag MW
07/09/2019	01		
07/09/2019	02		
07/09/2019	03		
07/09/2019	04		
07/09/2019	05		
07/09/2019	06		
07/09/2019	07		
07/09/2019	08		
07/09/2019	09		
07/09/2019	10		
07/09/2019	11		
07/09/2019	12		
07/09/2019	13		
07/09/2019	14		
07/09/2019	15		
07/09/2019	16	101	100
07/09/2019	17	110	100
07/09/2019	18	100	100
07/09/2019	19	100	100
07/09/2019	20	100	100
07/09/2019	21	101	100
07/09/2019	22		100
07/09/2019	23		100
07/09/2019	24		100

Transaction MW > eTag will be highlighted



# Transaction Validation Analysis, Compare OASIS

Compare OASIS Data

## Transaction Headers

ISO-NE ID	4510164
Customer	
Start Date	07/20/2019 00:00:00
End Date	07/21/2019 00:00:00
Direction	EXPORT
Source	
Sink	.I.SHOREHAM138 99

OASIS ID	
Offer Type	YEARLY
Status	CONFIRMED
Customer	
Seller	
Provider	
Path	
Begin	06/01/2002 00:00:00
End	06/01/2022 00:00:00
Service Type	YEARLY FIRM P-P FULL PERIOD SLIDING

Date	HE	RT Bid MW	Capacity	Used
07/20/2019	01	300	348	
07/20/2019	02	300	348	
07/20/2019	03	300	348	60
07/20/2019	04	300	348	60
07/20/2019	05	300	348	60
07/20/2019	06	300	348	60
07/20/2019	07	300	348	60
07/20/2019	08	300	348	60
07/20/2019	09	300	348	60
07/20/2019	10	72	348	60
07/20/2019	11	72	348	60
07/20/2019	12	72	348	60

Used indicates MW referenced by other Approved transactions

OASIS MW not covered by reservations will be highlighted

# Transaction Validation Analysis, Compare Market Options

Compare Market Data x close

**Transaction Headers**

ISO-NE ID	4442777
Customer	[REDACTED]
Start Date	06/10/2019 00:00:00
End Date	06/11/2019 00:00:00
Direction	IMPORT
Source	.I.HQ_P1_P2345 5
Sink	

**Options:**

Import Resource	[REDACTED]
GIS	[REDACTED]

Date	HE	RT Bid MW	Import Resource CSO	Used
06/10/2019	01	3	44	41
06/10/2019	02	3	44	41
06/10/2019	03	3	44	41
06/10/2019	04	3	44	41
06/10/2019	05	3	44	41
06/10/2019	06	3	44	41
06/10/2019	07	3	44	41
06/10/2019	08	3	44	41
06/10/2019	09	3	44	41
06/10/2019	10	3	44	41
06/10/2019	11	3	44	41
06/10/2019	12	3	44	41
06/10/2019	13	3	44	41
06/10/2019	14	3	44	41
06/10/2019	15	3	44	41
06/10/2019	16	3	44	41
06/10/2019	17	3	44	41
06/10/2019	18	3	44	41
06/10/2019	19	3	44	41
06/10/2019	20	3	44	41
06/10/2019	21	3	44	41
06/10/2019	22	3	44	41
06/10/2019	23	3	44	41
06/10/2019	24	3	44	41

Used indicates MW referenced by other Approved transactions

RT Bid MW less than available Import Resource CSO will be highlighted

# Resolving Pending Action Intervals

- 5 Min Re-validation
  - ISO-NE auto-validates all Pending Action intervals every 5 minutes
  - If eTag status updates and all else matches will flip to Approved
- Market Deadline validation
  - Future intervals continue to be re-validated in the 5-Min process
  - If remains Pending Action at market deadline, interval will go DENIED
    - If eTag does not become Confirmed BEFORE market deadline, interval will go DENIED

# Modify or Withdraw a Transaction

# Modify transactions

## Modify Header Data

ISO New England NEXTT Welcome Jane Doe 12345

Organizer | CTS Organizer | **Hourly Detail**

ISO-NE ID: 4510301  
Customer: AESH - An Energy Shop  
Direction: EXPORT  
Source/Sink: .I.HQHIGATE120 2  
Up-to Location:

Last Modified: Jane Doe, 07/23/2019 10:10:36

eTag ID:    
OASIS ID:    
DA Type:    
RT Type:

Outside Name:   
Outside ID:   
Subaccount:   
Import Resource:   
Options:

Total MWh		DA Submitted		RT Submitted			RT Results	
Date	HE	MW		Price	*	Status	MW	Reason
07/24/2019	01	44		33		<a href="#">PENDING ACTION</a>		
07/24/2019	02	44		33		<a href="#">WITHDRAWN</a>		
07/24/2019	03	44		33		<a href="#">APPROVED</a>		
07/24/2019	04	44		33		<a href="#">APPROVED</a>		
07/24/2019	05	44	33	44	33	<a href="#">APPROVED</a>		
07/24/2019	06	44	33	44	33	<a href="#">APPROVED</a>		

Header data can be modified until 60 minutes before earliest RT start

All intervals of transaction re-validated when header data is changed

# Modify transactions

## Modify MW and Price Values

ISO New England NEXTT Welcome Jane Doe 12345

Organizer | CTS Organizer | **Hourly Detail**

ISO-NE ID: 4510301  
Customer: AESH - An Energy Shop  
Direction: EXPORT  
Source/Sink: .I.HQHIGATE120 2  
Up-to Location:

Last Modified: Jane Doe, 07/23/2019 10:10:36  
eTag ID:   
OASIS ID:

Outside Name:   
Outside ID:   
Subaccount:   
Import Resource:   
Options:

Total MWh		DA Submitted		RT Submitted		RT Results		
Date	HE	MW	Price	MW	Price	Status	MW	Reason
07/24/2019	01	44	33	44	33	PENDING ACTION		
07/24/2019	02	44	33	0	33	WITHDRAWN		
07/24/2019	03	47	33	47	0			
07/24/2019	04	47	30.13	47	33			
07/24/2019	05	44	33	44	33	APPROVED		
07/24/2019	06	44	33	44	33	APPROVED		

MW and price can be modified up to applicable market deadline

Edited MW or price values will be yellow

# Modify transactions

## Submit Changes

ISO New England NEXTT Welcome Jane Doe 12345

Organizer | CTS Organizer | **Hourly Detail**

ISO-NE ID: 4510301    Last Modified: Jane Doe, 07/23/2019 10:10:36    Outside Name: JustTest3   

Customer: AESH - An Energy Shop    eTag ID: ISNE\_ISNESHOW125\_HQT    Outside ID:

Direction: EXPORT    OASIS ID:     Subaccount:

Source/Sink: .I.HQHIGATE120 2    DA Type: PRICE    Import Resource:

Up-to Location:

RT Type: PRICE

Total MWh		DA Submitted		RT Results				
Date	HE	MW	Price	MW	Price	Status	MW	Reason
07/24/2019	01	44	33			PENDING ACTION		
07/24/2019	02	44	33		0	WITHDRAWN		
07/24/2019	03	44	33		47			
07/24/2019	04	44	33		47			
07/24/2019	05	44	33		44	APPROVED		
07/24/2019	06	44	33		44	APPROVED		

The Status of an edited interval is removed and revalidated upon Submit

Submittal of new data replaces the previously existing data

# Modify transactions, withdraw

ISO New England Welcome Jane Doe 12345

Organizer | CTS Organizer | Hourly

ISO-NE ID: 4510301  
Customer: AESH - An Energy Shop  
Direction: EXPORT  
Source/Sink: .I.HQHIGATE120 2  
Up-to Location:

**Withdraw functionality**

- Can be done before *earliest* deadline
- Sets all DA and RT MW for all intervals to zero
- Sets RT Status to WITHDRAWN

Reset  
Withdraw  
Submit

Total MWh		DA Submitted		DA Results		RT Submitted			RT Results		
Date	HE	MW	Price	MW	LMP	MW	Price	*	Status	MW	Reason
07/24/2019	01	0	33			0	33		<a href="#">WITHDRAWN</a>		
07/24/2019	02	0	33			0	33		<a href="#">WITHDRAWN</a>		
07/24/2019	03	0	33			0	33		<a href="#">WITHDRAWN</a>		
07/24/2019	04	0	33			0	33		<a href="#">WITHDRAWN</a>		
07/24/2019	05	0	33			0	33		<a href="#">WITHDRAWN</a>		
07/24/2019	06	0	33			0	33		<a href="#">WITHDRAWN</a>		



# Modify transactions, withdraw

ISO New England NEXTT Welcome Jane Doe 12345

Organizer | CTS Organizer | **Hourly Detail**

ISO-NE ID: 4510301      Last Modified: Jane Doe, 07/23/2019 10:10:36      Outside Name: JustTest3     

Customer: AESH - An Energy Shop      eTag ID: ISNE\_ISNESHOW125\_HQT      Outside ID:

Direction: EXPORT      OASIS ID:       Subaccount:      

Source/Sink: .I.HQHIGATE120 2      DA Type: PRICED      Import Resource:       Options:      

Up-to Location:

Total MWh						RT Submitted				RT Results	
Date	HE	MW	Price	LMP	MW	Price	*	Status	MW	Reason	
07/24/2019	01	44	33		0	33		<a href="#">WITHDRAWN</a>			
07/24/2019	02	44	33		0	33		<a href="#">WITHDRAWN</a>			
07/24/2019	03	44	33		0	33		<a href="#">WITHDRAWN</a>			
07/24/2019	04	44	33		0	33		<a href="#">WITHDRAWN</a>			
07/24/2019	05	44	33		0	33		<a href="#">WITHDRAWN</a>			
07/24/2019	06	44	33		44	33		<a href="#">APPROVED</a>			

Change RT MW for any interval to zero and submit

No validations are performed, status set to WITHDRAWN



**DEMO**

# Conclusion



# Sandbox

- Access
  - Simultaneous access to both sandboxes
  - A temporary button will be added to Sandbox SMD SSO (<https://sandboxsmd.iso-ne.com/>)
- Sandbox will be connected to OATI Demo for eTags
- The following information will be updated from production on 7/31/2019:
  - OASIS reservations
  - Import Resource data
  - Subaccount data
- DAM results will not be available for any transactions
- RT results will be simulated after each business day for any APPROVED transactions from 8/1 – 8/9

# Production cutover

- Application name change in CAMS from EES to NEXTT
- No customer action is required
- All DAM transactions and all approved RTM transactions since January 1<sup>st</sup>, 2012 are included in the cutover

## **Be Ready for Sandbox on August 1, 2019**

- Align the creation of your file upload with the new XSD
- Make a plan to create and test your files
- Review Appendix D of the Web Services User Guide for error codes
- Contact Customer Support for help

## **Be Ready for Go Live on October 23, 2019**

- Create and test your XML files
- Familiarize yourself with the NEXTT software interface
- Contact Customer Support for help

# Customer Support Information

## Methods for Contacting Customer Support

### [Ask ISO](#) (preferred)

- Self-service interface for submitting inquiries
- Recommended browsers are Google Chrome and Mozilla Firefox
- For more information, see the [Ask ISO User Guide](#)



### Email [custserv@iso-ne.com](mailto:custserv@iso-ne.com)

### Phone

- (413) 540-4220
- (833) 248-4220

**Inquiries will be responded to during business hours (Monday through Friday; 8:00 a.m. to 5:00 p.m.)**

**Outside of regular business hours, the pager (877) 226-4814 may be used for emergency inquiries**

# Resources and References

Name	Link
<b>Update Enhanced Energy Scheduling (EES) Technical Architecture Project</b>	<a href="https://www.iso-ne.com/participate/support/customer-readiness-outlook/ees-technical-architecture-project">https://www.iso-ne.com/participate/support/customer-readiness-outlook/ees-technical-architecture-project</a>
<b>Summary of Business Rule Changes with EES Replacement</b>	<a href="https://www.iso-ne.com/static-assets/documents/2019/05/summary-of-business-rule-changes-with-ees-replacement.pdf">https://www.iso-ne.com/static-assets/documents/2019/05/summary-of-business-rule-changes-with-ees-replacement.pdf</a>
<b>NEXTT Web Services Guide</b> , a technical guide describing data exchange formats and requirements	<a href="https://www.iso-ne.com/static-assets/documents/2019/05/nextt-web-services-guide.docx">https://www.iso-ne.com/static-assets/documents/2019/05/nextt-web-services-guide.docx</a>
<b>NEXTT Web Services.XSD</b>	<a href="https://www.iso-ne.com/static-assets/documents/2019/05/nextt-web-services-v1.xsd">https://www.iso-ne.com/static-assets/documents/2019/05/nextt-web-services-v1.xsd</a>
<b>NEXTT User Guide</b> , description of user interface	TBD
<b>Sandbox SMD SSO</b>	<a href="https://sandboxsmd.iso-ne.com/">https://sandboxsmd.iso-ne.com/</a>





Questions?



# Evaluations