



Update Tariff Network Load User Manual

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Preface

Purpose

This user guide is a reference document created for the specific purpose of submitting 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

Update Tariff Network Load User Manual

1. Overview

1.1 Web Access Application

The SMS application is accessed through Internet facilities with the following web browser:

- Internet Explorer 5.5 or greater supporting SSL 3.0 secured 128-bit encryption

Additional software and hardware requirements for accessing the ISO SMD marketplace are listed on the ISO web page at: <http://www.iso-ne.com>

Users need to register with the Customer Services Department within ISO in order to submit and upload Network Load information in the SMS application for the intention and purpose of taking part in the ISO SMD Marketplace.

Registration for market system user access can be done by going to the registration area of the ISO web page at: <http://www.iso-ne.com/support/custsvc/index.html>

There are two types of access: Read Access and Read, Write Access.

Once registered, market system users will be provided with the link to access the SMD home page, which will then allow direct access to SMD software applications.

Questions or inquiries about market access should be addressed to the Customer Services Department at ISO.

1.2 Log into SMD Application

To log into the SMD Application follow the following steps:

1. Go to <http://www.iso-ne.com>
2. Select **SMD Applications** and click the yellow button

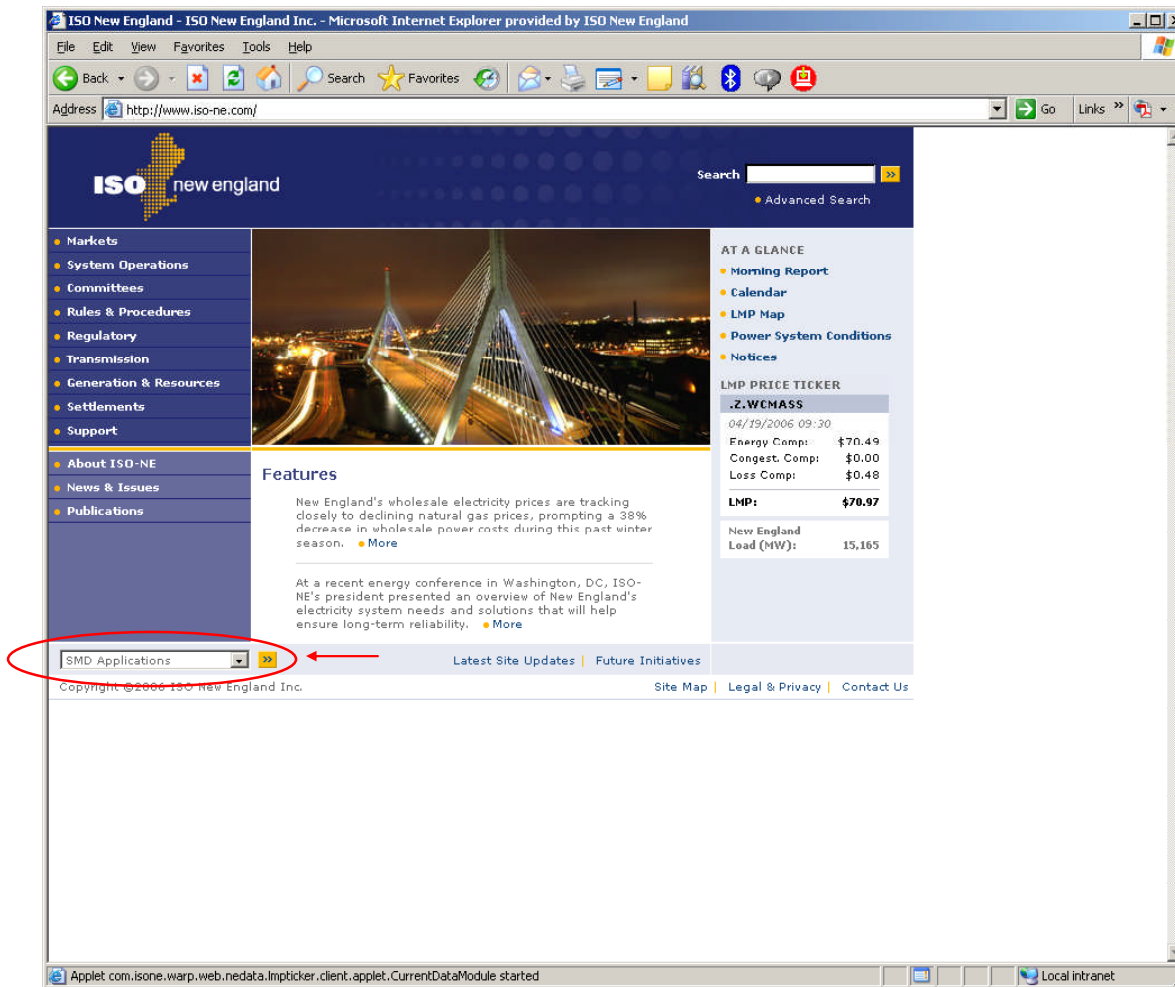


Figure 1 – ISO New England Homepage

3. Select **Submit Network Load** from the SMD Applications Home Page

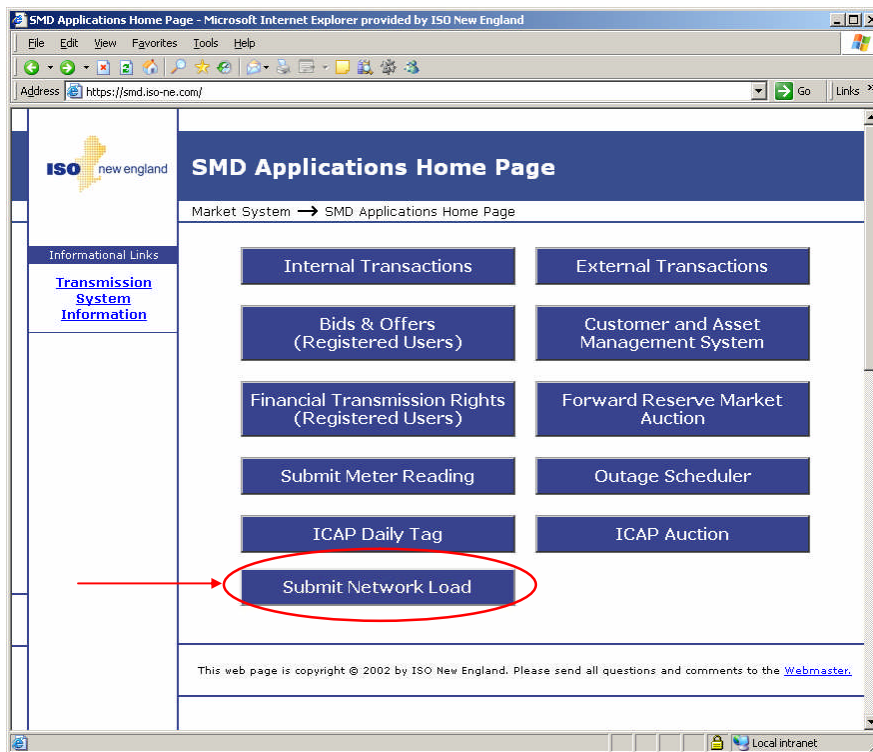


Figure 2 – SMD Applications Home Page

Once registered, you will receive your digital certificate. A user can then access the Update Tariff Network Load User Interface (UI). If your access rights are not setup properly an error screen will be displayed.

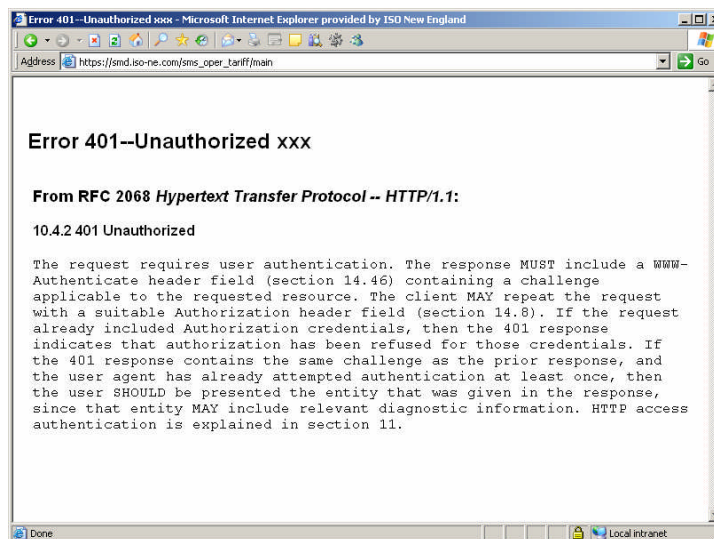


Figure 3 – Error 401 -- Unauthorized User

- The Update Tariff Network Load UI is displayed for users with valid access.

Customer VIU3(4)

Month ...

Local Network ▾

Monthly Load Values				
ID	Network Load	DUNS Number	DUNS Name	Value (KW)
4	MP4	00-779-7982	VIU3	<input type="text"/>
5	MP5	00-779-7982	VIU3	<input type="text"/>
6	MP6	00-779-7982	VIU3	<input type="text"/>

Total

Figure 4 – Update Tariff Network Load UI

2. Update Network Load UI Layout

The Network Load UI Layout has the following sections:

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

2.1 Main Network Load UI

The Main Network Load UI displays the following information:

The screenshot shows the 'Update Tariff Network Load UI Layout'. At the top, there are three input fields: 'Customer' (VIU3(4)), 'Month' (April 2006), and 'Local Network' (All Local Networks). To the right is a 'File Upload' button. Below these is a table titled 'Monthly Load Values' with columns: ID, Network Load, DUNS Number, DUNS Name, and Value (KW). The table contains three rows of data. Below the table is a 'Total' field showing '0', with 'Reset' and 'Submit' buttons. Red arrows labeled 'a' through 'j' point to specific UI elements: 'a' to Customer, 'b' to Month, 'c' to Local Network, 'd' to File Upload, 'e' to the ID column header, 'f' to the Network Load column header, 'g' to the DUNS Number column header, 'h' to the DUNS Name column header, 'i' to the Total field, 'j' to the Value (KW) column header, 'k' to the Reset button, and 'l' to the Submit button.

ID	Network Load	DUNS Number	DUNS Name	Value (KW)
4	MP4	00-779-7982	VIU3	<input type="text"/>
5	MP5	00-779-7982	VIU3	<input type="text"/>
6	MP6	00-779-7982	VIU3	<input type="text"/>

Figure 5 – Update Tariff Network Load UI Layout

- a. **Customer** – Identifies the Customer logged into the Update Tariff 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 Network Load data.
- e. **ID** – Network Load ID
- f. **Network Load** – Network Load Name
- g. **DUNS Number** – DUNS Number of the Company associated to the 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 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 6).

Customer VIU3(4)
 Month ...
 Local Network ▾

Monthly Load Values				
ID	Network Load	DUNS Number	DUNS Name	Value (KW)
6	MP6	00-779-7982	VIU3	<input type="text" value="33"/>
5	MP5	00-779-7982	VIU3	<input type="text" value="50"/>
4	MP4	00-779-7982	VIU3	<input type="text" value="444"/>

Total

Figure 6 – Network Load UI Layout: Sorting functions

2.2 Calendar Dialog Box

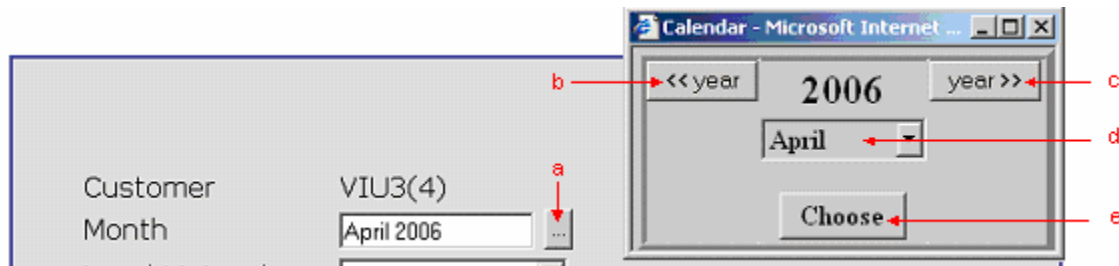


Figure 7 – Calendar Dialog Box

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

2.3 Local Network Drop Down Box

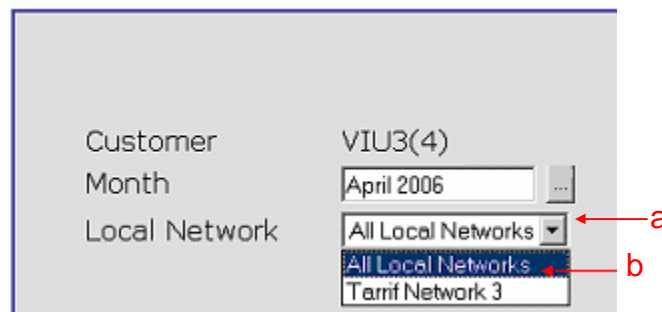


Figure 8 – Local Network Drop Down Box

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

2.4 File Upload Dialog Box

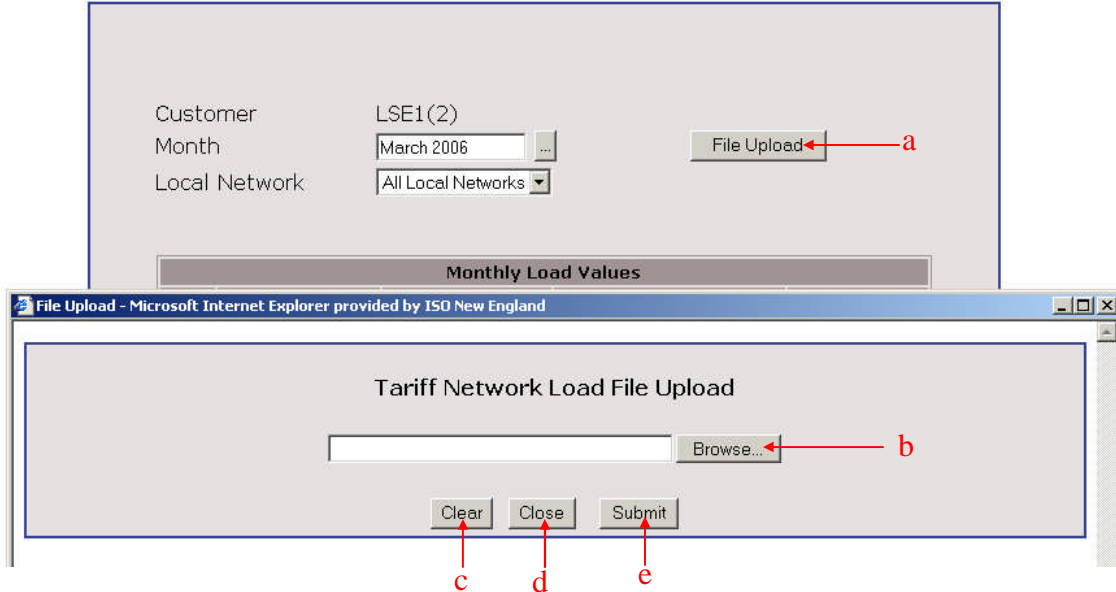


Figure 9 – File Upload Dialog Box

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

3.2 Retrieving Network Load Values through the User Interface

Customer: VIU3(4)

Month: April 2006

Local Network: All Local Networks

Monthly Load Values				
ID	Network Load	DUNS Number	DUNS Name	Value (KW)
4	MP4	00-779-7982	VIU3	100
5	MP5	00-779-7982	VIU3	200
6	MP6	00-779-7982	VIU3	300

Total: 600

Reset Submit

Figure 10 – Submit Network UI: Date & Local Network Selection

To retrieve Network Load values use the following steps:

Note: Regardless of how 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: 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 Network Load UI screen, right click on the lower portion of the toolbar.
- b. Select “Customize ...”
- c. Under “Available toolbar buttons”, select  and “Add->” to “Current toolbar buttons”.
- d. Select “Close”. “Size” option should appear in the toolbar.
- e. From the “Size” option on the toolbar, the font size may be adjusted from “Largest” to “Smallest” to properly print applicable network load data to a single page.
- f. Additionally, to change the print options so the screen prints properly click on Page Setup in the menu.
- g. The user should select the Landscape setting and if necessary change the paper size to legal and click OK to view the changes.
 - If the User Interface information does not appear fully on the printed page, it will be necessary to change the browser font size. To do this, do the following”
 - a. From the main Internet Explorer window, open the View Menu and click Text Size.
 - b. Select a smaller size from Largest to Smallest, than is currently set.

3.4 Entering Network Load Values through the User Interface

3.4.1 Enter new Network Load values

- a. Click on the **Value (KW)** field
- b. Enter the 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 Network Load values have been correctly entered.

3.4.2 Updating Existing 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 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 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 Network Load Values through a File Upload

3.5.1 Entering Network Load Values through a File Upload

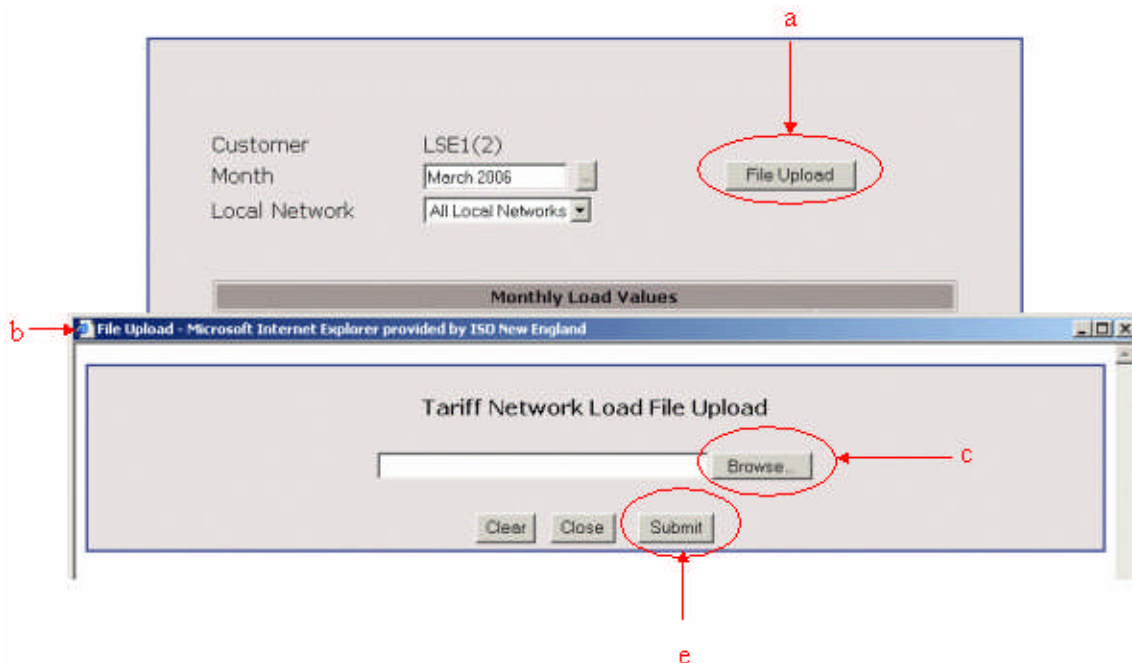


Figure 11 – Submitting a File Upload

To upload the 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 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 Network Load values, only those values that have changed.

3.5.3 Print and Save Messages through a File Upload

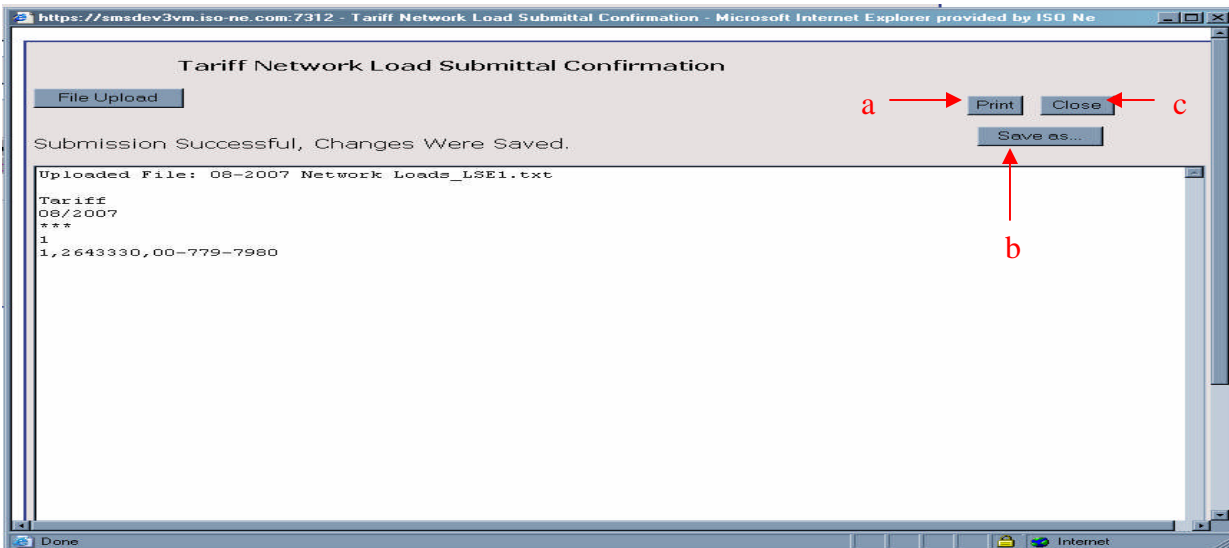


Figure 12 – Print and Save Dialogue Box for File Upload Confirmation

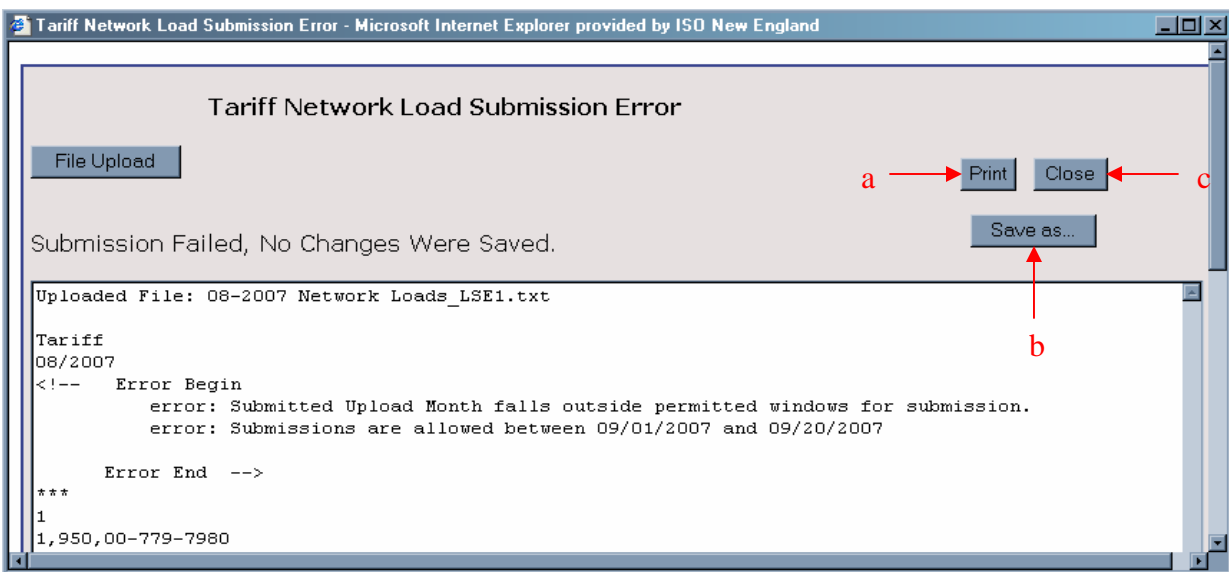


Figure 13 – Print and Save Dialogue Box for File Upload Error Message

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 Network Load to Local Network relationship	CSV and XML
Invalid Network Load Id Invalid networkLoadId Found Invalid networkLoadId encountered	1. The Network Load is not active for the date specified 2. The Network Load ID was not recognized by the system	CSV and XML
Invalid integer format	There are invalid characters in either the Network Load Id or Value (KW) field	CSV and XML
Invalid Duns Number	The DUNS Number is incorrect for the Network Load	CSV and XML
Missing Duns Number for Network Load ID	The Network Load DUNS Number is missing	CSV and XML
Invalid Network Load Id	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 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 defined in Manual 27, 5.1 Regional Network Service Accounting Overview	CSV and XML

Displayed below are typical Error Messages generated by the Tariff 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 14 – CSV and XML File Upload Errors as Displayed

4. Submission Questions or Problems

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

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