Member Impacting Project Overview:

Engineering Data Submission Tool (EDST) Release 1.0

Version 2.1

Contents

Version Control

Version	Date	Author	Change Description
1.0	03/12/2018	D. Giessmann	Initial Version
1.1	03/30/18	D. Giessmann	Updated training and testing information for Model Development and Resource Adequacy
2.0	5/23/2018	D. Giessmann	Extended Reset MTE database to pristine copy by one week; updated Model Development data submitters Modeling Data Entry into MTE under Summary of Timeline to start one week later and end one week later than originally scheduled
2.1	8/3/2018	D. Giessmann	To reduce data merge risks, Model Development and Resource Adequacy functionality will be moved to Production together on 9/12 rather than 8/1 and 10/1, respectively. Summary of Timeline has been updated. Also, RA data entry has been changed to data verification, and dates updated in Summary of Timeline.

Executive Summary

The Engineering Hub project, which completed in January, delivered the software that SPP has named the Engineering Data Submission Tool or EDST. The tool's User Interface is designed to replace a heavily manual data submittal process that uses spreadsheets. The tool is scheduled to be in Production in August of 2018 for Model Development data submittal, and in October of 2018 for Resource Adequacy data submittal.

During Engineering Hub testing, the data submitters in the testing group identified a list of enhancements and efficiency improvements to the system. EDST Release 1.0 will implement several of the suggested enhancements.

The list of enhancements includes:
- Include Status of Record in Basecase Grid
- Ability to Export Changeset Details to Excel
- Changing Confirming Entity Column Name
- Add Contact List
- Increase Changeset Details Page Size
- Freeze Columns on Specific Fields
- Include Record ID in WARN messages
- Send Emails every 5 minutes
- Change Delete Link to Delete from Changeset in Changeset Details
- New Tier 2 Validations for RA to prevent records from being in multiple changesets

Business Impact

The annual data submissions for SPP Model Development and Resource Adequacy (RA) data are the areas of business impact.

The enhancements are described below:

- Include Status of Record in Base Case Grid
  This request is to add a column to the Base Case Grid on each page that shows if a record is currently in a Changeset. The column would include the Changeset ID and the Status.

- Ability to Export Changeset Details to Excel
  This request is to add the ability for the user to export the records in the Changeset Details grid of a specific page to Excel.

- Changing Confirming Entity Column Name
  This request is to rename the Confirming Submitting Entity column in the Grids on the Resource Adequacy pages – "Purchases and Sales" and "Changeset History" – to clarify which party is responding.

- Add Contact List
  This request is to add a link to the website that will display a list of data submitters and their contact information. This will provide the information for the data submitters when they need to contact other entities for counter-party transactions.

- Increase Changeset Details Page Size
  This request is to increase the default number of records displayed in the Changeset Details grid. For Model Development data submitters, 50 records will show per page on load, and the number displayed for Resource Adequacy will be 100 records.

- Freeze Columns on Specific Fields
  This request is to make it so that important fields in the grid sections do not move when scrolling left and right (similar to "Freeze Panes" functionality in Excel).

- Include Record ID in WARN messages
  This request is to add the record ID to the warning message displayed after a validation check produces such message on saving or submitting records in a Changeset Details grid.

- Send Emails every 5 minutes
  This request is to send email notifications more frequently versus at the top of every hour. For example, email could include notice to contact counter-party for a transaction, notification upon SPP review, etc.

- Change Delete Link to Delete from Changeset in Changeset Details
  This request is to rename the Delete link in the Changest Details grid to clarify its function is to remove the record from the current changeset.

- New Tier 2 Validations for RA to prevent records from being in multiple changesets
  This request is to add a validation to check that a record being added to a changeset from the base case is not in another active changeset.

Users Impacted

The resources impacted are those that annually provide spreadsheets to SPP with Model Development or Resource Adequacy data. This includes Model Development data submitting entities who are required to submit modeling data for NERC Standard MOD-032, and Resource Adequacy data submitting entities who are load asset-owning Market Participants, load responsible entities, generator owners, or entities required to submit data for NERC Standard MOD-031-2.

Business Functions Impacted

Business Functions impacted include data submissions for Model Development and Resource Adequacy. Data submissions will be through the EDST User Interface UI.

Technical Impact

Users need to familiarize themselves with EDST UI functionality. There are no member coding changes required.

SPP Systems/Processes Impacted

SPP's gathering of Model Development and Resource Adequacy information will change from accepting Excel spreadsheets to reviewing and approving data submitted via the EDST UI. The EDST is a standalone system with no impact to other SPP systems.

Anticipated Member Systems/Processes Impacted

There will be a process change to use the new EDST UI instead of spreadsheets.

Member Requirements

There are no member coding changes required. Processes for submitting Model Development and Resource Adequacy data will change to use the EDST UI.

SPP Engineering will register users in the EDST site. Users will then receive an email notification that they have been registered and may access the EDST site using the link provided, along with the password emailed to them. Once the user logs in with user name and password, another email will be sent containing a numeric code that must be entered to reach the EDST dashboard, This two-factor authentication process will be required each time a user logs in.

Users not currently submitting Model Development or Resource Adequacy data must contact SPP staff through the SPP RMS system or via email through the Modeling or Resource Adequacy departments to request access.

Training

Training Assumptions:
- All participating entities will identify personnel to receive project-related training and/or documentation.
- SPP Engineering Model Development and RA SMEs will provide training sessions.
- Training dates and materials will be communicated prior to training with representatives and companies that currently submit Model Development and Resource Adequacy data.

Testing

Testing Assumptions:
- All testers will test connectivity to MTE.
- Testing participants are trained on the system prior to testing.
- Project Liaisons will be responsible for coordinating testing at their company, and reporting back to SPP on testing progress or issues. NOTE: Liaisons will be drawn from entities currently involved in Model Development and Resource Adequacy; CWG members with that background that have not been contacted to test, but wish to participate in testing should contact the Project Manager. Testing participants must be model data submitting entities who are required to submit modeling data for MOD-032, or Resource Adequacy data submitting entities who are load asset-owning Market Participants, load responsible entities, or generator owners.
- Testing dates and materials will be communicated prior to testing with representatives and companies that currently submit Model Development and Resource Adequacy data.

Implementation/Back-out Plan

The back-out plan will be to return to manual process of utilizing spreadsheets.

Summary of Timeline

Below is a summary timeline outlining the implementation of system improvements and other events prior to the first day of the submittal periods.

Date	Responsible Party	Action

Date	Responsible	Activity
1/22-4/27/2018	SPP	Model Development improvements and finalization
1/22-5/31	SPP	Resource Adequacy (RA) improvements and finalization
3/14/2018	SPP	Publish initial MIPO
4/25/2018	SPP / Modeling Data Submitters	Modeling Data Training
4/30-5/18/2018	Modeling Data submitters	Modeling Data Testing
5/21/2018-6/1/2018	SPP	Reset MTE database to pristine copy
6/4/2018-6/29/2018	Modeling Data submitters	Modeling Data Entry into MTE
July 2018	SPP Model Development SMEs	Complete verification of Model Development data submissions
6/19/2018	SPP / Resource Adequacy Data submitters	Resource Adequacy (RA) Training
6/25/2018-7/20/2018	RA Data submitters	Resource Adequacy (RA) Testing
7/23/2018-~~8~~7/~~32~~7/2018	SPP	Reset MTE database to pristine copy
~~8~~7/~~30~~6/2018-~~9~~8/~~31~~7/2018	RA Data submitters	Resource Adequacy (RA) Data ~~Entry into~~Verification in MTE
~~September 2018~~	~~SPP RA SMEs~~	~~Complete verification of RA data submissions~~
~~8/1/2018~~	~~SPP / Modeling Data submitters~~	~~Implementation of Modeling Development functionality for EDST; Production URL online – First day of 2019 MDWG Submittal period~~
9/12/2018	SPP	Model Development and Resource Adequacy database moved to production
9/17/2018	Modeling Data Submitters	Pass 1 opens for Model Development data submission. Users begin using EDST in Production
10/1/2018	SPP / RA Data Submitters	~~Implementation of Resource Adequacy functionality for EDST; F~~first day of 2019 RA Submittal period in Production

Risks

No risks have been identified.

Additional Documentation

The *EDST User Guide* is being updated for use during testing. A link to its location will be added to the MIPO after the User Guide update is complete and ready for use.

Communication Plan

Updates on the project will be provided to the CWG, in addition to other affected working groups. The MIPO will be updated as needed.

Liaisons

Liaisons will be entities who are currently involved in the Model Development and Resource Adequacy data submission processes. If CWG members with that background have not been contacted to test, and wish to participate in testing, please inform the Project Manager. Testing participants must be Model data submitting entities who are required to submit modeling data for MOD-032, or Resource Adequacy data submitting entities who are load asset-owning Market Participants, load responsible entities, or generator owners.

MIPO and Project Documentation

All project communication and information will be posted to the SPP Change Working Group Project Documentation folder, Engineering Data Submission Tool (EDST) Release 1.0.

This MIPO will be updated upon change or with any new information, and according to the Member Project Touch Points and Deliverables. With any update, a redline version will be posted to the project documentation folder, and the CWG will be notified.

Next Steps

Action	Assignee	Status & Due Date
Determine and Communicate Resource Adequacy Training Date(s)	SPP Engineering RA SMEs	Complete.

FAQs

Frequently asked questions will be added to the document as identified or necessary

Question	Origination	Answer
TBD		

More Information

At any time, members can ask questions or get more information by completing an RMS ticket using "Project Inquiries" Quick Pick and this project's subject option.

RMS link: https://spprms.issuetrak.com/login.asp.

If a new user ID is needed for RMS, click on that link and follow the directions for "Register Now".

Home

SPP *Southwest Power Pool*

Welcome to Southwest Power Pool's
Request Management System (RMS)

My SPP RMS
Submit Request
Search Requests
Lookup Request #
Unassigned Requests
Calendar
Knowledge Base
Reports
Closing Requests (NEW!)
RMS Metrics
SPP Website

Submit Request

[Submit Request]

Quick Pick: [Project Inquiries ▾]

* Class: [PMO ▾]

Request Status: [Open ▾] [▾]

This Request is used to submit an inquiry regarding current SPP Projects.

Do NOT change Request Type. Doing so will delay a response to your inquiry.

In *Subtype 1* select the appropriate project. Your selection ensures timely assignment of your inquiry to the appropriate project owner.

* Request Type: [Project Inquiries ▾]

* Subtype 1: [EDST ▾]

Subtype 2: [▾]

Severity: [5 Days ▾] descriptions

Caller: [ ] 🔍 add | details | history

Organization: [ ] 🔍 details | history

Assigned To: [Dena Giessmann] 🔍 (assignment based on Type Sub1)