

Customer Information and Data Exchange (CIDE) Project

Revenue Metering Standing Committee
October 28, 2010



□ Customer Information and Data Exchange (CIDE) Project

- Development of Customer Data Management System (CDMS)
- Includes grid assessments, market entry and metering
- PLC replacement

- ❑ The development and implementation of the Customer Data Management System CDMS is to manage master data within an organization.
- ❑ Other organizations in the electricity industry such as The Electric Reliability Council of Texas (ERCOT) have implemented the master data concept for the same reasons as the IESO, which are to:
 - Manage customer activities and information flows through a single, centralized IT supported solution.
 - Improve database integrity and reduce the likelihood of inaccurate/outdated customer information being used by staff.
 - Customer information will have a clear set of business owners and data definitions as the responsibility for the information is relayed to various areas of the IESO.
 - Provide the flexibility to incorporate new types of customers or include new master data on existing customers and equipment.

- ❑ The new Customer Data Management System (CDMS) will provide the functionality and common information infrastructure that the existing Participant Life Cycle system (PLC) was not originally designed for.
- ❑ This solution will lay the foundation for future improvements to management of customer information within the IESO and between the IESO and our customers.
 - Permit customers to submit and manage their own information.
 - Replace paper based forms.
 - Improve data availability and accessibility.

- ❑ Having a clear understanding of how the customer's information is used will help us to only ask for the needed information.
- ❑ The IESO's customers will then benefit by reducing our need to repeatedly ask for the same information, which leads to a reduction in information requests to customers. This issue has been raised through feedback to Customer Relations and comments in the annual customer survey.
- ❑ Provides reassurance that the all IESO staff are working with the most recent and accurate data managed from a centralized, common repository.

- ❑ The new CDMS will provide the functionality to manage customer information for organizations that participate in IESO administered programs and markets as well as other non-IESO programs for which the IESO is required to assist or coordinate.
- ❑ Eliminate the need of resources to support multiple business tools that contain duplicate and potentially inconsistent information.

Next Steps – CIDE Project

- ❑ Implement CDMS for IESO grid assessments, market entry and metering staff - Dec. 16, 2010.
- ❑ Role out CDMS across all IESO groups.
- ❑ Business process review to identify efficiencies related to registration, enrolment information and processes.
- ❑ Prepare for de-commissioning of Participant Life Cycle system (PLC).

- ❑ Metering group to review metering installation registration process to identify opportunities to improve efficiency and effectiveness.
- ❑ Identify possible form reductions with next phase of CIDE project.
- ❑ Prioritize on implementation of on-line form replacement to existing forms.
- ❑ Work with MSP's to implement changes to registration process which result from implementation of CDMS.