

# SettleCore

## Settlements Analyzer Desktop Version

Power Settlements Consulting and Software is pleased to offer a **30-day free-trial** version of the SettleCore Settlements Analyzer to all CAISO scheduling coordinators.

### What is the **SettleCore** Settlements Analyzer–Desktop Version?

The Settlements Analyzer is an application that:

- 1) Is used by CAISO scheduling coordinators as the premier application for hands-on MRTU settlement training.
- 2) Enables scheduling coordinators to analyze and drill-down into their MRTU settlement data.
- 3) Enables scheduling coordinators to export MRTU settlement files to MS Excel.
- 4) Includes the SIBR Upload Template for front-office.

The SettleCore Settlements Analyzer is a standalone settlements application, which has a unique settlement training feature built into the application that is discussed in more detail below. While the Settlements Analyzer is a very functional application, it should be noted that it is used for training and analysis purposes, not for performing shadow settlements. For companies that wish to purchase a shadow settlement system, the SettleCore ISO Downloader and SettleCore Shadow Settlement/Dispute add-on modules can be activated for a complete shadow settlement system.

The charge code formula view demonstrates to the users how the individual steps of the charge code formulas are calculated. Rather than using an example calculation, the users can view a charge code settlement interval in formula view. This screen incorporates the user-selected data directly into the charge code formula, allowing the user to view how the CAISO calculated each step of the charge code amount that appeared on their MRTU settlement statement!

### What does the **SettleCore** Settlements Analyzer do?

Described in detail on the following page.

### Who should use the **SettleCore** Settlements Analyzer?

The SettleCore Settlements Analyzer can be used as a complimentary MRTU settlement tool for all scheduling coordinators of the CAISO, including those that have settlement systems. So, who should use the SettleCore Settlements Analyzer? Any company that wants to:

- Provide summary and in-depth settlement training to their staff to assist with the transition to the new MRTU charge code calculations.
- View and analyze all MRTU settlement files.
- Export MRTU settlement files to MS Excel.

### Why should I download the 30-day free-trial offer today?

- The Settlements Analyzer is completely free for 30 days.
- It can be downloaded and installed directly onto your computer in less than 20 minutes.
- You can start enjoying the functionality of the Settlements Analyzer today.

# Power Settlements

Consulting and Software



Download and enjoy the benefits of the **30-day free-trial** version of the **SettleCore Settlements Analyzer** today!

## SettleCore Settlements Analyzer

The SettleCore Settlements Analyzer, which can be used as a stand-alone application or can be integrated with other SettleCore modules, includes the following features:

- **Training Feature:** View the charge code formulas from the CAISO BPM Configuration Guides.
- **Training Feature:** Select a settlement line item, right-click, and see the actual settlement data inside the charge code formula – enabling the user to see how the CAISO calculates each step of the charge code formula, resulting in the amount on the settlement statement.
- Import the scheduling coordinator's daily xml settlement files issued by the CAISO (BA statement file, BA billing determinant file, and the CAISO billing determinant file).
- Drill-down from a charge code into the billing determinants that are used to calculate the charge code quantity, price, and amount.
- View the statement and billing determinant data in data grids with pivot table, sorting, and filtering functionality.
- Export data into MS Excel by charge code (one worksheet for each charge code and its billing determinants).
- Export data into MS Excel by charge group (one worksheet for each charge group—a collection of CAISO charge codes—and its billing determinants).
- For simplified scheduling in SIBR, use the SIBR Upload Template to populate your bids, self-schedules, and inter-SC trades in the Excel file, import it into the Settlements Analyzer, which creates the xml files that can be uploaded into SIBR using the SIBR Advanced Submit button.

## How the 30-Day Free-Trial Offer Works

The 30-day free-trial version of the SettleCore Settlements Analyzer is available to all CAISO scheduling coordinators.

In order to use the free-trial offer:

- 1) Watch the Settlements Analyzer web demo at [www.powersettlements.com](http://www.powersettlements.com).
- 2) Send an email to [support@powersettlements.com](mailto:support@powersettlements.com) with the subject of the email as "Request for 30-Day Free-Trial."
- 3) We'll email you the link to download the application onto your computer.
- 4) Run the installer package, which will install the application on your computer (takes approximately 10 to 20 minutes to install).

- 5) Begin using the free-trial version of the Settlements Analyzer!

The following are the computer requirements needed to install the free-trial version:

- The Settlements Analyzer must be installed on the local hard drive of your computer. The free-trial offer version cannot be installed on a network.
- The Settlements Analyzer requires the Windows Server 2003, Windows XP, or Windows Vista operating system.
- The computer's hard drive must have at least 10 GB of available space.