



**Demystified Data plus Directed AI:
Applying Intelligence Technologies to Energy
System Planning**

Lunch and Learn



Hudson Hollister
Co-Founder and
CEO



Luke Ashton
Regulatory
Economist



Richard Grinschgl
Solutions
Consultant

Demystified Data: Structured and Unstructured



Demystified Data: Structured

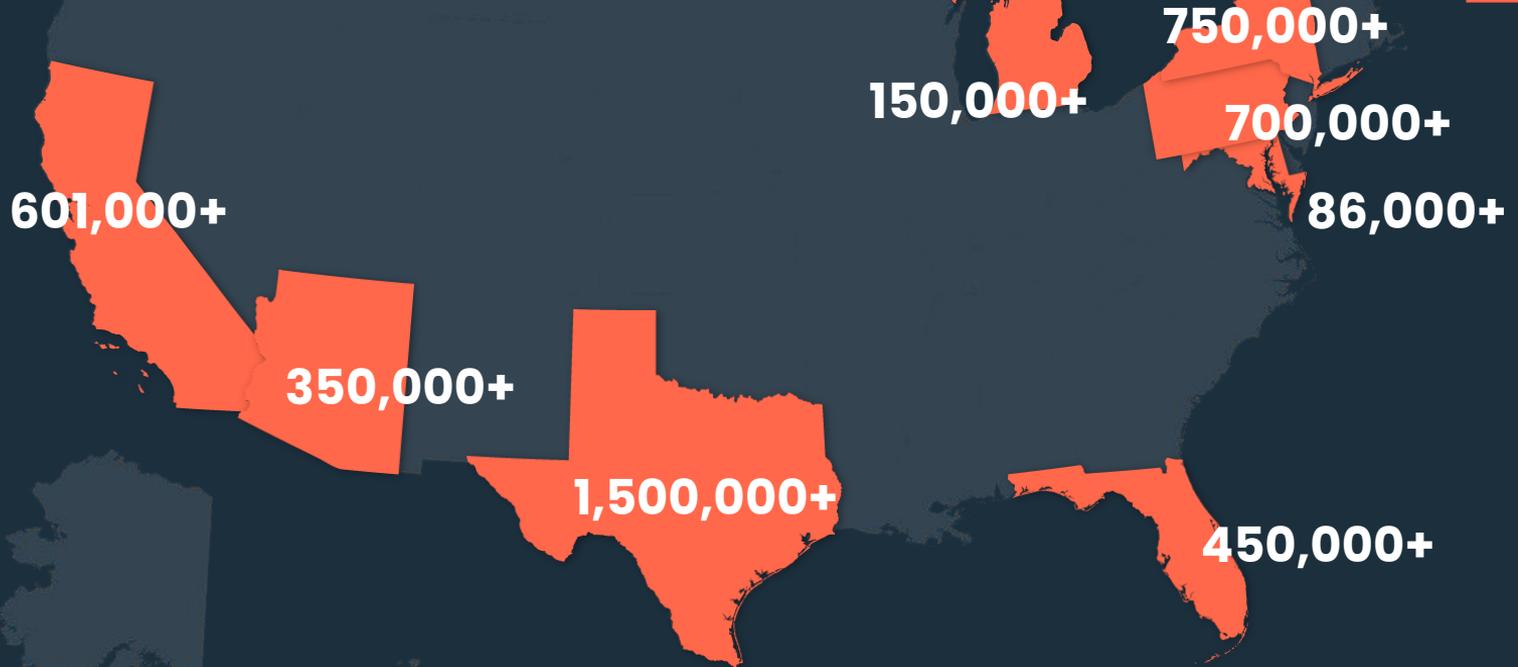
67,217,701

Data points from FERC, EIA, and
state-level sources

278,906

Facts filed to FERC to meet
compliance requirements

Demystified Data: Unstructured



Solutions



COMPLIANCE

Easy FERC filing of annual and quarterly forms, with automated XBRL formatting and tagging



ANALYTICS

Visualizations and raw data to gain insights across the industry, for a peer group, or an organization



DIRECTED ARTIFICIAL INTELLIGENCE

Regulatory AI, directed to locate, monitor, and interact with federal and state documents

Regulatory AI: More than a Large Language Model

✓ Grounding

Sources are divided into discrete pieces, using a method specifically designed for energy regulation, and each “chunk,” is separately tracked.

Natural language processing **identifies which chunks are relevant to a query** and feeds only those chunks into LLMs, so that all answers are “grounded” in their sources.

✓ Engineering

Every query starts a sophisticated internal process which might include many distinct LLM operations.

For example, the solution might **rewrite the query** by expanding it or correcting misspellings, **insert previous conversation history** to contextualize the answer, or even create and run many **sub-queries** all in parallel.

✓ Multiple LLMs

Different LLMs are best for different tasks. The solution can **select the LLM that is best** for the task at hand.

Some AI companies release new LLMs, changing the results of queries. **Using multiple LLMs aids consistency**. HData tests all new models before including them in the solution.

Benefits



- Avoid **hallucinations**
- Illuminate **citations**
- Escape **volume limits**

System Planning with Data and Regulatory AI



PEER RESEARCH

Rapidly digest and understand the key characteristics of peers' system, resource, and site plans; investigate regulatory commissions' consideration of peers' proposed plans; query testimony of intervenors on peers' proposed plans.



DISCOVERY ANALYSIS

Manage discovery requests and responses from previous IRP proceedings; create first drafts of responses to discovery requests in current proceedings.



PLAN PREPARATION

Source numeric and comparative data from regulatory filings, including FERC Form 714 (loads), FERC Form 1 (finance), and EIA sources (reliability, plant performance).

Users



Advisors



Hon. Jon Wellinghoff
Former Chairman, FERC



Hon. Neil Chatterjee
Former Chairman, FERC



Hon. H. Russell Frisby
Former Chair,
Maryland Public Service
Commission



Hon. Stan Wise
Former Chair,
Georgia Public Service
Commission



Hon. George P. Bush
Former Texas Land
Commissioner



Tom O'Neill
Former General
Counsel, Exelon



Becky Blalock
Former CIO,
Southern Company



Chris Blake
Assistant Treasurer,
Alabama Power



Susan Gamble
Regulatory Affairs
Executive, Alabama
Power Company



Marie Mouchet
Former SVP and CIO,
Colonial Pipeline



Donna Ward
SVP Utility Sales,
Southwire



Frank Lacey
Founder,
Electric Advisors
Consulting



Nate Haskins
Former CDO, S&P Global



Hon. Eduardo Balbis
Former Commissioner,
Florida Public Service
Commission; Partner,
Guidehouse





Demo: Exploring a Resource Plan

Demystified Data, Directed AI



Preview: Exploring 20 IRPs

Peer Analysis using Next-Generation Regulatory AI

Next-Generation Regulatory AI



Develop a matrix with an X and Y axis, where the X axis lists the name of each utility whose documents I've given you, and the Y axis is a list of questions about those utilities. Fill in the matrix with your responses to each question for each utility.

Collect the list of utilities from the Integrated Resource Plans I've given you. The list of questions is as follows:

1. What are the predicted percentage growths of demand for particular customer classes?
2. What does the utility expect to do with their coal generation fleet in the near future?
3. Does the utility plan to build new nuclear generation into their portfolio, including SMR or small modular reactors? If so, what is the expected timeline to do so?
4. What is the utility's planning reserve margin?

New session

Reg AI Pro > New session

< 20 files selected



Questions

Insights

Insights

Key topics



People mentioned



Dates and Events



Companies and Entities



:00

Develop a matrix with an X and Y axis, where the X axis lists the name of each utility whose documents I've given you, and the Y axis is a list of questions about those utilities. Fill in the matrix with your responses to each question for each utility. Collect the list of utilities from the Integrated Resource Plans I've given you. The list of questions is as follows: What are the predicted percentage growths of demand for particular customer classes? What does the utility expect to do with their coal generation fleet in the near future? Does the utility plan to build new nuclear generation into their portfolio, including SMR or small modular reactors? If so, what is the expected timeline to do so? What is the utility's planning reserve margin?



Sources



- **20** documents
- **~8,000** pages
- **~3 million** tokens

HData

Thank you



Appendix

Additional resources

HOW...

do I find all of the data I need?

Centralized Data

can I make it easier to actually use the data?

Better User Experience

do I get more value from the data?

AI-Powered Acceleration

BETTER USER EXPERIENCE: Advanced Search

The screenshot displays the HData interface for the California PUC Dockets Catalog. At the top, the HData logo is on the left, and navigation icons (notifications, help, profile) are on the right. Below the logo, the page title 'California PUC Dockets Catalog' is shown, along with a breadcrumb 'Library > California PUC Dockets Catalog'. A search bar is present with the placeholder text 'Search file content...'. To the right of the search bar are icons for list view, search, filters, and a '1' notification badge. Below the search bar are buttons for 'Proceedings' and 'Files'. The main content area is a table with the following columns: File Title, Document Description, Proceeding Number, Filed Date, and Tags. The table contains four rows of search results. At the bottom of the table, there are icons for document, PDF, and image, and a pagination control showing 'Per page: 100' and '1-100 of 75,392'.

File Title	Document Description	Proceeding Number	Filed Date	Tags
Application filed by Pacific Gas and Electric Company on 09/30/2024 Conf# 211444 (Attachment)Proceeding: A2409014	Application of Pacific Gas and Electric Company to Revise its Electric Marginal Costs, Revenue Allocation, and Rate Design. (U39E)	A2409014	09/30/2024	
Comments filed by Utility Consumers' Action Network on 09/30/2024 Conf# 211402Proceeding: R2207005	Comments of the Utility Consumers Action Network to Administrative Law Judges Ruling seeking party comment on Amendments to Decision 24-05-028 and Proposed Additional Third-Party Contract Budget.	R2207005	09/30/2024	
Comments filed by San Diego Gas & Electric Company on 09/30/2024 Conf# 211359 (Certificate Of Service)Proceeding: R2207005	Comments of Pacific Gas and Electric Company, San Diego Gas & Electric Company, and Southern California Edison Company in response to Administrative Law Judges Ruling seeking party comment on Amendments to Decision 24-05-028 and Proposed Additional Third-Party Contract Budget.	R2207005	09/30/2024	
Comments filed by Small Business Utility Advocates on 09/30/2024 Conf# 211360Proceeding: R2406012	PROPOSAL IN RESPONSE TO THE QUESTIONS TO CONSIDER CHANGES TO THE COMMISSION'S CARRIER OF LAST RESORT RULES	R2406012	09/30/2024	

Search Flexibility

Structure your search with the information you have about the files you need

Expand or Narrow Searches

Cast a wide net or refine searches to precisely what you're looking for

AI-POWERED ACCELERATION: AI Citations

LET'S
GO! 20
24
HData Customer Conference

The screenshot displays the HData Librarian chatbot interface. On the left is a sidebar with navigation options: Insights, Library, Gateway, Compliance, and Toolbox. The main chat area is titled 'Librarian' and shows a message from the chatbot: 'Hello, I am the HData Librarian Chatbot. You can ask me anything about the file that you just selected. Type a question in the text bar below or select one from the sidebar on the left to get started.' Below the message are tabs for 'Suggestions', 'Brief summary', and 'Detailed summary', and a text input field with a send button. On the right, a 'Citations' panel is visible with the text 'Ask a question before seeing a citation.' The top of the interface shows the HData logo, notification and user icons, and a breadcrumb trail: 'View Private Documents File > Librarian'.

Validate Accuracy

See exactly what information was referenced for AI to generate an answer

Ensure Trust & Credibility

Verify that responses are based on relevant and authoritative sources

Resource & Transmission Plan Catalog

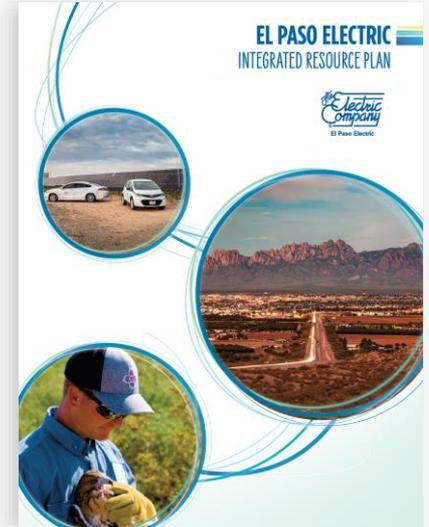
HData 🔔 ⓘ 👤

Resource & Transmission Plan Catalog Library > Resource & Transmission Plan Catalog

Search Docket # Search **Plans** Files

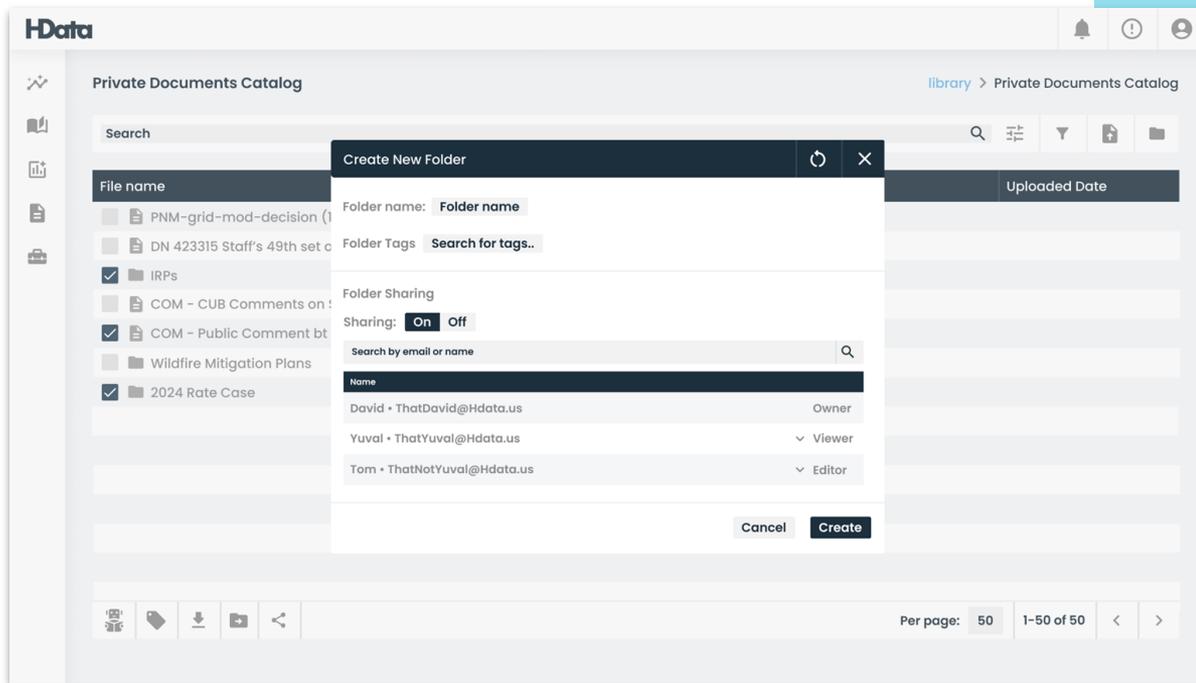
Filing Entity	State	Regulatory Body	Plan Name	Tags	Year
Jacksonville Electric Authority (JEA)	Florida	Florida PSC	Ten Year Site Plan		2024
Jacksonville Electric Authority (JEA)	Florida	Florida PSC	Ten Year Site Plan		2023
Jacksonville Electric Authority (JEA)	Florida	Florida PSC	Ten Year Site Plan		2022
Ameren Illinois Company	Illinois	Illinois Commerce Commission	Multi-Year Integrated Grid Plan		2023
Apple Valley Choice Energy	California	CPUC	IRP		2022
Ava Energy	California	CPUC	IRP		2022
Avista Corporation	Washington	Washington Utilities and Transportation Commission	Electric IRP		2023
Avista Corporation	Washington	Washington Utilities and Transportation Commission	Gas IRP		2022
CAISO	California	Ferc	Transmission Plan		2022

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Centralized documents from 150 utilities across the country

Document Management & Permissions



Organized Files

Library folders create easier file organization and access

Flexible Access

User access permissions at the folder and file levels increase flexibility for teams and individuals

Alert Configurability & Digests

HData

Alert Manager > Create Alert

Create Alert

Create

The alert management system allows you to set up alerts with specific criteria to receive in-app and email notifications when matching documents are found, allowing you to stay informed without manually searching through documents. Once an alert is created, the system will analyze new documents when they are detected and notify you if any match your criteria.

Name *

Name

This alert will match any new or updated document from the data source(s) you select based on the criteria you specify below. Utilize the Advanced Criteria option to enable a more guided approach to entering more complex criteria.

Advanced Criteria

Enter Advanced Criteria for your Alert...

Data Sources *

Federal

- Form 1
- Form 1/3-Q

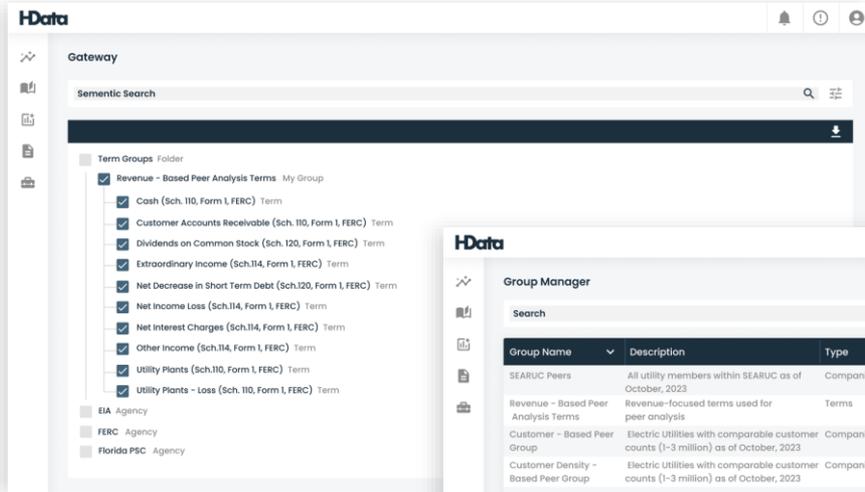
Alert Precision

More configurability refines alerts to the most important information you need to monitor

Easy Monitoring

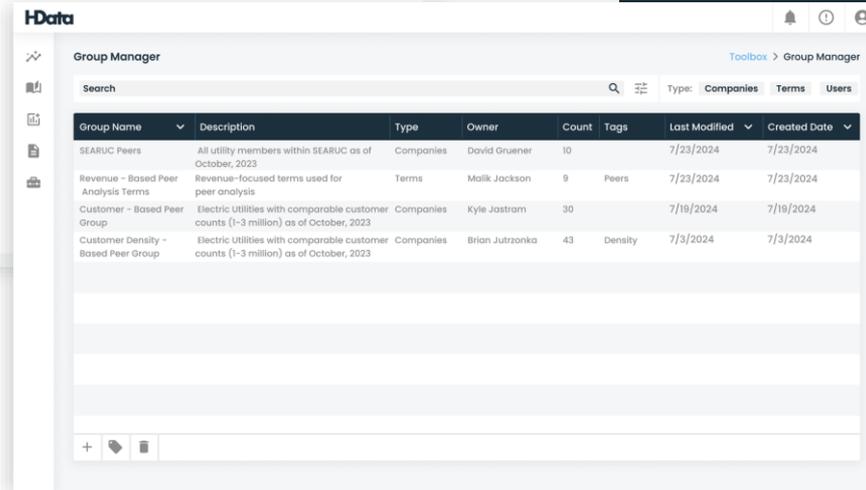
Notifications available as either real-time or a periodic digest to fit your workflow

Data Favorites



Shortcut Data Access

Customize and save groups of data used for recurring analysis



Faster Analysis

Return to pre-saved options at any time to reference selections you've already created

Full Preview Video

HD Data

Next-Generation Regulatory AI

Select up to 10 files to query at once



Select a larger number of files to query at once

Select files from a single catalog



Select files across all catalogs

Summarize a lengthy document



Get a summary of topics, companies, people, and dates mentioned in a document without having to ask

Ask any question about a document



View optional prompt suggestions based on document contents

Ask a question and get an answer



Get recommended follow-up questions in real time as your conversation progresses

Download and review citations for AI-generated answers



View a summary of how answers were generated along with a log of all information sources

Export AI conversation history from a session



Save entire conversation history and organize chats by case or topic

Share chat exports with colleagues



Collaborate on AI-powered analysis in real time

Customer Ecosystems



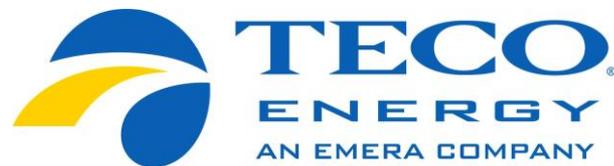
 Number of HData customers with regulatory requirements, participation, or oversight in jurisdiction



HDATA USE CASE

Modernizing Compliance

TECO Energy uses HData Compliance to prepare, validate, and file reports with the Federal Energy Regulatory Commission. By importing data from TECO's financial systems, HData helps eliminate manual data entry from the filing and compliance process.



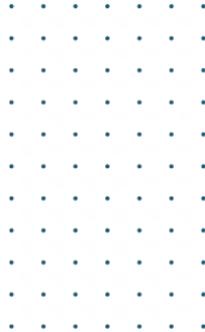
HData



HDATA USE CASE

Analytics for Enhanced Productivity

Southern Company's finance department uses HData Insights to create custom metrics for comparative analysis. With a significantly reduced need to spend time on repetitive data-input tasks, the team is positioned to enhance productivity and increase the finance department's output.



Southern
Company

HData



HDATA USE CASE

Delivering Alerts & Intelligence

The NextEra Energy Transmission Regulatory Management Office uses HData Alerts to track statistics, regulatory decisions, and transactions of interest that involve transmission lines.





HDATA USE CASE

Reducing Legal Costs

Exelon uses HData Regulatory AI to sift through state-level regulatory document repositories and quickly identify source documents for prospective regulatory proceedings.

