

CAISO INFORMATION PRODUCTS AND SERVICES PROJECT

Final Plan

Appendix B: Planned or In Process List (Update)

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Overview

As part of the needs assessment phase of the CAISO Information Product and Services project, the CAISO interviewed representatives from all major stakeholder segments and compiled a preliminary list of stakeholder needs based on those interviews (see [Initial Stakeholder Feedback Summary](#)). The following list is a refinement of the Initial Stakeholder Feedback Summary to identify items that are:

- Work-in-Progress – these items are already scheduled in a current CAISO project initiative with the expected completion before or during the MRTU project rollout.
- Planned for Future Implementation – these items are not yet in progress, but are planned for inclusion in a future project or implementation.
- Infeasible - these items can not be realistically addressed due to conflicts with current policy, procedures, or market rules.

Please note that this Project focuses on current stakeholder needs, and is not impacted by or related to Market Redesign and Technology Upgrade (MRTU). MRTU-related projects have existing stakeholder communication and feedback mechanisms already in place.

Purpose

The purpose of the Stakeholder Needs Assessment – Planned or In Process list is to inform participants of work already in-progress or planned to satisfy current unresolved stakeholder needs and requirements, and infeasible items that the CAISO does not currently intend to pursue.

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Stakeholder Needs Assessment – Planned or In Process List							
Line Item	Issue	Description	Enhancement, Variance, and Other Notes	In Process			Infeasible
				Pre - MRTU	MRTU	Post - MRTU	
Additions Made on Nov 30, 2006							
AUTOMATED DISPATCH SYSTEM (ADS)							
FORMAT							
1	More efficient formatting	Redesign for more compact depiction of downloaded data, e.g., delete excess "white space"	Moved to Planned or In Process list: The CAISO is currently testing an ADS Advance Query Tool, which will allow stakeholders to: <ul style="list-style-type: none"> · Download time blocks of data larger than 5-minutes; · Perform improved data filtering for viewing and downloading data; and · Save data in Excel or CSV format. The CAISO will also provide improved training and instruction manuals. 	X			
2	Formatting customization	Clearly post & explain the customization process	See Notes for Item 1.	X			
3	More efficient downloading	Allow users to specify a time-period block and: (1) download all data for that period in at once (into Excel), instead of requiring separate downloads for each 5-minute period; (2) include only intervals where they received an CAISO dispatch instruction. The OASIS download into Excel or CSV was cited as a good example of what is needed here.	See Notes for Item 1.	X			
CONTENT							

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6	Verbal instruction follow-up	Send electronic confirmation of verbal instructions overriding electronic instructions, every time, even after the fact, to ensure accurate info receipt & reflection in RTMA/Settlements.	Moved to Planned or In Process list: RMR Dispatch Modification – The CAISO will change its dispatch process so that verbal instructions would follow ADS instructions, except if a unit is offline. This will provide the necessary ADS electronic record showing when the unit was dispatched and the time record showing when unit began moving toward the instruction dispatch operating target (DOT).	X			
8	PROCESS	Stop unnecessary alarms for zero MW dispatches – set off alarm only when SC action is required	Moved to Planned or In Process list: MRTU ADS Market Design – Alarms are important for Inter-tie resources, as they must respond to ADS dispatches. Control area resources can silence the alarms using the ADS option settings. In addition, using the filtering function in ADS allows user to focus alarms on selected resources. The MRTU design anticipates addressing unnecessary alarms and focusing alarms on items that require SC actions.		X		
SCHEDULING INTERFACE (SI)							
19	ALTERNATIVE SETTLEMENT-DATA DOWNLOAD METHOD	Consider pushing data to another location; now, user entities must give settlements personnel access to SI in order to give them access to the data – problematic from a system-security perspective	Move to planned or in process: This issue will be resolved with the implementation of the new Settlement and Market Clearing (SaMC) system with MRTU. The SaMC application will be available to market participants separately from the scheduling system through a web-based portal.		X		
SLIC SYSTEM							

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96	MARKET PARTICIPANT NEED TO USE	Market Participants must use frequent SLIC updates to manage exposure from infeasible RTMA dispatch instructions, due to inadequate Master File data on generator configuration (e.g., inaccurate combined-cycle modeling) and operational limitations. SLIC is just not functional for that purpose, and these problems are made more acute by the potential imposition of UDP and outage protocol violation sanctions	Moved to Planned or In Process list: SLIC RTAM (Real-time Availability Modification) API Tool Kit: The CAISO is currently enhancing the current SLIC API. This enhancement will: <ul style="list-style-type: none"> · Simplify the process of making real-time adjustments to multiple and combined cycle resources; · Provide improved query functionality for filtering and data presentation; · Provide user with an API graphical user interface; · Take advantage of .NET software development protocol (note: support of .NET is currently under discussion at the CAISO); and · Provide user application developer insights to the functionality of the new RTAM API. 	X				
97	SLIC-SI-Master File links	Build/enhance links between SLIC, SI, and the Master File. Lack of these links (and lack of an API – see above) require multiple user entries of the same data – a “prescription for manual error.” Change should include the following:	See notes for Item 96.	X				
102	- Combined-cycle modeling	Either: (1) Model properly in these other systems; or (2) add a “toggle set point” to allow a plant operator to effectively remove the plant from dispatch for short periods (e.g., in transition between combined-cycle configurations); monitor this feature to prevent abuse	See notes for Item 96.	X				
103	- Unit direction changes	Allow users to specify a maximum number of direction changes per hour, to avoid frequent use of SLIC for that purpose. (Accompanying comment: CAISO should use Regulation to cover frequent direction-change needs – that service is better designed for that purpose.)	See notes for Item 96.	X				
	ADDITIONAL FUNCTIONALITY							
106	Completeness	Add a function showing all a Market Participant's outages in one report	See notes for Item 96.	X				
108	Editing	Allow users to edit screens to eliminate unneeded columns	See notes for Item 96.	X				
133	SLIC	PG&E recommends that the CAISO provide market participants with the opportunity to group resources on a single page so that if the outage of one unit on a hydro system affects other units, a dispatcher can enter all the pertinent data on one page and then submit multiple SLIC cards from that page.	See notes for Item 96.	X				

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OASIS					
CONTENTS					
26	IOU load forecasts	Include this info for all IOUs, and explain whether the posted forecast comes from the CAISO, the IOU, and/or the SCs	Moved to Planned or In Process list: MRTU OASIS: This stakeholder need will be address with the release of new MRTU OASIS. · CAISO peak load and a 2-day load forecast will be published for each IOU	X	
27	"Ticker" feature additions	Add system frequency measures, A/S clearing prices, & congestion information	Moved to Planned or In Process list: The current ticker tape function will be replaced with a Price Contour Map display. This display will show: · Graphical representation of the CAISO control area; · Contour lines to show the different LMP prices through out the control area; · Price table reflecting the individual prices at each node; and · Price data for energy, congestion, and loss components of the Locational Marginal Price.	X	
CAISO WEB SITE					
RECENT (& NOT-SO-RECENT) DOCUMENTS					
54	Timing	Go back more than 14 days, or have an archive ("old document repository") that lets users specify a date or date range and look at documents posted further back than 14 days, e.g., examples include old technical, operating, and tariff documents, which are often needed for litigation.	The CAISO is implementing a new website content management system in Q2 of 2007. In coordination with this change, the ISO will implement: · More user-friendly URLs; · Advanced search functionality; · RSS (Really Simple Syndication) allows visitors to receive a notice when web pages are updated. The CAISO will re-define its stakeholder interaction guidelines and educate the company. This is an on-going effort, as participant interactions are not always centrally handled (OCT 2006).	X	
86	OTHER DATA NEEDS	- Better & more timely Must-Offer Waiver Denial and RCST info	Ongoing RCST stakeholder process anticipates meeting this need.	X	

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87	OTHER DATA NEEDS	- Hourly loads, for the whole system and by LSE	The CAISO will provide hourly load data as part of the MRTU OASIS report. It does not plan to post load information by LSE, as this information is found to be confidential in nature	X			
Original List Created on September 15, 2006							
1	AUTOMATED DISPATCH SYSTEM (ADS)						
2	QUERY TOOL: Re-design, replace, and/or enhance		Testing of advance query tool underway. Verify if these items are included in the enhancement scope.	X			
3	Speed	Very slow - enhance data transmittal speed.	CAISO00004896 (closed) - improvement to cpu usage	X			
4	FORMAT						
5	Advance query window use	Notify users that the other fields are cleared if a new date is entered, i.e., they should enter the date <u>before</u> making other selections.	Testing of advance query tool underway.	X			
6	Other issues raised by adjacent Control Area						
7	Connectivity problems	The application says it's "connected" when it really isn't	CAISO00005300 (open) - ADS is disconnecting at top of the hour.	X			
8	Trajectory tool	Just cannot get it to work.	CAISO00004264 (open) - will address issue with unit start/end date recognition CAISO00004046 (closes) - regions under the curve corrected	X			
9	OASIS						
10	SPEED - PERFORMANCE	Fix speed & performance -- very slow, with frequent unit time-outs (widespread complaint) and "page cannot be displayed" messages -- possibly due to inadequate server capacity	OASIS Legacy - MRTU Enhancement Item No. 2004-0003, 2004-005, 2004-0019		X		
11	USER-FRIENDLINESS						
12	Site use instructions or tutorial	Provide these, for the novice and/or infrequent user, or those accessing new/unfamiliar features.	OASIS Legacy - MRTU Enhancement Item No. 2002-0007, 2002-0017		X		
13	Data definitions	Include data definitions and explanations of the data sources.	OASIS Legacy - MRTU Enhancement Item No. 2002-0007, 2002-0017		X		
14	CONTENTS						
15	Transmission info	List & explain forecasted operating limits, scheduled and actual path flows, congestion, and outages/return times	OASIS Legacy - MRTU Enhancement Item No. 2002-0040		X		
16	Outdated documents	Transfer these to an archive			X		
17	Links to other sites	Delete if not maintaining them -- many are out of date	Current OASIS Site cleanup	X			
18	FORMAT						
19	Unnecessary scrolling	To reduce the need to scroll in order to reach the options (including the "submit" button):	OASIS Legacy - MRTU Enhancement Item No. 2004-0016,		X		

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			2004-0056				
20		➤ Size the displays to fit standard computer screen size;			X		
21		➤ Reduce the size of the decorative design elements;			X		
22		➤ Display only the selected hours.	Report requestor may allow hourly selections - f/u with OASIS team.		X		
23	"Scrolling" format	Carry tab & column headings down when scrolling down columns of data			X		
24	Numerical vs. text format	Put contents of all cells with numerical data in numerical format - some are now in text format, requiring user conversion after a download.	CSV will simple be in text form, but xls file should be in correct value format.		X		
25	FUNCTIONALITY						
26	Data processing	Allow more filtering/sorting of data before downloads	MRTU OASIS Requirement.		X		
27	Downloads to Excel	Some interviewees identified problems here, while others didn't – bears more investigation	MRTU OASIS Requirement.		X		
28	MARKET NOTICES						
29	E-MAIL SUBJECT LINE	Reduce the number of words, and abbreviate those that are left, to facilitate sorting.			X		
30	SELF-SELECTION TOOL						
31	Election changes	Make it obvious on the CAISO Web site how to make or change elections. The method was specified in the original MN, but many don't remember it and didn't retain the original notice	This information is currently available on the CAISO website.				
32	SUMMARIES AT THE BEGINNING	Make them more succinct – sometimes, they are as long as the message itself	Over the past year, we have implemented additional standards that should have resolved this issue.		X		
33	FORMAT						
34	Text format	Send in Plain Text, or allow users to select that as an option	In process for 2007.		X		
35	CAISO logo	Eliminate or reduce the size of the CAISO logo at the bottom	The size of logo has been reduced to minimize recipients' problems.		X		
36	MEETING WEBCASTS						
37		<i>Make it faster:</i> Use log-in systems where participants can log in with a passcode number, instead of waiting for an operator	Operators are necessary to capture the audience attendance.				X
38	CAISO WEB SITE						
39	SEARCH TOOL	Advanced Search feature recommended by many, analogous to that on the FERC Web site; should allow users to specify date/date ranges and document types (e.g., Tariff, Tariff amendment, White Paper, Board resolution, or Operating Procedure), in addition to the subject.			X		
40	SETTLEMENTS AREA						

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	BETWEEN SLIC AND OTHER SYSTEMS, & JOINT/SEPARATE FIXES NEEDED						
57	- Information transfer	Allow copy/paste of data from other information sources into submittal report forms.	Copy and paste function is currently available for "text box" inputs.	X			