



California ISO

Resource Interconnection Management System (RIMS) Quick Start Guide



California ISO

New Resource Implementation (NRI)

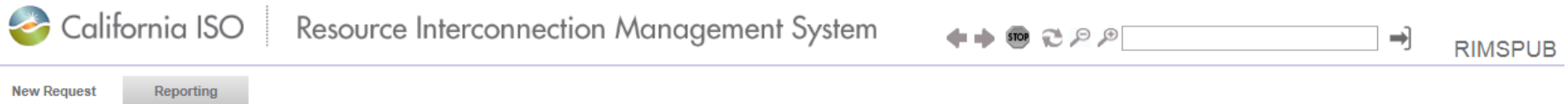


Starting a New Project, Document Submission, and Project Information Updates for:

- Solar
- Wind/Wind Repower
- Existing QF
- Wind QF
- Conventional
- Dynamic
- Pseudo
- Non-Generation
- Load
- Custom LAP
- Meter Replacement
- RIG Reconfiguration
- Meter Maintenance

Starting a new project

- Request a new project registration code via the RIMS public site (<https://rimspub.caiso.com/rims5/logon.do>)



New Request

First Name:

Last Name:

Email:

Confirm Email:

Requested Project Name:

Request Type:

- Select One
- Interconnection Request
- NRI Project Details Form**
- Conversion or Repower Request

Retrieve Request

Registration Code:

1. Fill in the "New Request" section above to receive a registration code via email that will allow you to upload an Interconnection Request or Project Details Form and associated documents. This only needs to be done once for each project to be submitted.

2. Once a registration code is received, paste it into "Registration Code" field to upload required project files.

Resource Interconnection Management System (RIMS) is the CAISO's system for tracking several different interconnection processes at the CAISO. A training presentation for RIMS is available [here](#).

Queue Viewing Instructions

- Click on "Reporting" tab in top left corner of this screen
- Once you are on the report dashboard, use scroll bar on bottom to view information on the right side of the report screen
- Use Action Toolbar icons at top left of report dashboard to customize the view. Expand the following section to view the details.

Requested Project Name cannot include special characters: ~ ' # % & @ * : ; < > ? / \ | () [] - _

CAISO Queue interconnection Requests are tracked in the App & Study Module. Click [here](#) for process guidance and forms. Please select the "Interconnection Request" request type at the left to submit this type of project.

Request Type should be set to **NRI Project Details Form**

Obtain project registration code via email

CAISO Project Registration - Enchirito6

FILE MESSAGE ADOBE PDF

Wed 1/17/2018 4:41 AM

rim-noreply@caiso.com

CAISO Project Registration - Enchirito6

To

Here are the details of your project registration

Project Name: Enchirito6
Registration Code: 132497_KHSHVH_BUVKNT_OALD2L

Please click on the link below to upload supporting documents
<https://rimspub.caiso.com/rims5>

Please click on the link below to download Project Details Form (PDF) template
<http://www.caiso.com/participate/Pages/NewResourceImplementation/Default.aspx>

- **Registration Code** is located here
- **RIMS Project Details Form** is located under the “Getting Started” section of this page
- Always use the most recent form from the ISO website to ensure that your file is accepted

Use registration code to access upload page

California ISO | Resource Interconnection Management System RIMSPUB

New Request Reporting

New Request

First Name:

Last Name:

Email:

Confirm Email:

Requested Project Name:

Request Type:

Retrieve Request

Registration Code:

1. Fill in the "New Request" section above to receive a registration code via email that will allow you to upload an Interconnection Request or Project Details Form and associated documents. This only needs to be done once for each project to be submitted.

2. Once a registration code is received, paste it into "Registration Code" field to upload required project files.

PUBLIC | PROD | Version: 5.1.8

- Copy the registration code from the email to this field and click Submit

**Once your project has been created you will not use the Registration Code again*

Complete project details form

- Click on the link provided in the registration email to download the RIMS Project Details Form.
- Read the form instructions carefully.
- Fill out Project Details Form completely.



Project Details Form

Submit a new request through the [Resource Interconnection Management System \(RIMS\) public site](#). 1) Fill out the "New Request" section 2) Choose the "NRI Project Details Form" drop down 3) Click "Register". A registration code will be emailed to the email contact in the New Request. 4) Place this code within the "Registration Code" section of the public site. 5) Click "submit" to access the upload screen for the project details form. You will receive an ISO Project code after the form validation is complete. The ISO project code will be used for all filenames.

All fields must be filled in, additional fields for Natural Gas Combustion Turbines complete section 8 A-E.

RIG Reconfiguration, Meter Replacement and Meter Maintenance Project Types please only fill out rows 1, 2A- 2G, 3A-C, 6A, 7A-C only.

The following characters are not allowed in any filename: ~ ' # % & @ * { } ; : < > ? / \ | () [] - _

| | |
|---|---|
| 1 | Project Type: <input type="text" value="Select One"/> |
|---|---|

Upload completed project details form

Project Details Form

Project Name: Enchirito6

| Uploaded Files | | | | |
|----------------|-----------|-----------------|---------------|---------|
| Document Type | File Name | Uploaded Status | Uploaded Date | Comment |
| | | | | |

Note:- The following special characters are not allowed in any file name : ~' # % & @ * ; < > ? / \ | () [] - _

Upload Project Files

- Click on **Upload Project Files** to browse for the completed project details form on your computer
- Click the **refresh** icon on the top menu if your file is not visible when you return to this screen

Complete and upload project details form

Project Details Form

Project Name: Indian Valley IP Change

| Uploaded Files | | | | | |
|----------------------|---------------------------|-----------------|---------------|--------|------------|
| Document Type | File Name | Uploaded Status | Uploaded Date | | Comment |
| Project Details Form | Project Details Form.docx | PENDING | 04/28/2020 | Delete | 0 Comments |

Note:- The following special characters are not allowed in any file name : ~ * # % & @ * : ; < > ? / \ | () [] - _

Upload Project Files

Submit Project Details Form

- Once the file has been uploaded, click the 'Submit Project Details Form' button
- After validation is complete, a project code is generated – this code is used in all documentation and is needed in order to obtain access to the project in RIMS

Obtain NRI project code via email

- Submitted project details form will be validated
 - Validation passes, you will receive confirmation email with NRI project code
 - Validation fails, you will receive an email with errors. Please correct any errors and resubmit the project details form using the same registration code

Enchirito6 18GEN132538 Your ISO Project Tracking Number

FILE MESSAGE INSERT OPTIONS FORMAT TEXT REVIEW ADOBE PDF

Wed 1/17/2018 4:41 AM

rims-noreply@caiso.com

Enchirito6 18GEN132538 Your ISO Project Tracking Number

To

Thank you for starting a project with the CAISO New Resource Implementation (NRI) process. The next steps are to submit project required documents in accordance to your project type. Please download and review the New Resource Implementation guide and checklist from the following link: <http://www.caiso.com/participate/Pages/NewResourceImplementation/Default.aspx>

****Important links for the NRI process**

New Resource Implementation Website:
<http://www.caiso.com/participate/Pages/NewResourceImplementation/Default.aspx>

Business Practice Manuals for Metering and Direct Telemetry:
<http://www.caiso.com/rules/Pages/BusinessPracticeManuals/Default.aspx>

Thank you,
New Resource Implementation

- Your User Access Administrator needs this project code in order to give you access to this project in RIMS

Access to CAISO NRI project code

- You will receive an email from NRI with your new project code.
- Access to an NRI project code will need authority from a User Access Administrator (UAA)
 - Provide the project code to your UAA
 - UAA will provision access to RIMS User
 - Need to establish a new UAA?:
Email UAARRequests@caiso.com
- A RIMS User has the ability to:
 - Receive FNM progress reports
 - Upload files
 - Edit project details

NRI bucket filenames

- Review the “Quick Reference File Naming Conventions” in the NRI guide for the appropriate file name for each submitted document
 - <http://www.caiso.com/participate/Pages/NewResourceImplementation/Default.aspx>
- Most filenames contain first the project code, space, filename, space, version number, for example:
 - 20GEN1234 MeterConfig Ver1
 - **Tip – The filename is generally listed as one word.*
- Some filenames will include additional identifiers such as the meter device ID, for example
 - 20GEN1324 MeterConfig 591000 ver1
- Every NRI required document has a filename exclusively for each business unit that reviews the documents.

Uploading bucket items

- Access your project through the RIMS UI
<https://portal.caiso.com/rims5/logon.do>
- Navigate to the corresponding tab for your project type
- Click the green 'View' button for the project you want to upload to

| Equipment List | Project Key | Resource ID | Queue Number | Implement Date | Target/COD Date | Projected Model | DBModel | MPAI Comments | HyperLink | Doc Count | Previous Date | Status | Rows |
|-----------------|-------------|-------------|--------------|----------------|-----------------|-----------------|---------|---------------|-----------|-----------|---------------|---------|------|
| Solar Test Site | 18GEN7181 | | 1234 | 12/27/2019 | 01/15/2020 | 19Q4.05 | | | | 1 | 12/27/2018 | On Hold | 25 |

- On the Project View screen, scroll down to the Documents section
- Click the green Upload Project Files button

Documents

Uploaded Files

| Document Group | Document Type | File Name | Sharepoint Link | Uploaded Status | User | Uploaded Date | Comment |
|----------------|----------------------|---|-----------------|-----------------|--------|---------------|------------|
| PDF | Project Details Form | Project Details Form v10 RIMS CW Invisible Generator Solar.docx | | SUCCESS | PUBLIC | 05/01/2018 | 0 Comments |

Upload Project Files

****Files must follow the naming convention specified in the [NRI Guide](#) as this is used to identify the files and link them to the respective bucket item****

Updating project information

- Project details form is only used once, after that updates are made directly in [RIMS](#)
 - Adding authorized contact email addresses,
 - contact information,
 - project description,
 - or moving the Sync/QF conversion date
- Moving a Sync date
 - The assigned initial sync date can be moved out later at anytime
 - If the assigned initial sync date is moving earlier, there is criteria that must be met
 - Is the new sync date greater than 84 days out from today's date?
 - If Yes, then the new sync date can move earlier as long as the new date is not under 84 days from the date the change is made.
 - If No, the new sync date will not be accepted.

FAQs

- When will I get my Resource ID?
 - Resource IDs are assigned during your assigned model build. They cannot be provided sooner.
- Why is RIMS telling me I need to push out my Implementation date to submit my bucket item?
 - Bucket due dates are derived from the Implementation date. You must push out your Implementation date in order to adjust your Bucket due dates.
- If I push out my Implementation date will I have to wait until that date to request Sync/QF Completion?
 - No, you can request Sync/QF Completion once all bucket and testing requirements have been met.
- Can Bucket items be emailed to NRI?
 - No, all bucket items must be uploaded to their project in RIMS.
- Where can I find templates for the Bucket items?
 - [NRI Webpage](#) and the resources listed on there.
- My SLD has been accepted, but is not checked off in RIMS.
 - SLDs require review/approval from two internal groups, once both have approved the Bucket requirement will be checked off.



Any questions, please submit a ticket through CIDI
<http://www.caiso.com/Pages/ContactUs.aspx>

THANK YOU