



# Market Simulation Call - Independent 2020 Release

Anshuman Vaidya  
Market Simulation Coordinator

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# Recordings

Calls and webinars are recorded for stakeholder convenience, allowing those who are unable to attend to listen to the recordings after the meetings. The recordings will be publicly available on the ISO web page for a limited time following the meetings. The recordings, and any related transcriptions, should not be reprinted without the ISO's permission.

# Agenda

- MAP Stage & Stage Availability
- Independent 2020 Releases Market Simulation Initiatives & Timelines
- Market Simulation Initiatives
- ADS Phase 3: Activation of New Features
- Next Steps

# MAP Stage Availability

- Refer to MAP Stage portal <https://portalmap.caiso.com> for system availability information
- Current MAP Stage & Stage Maintenance
  - **MAP STAGE**
    - 10/28 1500 PT thru 10/29: RCBSAP API only, RCBSAP UI is available
  - **STAGE**
    - ADS UI/API available until 10/30 1500 PT (end ADS Parallel Operations)
- Upcoming MAP Stage & Stage Maintenance
  - **MAP STAGE**
    - 10/30: CMRI UI/API unavailable
  - **STAGE**
    - ***10/30 1500 PT: Environment Closure; this will end ADS Parallel Operations***
- MAP Stage Weekly Maintenance Window
  - Friday

# Independent 2020 Releases Market Simulation Initiatives & Timelines

<b>Independent 2020 Release Initiatives</b>	<b>Start Date</b>	<b>End Date</b>	<b>Structured Simulation Start (Trade Date)</b>
<b>Independent 2020 Release Market Simulation</b>			
FRP Improvements - Buffer and Min	10/13/20	10/28/20	10/14/20 (Complete)
Energy Imbalance Market (EIM) Enhancements 2020 - CMRI	11/2/20	11/18/20	N/A
Hybrid Resources - Phase 1	10/26/20	11/13/20	N/A
Commitment Costs and Default Energy Bid Enhancements Phase 1	7/27/20 11/10/20	11/24/20	N/A
Nodal Pricing Model	10/6/20	11/13/20	10/20/20 -10/22/20 (Complete)
Intertie Deviation Settlement	12/3/20	12/18/20	<b>12/3/20</b>
Symmetrical Wheeling	11/12/20	11/30/20	
Settlements Q4/Winter Release	10/6/20	11/13/20	

## Market Simulation Settlements Calendar:

<http://www.caiso.com/Documents/MarketSimulationSettlementsCalendar-IndependentWinter2020Release.pdf>

# Market Simulation Initiatives

- Intertie Deviation Settlement

- **Timeline:** December 3 - December 18
- **Structured :** December 3
- Please use <https://demo.caiso.tag.oati.com/> to submit tags in MapStage environment
- Structured Scenarios document -  
<http://www.caiso.com/Documents/MarketSimulationScenariosIntertieDeviationSettlement.pdf>

- Symmetrical Wheeling

- **Timeline:** November 12 – November 30
- Business Requirements Specification -  
[http://www.caiso.com/Documents/BusinessRequirementsSpecification\\_SymmetricalSettlementForWheelingThroughEimBAAs.pdf](http://www.caiso.com/Documents/BusinessRequirementsSpecification_SymmetricalSettlementForWheelingThroughEimBAAs.pdf)

# Market Simulation Initiatives

- Hybrid Resources - Phase 1
  - **Timeline:** October 26 – November 13
  - Business Requirements Specification - <http://www.caiso.com/Documents/BusinessRequirementsSpecification-HybridResourcesPhase1.pdf>
- Commitment Costs and Default Energy Bid Enhancements
  - **Timeline:** July 27 – November 24; November 10 - November for new SIBR rules
  - Training
    - <http://www.caiso.com/Documents/Presentation-CommitmentCosts-DefaultEnergyBidEnhancements.pdf>
  - SIBR business rules, release notes published 10/27
    - <http://www.caiso.com/Documents/SIBRBusinessRulesforBiddingv11042Post.xlsx>
    - <http://www.caiso.com/Documents/SIBRReleaseNotesRulesFall2020.pdf>
- Nodal Pricing Model
  - **Timeline:** October 6 – October 30 (CMRI)
  - **Structured:** October 20 - October 22
  - Structured Scenarios document - [http://www.caiso.com/Documents/NPM\\_structured\\_mktsim-Reviewed.pdf](http://www.caiso.com/Documents/NPM_structured_mktsim-Reviewed.pdf)

# Market Simulation Initiatives

- FRP Improvement Buffer and Min
  - **Timeline:** October 13 – October 28
  - Structured Scenarios document - <http://www.caiso.com/Documents/MarketSimulationScenarios-FRPImprovementsBufferandMin.pdf>
- Energy Imbalance Market (EIM) Enhancements 2020
  - **Timeline:** November 2 – November 18 (CMRI)
  - BAAOP & BSAP currently available in MAP-Stage
  - Unstructured Scenarios document <http://www.caiso.com/Documents/MarketSimulationScenariosEnergyImbalanceMarket2020Enhancements.pdf>

# Settlements Q4/Winter Release

## Release Scope:

- Day Ahead Nodal (NPM project)
- Intertie Deviation Settlement (IDS)
- EIM Enhancement: Symmetrical Wheeling
- Production defects as noted in release component SUG email

## Release Milestones as follows:

- 1st draft technical documentation posted = **8/10**
- 1st draft configuration output file + initial release component summary posted = **8/25**
- 2nd draft configuration output file + 2nd draft tech docs + updated release component summary posted = **9/14**
- 3rd draft configuration output file (pre market sim) posted = **10/9**
- Unplanned draft configuration output file posting expected - **10/30**
  - IDS calc granularity change from MW to MWh
- Deployed to MAP-Stage = **10/6**

## Winter 2020 settlements release draft settlements technical documentation:

<http://www.caiso.com/Pages/documentsbygroup.aspx?GroupID=EF90CE68-D8D0-43F7-8052-04FBE1D0825B>

# ADS Phase 3: Activation of New Features

- ✓ 10/20: ADS Phase 1: Network
- ✓ 10/20: ADS Phase 2: New ADS UI, API v8 available
- **10/30: Close Stage, End Parallel Operations**
  - MAP-Stage remains available with active features from now on
- **12/16: Activation of New Features**
  - Only available on New ADS UI, API v8
    - DOTT
    - Unannounced AS Test
    - RTCD Commitment
    - Follow DOT Flag
    - Operating Instructions
- 2/1/21: ADS Phase 4: Decommission of Old ADS client, API v6

# ADS Phase 3: Activation of New Features

## ➤ 12/16: Activation of New Features

- Only available on New ADS UI, API v8
- ISO invites customers to leverage ISO Assisted Customer Cutover lines
  - To transition to new ADS UI, API v8
  - To report transition plans, progress, issues
  - By phone: call 1-866-528-2256, access code: 1465216
  - Dates: 11/4, 11/11, 11/18, skip 11/26 due to holiday, 12/2, 12/9 and 12/16
  - Time: 1300-1400 PT
- Recommendation
  - Run ADS Client and new ADS UI in parallel for validation
  - Cutover to API v8 now, as it provides same functionality as v7

# Next Steps

- The next teleconference is scheduled on Monday, November 2<sup>nd</sup> at 1400 PDT

# Reference Slides

# Independent 2020 Releases Communication Plan

- **Schedule**

<b><i>Monday</i></b> Sep 28, Oct 5,12,19, 26 Nov 2, 9, 16, 23, 30	<b><i>Thursday</i></b> Oct 1,8,15, 22, 29 Nov 5, 12, 19
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- **Connection Information**

- **Web Conference Information**

- Web Address: <https://caiso.webex.com/meet/MarketSim>
- Meeting Number: 962 067 710
- Audio connection instructions will be available after connecting to the web conference. When prompted, select "Call me" and enter the phone number you will use during the call. You will be called by the conference shortly.

- **Conference Call Information**

- Dial-in Number: 866-528-2256
- International Dial-in: 216-706-7052
- Access Code: 202 249 0

# Independent 2020 Releases Structured Scenario Registration Details

MP's will need to register their request with the ISO to participate in this simulation via the [MarketSim@caiso.com](mailto:MarketSim@caiso.com) mailbox.

Date of registration October 9, 2020.

We will do our best to accommodate for late registration

# Market Simulation Issue Management

- Submit all issues to the CIDI case management system
- CIDI tickets must have “**Functional Environment**” = “**Market Simulation Independent 2020**” to be reviewed by ISO SMEs

# ISO Market Simulation Support

- **Hours:** Monday thru Friday 0900-1800 PDT
- **ISO's 24x7 Service Desk:** (916) 351-2309 (Connectivity – UI or API)
  - Issues called in after hours will be worked on during the next business day
- **Email:** [MarketSim@caiso.com](mailto:MarketSim@caiso.com)

# Known Issues - ADS

#	System	Summary	Status	Estimated Fix Date
1	ADS	Support to share/port over the profiles across environment	Will help manually porting over one profile per user upon request. Please submit CIDI ticket with the details ( Profile Name, User ID & Environment To & From)	N/A