CMRI & OASIS
Customer Partnership Group
April 2020

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IT Product Management
Customer Partnership Group
Scope and Objective

• Created in response to customer’s request to have more involvement in the planning, design and usability validation phases of ISO application development
• Provide an open interactive partnership forum to identify potential opportunities to improve the overall customer experience
• Share ideas, opinions and provide feedback
• Discuss issues and concerns, and answer customer questions
• All ideas are welcome and will be considered based upon feasibility, prioritization and timeline constraints. Not all ideas may be feasible to implement
• Meetings vary in frequency to review progress, provide feedback on design and usability and discuss implementation approaches
• Active participation is critical to the CPG success and to improve our customer’s experience interacting with ISO applications
Agenda

• Introduction
• Process Improvements
  – Release Notes
  – Knowledge Articles
• Upcoming Changes
  – Variances
  – Lessons learned from 2019
  – Version Management
• Open Discussion
Process Improvements
CMRI Release Notes

• The latest release notes provides details on patches related to:
  – Commitment Costs and Default Energy Bids Enhancements (CCDEBE)
  – Reliability Coordinator (RC) West

• Path to latest release notes on developer site:
  – Go to developer site
  – Click on CMRI under Apps
  – Navigate to Release Notes

This is an example of latest release notes describing issues that were addressed as part of a patch. As part of process improvement, we will publish release notes as we deploy patches into production that addresses any open defects.
OASIS Release Notes

• The latest release notes provides details on the patches related to:
  – **Flex Ramp Surplus Demand Curve:** Fix to address Flex Ramp Surplus Demand Curve, returning data for any date irrespective of the date in the filter
  – **Flexible Ramp Aggregate Awards:** Fix to address Flexible Ramp Aggregate Awards returning data for any date irrespective of the date in the filter
  – **Flexible Ramping Constraint Results:** Fix to address the data consistency.
    • CIDI Ticket ref#: 218587

• Path to latest release notes on developer site:
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This is an example of latest release notes describing issues that were addressed as part of a patch. As part of process improvement, we will publish release notes as we deploy patches into production that addresses any open defects
Knowledge Articles

• Knowledge Articles are now available in CIDI
  – Mini FAQs or brief explanation on certain functions
  – SCs may contact your Customer Rep to get access to CIDI
Knowledge Articles

- Knowledge Articles are now available in CIDI
  - Example for discussion purposes Only

Load Settlement Price Report

**QUESTION**
The Load Settlement Price Report has not been updated with the latest data on the CAISO page, why?

**SOLUTION**
As part of the 2017 Fall release, the ISO has stopped posting data to the Load Settlement Price reports effective 04/03/18. These reports are located on the ISO website under Stay Informed / Bulletins, Reports and Studies / Market Performance Reports / Load Settlement Price Reports.


Effective 04/04/18, the data is now included in a new OASIS report under PRICES >> Hourly RTM LMP Prices.

**ATTACHMENTS**

Was this article helpful?
Examples of OASIS & CMRI Knowledge Articles

• How is a participant notified when prices are posted on OASIS?
• When will the missing prices in Open Access Same-time Information System (OASIS) and/or Customer Market Results Interface (CMRI) be published?
• Missing CAISO Demand Forecast data for Real-Time Market
• Reports in CMRI and OASIS contain no data after a certain trade date
• OASIS RUC LMPs not published for all locations
• Data retention period(s) for OASIS, CMRI, and ADS
• Prices in settlement statements differ from prices in OASIS for certain Scheduling Points?
Upcoming Changes
CMRI & OASIS Variances - April

• The upcoming release notes should highlight the defects that are fixed and deployed in production for both OASIS and CMRI

• The list below shows the current count of known variances in CMRI and OASIS

• Definition of Severity
  • Urgent - Data Loss/Critical Error
  • Very High - Loss of functionality without work around
  • High – Loss of functionality with work around
  • Medium – Partial Loss of feature set
  • Low – Cosmetic or documentation error

<table>
<thead>
<tr>
<th>System</th>
<th>Severity</th>
<th># Defects</th>
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</thead>
<tbody>
<tr>
<td>CMRI</td>
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</tr>
<tr>
<td></td>
<td>Medium</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Low</td>
<td>2</td>
</tr>
<tr>
<td>OASIS</td>
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<tr>
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<td>Low</td>
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OASIS – Lessons learned in 2019

• Background
  – Major stack Upgrade in Q1 2019 for performance and technology needs
    • No Market Simulation executed
    • Large number of CIDI cases related to few root-cause
    • Corrupted and Empty files created in high load conditions
  – OASIS has un-named user community currently which limits the ability to proactively inform customers of missing intervals
OASIS – Lessons learned in 2019

• Background
  – ISO’s standard policy is to support two versions of services as described in the Technical Specifications
  – Goal is to provide customers time to transition to latest version
  – The ISO currently supports multiple versions for OASIS
  – Customers continue to use unsupported versions, that are not tested for future upgrades.
  – Resulting in increased support time/cost for stakeholders and ISO when troubleshooting unsupported versions
OASIS – Lessons learned in 2019

• Controls implemented to date
  – Engage participants for simulation exercise for technology upgrades
  – Application self-heals when it encounters corrupt, no data returned or missing files with alerts for root cause investigation
OASIS – Lessons learned in 2019

• The Plan ahead
  – Version Management
    • Enforce the policy to support only two versions of services
    • Technical Specification will indicate supported and deprecated versions
      • Revised Technical Specification will be available on 5/29/2020
      • Deprecated versions will be decommissioned on 9/1/2020
    – Identifying patterns to embed information related to events resulting in failed market intervals within API and UI
OASIS – Version Management

• Path to latest Tech Specs on developer site:
  – Go to developer site
  – Click on OASIS under Apps
  – Navigate to Tech Specs

• Path to currently supported versions
  – Go to developer site & Click on OASIS
  – Navigate to Tech Specs section for these files
    • OASIS SingleZipServiceResults_SupportedVersions_April_09_2020.xls
    • OASIS GroupZipServiceResults_SupportedVersions_April_09_2020.xls
As an example, in the table below currently we support 3 versions of services:

- PRC_INTVL_LMP Report
- PRC_HASP_LMP Report

<table>
<thead>
<tr>
<th>Report ID</th>
<th>Report URL</th>
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<td>PRC_LMP</td>
<td>NULL=PRC_LMP&amp;startdatetime=20200202T08 00-0000&amp;enddateptime=20200203T08 00-0000&amp;version=1&amp;market_run_id=DAM&amp;grp_type=ALL APNODES</td>
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</table>
Snapshot of current OASIS Version Support - GroupZip

- As an example, in the table below currently we support 3 versions of services
  - HASP_LMP_GRP Report
  - RTPD_LMP_GRP Report

<table>
<thead>
<tr>
<th>Report ID</th>
<th>Report URL</th>
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<td>HASP_LMP_GRP_v3</td>
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<td>RTPD_LMP_GRP_v2</td>
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The following table illustrates an example showcasing the versions supported by OASIS application vs documented Tech Specs

<table>
<thead>
<tr>
<th>Report ID</th>
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<tbody>
<tr>
<td>HASP_LMP_GRP v1</td>
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<td>HASP_LMP_GRP v3</td>
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<td>HASP_LMP_GRP v2</td>
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**From TechSpec**

<table>
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<tr>
<th>HASP_LMP_GRP</th>
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</tr>
</tbody>
</table>

**Note:** Version 3 response zip file will include separate file for each price component
CMRI – Version Management

• CMRI currently supports two versions of services which is in compliance with CAISO guidelines

• Path to latest Tech Specs on developer site:
  – Go to developer site
  – Click on CMRI under Apps
  – Navigate to Tech Specs
Open Discussion

• Some high level feedback we’ve heard but would like more details *on recent experiences*, so we can make these actionable
  – OASIS usability
  – Data takes too long to load
  – Customers want to pull more data at a time
  – Data missing or “incorrect” at times
  – Data in OASIS is inconsistent with data in CMRI
Follow up Questions / Communications
For follow-up questions or to suggest future topics please contact your client representative or submit a CIDI ticket.