Market Simulation Independent Pre Spring 2015 and Fall 2014 Release

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Lead Market Simulation Coordinator

Independent Pre Spring 2015 and Fall 2014 Release
February 19th, 2015
Agenda

- Independent Pre Spring 2015 and Fall 2014 Market Simulation Initiatives and Timelines
- Independent Pre Spring 2015 and Fall 2014 MAP Stage Availability
- OMS Market Sim Update
- OMS Key Dates
- OMS External Deployment Plan
- OMS Known Issues
- DRS API’s
- RDRR Mkt Sim Re-Run
- Next Steps
- Reference Slides
Independent Pre Spring 2015 and Fall 2014 Release
Market Simulation Initiatives and Timelines

Outage Management System Replacement - July 28th, 2014 – February 26th, 2015 (Unstructured)

DRS API’s - February 11th, 2015 – February 27th, 2015 (Unstructured)

RDRR Mkt Sim Re-Run - February 23rd, 2015 – March 13th, 2015 (Structured)
Independent Pre Spring 2015 and Fall 2014 Release
MAP Stage Availability

• MAP Stage Scheduled Maintenance – February 19\(^{th}\), 2015 16:00 – 20:00

• WebOMS MAP Stage Scheduled Maintenance – February 19\(^{th}\), 2015 outage to occur, time to be announced via Customer Partnership Group
Outage Management System

The Outage Management System Market Simulation –

• **Outage Management System**: July 28\textsuperscript{th} – February 26\textsuperscript{th}, 2015 (Unstructured)
  
  • For coordinated outage approval, please email [MarketSim@caiso.com](mailto:MarketSim@caiso.com).
WebOMS Key Dates

- **WebOMS Go-Live Schedule**
  - 2/26/2015: Section 9 of the tariff
- All production active transmission outages available in MAP Stage OMS now
- All production active generation outages from SLIC will be in MAP Stage WebOMS tomorrow.
- ISO requests that participants minimize outage submission 1 week prior to and 1 week after go-live
External Deployment Plan

• The plan document has been posted on the CAISO website and can be accessed at:

## External Deployment Timeline

<table>
<thead>
<tr>
<th>Date / Time</th>
<th>Deployment Information</th>
<th>Responsibility</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PREPARATORY STEPS</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12/1/2014</td>
<td>Provision all confirmed active Production SLIC users in WebOMS</td>
<td>ISO/ MPs</td>
<td>COMPLETE</td>
</tr>
<tr>
<td>12/1/2014</td>
<td>Perform B2b connectivity testing (Read-Only)</td>
<td>ISO/ MPs</td>
<td>ONGOING</td>
</tr>
<tr>
<td>1/28/2015</td>
<td>Add WebOMS URL to MPP</td>
<td>ISO</td>
<td>COMPLETE</td>
</tr>
<tr>
<td>1/29/2015</td>
<td>UI Connectivity via MPP (Read-Only Access)</td>
<td>MPs</td>
<td>ONGOING</td>
</tr>
<tr>
<td><strong>PRE-CUTOVER</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/18/2015</td>
<td>Market Notice Cutover Date - 7 Business Days prior</td>
<td>ISO</td>
<td>ON TRACK</td>
</tr>
<tr>
<td>2/23/2015</td>
<td>Market Notice Cutover Date - 3 Business Days prior</td>
<td>ISO</td>
<td>ON TRACK</td>
</tr>
<tr>
<td>2/25/2015 - 3/2/2015</td>
<td>ISO requests that participants minimize planned outage entry during this window to the extent possible.</td>
<td>MPs</td>
<td>REQUESTED</td>
</tr>
<tr>
<td>2/25/2015</td>
<td>ISO requests that participants submit outages affecting CRRs for April by 2/25/2014</td>
<td>MPs</td>
<td>REQUESTED</td>
</tr>
<tr>
<td>2/25/2015</td>
<td>FERC Notice - 2 Business Days prior</td>
<td>ISO</td>
<td>ON TRACK</td>
</tr>
<tr>
<td>Date / Time</td>
<td>Deployment Information</td>
<td>Responsibility</td>
<td>Status</td>
</tr>
<tr>
<td>---------------------</td>
<td>----------------------------------------------------------------------------------------</td>
<td>----------------</td>
<td>---------------</td>
</tr>
<tr>
<td><strong>DAY OF CUTOVER</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/26/2015 8 p.m.</td>
<td>Switch to READ ONLY access to SLIC for all users</td>
<td>ISO</td>
<td>ON TRACK</td>
</tr>
<tr>
<td>2/26/2015 9 p.m.</td>
<td>Accept or deny all pending outage change requests in SLIC/OMS</td>
<td>ISO</td>
<td>ON TRACK</td>
</tr>
<tr>
<td>2/26/2015 10 p.m.</td>
<td>Migrate active outages from SLIC to WebOMS and perform verification/ manual updates as needed</td>
<td>ISO</td>
<td>ON TRACK</td>
</tr>
<tr>
<td>2/27/2015 1 a.m.</td>
<td>Enable Write Access for WebOMS Users</td>
<td>ISO</td>
<td>ON TRACK</td>
</tr>
<tr>
<td>2/27/2015 1 a.m.</td>
<td>WEBOMS GO LIVE</td>
<td>MILESTONE</td>
<td>ON TRACK</td>
</tr>
<tr>
<td>2/27/2015 1 a.m.</td>
<td>B2B Submit Verification</td>
<td>MPs</td>
<td>ON TRACK</td>
</tr>
<tr>
<td>2/27/2015 Onwards</td>
<td>Active Outage Verification</td>
<td>ISO/ MPs</td>
<td>ON TRACK</td>
</tr>
</tbody>
</table>
## External Deployment Communications

<table>
<thead>
<tr>
<th>Description</th>
<th>Communication</th>
<th>Frequency / Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market Participant Cutover Support Bridge</td>
<td>Teleconference Bridge</td>
<td>Support will be available beginning the Cutover Start at 6 p.m. Pacific on February 26, 2015 through the weekend (midnight March 1, 2015). USA Toll-Free: (866) 528-2256 USA Caller Paid: (216) 706-7052 <a href="#">View Global Conference Access Numbers</a> Access Code: 3512252</td>
</tr>
<tr>
<td>OMS Customer Partnership Group Daily Calls</td>
<td>Teleconference Bridge</td>
<td>Daily OMS Customer Partnership Group Web Conferences will be scheduled through March 6, 2015, to discuss production performance. USA Toll-Free: (866) 528-2256 USA Caller Paid: (216) 706-7052 <a href="#">View Global Conference Access Numbers</a> Access Code: 1702851</td>
</tr>
</tbody>
</table>
## Outage Management System Known Issues List

<table>
<thead>
<tr>
<th>#</th>
<th>Severity (H/M/L)</th>
<th>New or Existing Issue</th>
<th>Issue Description</th>
<th>Resolution Expectations</th>
<th>CIDI #</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>L</td>
<td>Existing</td>
<td>OMS only allows to copy one cell at a time for Availability Date/Time</td>
<td>Enhancement. Target Date Post Go-Live</td>
<td>00160592</td>
</tr>
<tr>
<td>2</td>
<td>M</td>
<td>Existing</td>
<td>Break Points for Canceled Outages are being returned via RetrieveAvailability and RetrieveResourceOutage APIs</td>
<td>Target Date Post Go-Live</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>M</td>
<td>Resolved</td>
<td>Unable to reduce the availability on a combined Pmax and Pmin Outage Card through the UI</td>
<td>Completed in MAP Stage</td>
<td>00162808</td>
</tr>
<tr>
<td>4</td>
<td>H</td>
<td>New</td>
<td>OMS: API: End point duplicated is outage query response</td>
<td>Next Maintenance Window</td>
<td>00163012</td>
</tr>
<tr>
<td>5</td>
<td>H</td>
<td>New</td>
<td>OMS: API: Unrelated points returned when querying outage</td>
<td>Next Maintenance Window</td>
<td>00163014</td>
</tr>
<tr>
<td>6</td>
<td>H</td>
<td>New</td>
<td>OMS: API: Query Availability returning Framework errors</td>
<td>Next Maintenance Window</td>
<td>00163018 00163081 00163186</td>
</tr>
<tr>
<td>7</td>
<td>H</td>
<td>New</td>
<td>When querying transmission outage, equipment information is missing.</td>
<td>Next Maintenance Window</td>
<td>00163142</td>
</tr>
</tbody>
</table>
• DRRS API’s Market Simulation –
  – **DRRS API’s** - February 11\(^{th}\), 2015 – February 27\(^{th}\), 2015 (Unstructured)

• As requested ISO has added a DR Customer Partnership Group Email for project discussions related to demand response - 
  [CPGDemandResponse@caiso.com](mailto:CPGDemandResponse@caiso.com)

• Draft User Guide -
# RDRR Mkt Sim Re-Run

- **RDRR Market Simulation –**
  - **RDRR Re-Run** - February 23rd, 2015 – March 13th, 2015 (Structured)

<table>
<thead>
<tr>
<th><strong>RDRR Structured Scenarios</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
</tr>
</tbody>
</table>
| **ISO Actions** | ISO will take the following steps -  
  1. TD-4B ISO approves resource modification, on MP’s behalf if applicable  
  2. TD -1B ISO dispatches the resources in DAM  
  3. TD ISO dispatches the resources in RTM  
  4. TD +3B ISO runs Performance in DRS system  
  5. TD +5B ISO publishes “initial” settlement statement including submitted OMAR meter data, where applicable |
| **SC Actions** | Please follow the following steps in order -  
  1. No later than TD-7B MP to register resources and submit RDTs  
  2. TD-5B LSE/UDC approve registrations  
  3. TD -2B MPs submit 10 days of meter data for base line in DRS  
  4. TD -1B MPs submit bids on the registered resource  
  5. TD +2B MPs submit meter data to the DRS and OMAR for scenario TD  
  6. TD +5B MP’s validate their settlement statement |
| **Expected Outcome** | DRS correctly calculates the resources’ performance. Settlements correctly calculates the charges/credits per the resources' performance. |
| **Anticipated Settlement Outcome** | Impacted Charge Codes are CC 6470 and 6475 |
RDRR Market Simulation Timeline

2/23/2015
MP’s to Register Resources and Submit RDT’s

2/25/2015
LSE/UDC Approve Registrations

2/26/2015
ISO Approves Resource Modification on MP’s Behalf, if Necessary

3/2/2015
On 3/3 MP’s Submit DAM and RTM Bids for Registered Resources

3/3/2015
ISO Dispatches Bid in Resources in DAM

3/4/2015
Trade Date 3/4 ISO Dispatches Resources in RTM

3/6/2015
MP’s Submit Meter Data to DRS and OMAR for TD 3/4

3/9/2015
ISO Runs Performance in the DRS Application

3/11/2015
ISO Publishes “Initial” Settlement Statement with Submitted OMAR Meter Data

3/13/2015
MP’s Validate Settlements Statement

3/15/2015
ISO Approves Resource Modification on MP’s Behalf, if Necessary

3/22/2015
MP’s Submit DAM and RTM Bids for Registered Resources

3/30/2015
ISO Dispatches Bid in Resources in DAM

3/31/2015
Trade Date 3/3 ISO Dispatches Resources in RTM

3/31/2015
ISO Publishes “Initial” Settlement Statement with Submitted OMAR Meter Data
Next Steps

• The next teleconference will take place @ 13:00 PPT on Monday, February 23rd, 2015
Reference Slides
Fall 2014 Release Market Simulation Plan

ISO Market Simulation Support

- **Hours** - 09:00 - 18:00, PST (Monday through Friday)
- **Mkt Sim Coordinator Phone** - (530) 518 - 8539
- **ISO’s 24X7 Help Desk** - (916) 351-2309 (Connectivity - GUI or API)
- **Email** - MarketSim@caiso.com
Market Simulation Issue Management

• Submit all issues to the CIDI case management system.
• CIDI tickets will need to have “Functional Environment = Market Simulation Fall 2014 and Functional Environment = Market Simulation Spring 2015” to be reviewed by ISO SME’s.