Scheduling Infrastructure Business Rules (SIBR) User Interface (UI) Update

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Objective

• By the end of this session, you will be able to:
  – Identify screen changes
  – Access data using in-line filters
  – Use right click functionality to access and copy data
  – Define new alert icons
  – Identify bid creation, viewing and copying bids
# Spring 2018 – SIBR UI Upgrade

## Application Software Changes

**SIBR** – The CASIO will be upgrading the underlying SDK platform utilized for displaying the Scheduling Infrastructure Business Rules (SIBR) user interface (UI). This latest SDK version will strengthen the security of the SIBR application and will improve compatibility with the latest version of Internet Explorer.

It is anticipated no functional changes or API will be impacted by this upgrade.

<table>
<thead>
<tr>
<th>Milestone Type</th>
<th>Milestone Name</th>
<th>Dates</th>
<th>Status</th>
</tr>
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<tbody>
<tr>
<td>Board Approval</td>
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<td>N/A</td>
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<tr>
<td>BPMs</td>
<td>Publish Final Business Practice Manuals</td>
<td>N/A</td>
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<tr>
<td>External BRS</td>
<td>Post Draft BRS</td>
<td>N/A</td>
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<tr>
<td>Config Guides</td>
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<td>Tech Spec</td>
<td>Publish Tech Specs</td>
<td>N/A</td>
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<tr>
<td>Training</td>
<td>Conduct External Training</td>
<td>Feb 21, 2018</td>
<td>✔️</td>
</tr>
<tr>
<td>Market Sim</td>
<td>Market Sim Window</td>
<td>Feb 27, 2018 – Apr 27, 2018</td>
<td></td>
</tr>
<tr>
<td>Production Activation</td>
<td>SIBR WebSDK Upgrade</td>
<td>May 01, 2018</td>
<td></td>
</tr>
</tbody>
</table>
Refer to the updated SIBR Users Guide

The **SIBR – Scheduling Coordinator Users Guide** explains each step along the way.

Confirm your IE11 compatibility settings

Important note: Only IE11 will be supported

Select Compatibility View Settings from the menu:

Make sure the following boxes are NOT checked:

Be sure that these boxes are not checked
Application specific menu tabs

- BIDS: Submit, remove and view status of bids
- TRADES: Create and manage trades for Day-ahead (DA) and Real-time (RT) markets
- CONVERGENCE BIDS: Create, submit, and manage convergence bids (also known as Virtual Bids) for the day-ahead market
- ENERGY FORECAST: Submit energy forecasts for Variable Energy Resources (VER) and Load Serving Generators (LSG)
- IND VIEWER: Check imbalances on select resources in DA or RT markets for balancing (ETC/TOR/WHL and/or priority (ETC/TOR)
- OTC VIEWER: View a given date, by interchange, the Import and Export Limits received in SIBR and if there is an ‘Isolated Tie Condition’
Application specific menu

NEW ICON: Favorites

CHANGED ACCESS:
Portfolios icon replaces tab

Select Market drop down for market type

Select Calendar to change date

Available SC based on certificate logged in
Application Content Area – 3 basic components

- Filter pane
- Data grid with details
- Message bar
NEW: Create bid button has been replaced by icon

NEW: In-line filter allows for better granularity
- Filters will be cached based on login
- Date filter on login defaults to current date

NEW: Adjust column allows user to select data columns
NEW: Click on the orange filter icon to turn off applied in-line filter
In-line drop down option examples

Click on the down arrow to view filter criteria

Available criteria will display

Select a status to refresh

All modified bids will now show in data grid
In-line multi select

Click on the icon with 3 dots when mouse is in the filter column

Available criteria will display and user can select multiple using CTRL or SHIFT keys

Once selected click on OK to apply

Selected status will display; hover over icon to show status
Application Content Area – Data grid management features

Refer to pages 37-38 for icon functionality

Selecting subtabs displays associated information
The exact contents of this display will vary, depending upon the type of resource. These can include the following for both markets unless noted:

- **Hour**
- **Price Curve(s)** – The ID number, the curve is displayed in the Price Curve(s) pane to the right.
- **Distribution pair** – The ID for aggregated resources, details are in the Distribution Pair(s) pane to the right.
- **Pumping** - Level / Shutdown cost / Cost (Pump Storage Hydro units only).
- **RUC** - Price / Quantity (DAM only) – Resource must be certified for RUC.
The exact contents of this display will vary, depending upon the type of resource. These can include the following:

- Startup information (cost curve, time curve) (DAM and RTM)
- Minimum Load information. (DAM and RTM)
- Minimum and Maximum Energy Limit information. (Gen only)
- Minimum and Maximum Charge Limit information. (NGR only)
- Initial State of Charge Limit Information (Initial State) (NGR only)
- State Transitions (MSG only)
Input accelerators – new methods

• Two options:
  – Right-click menu
  – CTRL & SHIFT keys
    • CTRL+C to copy
    • CTRL+V to paste
In the current version of SIBR, the alert icon prompts you to look further…
New status icon definitions for bids and trades

- Submitted data matches Master File
- Trades already processed through rules engine
- Invalid bids or trades
- Conditionally valid
- Added or modified components
- Submitted / Recent submission
- Edited trades
- Added or modified data
- Rejected bids and trades

Refer to pages 40 & 41 of the User Guide for definitions
Creating bids in updated SIBR

- Select the market for the bid and apply

- Select the Create Bid icon
Creating bids in updated SIBR (continued)

- Date
- Type
- Product type
- Hours (RTM only)
- Coordinator
- Resource

- Product type
- Default set to Energy and Self Schedule Standard
- Select from Available then use move arrows to the Selected
Creating bids in updated SIBR (continued)

- You can also remove from the Selected by using the move arrow.

- Hours
- Can be ALL or a subset.
Creating bids in updated SIBR (continued)

- Select from Available then use move arrows to the Selected
- When Product and Hours are done click OK

- Once criteria has been set Click the Create button
Displaying the data

- Status
- Hour
- Resource type
- Applied on In-Line
  - Note HE20 is the selected row
  - Energy details shows HE20
Displaying the data (continued)

• If more than 1 row is selected:
  – Energy details now show 1 of 3
  – Using the arrow will move to the next record.
Users guide

Let’s visit the guide for more information on bidding, including copying…

The following sections were discussed:
- Section 3 Bidding
- Section 9 Portfolios

Have suggestions or questions?

Remember to refer to the Users Guide for:

- Detailed info
- Acronyms & definitions
- FAQs

Please log a CIDI ticket with:

- Suggestions
- Issues
- Concerns

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http://www.caiso.com/informed/Pages/Notifications/Default.aspx
Ways to participate in releases

• Visit the Release Planning page

• Attend meetings
  – Release Users Group (RUG) bi-weekly meetings
    • Initiative status updates
    • System change updates on independent releases
  – Market Simulation calls
    • Visit the ISO calendar at [www.caiso.com](http://www.caiso.com) for meeting dates and times and add events to your calendar
    • Typically held on Mondays and Thursdays
    • Market sim calls for major releases will be market noticed
What to look for on the calendar…

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>Market Sim</td>
</tr>
<tr>
<td>9</td>
<td>Market Sim</td>
</tr>
<tr>
<td>15</td>
<td>Market Sim</td>
</tr>
<tr>
<td>11</td>
<td>Release Users Group (RUG)</td>
</tr>
<tr>
<td>13</td>
<td>Release Users Group (RUG)</td>
</tr>
<tr>
<td>18</td>
<td>Release Users Group (RUG)</td>
</tr>
</tbody>
</table>

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