RIMS: Transmission Implementation Module

Resource Interconnection Management System (RIMS) Functional Enhancements

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Training and Readiness

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Agenda

• Overview
• Transmission implementation module
  – Navigation and screens
• Equipment Voting
  – How to move projects off this list
• Removing Resources, Interconnections and Transmission assets from the FNM
• Discussion
• Lab activity using bulk uploader
• Review New Resource Interconnection module
• Wrap Up
Project background

• Since 2008, the ISO’s interconnection management processes have evolved to support the growing number of requests throughout the western interconnection, and changing FERC regulations

• Currently, the ISO uses two processes to manage these requests:

APPLICATION: Resource Interconnection Management System (RIMS) to manage the application and study process

SYSTEM: An email-based system to manage the New Resource Interconnection (NRI) process
Project background – new functionality

• This RIMS update adds the NRI process and other new functionality to the RIMS application

• Will now track projects that will result in changes to the Full Network Model resulting from:
  – new and existing generator resources
  – ISO polled meter maintenance and replacement
  – Real-time devices
  – Transmission topology changes as it affects the ISO controlled grid
RIMS is used to manage these processes

This session focuses on the **Transmission Implementation** process
The Transmission Asset Implementation Guide explains each step along the way.
Important note about IE browser compatibility settings and RIMS

- RIMS should **not** be run using Internet Explorer’s Compatibility View
  - feature is already built into the user interface

- Checking the boxes (in Internet Explorer) confuses the interface and prevents certain functions from working properly
  - Example: file uploads will freeze
Important note about IE browser compatibility settings and RIMS

• Check your settings by doing the following:

Adjust settings here
Ensure that Compatibility View settings are **not** checked

Select Compatibility View Settings from the menu:

Make sure the following boxes are **NOT** checked:

Be sure that these boxes are **not** checked
Navigate to the transmission module for “Market Participation Asset Implementation (MPAI)”

• Today’s focus is:
  – PTO Trans Dashboard
  – Transmission menu

• Accessible from the MPAI menu
Dashboard: Transmission Project Details

- This section displays all transmission projects that have met the timing requirements
  - i.e. submitted more than 202 days in advance

- Add items to this list by using the Bulk Data Upload function on the Transmission menu
Dashboard: Sorting and filtering

- Click on the **filter icon** to activate filtering options

- Use inline filtering to search for projects

- Example: Type “Olsen” in the **Project Name** field and press enter to view all projects that contain that word

<table>
<thead>
<tr>
<th>ISO Project Number</th>
<th>PTO Resource ID</th>
<th>Project Name</th>
<th>Project Description</th>
<th>PTO Project Status</th>
<th>Location</th>
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<td>12/19/2017 16:16</td>
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<td></td>
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<tr>
<td>Fresno D / Fresno C.</td>
<td>Kern D / Kern C.</td>
<td>10/20/2016</td>
<td>12/19/2017 16:16</td>
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<td>Kern D / Kern C.</td>
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</tbody>
</table>
Dashboard: Editing list items

- Click the pencil icon to edit project details
Dashboard: Transmission Project Details

- Select a project from the list
- The grids will update with details for that specific project
Dashboard: Transmission Equipment Types

- This section shows all equipment related to the transmission project
- Each project has one or more pieces of equipment associated with it
- The dates associated with the equipment drive the bundle completion dates
- Clicking on an item from this list affects the Associated Resource Projects display grid
Dashboard: Transmission Project Comments

- This section contains notes from ISO staff related to the project
- For example, comments explaining why a document was not accepted will show here
Dashboard: Project File Documents Uploaded

- This section displays the project files that have been uploaded through the Project File Upload option on the Transmission menu.
Special note regarding SharePoint Link

- Click on the icon in the SharePoint link field to download the file for viewing
- Changes to the file must be uploaded to RIMS again
- Only documents that have been uploaded to RIMS can be reviewed by the ISO
Dashboard: Transmission Bundle Notes

- This section contains system generated notes on what documents have been:
  - received,
  - accepted,
  - not accepted, or
  - conditionally accepted

- The most recent item appears at the top of the list
Dashboard: Bundle Items

- Submit bundle items based on those required for your specific project
  - Note that bundle items are submitted from the Transmission menu using the Project File Upload function

- All required files must by accepted by the ISO by the bundle date
  - Note re: deadline dates – these will change anytime the “Earliest Date” is moved

- Items can be completed early and out of order, but must be accepted by the due date

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Submit documentation in advance of the bundle approval dates and track approval status to keep project on schedule

- The ISO has implemented a bundle date system that is derived from the “Earliest Date” of each equipment type

- These dates should be viewed as ISO acceptance dates not the last day to submit information, forms or details required to move the project forward

- If the bundle date expires without files being uploaded, you’ll need to move the “Earliest Date” in order to submit files
Discussion with ISO Team

• Bundle dates
• Getting your projects into the full network model scope
• What is changing?
Associated Resource Projects

- The Equipment associated to the App & Study Queue is shown in the Equipment Queue(s) section.

- The Related Generation Projects section shows the generation projects that are related to the transmission project.

- Equipment and projects are displayed in this grid based on the equipment selected on the Transmission Equipment Types list.
Relationship between the **Transmission Equipment Types** and **Associated Resource Projects** grids

**Transmission Equipment Types**

- **Select equipment from the list**
- **The grids will update with details for that specific project**

**Transmission Project Comments**

**Project File Documents Uploaded**

**Transmission Bundle Notes**

**Associated Resource Projects**

- **Equipment Queue(s)**
- **Related Generation Projects**

- **Equipment Code**: ET2770, ET3225, ET3226
- **Project Key**: 744
- **PTO**: NA
- **Project Name**: Solar, 16.65 MW solar PV project, 15 MW solar PV project, 27 MW solar PV project, 20 MW solar PV project
- **Equipment Type**: Solar
- **Equipment List**: 16.65 MW solar PV project, 15 MW solar PV project, 27 MW solar PV project, 20 MW solar PV project

**Queue Numbers**: 744
More Transmission Project Details

- Click the pencil icon to make updates
- The PTO transmission planners can use this area to keep track of additional details related to the transmission project
- Note that this section of the screen is a placeholder for future process enhancements
General File Documents Uploaded

- Use this section to upload files
- (This function may move to the Transmission menu)
Transmission Menu

Transmission Project Bulk Data Upload

- Use the bulk loading spreadsheet to inform the ISO of updates, new projects and equipment types
- After upload, you’ll receive a digest email notification which provides a line-by-line change log for any items updated

Project File upload

- Upload files for project bundle items here

Equipment Voting Dashboard

- Projects that did not meet the advance notice requirement (greater than 202 days) are placed here
- Dates are examined and voted on by the ISO’s energy management system and operations engineering business units
Transmission Project Bulk Data Upload

- Download the latest template
- Ensure all required fields are filled out
- There must be at least one piece of equipment assigned to a project
Use the Project File Upload function to upload documents to the various bundles

- Both Read-Only and Write users can upload documents

Files must follow the naming convention specified in the Transmission Asset Implementation Guide as this is used to identify the files and link them to the respective bundle item.
Projects that did not meet the advance notice requirement (greater than 202 days) are placed here.

Dates are examined and voted on by the ISO’s energy management system and operations engineering business units.
### Equipment Voting Dashboard

**List of Voting Equipments**

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<tr>
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<th>Project Code</th>
<th>Project Name</th>
<th>Equipment Code</th>
<th>Equipment Type</th>
<th>Equipment Status</th>
<th>Earliest Date</th>
<th>Target Date</th>
<th>Equip Vote Status</th>
<th>EMS Voting Status</th>
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- **Use Shift + Click** or **Ctrl + Click** to select multiple lines to edit.
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</tr>
</tbody>
</table>

- Click pencil icon to edit dates
• If you adjust the Earliest Date to greater than 202 days from current date:
  • The status will change to “RESOLVED”
  • The item will become visible on the PTO Trans Dashboard view
Process for Removing Assets from the Full Network Model

• Assets include:
  – Generation resources
  – Interconnections
  – Transmission equipment

• Add a transmission project to RIMS to begin the process

• The ISO will start an internal process to discuss and prepare for the removal

• The item will be fully vetted by the ISO and the PTO before it is removed from the full network model
Questions?

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