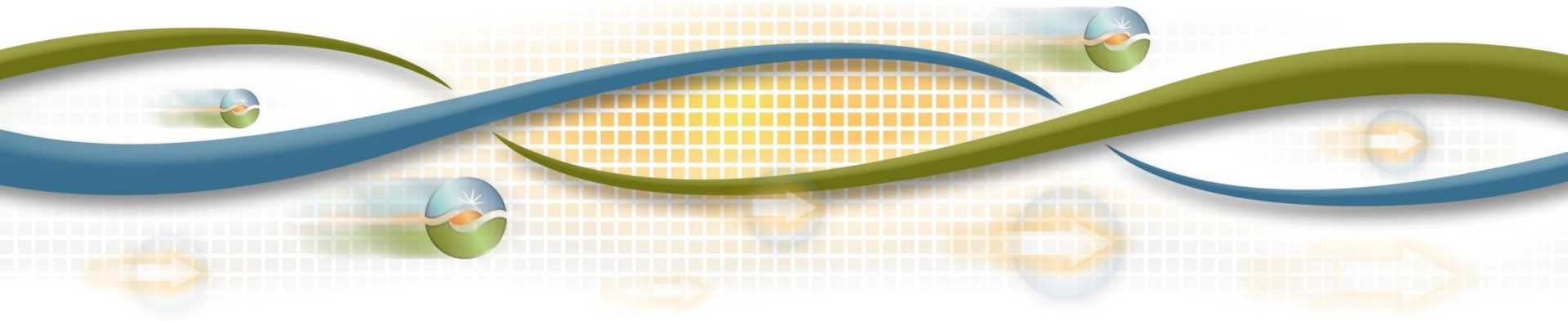




Market Results Interface – Settlements User Interface (OMAR Replacement) 2016 Fall Release

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Customer Service Department



Agenda

- Objective
- Terms and acronyms
- Market Results Interface – Settlements (MRI-S)
 - Cert
 - User role
 - Functionality
 - Changes from OMAR
- Review of settlements timelines

Objective

Given an overview of the new Market Result Interface – Settlements User Interface (MRI-S UI), you be able to practice the following in market simulation:

- Settlement Quality Meter Data (SQMD) submission
- MRI-S functionalities
- User roles
- Digital certificates
- Settlements timelines
- Identify changes from OMAR to UI

Terms and Acronyms

Terms & Acronyms

Acronym	Description
AARF	Application Access Request Form
AIM	Access and Identity Management
API	Application Programming Interface
Authorized ACL Group	The Authorized ACL Group section displays a list of the Access Control List (ACL) groups that isolate and grant access to a single asset (or group of assets). This group only has read only access.
CAISO	California Independent System Operator
CIM	Common Information Model
CMA	Common Multiple Application
CSV	Comma Separated Value
ECN	Electronic Communication Network
Flow gate	Any schedule flow between two substations. In the metering space, an intertie and/or citigate is referred to as a flow gate. Physical path between BA(s) (i.e. Intertie)
FTP	File Transfer Protocol

Flowgate =
Intertie

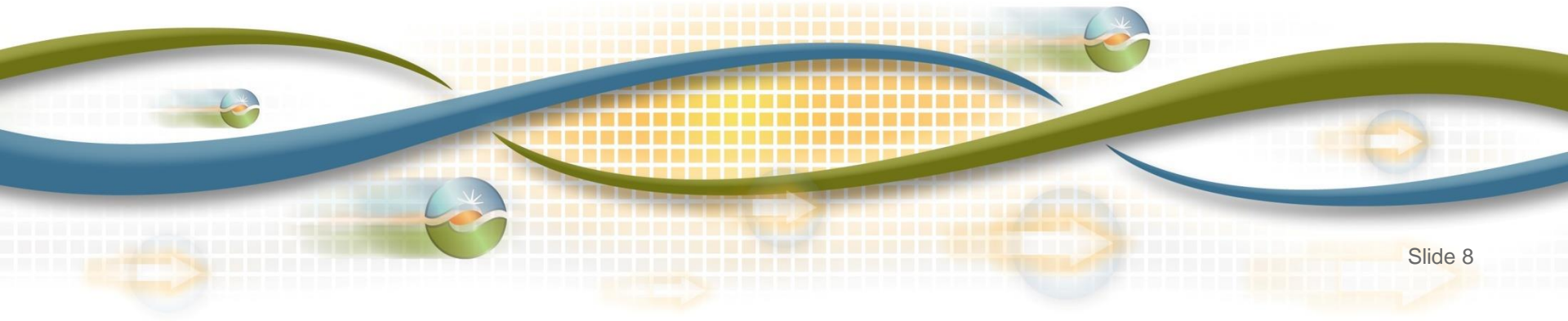
Terms & Acronyms

Acronym	Description
GMT	Greenwich Mean Time
ISOME	ISO Metered Entity
LDAP	Lightweight Directory Access Protocol
MDEF	Meter Data Exchange Format
MPP	Market Participant Portal
mRID	Market Resource. Resource ID as defined in the CAISO Master File.
MRI-S	Market Results Interface - Settlements
NMS	New Metering Solution
OMAR	Operational Meter Analysis and Reporting
PDT	Pacific Daylight Time. Currently has same time zone offset as PDT (UTC -7) but different time zone name. Pacific Daylight Time (PDT) is 7 hours behind Coordinated Universal Time. This time zone is a Daylight Saving Time zone and is used in: North America.
POC	Point of Contact (replaced by UAA)

Terms & Acronyms

Acronym	Description
PST	Pacific Standard Time
RQMD	Revenue Quality Meter Data
SC	Scheduling Coordinator
SCID	Scheduling Coordinator ID
SCME	Scheduling Coordinator Metered Entity
SQMD	Settlement Quality Meter Data
UAA	User Access Administrator. This terminology replaces the term Point of Contact (POC) to better reflect the role of the person responsible for administering the user access for their organization. The UAA will have to sign the UAA agreement through DocuSign. The agreement is sent to the signer and to the UAA Requests mailbox at UAARRequests@caiso.com.
UI	User Interface
XML	Extensible Markup Language
XSD	XML Schema Definition

What has changed?



What has changed

- Two user roles
 - Utilize CMA certificate
- Two screens
- Versioning
- Timeline
 - No longer submitting late meter data forms
- Error codes

What has changed

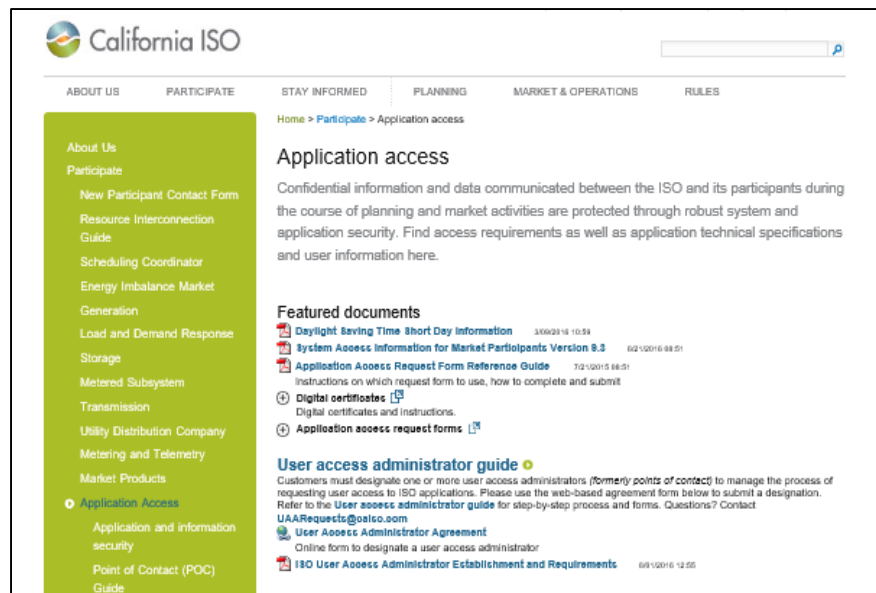
- Submission methodologies
 - API vs UI
 - FTP – no longer being used (replaced by API)
- Submission formats
 - GMT instead of PST/PDT
 - CSV, XML, MDEF
 - mRID vs. MSID

Manage User Authentication and Authorization

Request authorization for access

- Request application access from designated User Access Administrator (UAA)

<http://www.caiso.com/participate/Pages/ApplicationAccess/Default.aspx>

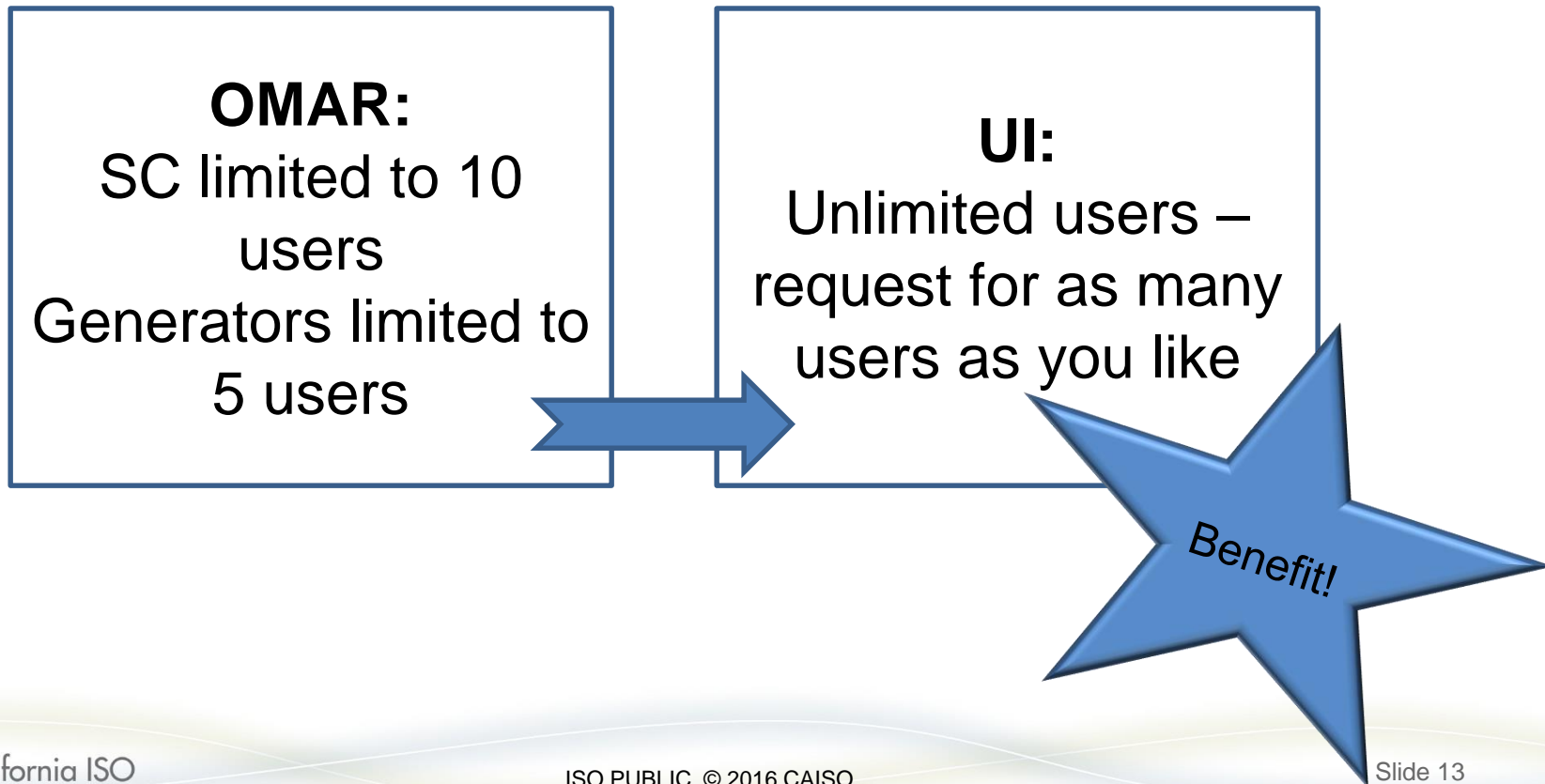


The screenshot shows the California ISO website's 'Application access' page. The page has a green sidebar with navigation links such as 'About Us', 'Participate', 'New Participant Contact Form', 'Resource Interconnection Guide', 'Scheduling Coordinator', 'Energy Imbalance Market', 'Generation', 'Load and Demand Response', 'Storage', 'Metered Subsystem', 'Transmission', 'Utility Distribution Company', 'Metering and Telemetry', 'Market Products', and 'Application Access'. The main content area is titled 'Application access' and contains a paragraph of text: 'Confidential information and data communicated between the ISO and its participants during the course of planning and market activities are protected through robust system and application security. Find access requirements as well as application technical specifications and user information here.' Below this is a 'Featured documents' section with links to 'Daylight Saving Time Short Day Information', 'System Access Information for Market Participants Version 3.3', 'Application Access Request Form Reference Guide', 'Digital certificates', and 'Application access request forms'. At the bottom, there is a 'User access administrator guide' section with a paragraph of text and links to 'User Access Administrator Agreement' and 'ISO User Access Administrator Establishment and Requirements'.

- *Access to MRI-S is managed using the Access and Identity Management (AIM) application*

Digital Certificates – Common Multiple Application (CMA)

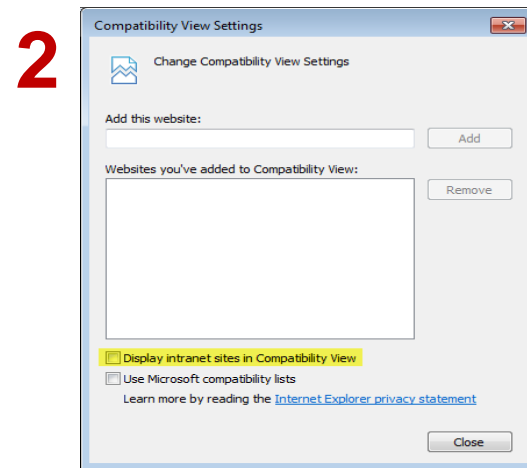
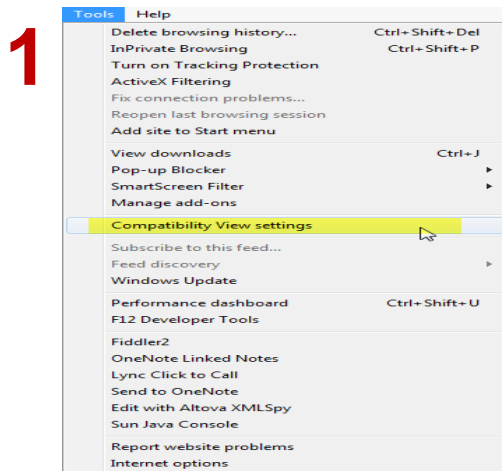
- Before the MRI-S UI application can be displayed, user is required to select the respective CMA digital certificate for authentication.



Manage Application Configuration

Manage application configuration

- Internet Explorer 11 (IE11) is recommended for support purposes
- Check compatibility to ensure successful uploads:
 - Tools → Compatibility View settings → Uncheck Display internet sites in Compatibility View box → Close → Re-open application



Application Access

- Users must be provisioned for access to Market Participant Portal page in order to participate in market simulation

California ISO
Shaping a Renewed Future

Market Applications

[Market Participant Portal](#)
[CAISO.com](#)
MAP-STAGE

Application Access	Metering	Renewables & Demand Response
AIM Access and Identity Management	OMAR Operational Meter Analysis & Reporting	DRS Demand Response System
Inquiries & Disputes	OASIS	DRRS Demand Response Registration System
CIDI Customer Inquiry Dispute and Information	OASIS Open Access Same-Time Information System	PIRP Participating Intermittent
Market & Operations	Outage Coordination	Settlements
CMRI Customer Market Results Interface	WebOMS Outage Management System	MRI-S Market Results Interface - Settlements
CRR Congestion Revenue Rights	Reliability Requirements	Systems & Resource Modeling
SIBR Scheduling Infrastructure & Business Rules	CIRA California ISO Interface for Resource Adequacy	TR Transmission Registry
SIBR Reports Scheduling Infrastructure & Business Rules Reports	RAAM Resource Adequacy Availability Management	Master File
		RIMS Resource Interconnection Management System
		RIMSG Resource Interconnection Management System - Generation

Manage User Data

Manage user roles

- Two user roles:
 - Meter Read
 - Meter Write
- Two screens:
 - Meter Data
 - Batch Status



Manage user roles

Meter Data

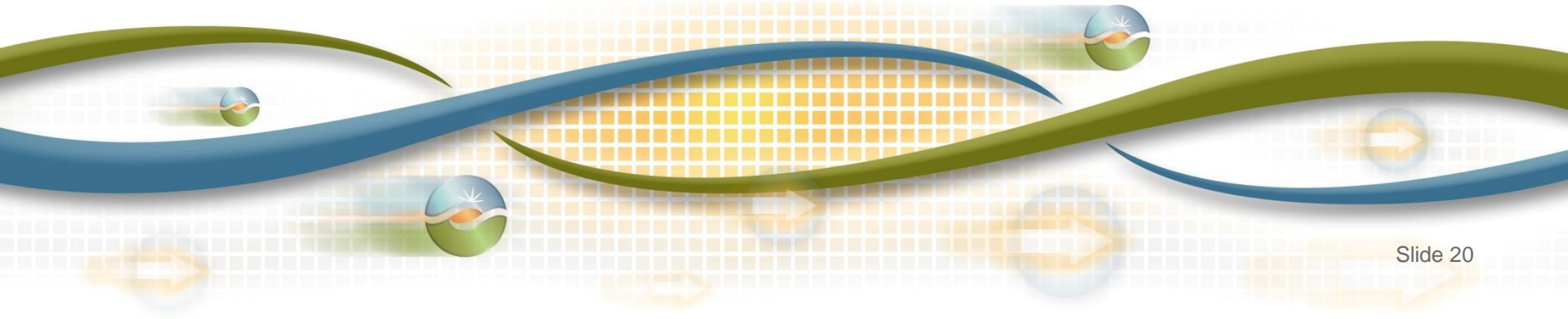
- View
- Sort
- Filter meter data
- Download meter data from grid view*
- Use Manage User Filters

Batch Status

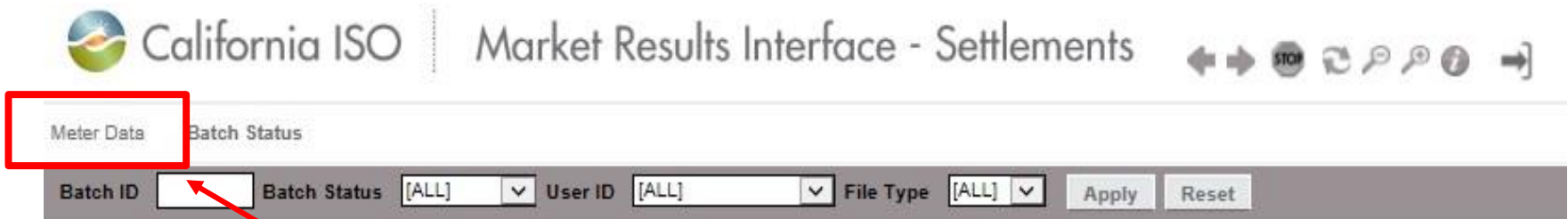
- Upload file
- View
- Sort
- Filter Batch ID
- Export Batch ID(s) from grid view
- View Batch ID errors

*Meter Read users will not be able to export meter data from the grid view & will not be able to see batch status information

Managing Meter Data



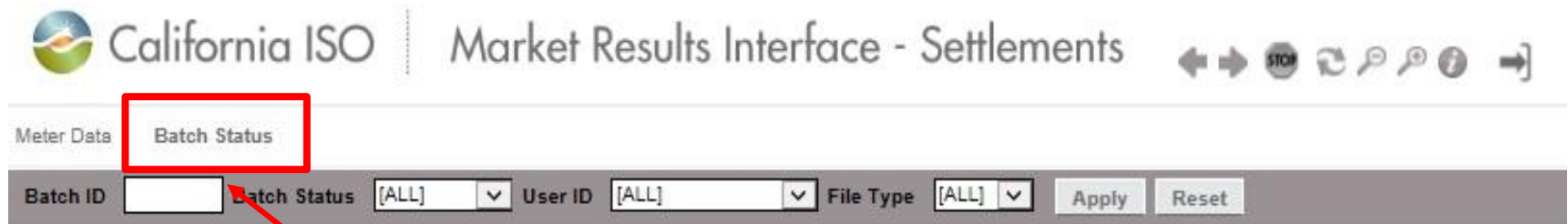
Two screens – Meter Data



Meter Data

- Manage User Filters
 - Retrieve SQMD
- Export Meter Data grid

Two screens – Batch Status



California ISO Market Results Interface - Settlements

Meter Data **Batch Status**

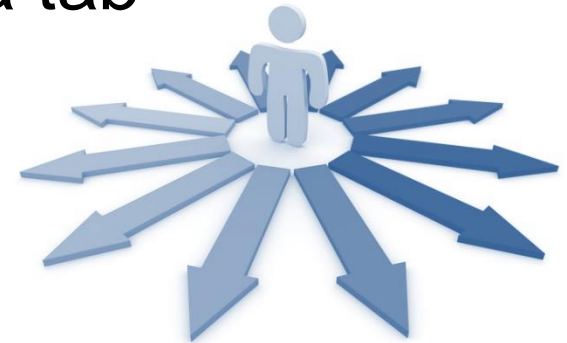
Batch ID Batch Status [ALL] User ID [ALL] File Type [ALL] Apply Reset

Batch Status

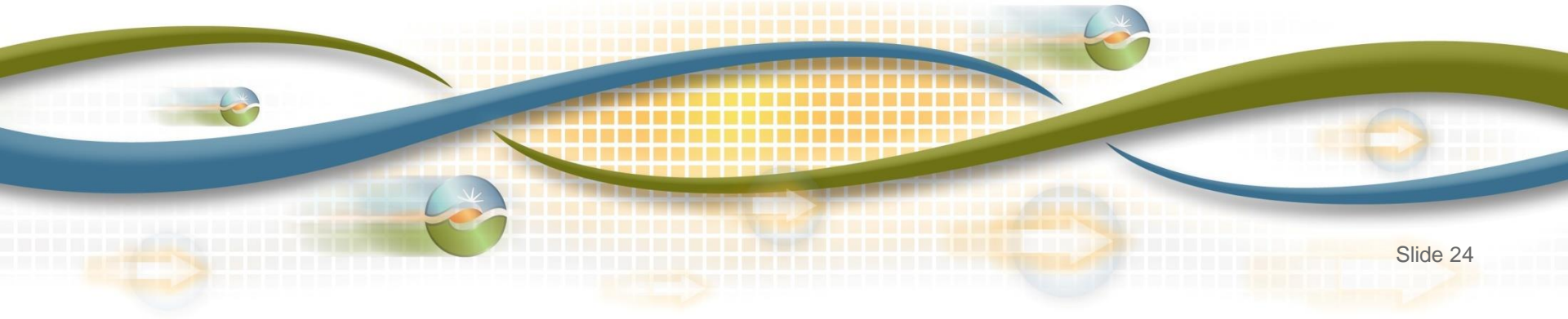
- Upload files
- Filter batch data
- Export Batch IDs
- View Batch ID errors

Manage meter data – multiple SCIDs

- Users with multiple SCIDs have the flexibility to select all or specific SCID(s) for meter data management.
- Performed under the Meter Data tab



Application Functionality



Manage application functionalities

- Based on the user's role, the MRI-S application allows user(s) to perform the following functionalities:
 - Access SQMD files
 - Search for SQMD files
 - Export files in the following formats, as applicable:
 - *XML, CSV, PDF*
 - Upload batch files via API or UI using the following formats:
 - *XML, CSV, MDEF*

Meter data – manage user filters

“Group” functionality is performed through the provisioning process in AIM by the UAA; contact Client Rep with questions

California ISO | Market Results Interface - Settlements

Meter Data | Batch Status

Trade Date: 07/25/2016 | SCID: [ALL] | Resource: [ALL] | Apply | Reset
User Filter: [ALL] | User Filter Resource: [ALL]

Manage User Filters

Meter Data

Trade Date	Resource ID	Interval ID	SCID	Measurement Type	Resource type	Batch ID	Value	Quality	Batch ID	Value	Quality	Value	Quality	Value	Quality	Rerun 1	Rerun 2	Rerun 3	Rerun 4
No Data found																			

Click **Manage User Filters** button to create/edit

Acts as a “favorites” for filtering meter data:

- Accessible by creator only
- Cannot delete a filter
- Can edit an existing filter

Meter data – manage user filters

California ISO | Market Results Interface - Settlements

Meter Data | Batch Status

Trade Date: 07/25/2016 SCID: [ALL] Resource: [ALL] Apply Reset
User Filter: [ALL] User Filter Resource: [ALL]

Manage User Filters

Meter Data

Rows 25

Trade Date	Resource	Interval ID	SCID	Measurement Type	Resource type	Batch ID	Value	Quality	Batch ID	Value	Quality	Value	Quality	Value	Quality	Rerun 1	Rerun 2	Rerun 3	Rerun 4
No Data found																			

California ISO | Market Results Interface - Settlements

Meter Data | Batch Status

User Filters

User Filter Name	Updated Date	Created By	Action
	07/07/2016 15:13		Edit
	07/20/2016 14:41		Edit
	07/07/2016 14:57		Edit

Selected Resources

Resource	Resource Type	Entity
	GEN	
	GEN	
	GEN	

Meter data – create and edit user filters

Manage groups - - 1 - Internet Explorer


Close

Available Resources

1 - 20 of 345

Rows 0-0 of 0

Type	Resource	Resource Type	Entity
RESOURCE		GEN	
RESOURCE		GEN	
RESOURCE		GEN	
RESOURCE		GEN	
RESOURCE		GEN	
RESOURCE		GEN	



>

<

<<

Selected Resources

1 - 3 of 3

Rows 0-0 of 0

Resource	Resource Type	Entity
	GEN	
	GEN	
	GEN	

Meter data – search parameters

California ISO Market Results Interface - Settlements

Meter Data Batch Status

Trade Date: 07/25/2016 SCID: [ALL] Resource: [ALL] Apply Reset

User Filter: [ALL] User Filter Resource: [ALL]

Manage User Filters

Meter Data

Trade Date	Resource ID	Interval ID	SCID	Measurement Type	Resource type	Batch ID	Value	Quality	Batch ID	Value	Quality	Initial	Recalc 1	Recalc 2	Rerun 1	Rerun 2	Rerun 3	Rerun 4
No Data found																		

Retrieve SQMD using:

- Trade date
- SCID
- Resource ID

Trade date must be specific.

Can no longer select from a range of dates.

In order to export data from a range of dates, you must use API

Meter data – performing a criteria-based meter data search

California ISO | Market Results Interface - Settlements

Meter Data | Batch Status

Trade Date: 05/31/2016 | SCID: [dropdown] | Resource: [dropdown] | Group: [ALL] | Group Resource: [dropdown]

Apply | Reset

Manage Groups

Meter Data

Trade Date	Resource ID	Interval ID	SCID	Measurement Type	Quality	Batch ID	Value	Quality	Value	Quality	Value	Quality	Value	Quality	Rerun 1	Rerun 2	Rerun 3	Rerun 4
No Data found																		

Rows 25

Select options for Reso...
RESOURCE ID1
OK | Cancel

RESOURCE ID1

2 ways to search resource IDs for a selected SCID

Meter data – search parameter columns

Columns under History reflect Settlements Timelines; an example will be included in the updated user's guide

Trade Date: 07/25/2016 SCID: [ALL] Resource: [ALL] User Filter: [ALL] User Filter Resource: [ALL]

VERSION **HISTORY**

Trade Date	Resource ID	Interval ID	SCID	Measurement Type	Resource Type	Current Batch ID	Current Value	Current Quality	Previous Batch ID	Previous Value	Previous Quality	Initial Value	Initial Quality	Recalc 1 Value	Recalc 1 Quality	Recalc 2 Value	Recalc 2 Quality	Rerun 1	Rerun 2	Rerun 3	Rerun 4
No Data found																					

- Trade Date
- Resource ID
- Interval ID
- Measurement Type
- Resource Type

- Batch ID Value Quality (Current)
- Batch ID Value Quality (Previous)

- Value Quality (Initial)
- Value Quality (Recalc 1)
- Value Quality (Recalc 2)
- Rerun 1
- Rerun 2
- Rerun 3
- Rerun 4

Meter data - versioning

California ISO Market Results Interface - Settlements

Meter Data Batch Status

Trade Date: 07/25/2016 SCID: [ALL] Resource: [ALL] Apply Reset
User Filter: [ALL] User Filter Resource: [ALL]

Manage User Filters

Meter Data

Rows 25

Trade Date	Resource ID	Interval ID	SCID	Measurement Type	Resource type	Current		Previous		Initial	Recalc 1		Recalc 2		Rerun 1	Rerun 2	Rerun 3	Rerun 4
						Batch ID	Value Quality	Batch ID	Value Quality		Value	Quality	Value	Quality				
No Data found																		

It is important to note: UI only contains the last two versions of SQMD that has been submitted

- CURRENT
- PREVIOUS

- Batch ID Value Quality (Current)
- Batch ID Value Quality (Previous)

Meter data – export

- Export data from the Meter Data grid

The screenshot shows the California ISO Market Results Interface - Settlements. The main section is titled "Meter Data" and includes a "Batch Status" link. Below this is a filter bar with fields for Trade Date (07/11/2016), SCID (ALL), Resource (ALL), and User Filter (ALL). A "Manage User Filters" button is also present. The "Meter Data" table is displayed with columns for Trade Date, Interval ID, SCID, Measurement Type, Resource Type, Batch ID, Value, Quality, and Batch ID. A context menu is open over the table, showing options: "Export All", "Export Page", and "Export Wizard".

Trade Date	Interval ID	SCID	Measurement Type	Resource Type	Batch ID	Value	Quality	Batch ID
07/11/2016	25		GEN	GEN	2623	22.0234561	ESTIMATED	
07/11/2016	13		GEN	GEN	2763	50.0000000	ACTUAL	
07/11/2016	25		LOAD	LOAD	2623	4.0000000	ESTIMATED	
07/11/2016	25		GEN	ITIE	2623	2.0000000	ESTIMATED	
07/11/2016	25		LOAD	ETIE	2623	3.0000000	ESTIMATED	

- View data records on page in following increments:
 - 25, 50, 100, 200 or 500

Meter data – export

Meter Data Batch Status

Trade Date: 07/11/2016 SCID: [ALL] Resource: [ALL] Apply Reset
User Filter: [ALL] User Filter Resource: [ALL]

Message User Filters

Meter Data

Trade Date	Resource ID	Interval ID	SCID	Measurement Type	Resource type	Batch ID	Value	Current	Qu
07/11/2016		20		GEN	GEN	2163	22,2234581		
07/11/2016		12		GEN	GEN	2163	50,0000000		AC
07/11/2016		25		LOAD	LOAD	2623	4,0000000		ES
07/11/2016		25		GEN	ITIS	2623	2,0000000		ES

Export Wizard - - Internet Explorer

Export Excel Export

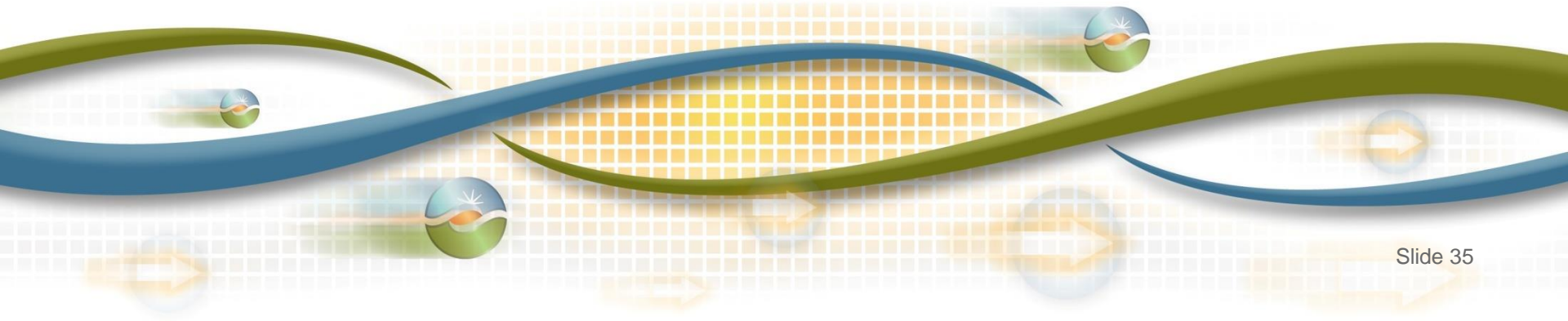
Grid 1: Meter Data

Trade Date	<input checked="" type="checkbox"/>	
Resource ID	<input checked="" type="checkbox"/>	
Interval ID	<input checked="" type="checkbox"/>	
SCID	<input checked="" type="checkbox"/>	
Measurement Type	<input checked="" type="checkbox"/>	
Resource type	<input checked="" type="checkbox"/>	
Batch ID	<input checked="" type="checkbox"/>	
Value	<input checked="" type="checkbox"/>	
Quality	<input checked="" type="checkbox"/>	
Batch ID	<input checked="" type="checkbox"/>	
Value	<input checked="" type="checkbox"/>	
Quality	<input checked="" type="checkbox"/>	
Value	<input checked="" type="checkbox"/>	
Quality	<input checked="" type="checkbox"/>	
Value	<input checked="" type="checkbox"/>	
Quality	<input checked="" type="checkbox"/>	
Value	<input checked="" type="checkbox"/>	
Quality	<input checked="" type="checkbox"/>	
Rerun 1	<input checked="" type="checkbox"/>	
Rerun 2	<input checked="" type="checkbox"/>	
Rerun 3	<input checked="" type="checkbox"/>	
Rerun 4	<input checked="" type="checkbox"/>	

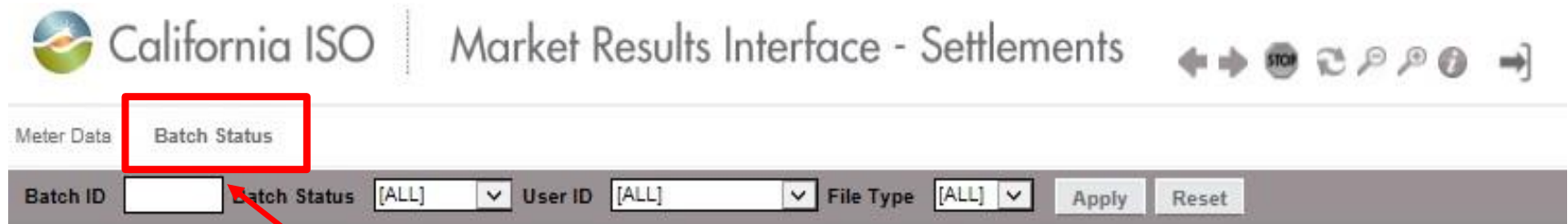
All Rows

- Export meter data
- Select data to export:
 - Export wizard allows for filtering data
 - Select export format

Batch Status



Two screens – Batch Status



California ISO Market Results Interface - Settlements

Meter Data **Batch Status**

Batch ID Batch Status [ALL] User ID [ALL] File Type [ALL] Apply Reset

Batch Status

- Upload files
- Filter batch data
- Export Batch IDs
- View Batch ID errors

Batch Status – upload SQMD

Data submitted through API will be visible on the Batch Status tab based on user role

Meter Data Batch Status

Batch ID Batch Status [ALL] User ID [ALL] File Type [ALL] Apply Reset

Upload File

Batch ID	Status	User ID	File Type	File Name	File Size	Created Date	Updated Date
1008	ERROR		XML		.003 KB	06/14/2016 11:52	06/14/2016 11:53
1001	ERROR		XML	regauthstatus_3814665.xml	.742 KB	06/14/2016 09:48	06/14/2016 09:49
952	ERROR		XML		.005 KB	06/10/2016 17:38	06/10/2016 17:39
942	ERROR		XML		.003 KB	06/10/2016 13:15	06/10/2016 13:16
923	ERROR		XML		.004 KB	06/10/2016 10:11	06/10/2016 10:12
922	ERROR		XML		.003 KB	06/10/2016 10:07	06/10/2016 10:09
902	ERROR		XML		.003 KB	06/09/2016 17:32	06/09/2016 17:33
661	SUCCESS		XML		.01 KB	05/31/2016 11:01	06/01/2016 12:04

Batch ID: 1001							
Error Code	Resource ID	Type	Measurement Type	Interval	End Date	Error Message	Created Date
1002					06/14/2016 16:49	Invalid Xml	06/14/2016 09:49

From the Batch Status screen, participants can upload meter data for a given trade date

Submission methodology: API vs UI

- API
 - SQMD must be in an XML format
 - SQMD must be in GMT
 - SQMD must contain the Market Resource ID (mRID)
- UI
 - SQMD must be in XML, MDEF or CSV*
 - SQMD must be in GMT
 - SQMD must contain the Market Resource ID (mRID)

Maximum acceptable attachment size 10MB
(uncompressed)

Format: MSID vs. mRID

Meter System Identification (MSID)

Identification of Market Resource for OMAR online meter data submittal – NO LONGER APPLICABLE

EXAMPLE: **APPLE2PIE**

Market Resource Identification (mRID)

Identification characters assigned by the CAISO to Generating Units, Loads, Participating Loads, System Units, Proxy Demand Resources, and Physical Scheduling plants.

EXAMPLE: **APPLE_2_PIE**

Meter intervals: EIM

EIM meter intervals

- Generation for participating generators at 5-minute intervals
- Non-participating generators at 5, 15 or 60- minute intervals
- Interties at 5-minute intervals
- Load at 5,15 or 60-minute intervals

* Prior to submitting any given EIM resource, interval variation must be finalized for those resources identified with more than one interval options

Batch Status – upload meter data screen

Close

Upload Meter Data File

Select File Browse...

File Name:

File Size:

User Id:

Batch Id:

Submit Cancel

Once file is selected, fields auto populate
If it does not auto populate there is an error

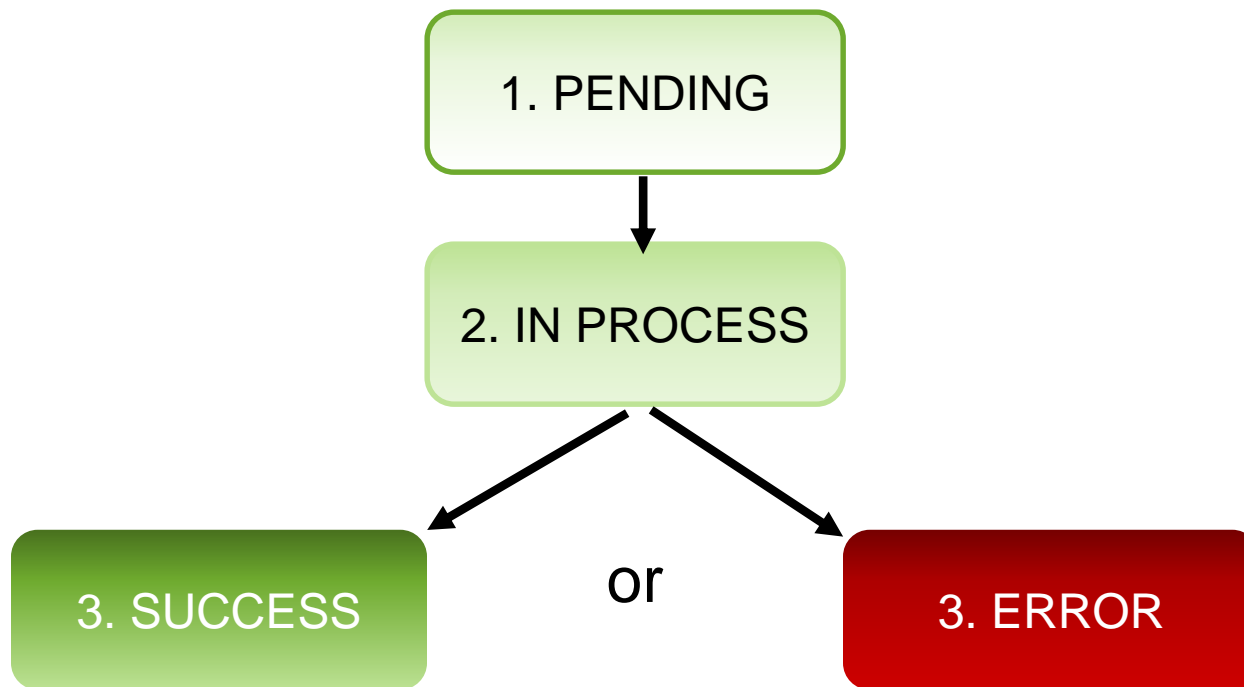
Files can be uploaded using one of the following formats:

- XML
- CSV
- MDEF

Return to Batch Status screen to view that status of your upload by clicking Close

Batch submission status

There are four values for the status of a submission:



Error Codes

Error code

Error message

California ISO | Market Results Interface - Settlements

Meter Data Batch Status

Batch ID: [] Batch Status: [ALL] File Type: [ALL] Apply Reset

Upload File

Batch ID	Status	User ID	File Type	File Name	File Size	Created Date	Updated Date
3871	SUCCESS		CSV	Meter_Data_1262.CSV	497 KB	07/19/2016 15:58	07/19/2016 15:59
3870	SUCCESS		CSV	Meter_Data_1262.CSV	497 KB	07/19/2016 15:54	07/19/2016 15:55
3852	SUCCESS		CSV	Meter_Data_1262.CSV	497 KB	07/19/2016 15:50	07/19/2016 15:51
3851	ERROR		CSV	Meter_Data_1262.CSV	497 KB	07/19/2016 15:48	07/19/2016 15:49
3850	ERROR		CSV	Meter_Data_1262.CSV	497 KB	07/19/2016 15:47	07/19/2016 15:48
3830	ERROR		CSV	Meter_Data_1262.CSV	488 KB	07/19/2016 15:45	07/19/2016 15:46
3810	ERROR		CSV	Meter_Data_1262.CSV	475 KB	07/19/2016 14:56	07/19/2016 14:57
3790	ERROR		XML	Meter_Data_Error_Messages.XML	9638.321 KB	07/19/2016 14:42	07/19/2016 14:43
3771	ERROR		CSV	Meter_Data_combined_error_messages.csv	19.729 KB	07/19/2016 13:56	07/19/2016 13:57
3770	ERROR		CSV	Meter_Data_combined_error_messages.csv	19.729 KB	07/19/2016 13:52	07/19/2016 13:53

Error Code Resource ID	Type	Measurement Type	Interval End Date	Error Message	Created Date
1004				Invalid Resource	07/19/2016 14:43
1017	GEN	GEN	06/18/2016 08:05	Estimated Data Cannot Be Provided For This Trade Date	07/19/2016 14:43
1017	GEN	GEN	06/18/2016 08:05	Estimated Data Cannot Be Provided For This Trade Date	07/19/2016 14:43
1006	GEN	GEN	06/18/2014 07:10	Late Meter Data	07/19/2016 14:43
1017	GEN	GEN	06/20/2016 08:05	Estimated Data Cannot Be Provided For This Trade Date	07/19/2016 14:43
1017	GEN	GEN	06/20/2016 08:05	Estimated Data Cannot Be Provided For This Trade Date	07/19/2016 14:43
1010	GEN	GEN	06/20/2016 07:05	Interval End Time Does Not Match With Time Interval Length	07/19/2016 14:43
1010	GEN	GEN	06/20/2016 07:10	Interval End Time Does Not Match With Time Interval Length	07/19/2016 14:43
1010	GEN	GEN	06/20/2016 07:15	Interval End Time Does Not Match With Time Interval Length	07/19/2016 14:43
1010	GEN	GEN	06/20/2016 07:20	Interval End Time Does Not Match With Time Interval Length	07/19/2016 14:43
1010	GEN	GEN	06/20/2016 07:25	Interval End Time Does Not Match With Time Interval Length	07/19/2016 14:43
1010	GEN	GEN	06/20/2016 07:30	Interval End Time Does Not Match With Time Interval Length	07/19/2016 14:43

If you receive error code 1001 or some other unexpected code, submit a CIDI ticket to troubleshoot

All error codes that are associated with the selected Batch ID will be displayed on the right
Complete list can be found in the tech specs and user guide

Batch Status - filter

Meter Data Batch Status

Batch ID Batch Status [ALL] File Type [ALL] Apply Reset

Upload File

Batch Status

1 - 25 of 188 Rows 0-0 of 0 Rows 25

Batch ID	Status	User ID	File Type	File Name	File Size	Created Date	Updated Date
3871	SUCCESS		CSV	Meter_Data_1262.CSV	.497 KB	07/19/2016 15:58	07/19/2016 15:59
3870	SUCCESS		CSV	Meter_Data_1262.CSV	.497 KB	07/19/2016 15:54	07/19/2016 15:55
3852	SUCCESS		CSV	Meter_Data_1262.CSV	.497 KB	07/19/2016 15:50	07/19/2016 15:51
3851	ERROR		CSV	Meter_Data_1262.CSV	.497 KB	07/19/2016 15:48	07/19/2016 15:49
3850	ERROR		CSV	Meter_Data_1262.CSV	.497 KB	07/19/2016 15:47	07/19/2016 15:48
3830	ERROR		CSV	Meter_Data_1262.CSV	.488 KB	07/19/2016 15:45	07/19/2016 15:46
3810	ERROR		CSV	Meter_Data_1262.CSV	.475 KB	07/19/2016 14:56	07/19/2016 14:57
3791	ERROR		XML	Meter_Data_Error_Messages.XML	9638.321 KB	07/19/2016 14:44	07/19/2016 14:45
3790	ERROR		XML	Meter_Data_Error_Messages.XML	9638.321 KB	07/19/2016 14:42	07/19/2016 14:43
3771	ERROR		CSV	Meter_Data_combined_error		9/2016 13:56	07/19/2016 13:57
3770	ERROR		CSV	Meter_Data_combined_error		9/2016 13:52	07/19/2016 13:53
3751	ERROR		CSV	Meter_Data_943_60min_inte		9/2016 13:34	07/19/2016 13:35
3750	ERROR		CSV	Meter_Data_943_60min_inte		9/2016 13:30	07/19/2016 13:31
3710	SUCCESS		CSV	Meter_Data_943_60min_inte		9/2016 11:42	07/19/2016 11:43
3690	ERROR		CSV	Meter_Data_943_60min_inte		9/2016 10:39	07/19/2016 11:18
3675	ERROR		CSV	Meter_Data_943_60min_inte		9/2016 10:22	07/19/2016 11:17
3610	SUCCESS		XML			8/2016 16:14	07/18/2016 16:15
3540	ERROR		XML			8/2016 15:34	07/18/2016 15:35

- Filter by:
- Batch ID
 - Status
 - User ID
 - File details
 - Dates

Batch Status – export wizard

Export batch status information

Select data to export:

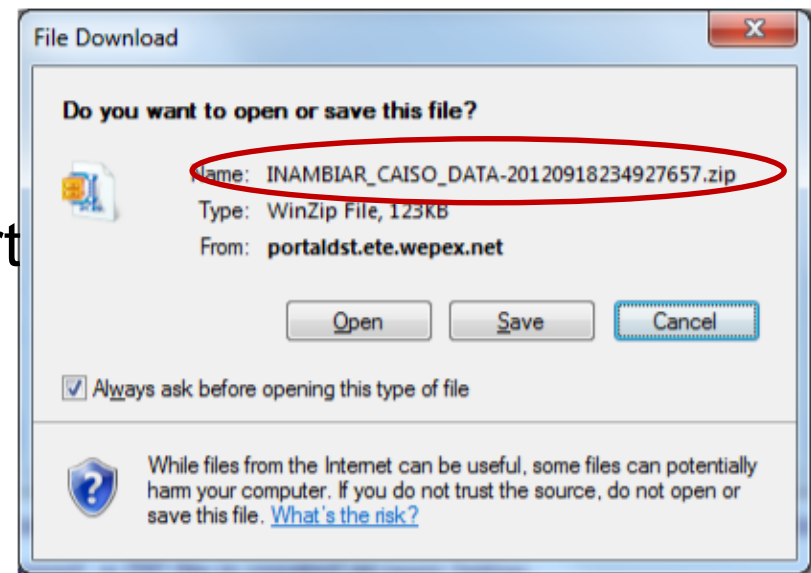
- Export wizard allows for filtering data
- Exports applicable file type:
 - XML
 - CSV
 - PDF

The screenshot displays the California ISO Market Results Interface - Settlements. The main window shows a 'Batch Status' table with columns for Batch ID, Status, User ID, File Type, File Name, File Size, Created Date, and Updated Date. A red box highlights the 'File Type' column. An 'Export Wizard' dialog box is open, showing a list of fields to export, with a red box highlighting the 'Export' button and the list of fields.

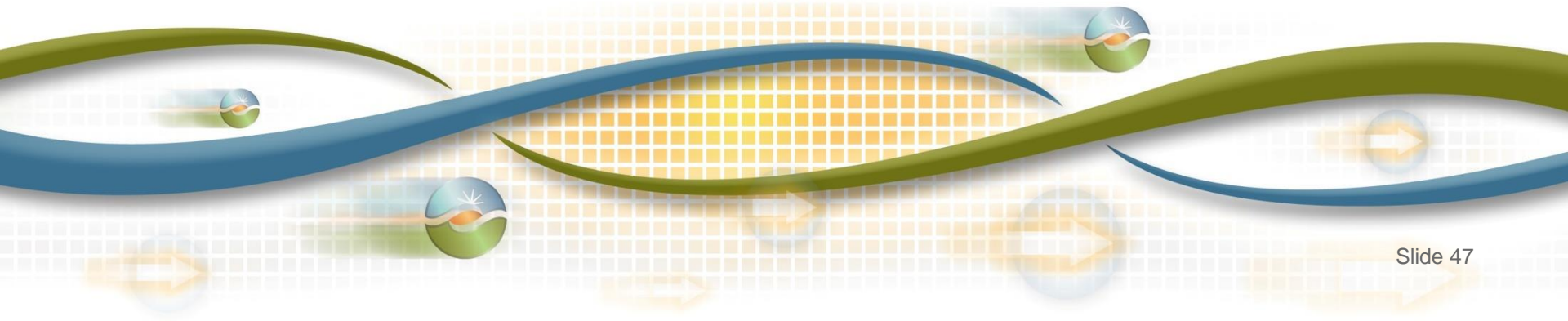
Batch ID	Status	User ID	File Type	File Name	File Size	Created Date	Updated Date
3871	SUCCESS		CSV	Meter_Data_1262.CSV	497 KB	07/19/2016 15:58	07/19/2016 15:59
3870	SUCCESS		CSV	Meter_Data_1262.CSV	497 KB	07/19/2016 15:54	07/19/2016 15:55
3852	SUCCESS		CSV	Meter_Data_1262.CSV	497 KB	07/19/2016 15:50	07/19/2016 15:51
3851	ERROR		CSV	Meter_Data_1262.CSV	497 KB	07/19/2016 15:48	07/19/2016 15:49
3850	ERROR		CSV	Meter_Data_1262.CSV	497 KB	07/19/2016 15:47	07/19/2016 15:48
3830	ERROR		CSV	Meter_Data_1262.CSV	488 KB	07/19/2016 15:45	07/19/2016 15:46
3810	ERROR		CSV	Meter_Data_1262.CSV	475 KB	07/19/2016 14:56	07/19/2016 14:57
3791	ERROR		XML	Meter_Data_Error_Messages.XML	9638.321 KB	07/19/2016 14:44	07/19/2016 14:45
3790	ERROR		XML	Meter_Data_Error_Messages.XML	9638.321 KB	07/19/2016 14:42	07/19/2016 14:43
3771	ERROR		CSV	Meter_Data_combined_error_messages.csv	19.729 KB	07/19/2016 13:56	07/19/2016 13:57
3770	ERROR		CSV	Meter_Data_combined_error_messages.csv	19.729 KB	07/19/2016 13:52	07/19/2016 13:53
3751	ERROR		CSV	Meter_Data_943_60min_interval.csv	19.576 KB	07/19/2016 13:34	07/19/2016 13:35
3750	ERROR		CSV	Meter_Data_943_60min_inte			
3710	SUCCESS		CSV	Meter_Data_943_60min_inte			
3690	ERROR		CSV	Meter_Data_943_60min_inte			
3675	ERROR		CSV	Meter_Data_943_60min_inte			
3610	SUCCESS		XML				
3510	ERROR		XML				
3473	ERROR		XML				
3472	ERROR		XML				
3471	ERROR		XML				
3470	ERROR		XML				
3308	SUCCESS		CSV				
3298	SUCCESS		CSV				
3291	ERROR		CSV				

Export SQMD files

- Once user selects file(s) and download format, a zip file will be generated
- Naming convention:
 - **<CertificateID>- CAISO_DATA-YYYYMMDDHH24MISSFFF.zip**
- Save or open zip to extract file(s) requested
- Download formats using export wizard include Excel & CSV
- Export All & Export Page CSV only



Auditability



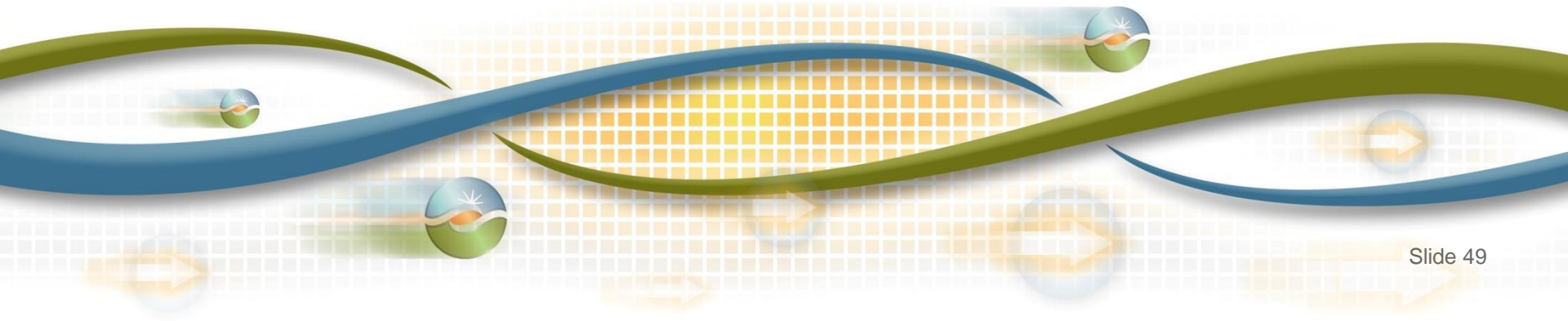
Auditability

The UI allows auditability, which includes the following information:

- Creation Date
- Update Date
- Update User
- Update Reason/Comments
- Publish Date for downstream applications (i.e. timestamp when the data was published to Settlements)

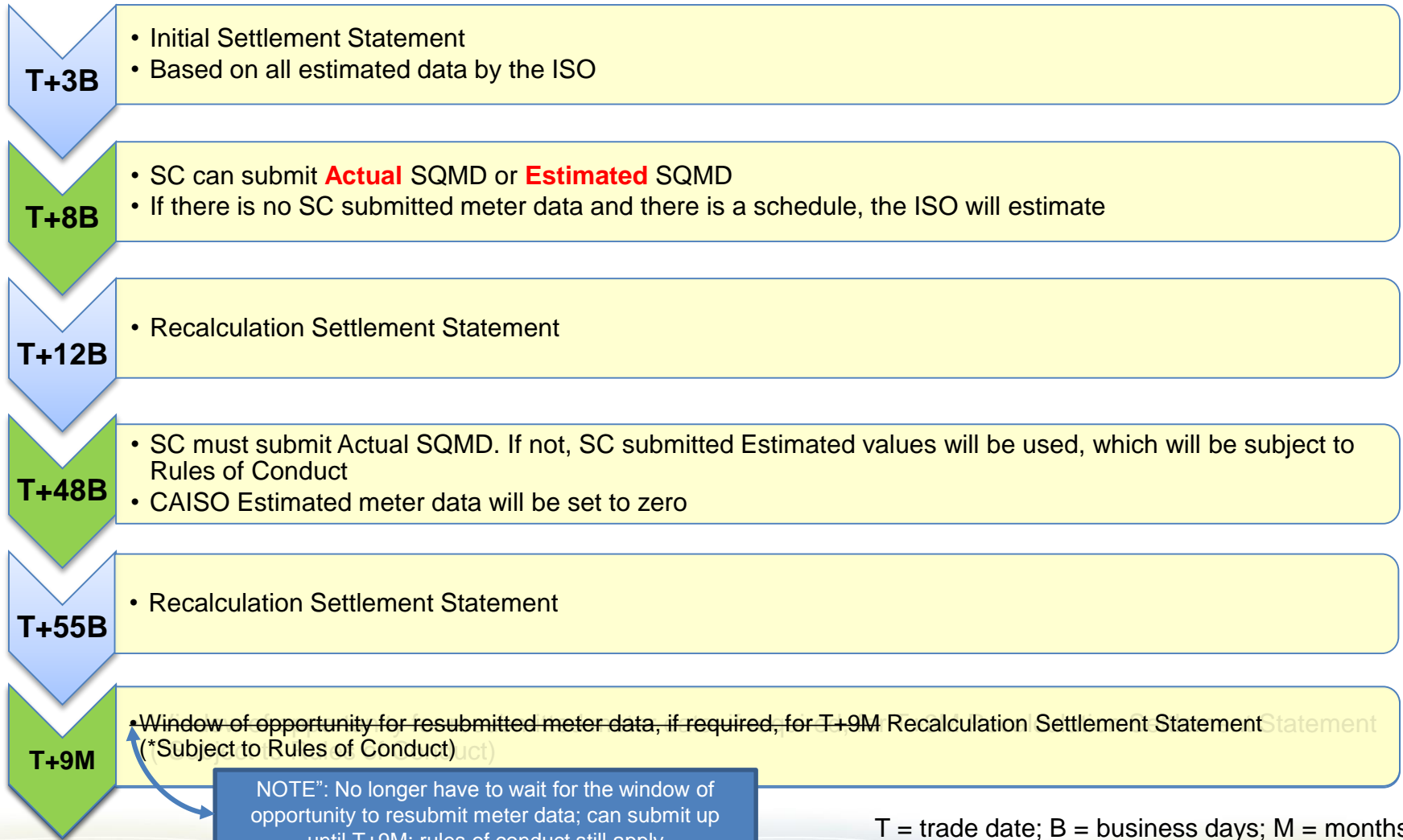
Timelines

For submission and resubmission



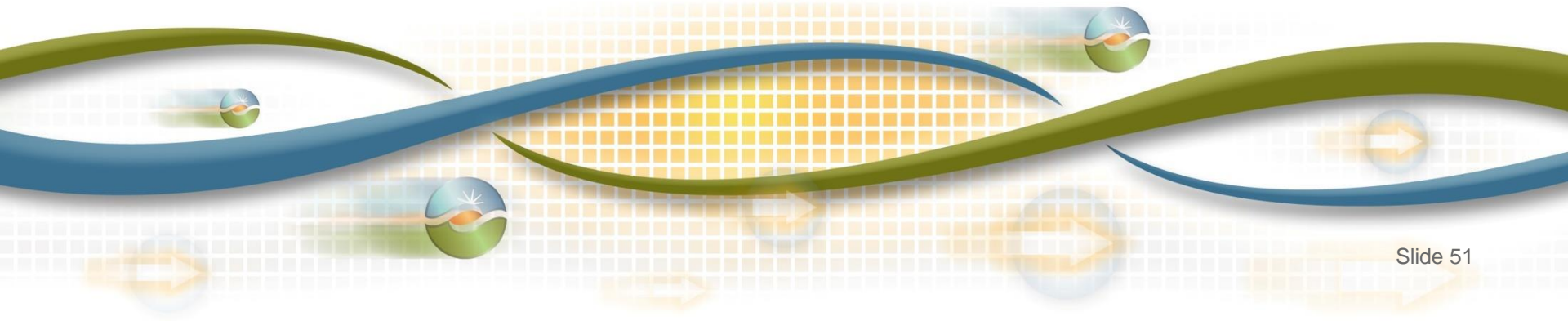
Meter data submission: Settlement timelines

* Subject to rules of conduct



T = trade date; B = business days; M = months
T+9M = T+172B

Transition

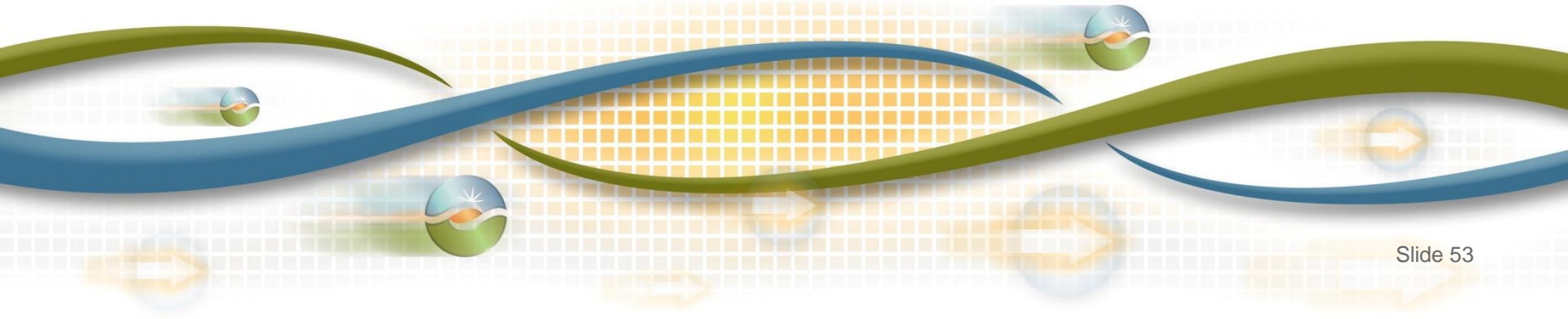


Transition from OMAR to UI

- OMAR will no longer be available after March 31, 2017
 - Data from OMAR will be migrated
- Individual cut-over based on demonstrated readiness and coordination between SC & ISO resources
- Data entered in market sim will NOT be considered production quality
- Formal data transition plan is under development



Recap Changes



What has changed

- Two user roles
 - Utilize CMA certificate
- Two screens
- Versioning
- Submission methodologies
 - API vs UI
 - FTP – no longer being used (replaced by API)
- Submission formats
 - GMT instead of PST/PDT
 - CSV, XML, MDEF
 - mRID vs. MSID
- Error Codes
- Timeline
 - No longer submitting late meter data forms



Contacts



- **CAISO client service representatives**
 - Contact your client representative with questions
- **Scheduling coordinator's User Access Administrator (UAA)**
 - SC's central point of contact, responsible for submitting new requests or modifying user's ISO application access

Questions?

- Support during market simulation:
 - Contact the ISO Service Desk at (888) 889-0450 or servicedesk@caiso.com
 - Submit a CIDI ticket
 - *select the market sim environment*





Reference Material

Features of User Interface

Helpful Links

Features of User Interface: Results Window

- The results window provides inline filtering and export functionality

	
	Restore sort to default setting (removes user-created multiple column sorting)
	The Inline Filter works as a toggle. Click the icon to filter data based on the content of a particular column. Press Enter after inputting the filter criteria. (Note: Wildcard symbols can be used in this column, but they are not necessary. For example, searching for *lake* or lake will provide the same results.)
	Exporting (to Excel, Word, CSV)

Features of User Interface: Export Menu









- The export menu allows the user to customize the data export

Export All
Export Page
Export Wizard

Export All	All data points will be exported to Excel
Export Page	The current page will be exported to Excel
Export Wizard	The user can customize the data export







Features of User Interface: Application Toolbar

- The application toolbar contains the application or browser-based functions

	
	Goes to the previous display in browsing history
	Goes to the next display in browsing history
	Stops loading the current display
	Refreshes the display in the current window
	Zoom out
	Zoom in
	Log out

Features of User Interface: Results Window

- The results window provides data in multiple pages

	
	Navigate to the first page of data
	Navigate to the previous page of data
	Navigate to the next page of data
	Navigate to the last page of data
	Go to specific line item entered in search box

Helpful links



For Tech Specs, User Guide, BRS

<http://www.caiso.com/Pages/documentsbygroup.aspx?GroupID=53D6EA67-9F4A-434D-8C41-BAA46169A237>

Application Access Page

<http://www.caiso.com/participate/Pages/ApplicationAccess/Default.aspx>

Access and Identity Management (AIM) User Guide

http://www.caiso.com/Documents/AccessandIdentityManagement_AIM_UserGuide.pdf

Thank you!!!

This concludes today's Market Results Interface – Settlements User Interface (OMAR Replacement) 2016 Fall Release training session...