



New Resource Implementation

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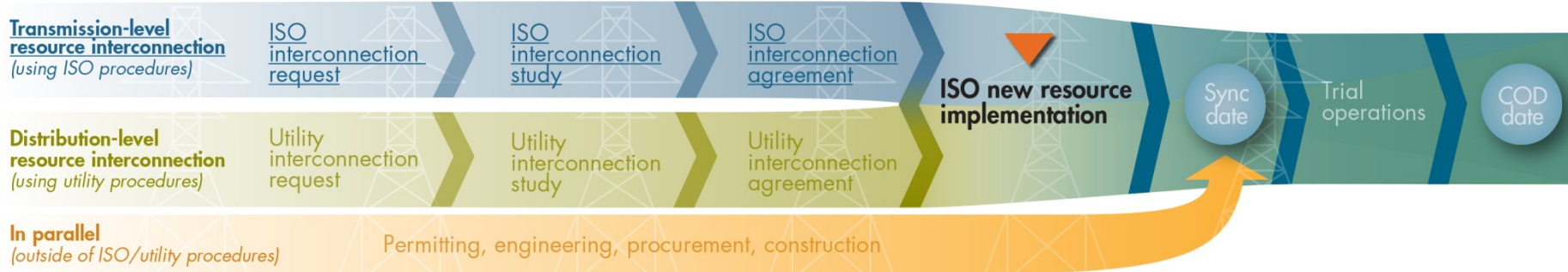
February 27, 2019

Objectives

- New Resource Implementation (NRI) process.
 - NRI Webpage Updates
 - Getting started
 - Bucket timeline and requirements
 - Sync and COD Process
- Tips for success
- New things coming in 2019!
 - NRI FNM Monthly Builds

Interconnection Process Map

You are here



For some interconnection customers (IC), such as distribution connected and QF resources, New Resource Implementation (NRI) will be the first point of contact at the ISO.

New Resource Implementation ensures that a resource requirements are met before:

- Initial sync
- Commercial operations
- Qualified Facility conversions and conversions

NRI Webpage Updates

New Resource Implementation process and requirements

- Updated NRI webpage to help give more guidance
- Most projects will be using RIMS User Interface
- 3 Step process

This webpage contains the guidelines, deliverables and activities needed during the final 203 days of interconnection projects to successfully complete resource implementation to the ISO grid.

Getting started

- 1 Determine how to start a project at the ISO.
Using the resource list below, determine how you will submit your project request to the ISO.

Resource project types to be created through NRI:

- Distributed Energy Resource (DERP)
- SCME EIM onboarding
- SCME EIM Updates
- Existing resources converting from ISOME to SCME

Use:

- ➔ [New Resource Implementation Quick Start Guide](#)
- ➔ [Project Details Form](#)

All other project types to be created through RIMS:

Use:

- ➔ [RIMS Quick Start Guide](#)
- ➔ [RIMS Project Details Form](#)
- ➔ [Create RIMS Project](#)

- 2 Review [New Resource Implementation Guide](#)
Follow the guide to ensure a smooth transition from build to bid in the ISO markets
- 3 Review [New Resource Implementation Checklist](#)
The checklist provides requirements based on project type.

Getting Started

The first step of the NRI process is to:

- Submit a Project Details Form through the [RIMS Public Site](#)
Participate → Generation → New resource implementation → Create RIMS project
- Submit Project in advance of your estimated initial sync or Implementation date
- Once successfully submitted, your project will be assigned a NRI



Project Details Form

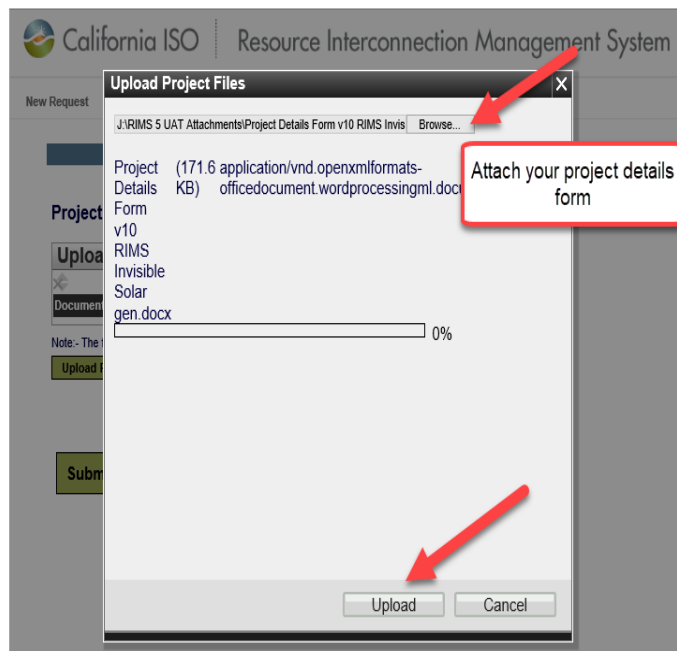
Submit a new request through the [Resource Interconnection Management System \(RIMS\) public site](#). 1) Fill out the "New Request" section 2) Choose the "NRI Project Details Form" drop down 3) Click "Register". A registration code will be emailed to the email contact in the New Request. 4) Place this code within the "Registration Code" section of the public site. 5) Click "submit" to access the upload screen for the project details form. You will receive an ISO Project code after the form validation is complete. The ISO project code will be used for all filenames.

All fields must be filled in, additional fields for Natural Gas Combustion Turbines complete section 8 A-E.

RIG Reconfiguration, Meter Replacement and Meter Maintenance Project Types please only fill out rows 1, 2A- 2G, 3A-C, 6A, 7A-C only.

The following characters are not allowed in any filename: ~ ' # % & @ * { } : ; < > ? / \ | () [] - _

Project Creation



New Request Reporting

Project Details Form

Project Name: rims

Uploaded Files

Document Type	File Name	Uploaded Status	Uploaded Date		Comment
Project Details Form	Project Details Form v10 RIMS Invisible Solar gen.docx	PENDING	02/12/2019	Delete	0 Comments

Note:- The following special characters are not allowed in any file name: ~' # % & @ ! < > / \ | : ; , . ' " [] _ -

Upload Project Files


Submit Registration for Validation

What to know about RIMS

- RIMS User has the ability to...
 - Upload bucket documents
 - Edit project details
(Contacts, implementation date, project description or incorrect or missing data)
- Bucket timelines are automatically enforced by the system
- Access Sharepoint link for all “Accepted” bucket items

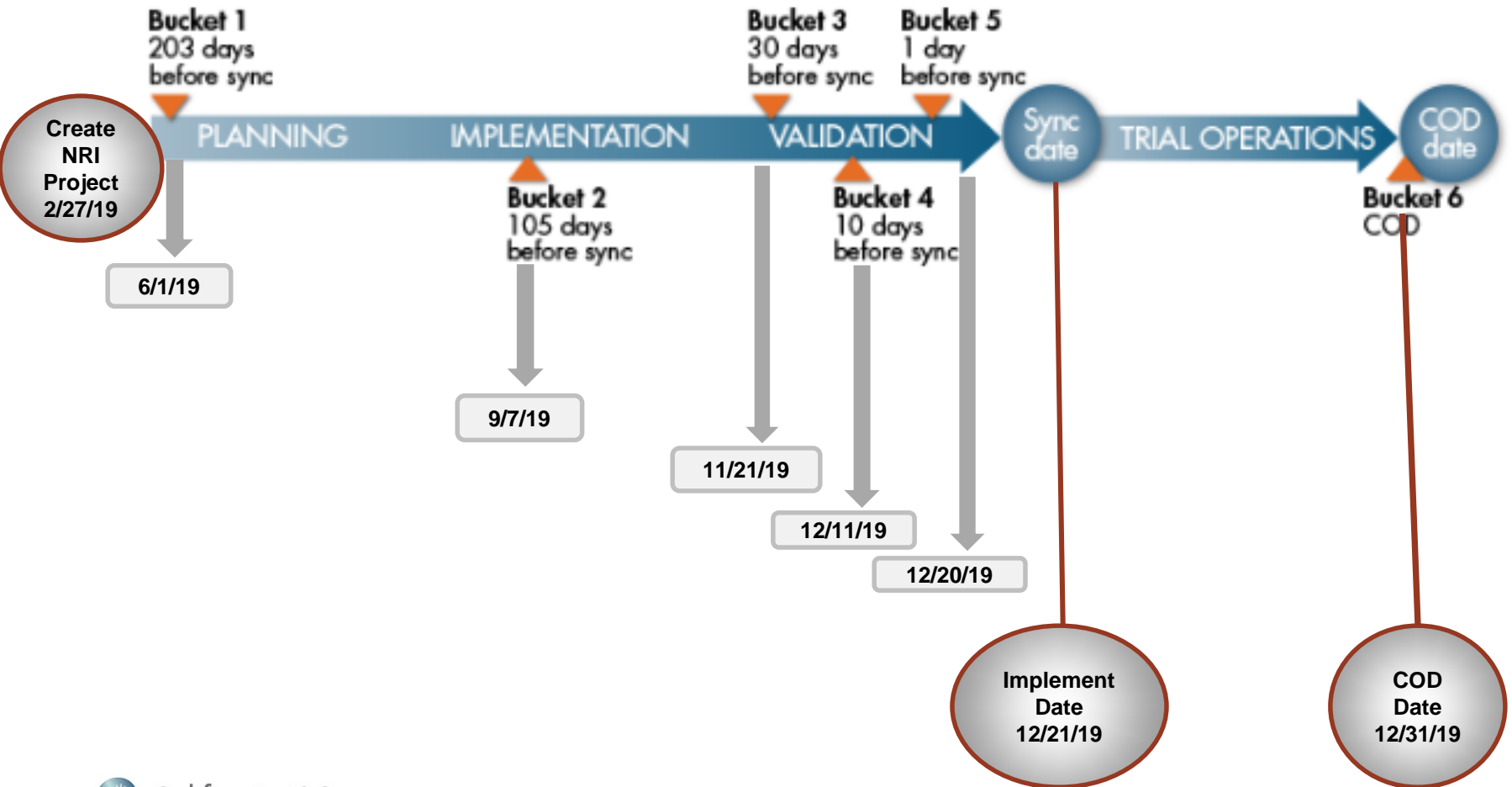
Documents

Uploaded Files

Document Group	Document Type	File Name	Sharepoint Link	Uploaded Status	User	Uploaded Date	Comment
PDF	Project Details Form	Project Details Form v10 RIMS Invisible Solar gen.docx		SUCCESS	PUBLIC	02/07/2019	0 Comments

Upload Project Files

Full Network Model and Bucket timeline



FNM Bucket Requirements

Bucket Items

BUCKET 1 06/07/2019

Bucket Item Name	Required?	File Accepted
SLD	Yes	No
IA	Yes	No
3LD	Yes	No
CommBlock	Yes	No
RIGDetails	Yes	No
DYNGEN	Yes	No
PSLF	Yes	No
NetAppInfo	Yes	No
TopoMap - Wind	No	No
SiteInfo - Wind	No	No

BUCKET 2 09/13/2019

Bucket Item Name	Required?	File Accepted
TopoMap - Solar	Yes	No
SiteInfo - Solar	Yes	No
MeterConfig	Yes	No

BUCKET 3 11/27/2019

Bucket Item Name	Required?	File Accepted
FinalGRDT	Yes	No
PIRPLOI	Yes	No
CECPreCert	Yes	No
ControlProtection	No	No
SCSelection	Yes	No
SCAcceptance	Yes	No
24HourContact	Yes	No
CPSAgreement	Yes	No
ECNAgreement	Yes	No

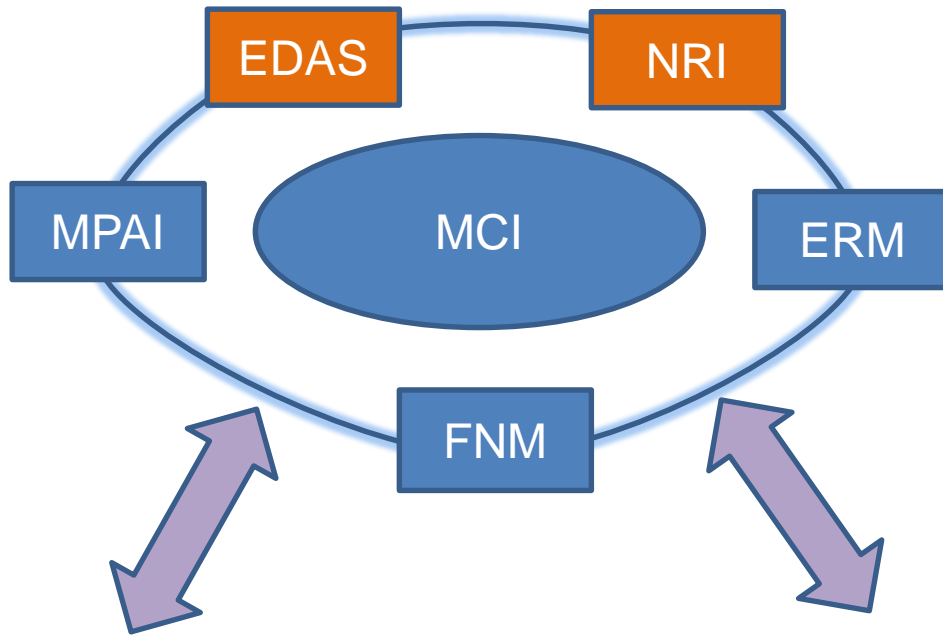
BUCKET 4 12/17/2019

Bucket Item Name	Required?	File Accepted
PTO Sync Approval	Yes	No

BUCKET 5 12/26/2019

Bucket Item Name	Required?	File Accepted
PORCalc	No	No
MSVS	Yes	No
Final Control Protection	No	No

Model and Contracts Implementation Group



EDAS – Energy Data Acquisition Systems

NRI – New Resource Implementation

MPAI – Market Participant Asset Implementation

FNM – Full Network Model

ERM – Entity Resource Management

Operations

Energy Management

Outage Planning

Op Engineering Services

Operational Readiness

Congestion Rights

Transmission Planning

Regulatory Contracts

Short Term Forecasting

Queue Management

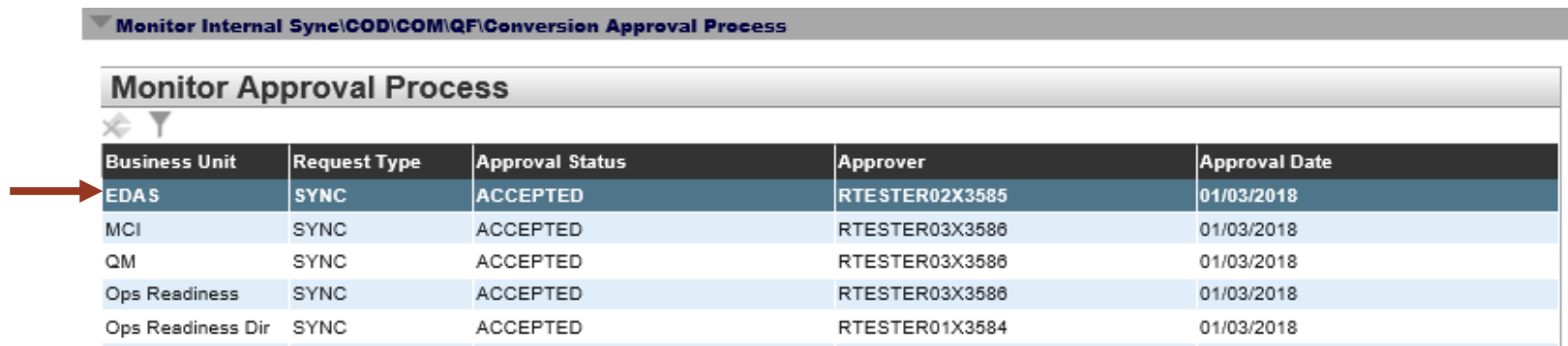
Sync/COD process

- Interconnection Customers will use the web interface to request sync, Conversion completion, COM, COD etc.
 - Request is enabled once requirements fulfilled



The screenshot shows two sections of a web interface. The top section, titled "General Project Information", contains three buttons: "SYNC" (highlighted in green), "COM", and "COD". A red arrow points to the "SYNC" button. The bottom section, also titled "General Project Information", contains a single button labeled "GF Conversion".

- Monitor the approval process for your request



The screenshot shows a table titled "Monitor Approval Process" under the heading "Monitor Internal Sync\COD\COM\GF Conversion Approval Process". The table has five columns: Business Unit, Request Type, Approval Status, Approver, and Approval Date. A red arrow points to the first row of the table.

Business Unit	Request Type	Approval Status	Approver	Approval Date
EDAS	SYNC	ACCEPTED	RTESTER02X3585	01/03/2018
MCI	SYNC	ACCEPTED	RTESTER03X3586	01/03/2018
QM	SYNC	ACCEPTED	RTESTER03X3586	01/03/2018
Ops Readiness	SYNC	ACCEPTED	RTESTER03X3586	01/03/2018
Ops Readiness Dir	SYNC	ACCEPTED	RTESTER01X3584	01/03/2018

Tips for success through the NRI Process

- Review the NRI Guide and Checklist
- Review the Project Naming Conventions prior to project creation
- Follow the file naming convention in the NRI Guide
- User must be provisioned by User Access Administrator (UAA) before uploading files in RIMS
- Start the NRI Process early and submit documents well before bucket due dates
- Please read the email notifications from RIMS or visit the RIMS UI for updates

New things to come

- NRI Data packages exported for new generator resources 21 days before bucket date
 - Metering documents,
 - ECN & CPS agreements

This is to mitigate Interconnection Customer's minor data flaws which in turn will help the completion of the NRI process and eliminating submitting duplicate data and revisions.

- Scheduling coordinator selection and acceptance process in RIMS. Eliminating the paper process.
- Monthly FNM model builds

NRI bucket timeline as it is today



New NRI Bucket Timeline



- Buckets 1 & 2 will be on the same bucket date.
- The documents in bucket 1 are still needed to make the FNM scope.
- Bucket 1 & 2 items will stay the same
 - Except for Topo Map and Site Info documents, they will be in bucket 1.

NRI FNM Monthly Builds

- NRI monthly builds will commence in September 2019.
 - Each monthly release will fall on the third week of each month
- 19 Quarter 3 generator resources will be in production on the FNM scheduled date of 8/22/19.
- Bucket 1 & 2 dates will be set to the new date timeline in June 2019, after the 19 Quarter 3 scope is closed.
 - This will not affect NRI projects that are on the old bucket 1 date and have a 19Q3 DB Model indication in RIMS.
 - The changing of the bucket dates will give an opportunity for Interconnection Customers projects that miss the production release of 19Q3 to be incrementally added in FNM September, October, etc.

NRI FNM Monthly Build Transition

- After 19 Quarter 3 FNM model release and the new bucket 1 & 2 dates reset to 84 days from the implementation date.
 - You will see changes on your RIMS display *Projected Model* field changing from 19Q4.01 to 19M10.01 for example.
 - Most monthly model releases will be 4 weeks builds, however there will be a 5th week occasionally.
 - The monthly builds will allow you to be in the FNM production more often.
 - The monthly builds will be closer to the Sync date which will help the NRI process documentation.
 - We also hope that this will alleviate documentation revision.

Resources: NRI Webpage, Checklist, and Guide

- New Resource Implementation webpage:
<http://www.caiso.com/participate/Pages/NewResourceImplementation/Default.aspx>
- NRI Checklist:
<http://www.caiso.com/Documents/NewResourceImplementationChecklist.xls>
- NRI Guide:
<http://www.caiso.com/Documents/NewResourceImplementationGuide.doc>

Thank you!

- If you have questions, please submit them either through the CIDI application or using the [Contact Us](#) form.
 - Make sure to include your project code (i.e. 19GEN1234)
- One more change - the NRI email inbox.
 - The inbox will be monitored for Energy Imbalance Market onboarding, Scheduling Coordinator Metered Entity conversions, and Distributed Energy Resource Provider NRI project types.
 - For NRI questions please use the CIDI system or the Contact Us at the top of the www.CAISO.com web page.

Questions?

