



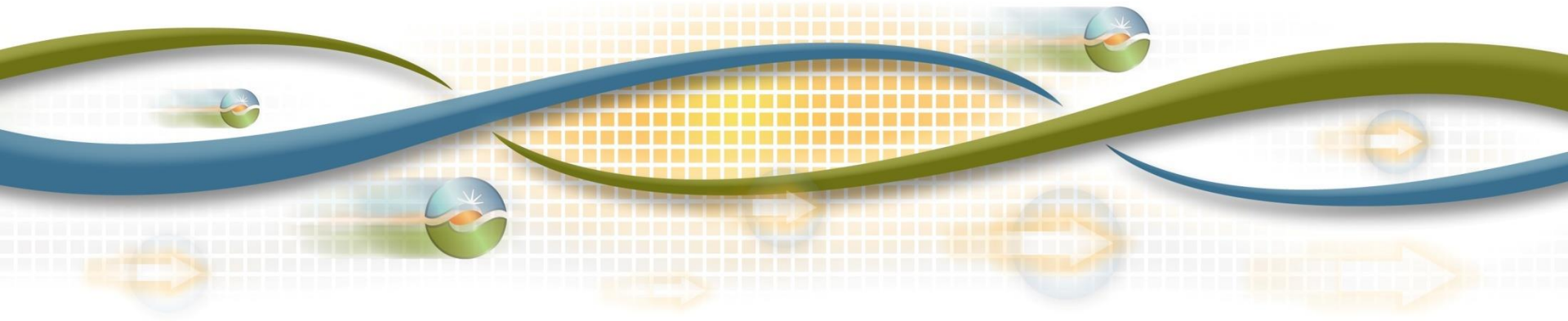
California ISO

# Reliability Requirements Customer Partnership Group

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# Customer Partnership Group

## Scope and Objective

- Created in response to customer's request to have more involvement in the planning, design and usability validation phases of ISO application development
- Provide an open interactive partnership forum to identify potential opportunities to improve the overall customer experience
- Share ideas, opinions and provide feedback
- Discuss issues and concerns, and answer customer questions
- All ideas are welcome and will be considered based upon feasibility, prioritization and timeline constraints. Not all ideas may be feasible to implement
- Meetings vary in frequency to review progress, provide feedback on design and usability and discuss implementation approaches
- Active participation is critical to the CPG success and to improve our customer's experience interacting with ISO applications

# Agenda

- RSI 1B Design Discussion for Changes to:
  - RA & Supply Plan
  - Cross Validation
  - RA Report
  - Reports Module
  - Report Changes
- Product Backlog

# RSI 1B design discussion: RA & Supply plan changes

# RA Plan Changes



## RA Plan Template

- Local MW – only from local GEN resources
- System MW – from local and system GEN resources, ITIEs & TGs
- Existing validations will continue to apply for the fields in the template. E.g. Flex Validation, Resource to SC association, etc.
- For resubmissions, user can upload RA Plan with RA MW lesser than prior submission with a warning.

# Supply Plan Changes



## Supply Plan Template

- Local MW – only from local GEN resources
- System MW – from local and system GEN resources, ITIEs & TGs
- $\sum$  Local RA + system RA across LSEs  $\leq$  NQC of the resource
- $\sum$  Local RA + system RA across LSEs  $\leq$  PMax of the resource
- Existing validations will continue to apply for the fields in the template. E.g. Flex Validation, Resource to SC association, etc.

# Supply & RA Plan User Interface (UI) Changes

## 1. Templates

- Will have RSI-2017 templates with split of Local vs System Capacity
- For the transition period contact OES for existing templates, if needed

## 2. Upload Supply/RA Plans

- ‘Comments’ is a new optional field

## 3. Download Supply/RA Plans

- ‘Comments’ will be in the landing page with existing fields
- Downloaded file will not show the comment

## 4. Template Validation:

- Validation will be driven by the trade month for which plan is uploaded.

# Late & Missing RA Plans

## Download RA Plan

Submittal Type

Target Period

LSE

Month

Year

Version

Display Plans

Submitted

Missing/Late Plan


LSE SCID	Submittal Type	Submission Date	Plan Month	Plan Year	Missing	Late Days
SC1	M		05	2017	Y	
SC2	M	3/17/2017 16:11	05	2017	N	2

- Late RA Plan report – for initial submission after showing due date.
- If LSE's total peak obligation (across TACs) is less than 1 MW (configurable) then the plan will not be considered in the missing plans report.



# Late Supply Plans

## Download Supply Plan

Submittal Type    
Target Period  Month  Year   
Supplier  Version   
Display Plans   Submitted  Late Plan

Supplier SCID	Submittal Type	Submission Date	Plan Month	Plan Year	Late Days
SC1	M	3/17/2017 16:11	05	2017	2

- Late Supply Plan report – newly added for initial submission after the showing due date

# Cross Validation (CV) for Generic RA

Example #	Resource	LSE's Showing		Supplier's Showing		CV Results			Comments
		Local RA	System RA	Local RA	System RA	Status	Qualified Local RA	Qualified System RA	
1	A	100	50	100	50	Pass	100	50	
2	B	100	50	110	60	Pass	110	60	
3	C	100	50	100	40	Warning	100	40	LSE's showing was capped at the Supplier's
4	D	100	50	90	60	Warning	90	60	LSE's showing was modified to match the Supplier's
5	E	100	50			Error			No Supplier found

CV between RA and Supply Plans validates the breakup of local and system RA MWs showings between LSE and Supplier and caps at supplier's showing when there is a mismatch.

# Cross Validation (CV) Changes for Planned Outage Substitution Obligation Output

- Landing Page for CV Results
  - New column 'Outage Type' added
  - Initial POSO run for the trade month will be color coded
- View Results -> Supply / RA Plans
  - Local, System & Total MW will be displayed for trade dates effective after RSI2 implementation.
- View Results -> LRA Obligation
  - Adding filter for LRA

# RA Report Changes

## RA Report

Resource  Start date  End date

Resource ID	Start Date	End Date	PMAX	PMIN	NQC	EFC	TAC	Local Area	Generic RA	CPM	Flex RA	Flex CPM	Flex Cat.	Must Offer Obligation
Res A	5/1/2017 0:00	5/1/2017 23:59	174.6	25.0	174.6	12.0	ABC	Bay area	1	0	65	0	1	Y

- Download RA for Search Period
- Download RA for Month

- RA will be at a daily granularity (not hourly)
- Header level data
  - Displayed on the UI & will be in the download
- Details level data
  - Only in the download
- Replacement fields removed

# RA Report – Fields Displayed on the Screen

Field Name	Description
Resource ID	Resource ID for each resource adequacy resource
Start Date	Start date selected by the user. RA is displayed at a daily granularity in PST
End Date	End date selected by the user. RA is displayed at a daily granularity in PST
PMAX	Maximum power limit
PMIN	PMin of the resource from MF
NQC	Net Qualifying Capacity of the resource
EFC	Effective Flexible Capacity of the resource
TAC	Transmission Access Charge area of the resource
Local Area	Local area, mapped to a TAC, for the resource
Generic RA	Total Generic RA for the resource for the day. Use max RA for a day if this varies during a day.
CPM	Total Generic Capacity procurement mechanism MW for the resource for the period selected
Flex RA	Total Flex RA for the resource for the period selected. Use max Flex RA for a day if this varies during a day.
Flex CPM	Total Flex CPM for the resource for the period selected
Flex Cat.	Flex category of the resource
Must Offer Obligation	Must Offer Obligation (MOO) for the resource for the period selected. Possible values are: Y, N

# RA Report – Additional Details in the Download – Page 1

Field Name	Description
SCID	Supplier
Dispatchable	Dispatchable flag for the resource
Fuel Type	Fuel type resource attribute from MF
Res Type	Resource type attribute from MF. E.g. GEN, ITIE, TG, etc.
Use Limit	Use limit flag resource attribute from the MF
Local MW	Total Local MW (from Supply plan & Forced Substitutions)
System MW	Total System MW (from Supply plan & Forced Substitutions)
Local Substitute MW	Total Generic Local Substitution MW provided by this resource to other resource(s) on forced outage.
System Substitute MW	Total Generic System Substitution MW provided by this resource to other resource(s) on forced outage.
Planned Substitute MW	Total Generic Substitution MW provided by this resource for planned outages

# RA Report – Additional Details in the Download – Page 2

Field Name	Description
Transferred MW - Local Substitution	Generic Local MW transferred from this resource to other resources that have provided forced substitution
Transferred MW - System Substitution	Generic System MW transferred from this resource to other resources that have provided forced substitution
Transferred MW - Planned Substitution	Generic System & Local MW transferred from this resource to other resources as system RA that have provided planned substitution
CPM Substitute MW	The amount of Generic CPM substitution megawatts provided by this resource to other resource(s) for forced & planned
Transferred MW - CPM Substitution	Total Generic CPM MW transferred from this resource to other resource(s) that have provided substitution for planned outages
Flex MW	Flex MW from the Supply plan after validation
Flex Substitute MW	The amount of Flex CPM substitution megawatts provided by this resource to other resource(s)
Transferred MW - Flex Substitution	Total Flex CPM MW transferred from this resource to other resource(s) that have provided substitution for planned outages
Flex CPM Substitute MW	Total Flex CPM Substitution MW provided by this resource to other resource(s) on outage
Transferred MW - Flex CPM Substitution	Total Flex CPM MW transferred from this resource to other resource(s) that have provided substitution for outages

# Reports

- 'Validation & Reports' will be renamed as 'RA Validation'
- New tab for 'Reports'
- Reports module will contain
  - RA Report
  - Generic Obligation Report (previously 'Obligation')
  - Flex Obligation Report (previously 'View Flex Analysis Results')
  - SC Transfer Report (previously 'View SC Transfer Details')

Note: Existing security rules apply to these reports. Navigation to these reports will be easier.



# Report Changes

- Generic Obligation Report
  - Month replaced with Start and End month filters
- Flex Obligation Report
  - Month replaced with Start and End month filters
- SC Transfer Report
  - Removing 'Repl Capacity' and 'RA MW' columns

**Questions?**

## Product Backlog and Roadmap

<(http://www.caiso.com/Documents/CIRARoadmap\_ProductionBacklogJun212017.xlsx)>