



Master File Interface User Guide

Version 1.8

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Location of Document

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

Revision History

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08/28/2009	1.4	Production URLs now available. Updated reporting instructions to show possible error conditions. Added note to U.I. error display on upload.	Project
01/22/2015	1.5	Added new sections for Data Upload, Actions, Rates and Notifications	Project
1/4/2015	1.6	Added new section for Use Limit Plan Data Template; added ULPDT error messages to Appendix B.	LRivera
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Table of Contents

Contents

Version 1.7.....	Error! Bookmark not defined.
1. Introduction.....	4
1.1 Purpose.....	4
1.2 Scope.....	4
1.3 Content and Organization.....	5
1.4 Definitions.....	6
2. Installation.....	7
2.1 System Requirements.....	7
2.2 Application Access.....	7
3. Using the System.....	9
3.1 Accessing the Application.....	9
4. Upload of RDT data.....	13
4.1 Submission of Upload Request.....	13
5. Upload of ULPDT data.....	Error! Bookmark not defined.
5.1 Submission of Upload Request.....	Error! Bookmark not defined.
6. Status of Submission.....	17
6.1 Request Status Information.....	17
7. Reports.....	20
6.1 Generating the Reports.....	21
6.2 Download and Viewing the Reports.....	31
6.3 Resources with Approved Changes Becoming Effective.....	41
6.3.1 Search Criteria.....	Error! Bookmark not defined.
6.3.2 Report Output.....	43
6.4 Program Limitations.....	44
8. Data Load.....	45
8.1 Uploading using the Data Load feature.....	45
9. Actions.....	47
9.1 Actions related to Batch.....	47
10. Rates.....	48
10.1 Updating the Rates.....	48
11. Notifications.....	49
11.1 Show notifications.....	49
12. Help.....	50
12.1 Help on the Master File User Interface.....	50
13. Troubleshooting/FAQ.....	51
14. Contact Information.....	53
Appendix A – External User Request for Certificate.....	54
A.1 Digital Certificate.....	54
A.2 Certificate Installation.....	54
A.3 Accessing the Master File User Interface.....	54
Appendix B – User Messages.....	55

1. Introduction

The Master File database contains static data that reflects the operating characteristics of resources that participate in California ISO Markets. Periodically, Scheduling Coordinators may need to make changes to specific operating parameters and may do so by submitting their data changes via a Generator Resource Data Template (GRDT or RDT), Intertie Resource Data Template (IRDT or RDT), or Use Limit Plan Data Template (ULPDT). This user guide explains how to use the Master File User Interface for submitting these data changes, viewing and downloading approved RDT or ULPDT data for a selected effective trade date, and viewing and downloading a list of resources with upcoming approved changes for specified date range.

1.1 Purpose

The purpose of the Master File database is to hold static reference data that is used by many key market applications that operate at the California ISO.

1.2 Scope

This manual provides instructions for using the basic Master File User Interface features, which include the following topics:

- Accessing the application
- Navigating through the web content and controls
- Generating and saving reports

The details of how to utilize the Master File Application Programming Interface (Web Services) are documented in the Technical Interface Specification for Master File Data Exchange Services.

1.3 Content and Organization

1. The purpose of the guide is to instruct users how to use the features of the Master File User Interface.
2. This guide describes the steps for submitting (uploading) RDT data updates using three Excel templates: the GRDT, IRDT, or ULPDT.
3. This guide describes the steps for viewing and downloading data in GRDT, IRDT, and ULPDT Excel formats.

This application may be used to generate the following reports:

- a. **Generator RDT Report** – data for GEN, TG, LOAD resources in a format used currently to exchange resource data between CAISO and Scheduling Coordinators. It also allows users to view/download data which SIBR/IFM/SaMC use to perform validations.
 - b. **Intertie RDT Report** – data for ITIE, ETIE resources in a format used currently to exchange resource data between the CAISO and Scheduling Coordinators. It also allows users to view/download data which SIBR/IFM/SaMC use to perform validations.
 - c. **Use Limit Plan (ULPDT) Report** – data for Use Limit Plans in a format used to exchange ULP data between the CAISO and Scheduling Coordinators.
 - d. **Resources with Approved Changes** – list of resource IDs that have approved changes for a specified effective trade date, or range of effective trade dates.
4. This guide describes the steps for viewing the status of an uploaded RDT or ULPDT request.

1.4 Definitions

The following defined terms and acronyms are used within this document:

Object	Definition
Approved	<p>A submitted data change must be approved by ISO staff before it can be considered effective.</p> <p>Approved data changes will be included in the featured reports beginning the calendar day following the day the change is approved by ISO staff.</p>
Effective Date	The first trading date an approved data change becomes applicable.
SCID	A unique identifier for a market participant that is certified by the ISO to submit bids and preferred self-schedules.
Resource Type	<p>Descriptive identifier denoting the type of resource. Different types of resources may have additional validation requirements. Resource type can be one of the following:</p> <ul style="list-style-type: none"> a) GEN: Generating Resource b) TG: Dynamic Tie Generator Resource c) LOAD: Load Resource d) ETIE: Export System (Intertie) Resource e) ITIE: Import System (Intertie) Resource
Resource Id	The ISO resource identifier used for tracking each resource for market scheduling and outage coordination purposes.
Trade Date	The effective date for which the report retrieves the data from Master File
ULP	Use Limit Plan
ULPDT	Use Limit Plan Data Template

2. Installation

2.1 System Requirements

Hardware

There is no specific limitation on the Hard Disk Drive or the RAM capacity however, a minimum of 512 Mb of RAM is advised for better performance.

Software

- Windows XP or Windows NT 2000 and above
- Internet explorer 6.0 with service pack 2 is recommended
- Microsoft Office 2000 or higher is recommended

Lower versions of the software components may result in some of the user features not looking the same and some features may be totally unavailable.

2.2 Application Access

Please refer to [Appendix A – External User Access](#) for external user access information.

URL information is located in section 3.1 (Using the System).

2.3 Client Side Setup Procedure

Use this procedure to configure the Microsoft Explorer to open Office files in the appropriate Office program by using the Folder Options tool. These steps are performed in order to allow the Actuate Reporting Tool to open Excel files in a separate window, which enhances its usability:

1. Open **My Computer**.
2. On the **Tools** menu, click **Folder Options**.
3. Click the **File Types** tab.
4. In the **Registered file types** list, click the specific Office document type (select Microsoft Excel Worksheets .xls, .csv), and then click **Advanced** (or click **Edit**).
5. In the **Edit File Type** dialog box, click to clear the **Browse in same window** check box (or click to clear the **Open Web documents in place** check box).
6. Click **OK**.

3. Using the System

3.1 Accessing the Application

1. Click on the URL for the application:

Master File Production Environment

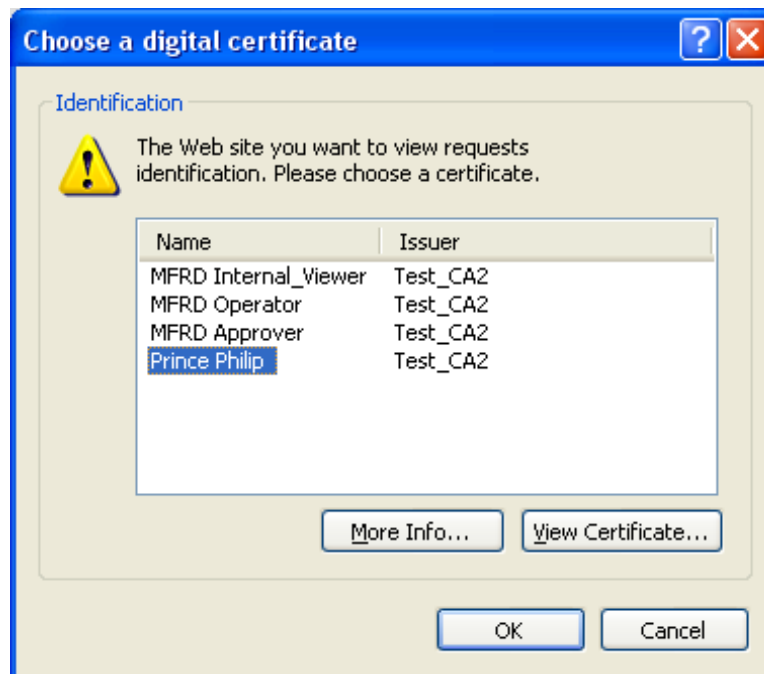
[CAISO Portal](#)

Select



Please refer to the [Master File Production URL List](#) to start Master File

2. A pop-up window appears with the list of available installed certificates displayed. Select the Digital Certificate with which the request is to be authenticated and click on OK.



3. *Figure 1: Login Dialog - CertificateFor* for the next pop-up window, accept the request to sign data with the Private Exchange Key of the certificate by clicking on the OK button. This screen should only appear the first time accessing the application.



Figure 2: Login Dialog – Access

4. The Master File Home Page will display as shown below

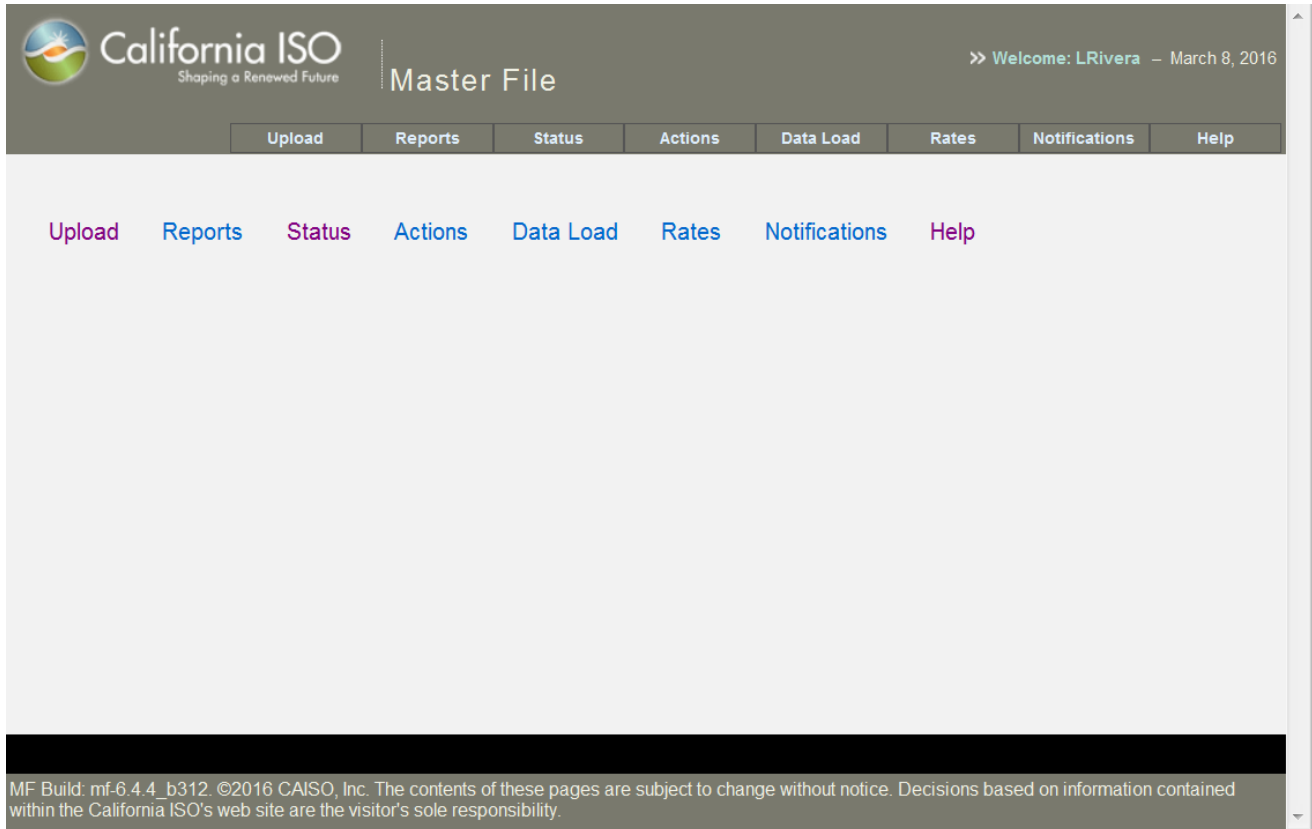


Figure 3: Master File Home Page

5. The functionality available includes:

- a. Upload (RDT and ULPDT)
- b. Reports
- c. Status of Submission
- d. Actions
- e. Data Load
- f. Rates
- g. Notifications
- h. Help

6. Role to Function Matrix

Function/Role	External Operator	External Viewer	Internal Operator
Upload RDT/ULPDT Data	√		√
RDT Submission Status	√		√
Reports (Download)	√	√	√
Actions			√
Data Load			√
Rates			√
Notifications			√
Help	√	√	√

4. Upload of RDT/ULPDT data

4.1 Submission of Upload Request

1. Click the “Upload” button from the home page.
2. The system displays the “Upload” Page. Note the RDT selections require entering Effective Date and SC ID. These fields are not required/displayed when the ULPDT radio button is selected.

The screenshot shows the 'Upload' page for RDT data. At the top, there is a navigation bar with 'Upload' selected. The main form area is titled 'Upload' and contains the following elements:

- File Name:** A text input field with a 'Browse...' button next to it.
- Upload Type:** Three radio buttons: 'RDT Generator' (selected), 'RDT Intertie', and 'ULPDT'.
- Effective Date:** A date input field showing '02/22/2018'.
- SC ID:** A dropdown menu.
- Comments:** A text area with a vertical scrollbar.
- Upload:** A button at the bottom of the form.

Figure 4a: Upload Page for RDT

The screenshot shows the 'Upload' page for ULPDT data. At the top, there is a navigation bar with 'Upload' selected. The main form area is titled 'Upload' and contains the following elements:

- File Name:** A text input field with a 'Browse...' button next to it.
- Upload Type:** Three radio buttons: 'RDT Generator', 'RDT Intertie', and 'ULPDT' (selected).
- Comments:** A text area with a vertical scrollbar.
- Upload:** A button at the bottom of the form.

Figure 4b: Upload Page for ULPDT

3. Interact with the following elements on the upload screen:
 - a. **File Name** – Must be an .xls file in RDT or ULPDT format. The “Browse” button will allow for file selection from any local or network drive that user is hooked up to. This field is required.
 - b. **Upload Type** – Defaults to “RDT Generator”. Be sure to select “RDT Generator” if a GRDT is being submitted, “RDT Intertie” if an IRDT is being submitted, or “ULPDT” if a Use Limit Plan data template is being submitted. A GRDT can contain Generator, TG, and Load resource IDs, and an IRDT can contain only Intertie resource IDs. This field is required.
 - c. **Effective Date (RDT Only)** – Defaults to today plus five business days. The date should be five or more business days from the current date. Business days exclude weekends and CAISO holidays. If the five business day rule is broken, an error message will be displayed. Beginning in Spring 2018, ULPDTs will not be required to adhere to the 5 business day rule.

Type in a date, or use the calendar popup to select an appropriate date. Only valid dates will be accepted. This field is required.

- d. **SC ID (RDT Only)** – A list of SC IDs will be displayed which is based on the valid SC IDs in the Security Certificate for the User who has logged on. Only one SC ID may be selected per batch submission. All data contained in the file must be associated to the specified SC ID. This field is required. Note that SC ID is not required for ULPDT uploads.
 - e. **Comments** – This field allows you to send comments to the CAISO Business Unit that pertain to the file being submitted. The comment field is optional.
 - f. **Upload button** – Select the Upload button to submit the file for processing. When Upload is selected, the system will perform basic structural validation on the RDT file. It will verify that the file is in the correct format (based on the RDT Type selected), and valid data types are presented (such as numbers in a numeric field and values based on a list of valid values). For ULPDTs, the contents of the file are also validated upon uploading the file. Refer to Appendix B for User Messages.
4. If no errors are found with the submission, the following screen will appear. Note that there is a message between the header block and “Upload” title which indicates that the upload request was successful. The Batch Id associated with this RDT/ULPDT Upload is provided. The Batch Id is needed for following the progress of this request.

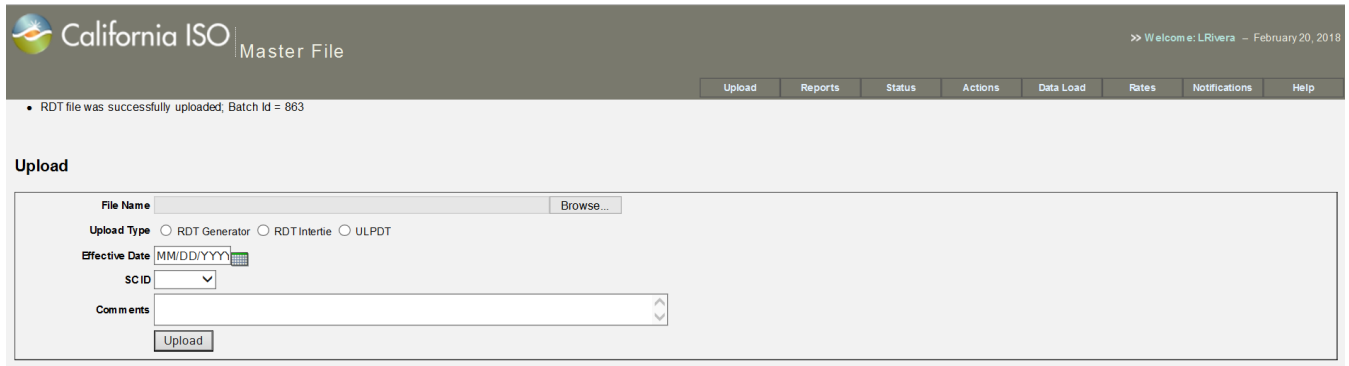








Figure 5: RDT/ULPDT Successfully Uploaded for Submission

5. If an error is found upon Upload, a list of the errors will display on the screen as shown in **Figure 6: Upload Error Display**. Note: once leaving this screen, the errors won't be available again, a new upload request will need to be made.

Sheet Name	Resource Id	Cell/Row Location	Error Message
Use Limit_Plan	DEERCR_6_UNIT 1	H5	Limitation number must be a valid non-negative number
Use Limit_Plan	GENESI_2_STG	Row 3	The plan start date for GENESI_2_STG must fall between start and end date of an approved configuration
Use Limit_Plan	GENESI_2_STG	Row 4	The plan start date for GENESI_2_STG must fall between start and end date of an approved configuration
Use Limit_Plan	GENESI_2_STG	Row 4	ULPs with granularity of ROLL_12 must cover twelve or more whole calendar months.
Use Limit_Plan	GENESI_2_STG	Row 4	Maximum capacity level has to be greater than minimum capacity.
Use Limit_Plan	DEERCR_6_UNIT 1	Row 5	The end date of the submitted use limit plan must be greater than or equal to the submission date.
Use Limit_Plan	DEERCR_6_UNIT 1	Row 5	Maximum capacity level has to be greater than minimum capacity.

Figure 6: Upload Error Display

- a. **Status Bar** – Overall message; indicates whether the upload was successful or not.
- b. **Table of errors** – indicates the file name that was used in the upload.
 - i. Sheet Name – Indicates the worksheet in the Excel file where the error occurred.
 - ii. Resource Id - Identifies which resource had a problem.
 - iii. Cell Location – The cell name in the spreadsheet. This will allow you to navigate directly to the piece of information that has the problem.
 - iv. Error Message – The message that indicates the nature of the problem. A list of all possible messages is in [Appendix B](#) in this document.
- c. **Navigational buttons** – Allows for moving between multiple pages of errors: (left to right):
 - i.  First – Navigates to the first page of errors
 - ii.  Fast Reverse – Navigates 2 pages back from the current page
 - iii.  Previous – Navigates to the previous page of errors

- iv. Numbers – Navigates directly to a page
- v.  Next – Navigates to next page of errors
- vi.  Fast Forward – Navigates 2 pages forward from the current page
- vii.  Last – Navigates to the last page of errors

d. **Display All Errors** – This link will take you to a page that looks like the example below and will contain a list of all errors rather than a page at a time. The output columns have the same specification as the partial list specified in step 5 above.

RDT Processing Errors for file: BAD_Intertie_RDT_v2.xls			
Sheet Name	Resource Id	Cell Location	Error Message
Intertie Resource	TEST_MARKET01_E_F_DAD_TEST_MARKET01_E_F_DAD	A3	Resource Id > 32 characters
Intertie Resource	TEST_MARKET01_E_F_DAD_TEST_MARKET01_E_F_DAD	B3	Energy Type needs to be 'FIRM', 'NFRM', 'WHL', or 'UCTG'
Intertie Resource	TEST_MARKET01_E_F_DAD_TEST_MARKET01_E_F_DAD	C3	Minimum Hourly Block Limit needs to be a valid number
Intertie Resource	TEST_MARKET01_E_F_DAD_TEST_MARKET01_E_F_DAD	F3	Certified for A/S Non Spin RTM needs to be 'Y' or 'N'
Intertie Resource	TEST_MARKET01_E_F_DAD_TEST_MARKET01_E_F_DAD	G3	Spinning Reserve Cap needs to be a valid number
Intertie Resource	TEST_MARKET01_E_F_DAD_TEST_MARKET01_E_F_DAD	I3	Certified for RUC needs to be 'Y' or 'N'
Intertie Resource	TEST_MARKET01_E_F_DAD_TEST_MARKET01_E_F_DAD	N3	Wheeling Reference Number > 32 characters
Intertie Resource	TEST_MARKET01_E_F_DAD_TEST_MARKET01_E_F_DAD	B4	Energy Type needs to be 'FIRM', 'NFRM', 'WHL', or 'UCTG'
Intertie Resource	TEST_MARKET01_E_F_DAD	C4	Minimum Hourly Block Limit needs to be a valid number
Intertie Resource	TEST_MARKET01_E_F_DAD	D4	Certified for A/S: Spin needs to be 'Y' or 'N'
Intertie Resource	TEST_MARKET01_E_F_DAD	F4	Certified for A/S Non Spin RTM needs to be 'Y' or 'N'
Intertie Resource	TEST_MARKET01_E_F_DAD	G4	Spinning Reserve Cap needs to be a valid number
Intertie Resource	TEST_MARKET01_E_F_DAD	H4	Non-Spinning Reserve Cap needs to be a valid number
Intertie Resource	TEST_MARKET01_E_F_DAD	I4	Certified for RUC needs to be 'Y' or 'N'

Figure 7: Display All Upload Errors

6. Status of Submission

6.1 Request Status Information

Purpose: This allows you to see the status of batches that have been submitted by a particular SC ID. Only one SC ID may be selected at a time.

1. Click on the “Status” button on the header block.
2. The system responds by showing the “Batch Status” screen.

The screenshot shows the California ISO Master File web interface. At the top left is the California ISO logo and the text "Master File". At the top right, it says "Welcome: LRivera - March 14, 2018". Below this is a navigation bar with buttons for "Upload", "Reports", "Status", "Actions", "Data Load", "Rates", "Notifications", and "Help". The main content area is titled "Batch Status" and "LMPM Net Buyer with Generation Control Status". Below this, there is a search form with a label "SC ID" and a dropdown menu, followed by a "Get Status" button.

Figure 12: Batch Status Submission Search Criteria

3. Select or type in the field labeled “SC ID”. The drop down will only include valid SC IDs based on the security set up in their certificates.
4. Select the “Get Status” button to initiate the system search for RDT/ULPDT Status.
5. The system returns a screen that will look like the example below and contains a list of Batch Submissions for the specified SC ID.

The screenshot shows the Master File User Interface. At the top, there is a navigation menu with options: Upload, Reports, Status, Actions, Data Load, Rates, and Notifications. The header includes the California ISO logo and the text 'Master File'. A user greeting 'Welcome: LRivera' is visible in the top right.

The main content area is titled 'RDT Status' and 'LMPM Net Buyer with Generation Control Status'. Below this, there is a form with a dropdown menu for 'SC ID' set to 'TST1' and a 'Get Status' button. Below the form, a message states 'is a Net Buyer with Generation Control'.

The central part of the screen displays a table with the following columns: Submit Date, File Name, Batch ID, Status, Batch Change Date, Effective Date, and Subm. The table contains 17 rows of data, showing various batch submissions with their respective dates, file names, batch IDs, and statuses (Validation Error, Submitted).

Submit Date	File Name	Batch ID	Status	Batch Change Date	Effective Date	Subm
Mar 9, 2016	Generator RDT Version 10 LR Bad.xlsx	10236	Validation Error	Mar 9, 2016	Mar 16, 2016	LRivera
Mar 9, 2016	Generator RDT Version 10 SK.xlsx	10234	Submitted	Mar 9, 2016	Mar 16, 2016	LRivera
Mar 9, 2016	Generator RDT Version 10 HUMB.xlsx	10233	Submitted	Mar 9, 2016	Mar 16, 2016	LRivera
Dec 10, 2015	Generator RDT Version 10.0 (1).xlsx	10232	Validation Error	Dec 10, 2015	Dec 22, 2015	SKESIREDDY
Dec 10, 2015	Generator RDT Version 10.0 (1).xlsx	10231	Validation Error	Dec 10, 2015	Dec 22, 2015	SKESIREDDY
Dec 10, 2015	Generator RDT Version 10.0.xlsx	10230	Validation Error	Dec 10, 2015	Dec 21, 2015	SKESIREDDY
Dec 9, 2015	Generator RDT Version 10 nonmsg.xlsx	10229	Submitted	Dec 9, 2015	Dec 16, 2015	LRivera
Dec 9, 2015	Generator RDT Version 10 nonmsg.xlsx	10228	Validation Error	Dec 9, 2015	Dec 16, 2015	LRivera
Dec 9, 2015	Generator RDT Version 10.0.xlsx	10227	Validation Error	Dec 9, 2015	Dec 21, 2015	LTTester47
Dec 9, 2015	Generator RDT Version 10.0.xlsx	10226	Validation Error	Dec 9, 2015	Dec 21, 2015	LTTester47
Dec 9, 2015	Generator RDT Version 10.0.xlsx	10225	Validation Error	Dec 9, 2015	Dec 16, 2015	LTTester47
Dec 8, 2015	Generator RDT Version 10 HUMB.xlsx	10224	Submitted	Dec 8, 2015	Dec 15, 2015	LRivera
Dec 8, 2015	Generator RDT Version 10.0 (3).xlsx	10223	Submitted	Dec 8, 2015	Dec 15, 2015	LTTester47
Dec 8, 2015	Generator RDT Version 10.0 (2).xlsx	10222	Submitted	Dec 8, 2015	Dec 15, 2015	LTTester47
Dec 8, 2015	Generator RDT Version 10 HUMB.xlsx	10221	Submitted	Dec 8, 2015	Dec 15, 2015	LRivera

At the bottom of the table, there are navigation buttons: < << >> > and a page indicator '1 2 3 4 5'.

Figure 13: Batch Submission Status Display

6. The Batch Status screen contains the following data:
 - a. **Submit Date** – The date the batch was submitted.
 - b. **File Name** – The name of the input file (RDT/ULPDT). This will be an .XLS file when submitted by the UI and an .XML file when submitted by the API.
 - c. **Batch ID** – This is the system-generated unique identifier associated to the Batch.
 - d. **Status** – Displays the current status of the batch. The possible values are as follows:
 - i. **Request to Load** – The XLS file has been uploaded, and your file is in the queue for automated validation.
 - ii. **In Process** – Your file is currently being validated in the automated validation process.
 - iii. **Submitted** – The automated validation is complete, there were no validation errors, and your changes are ready for review and approval by the ISO.
 - iv. **Validation Error** – The automated validation found errors in your file. You will receive an email notification from ISO staff that includes the details of the errors.

- v. **Approved** – Your changes have been approved by the ISO Approver and will be implemented on the requested effective date. Please note, approved changes will not be visible in the RDT/ULPDT reports or in the Resources with Approved Changes report until the day after batch status changes to Approved.
 - vi. **Declined** – Your changes have been declined by the ISO Approver. You will receive an email notification that includes the details.
 - e. **Batch Change Date** – The date the last change occurred to the batch.
 - f. **Effective Date** – The date that the change will become effective
 - g. **Submitter** – The name of who submitted the change.
7. Each column in the display can be used to sort the results. This is accomplished by clicking on the title of the column to be sorted. An arrow will show which direction (ascending or descending) the data will be sorted. If clicked a second time, the system will sort the data the opposite direction.

7. Reports

1. The Master File Actuate application opens in the Internet Explorer window with the default screen displayed below. The default folder selected is your Personal Folder. The left navigation pane displays the folders to which you have access.

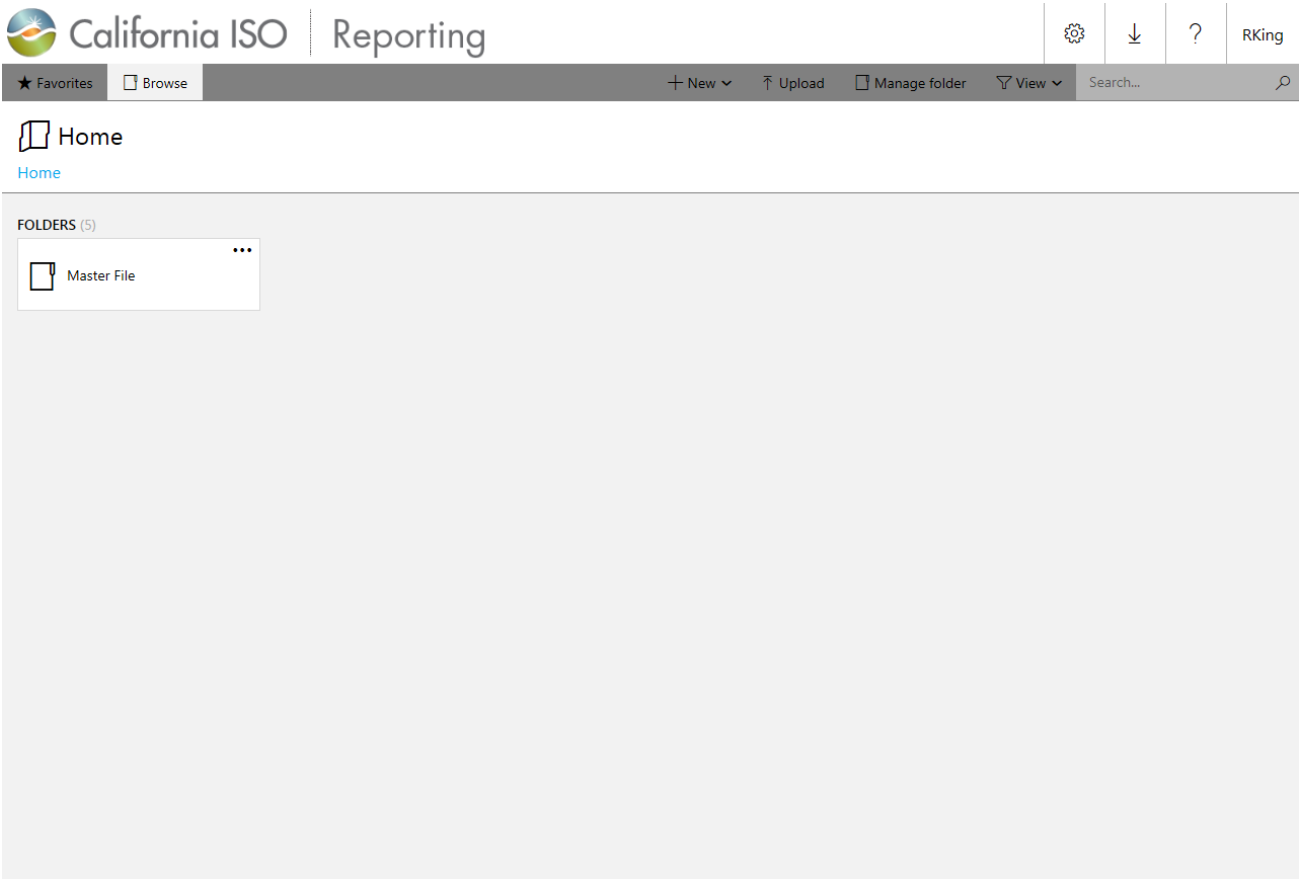


Figure 14: Main Page – Default Folder

Note: The top right hand corner of the screen displays the name of the user that has logged in.

7.1 Generating the Reports

1. Select the 'Master File' folder on the left navigation pane. This displays the list of reports that you have access to.

The following reports are available for view and download:

- **Generator RDT Report** – data for GEN, TG, LOAD resources in the format used to exchange resource data between the ISO and Scheduling Coordinators.
- **Intertie RDT Report** – data for Intertie resources (ITIE or ETIE) in the format used to exchange resource data between the ISO and Scheduling Coordinators.
- **Resources with Approved Changes** – see Section 6.3.
- **ULPDT Report** – data for Use Limit Plans in the format used to exchange Use Limit Plan data between the ISO and Scheduling Coordinators.

2. Select the report to generate by clicking on the tile for the relevant report (e.g. Generator RDT)

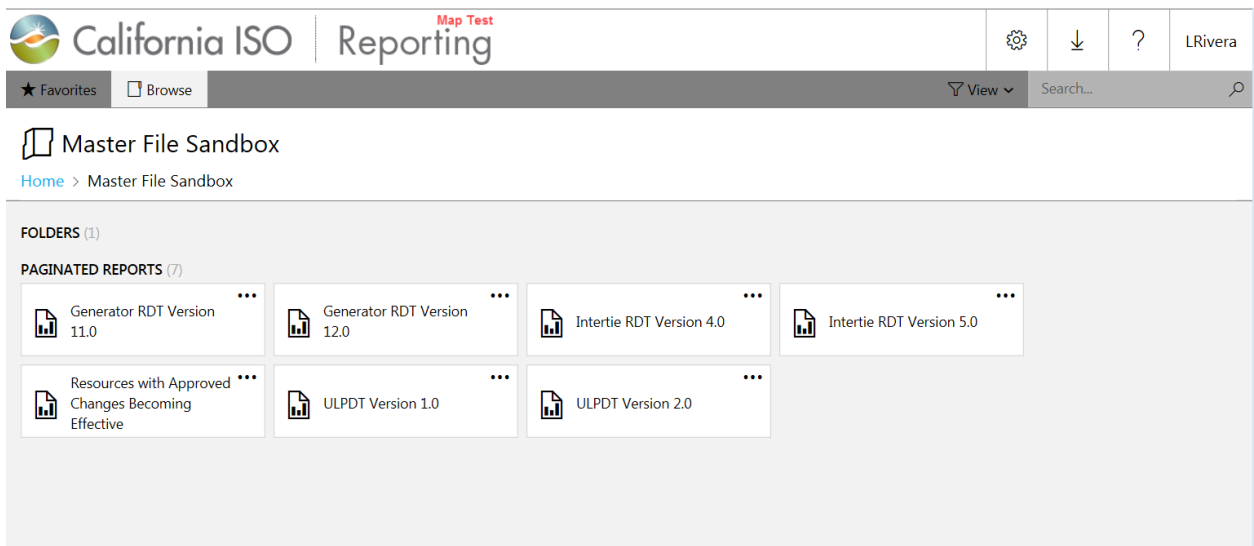


Figure 15: Master File Folder

3. The screen refreshes to display the report parameters specific to the report, in the upper pane .

★ Favorites □ Browse

Home > Master File > Generator RDT Version 10.0

Trading Date: <input type="text"/> 	<input type="button" value="View Report"/>
SCID: <input type="text"/>	Resource Type: <input type="text" value="<Select a Value>"/>
Resource ID: <input type="text"/>	

Figure 16: Generator RDT Report Screen

Trading Date: <input type="text"/>		<input type="button" value="View Report"/>
SCID: <input type="text"/>	Use Limit Type: <input type="text" value="<Select a Value>"/>	
Granularity: <input type="text" value="<Select a Value>"/>	Resource ID: <input type="text"/>	

Figure 17: ULPDT Report Screen

4. Type in the Trade Date for which the report is to be generated, or you may use the calendar box by clicking on the calendar icon next to the Trade Date field and selecting the required date from the calendar box.



Figure 18: Calendar Box

5. Select the SCID from the drop down list of available SC IDs that have associated resources for the selected Trade Date.

The screenshot shows the California ISO Reporting web application. At the top left is the logo and text "California ISO Reporting". To the right are icons for settings, download, help, and the user name "RKing". Below the header is a navigation bar with "Home > Master File > ULPDT Version 1.0". The main content area contains a form with the following fields: "Trading Date" (text input with "3/14/2018" and a calendar icon), "SCID" (dropdown menu with "<Select a Value>"), "Use Limit Type" (dropdown menu with "<Select a Value>"), "Granularity" (dropdown menu with "<Select a Value>"), and "Resource ID" (dropdown menu). A "View Report" button is located on the right side of the form.

Figure 19: SCID List

Note: The Resource Type and Resource ID lists default to '<Select a Value>' .

6. If generating an RDT report, select the Resource Type to generate the report (e.g. GEN). The available options are:

- **Generator RDT Report** – ALL, GEN, TG, LOAD
- **Intertie RDT Report** – ALL, ETIE, ITIE

Selecting the 'ALL' option for Resource Type will result in the report including information for all the listed resource types for each RDT report as listed above, if it exists. Or you can select any one of the applicable resource types from the list to generate the report for a single resource type.

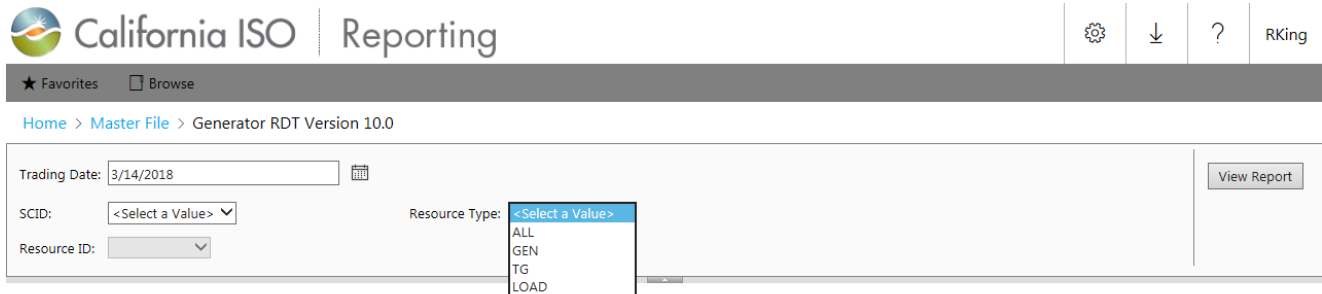


Figure 20: Resource Type List

7. If generating a ULPDT report, select the Limitation Type. The available options are: ENERGY, RUNHOURS, START, OTHER and ALL.

Selecting the 'ALL' option for Limitation Type will result in the report including information for all the listed limitation type as listed above, if it exists. Note that the drop down list only includes Limitation Types for existing approved Use Limit Plans. (If no approved ENERGY Use Limit Plan already exists, 'ENERGY' will not appear in the drop down list.) Optionally you can select any one of the applicable limitation types from the list to generate the report for a single limitation type.

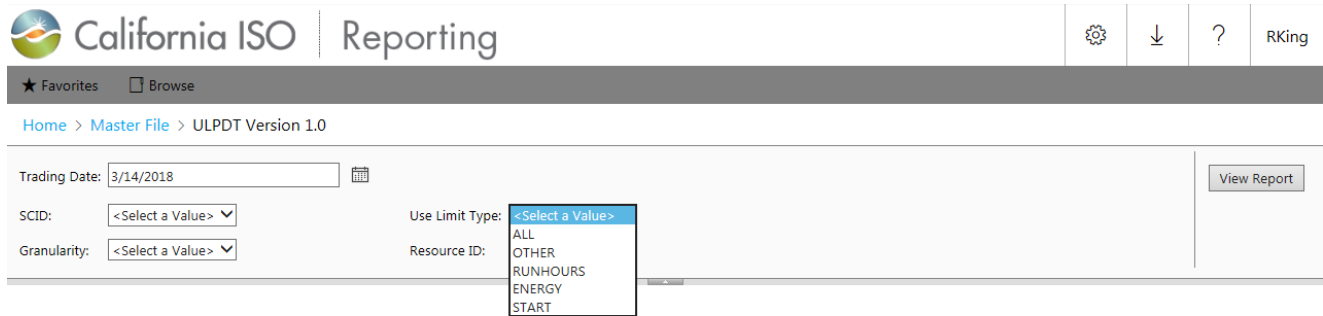


Figure 21: Use Limit Type List

8. After selecting the Use Limit Type for a ULPDT report, select the Granularity. The available options are: ANNUALLY, ROLL_12, MONTHLY, DAILY, OTHER and ALL.

Selecting the 'ALL' option for Granularity will result in the report including information for all the listed granularities as listed above, if it exists. Note that the drop down list only includes Granularities for existing approved Use Limit Plans. (If no approved monthly Use Limit Plan already exists, 'MONTHLY' will not appear in the drop down list.) Optionally you can select any one of the applicable granularities from the list to generate the report for a single granularity.



Figure 22: Granularity List

9. Once the other filters are selected, the Resource ID list is refreshed with all the qualifying resources to which the SC ID is associated. Again, the drop down list only includes Resources for existing approved Use Limit Plans.

- Select 'ALL' from the drop down list to generate a report including all the Resource IDs with the specified filters.
- Select a single Resource ID to generate a report for just that Resource.
- Note: Reports can only be run for 'ALL' resources or one specific resource at a time. The reports do not allow for multiple Resource ID selections.

★ Favorites □ Browse

Home > Master File > UL PDT Version 1.0

Trading Date: <input type="text" value="3/14/2018"/>	<input type="button" value="View Report"/>
SCID: <input type="text" value="-Select-"/>	Use Limit Type: <input type="text" value="START"/>
Granularity: <input type="text" value="MONTHLY"/>	Resource ID: <input type="text" value="ALL"/>

Figure 23: Resource Id List

10. Click on the 'View Report' button to generate the report.

The screenshot shows the California ISO Reporting web interface. At the top left is the California ISO logo and the text 'California ISO Reporting'. To the right are icons for settings, download, help, and the user name 'RKing'. Below the header is a navigation bar with '★ Favorites' and '□ Browse'. The main content area shows a breadcrumb trail: 'Home > Master File > ULPDT Version 1.0'. Below this is a form with the following fields: 'Trading Date: 3/14/2018' with a calendar icon; 'SCID: TST1' with a dropdown arrow; 'Granularity: MONTHLY' with a dropdown arrow; 'Use Limit Type: START' with a dropdown arrow; and 'Resource ID: ALL' with a dropdown arrow. A 'View Report' button is located on the right side of the form.

Figure 24: View Report

7.2 Download and Viewing the Reports

1. Upon clicking the 'View Report' button, the application processes the request in the background and, when complete, displays the file download instructions.
 - Click on 'Export' menu (under the disk icon) and select the "Excel designed by OfficeWriter" option to begin the file download.
 - Click on 'Open' to view the report directly – Go to step 4 for further instructions for viewing the report directly.
 - Click on 'Save' to download the report prior to viewing it. – Go to step 2 for further instructions on downloading the report.
 - Click on 'Cancel' to terminate the request.

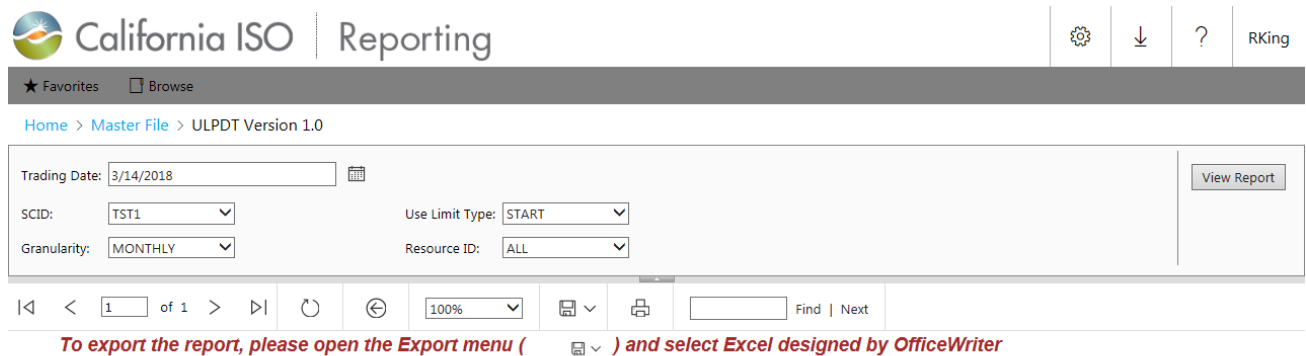


Figure 25: File Download Instructions

★ Favorites Browse

Home > Master File > ULPDT Version 1.0

Trading Date: 3/14/2018

SCID: TST1 Use Limit Type: START

Granularity: MONTHLY Resource ID: ALL

Navigation: |< < 1 of 1 > >| 100% Find | Next

To export the report, please open the Export menu (

- Word
- Excel
- PowerPoint
- PDF
- TIFF file
- MHTML (web archive)
- CSV (comma delimited)
- XML file with report data
- Data Feed
- Excel designed by OfficeWriter
- Word designed by OfficeWriter

) designed by OfficeWriter

Figure 26: Export Format Selection

Master File User Interface User Guide

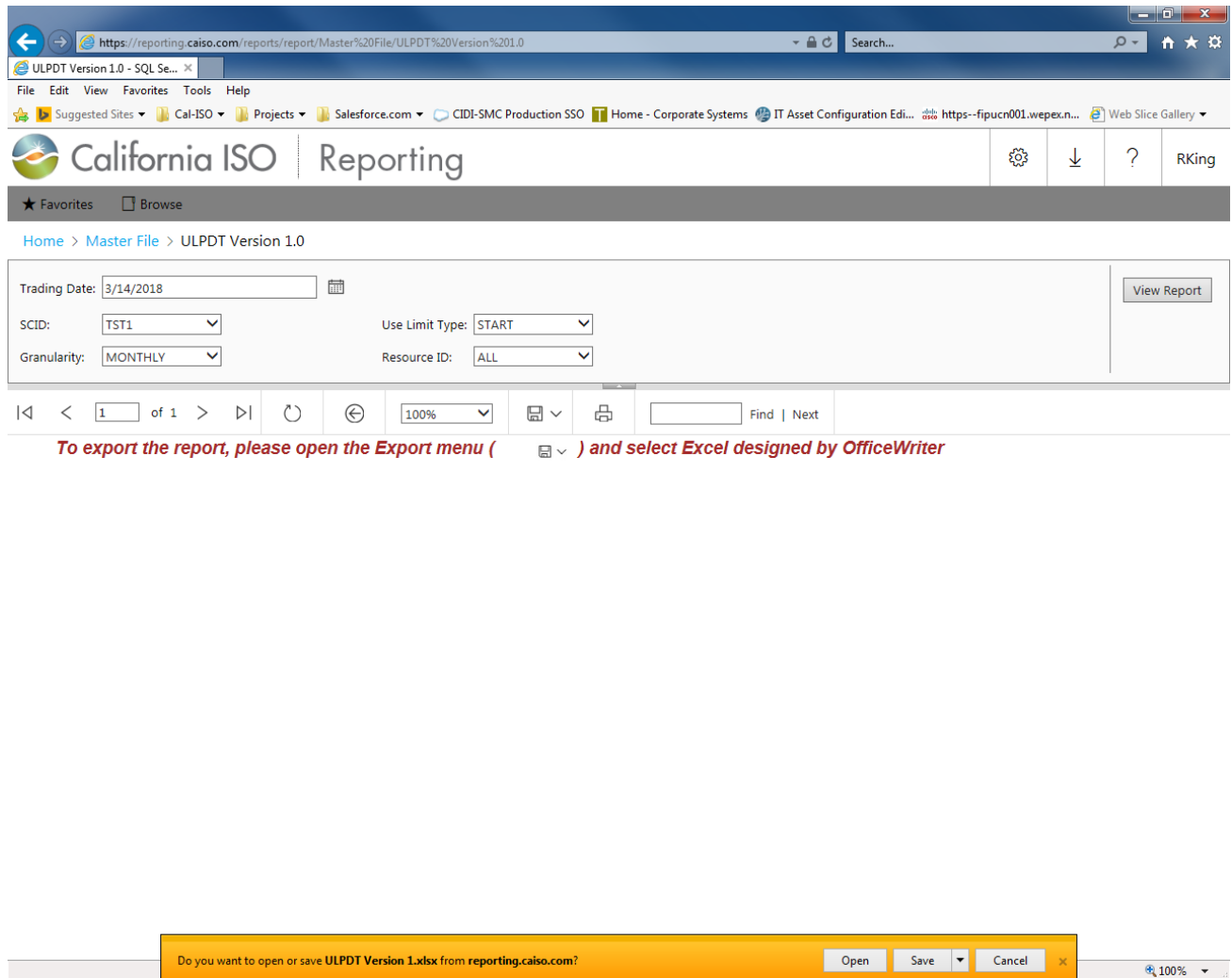


Figure 27: File Download

2. Upon clicking the 'Save' button, the 'Save As' window opens and provides you an option to browse to a destination folder and save the report.

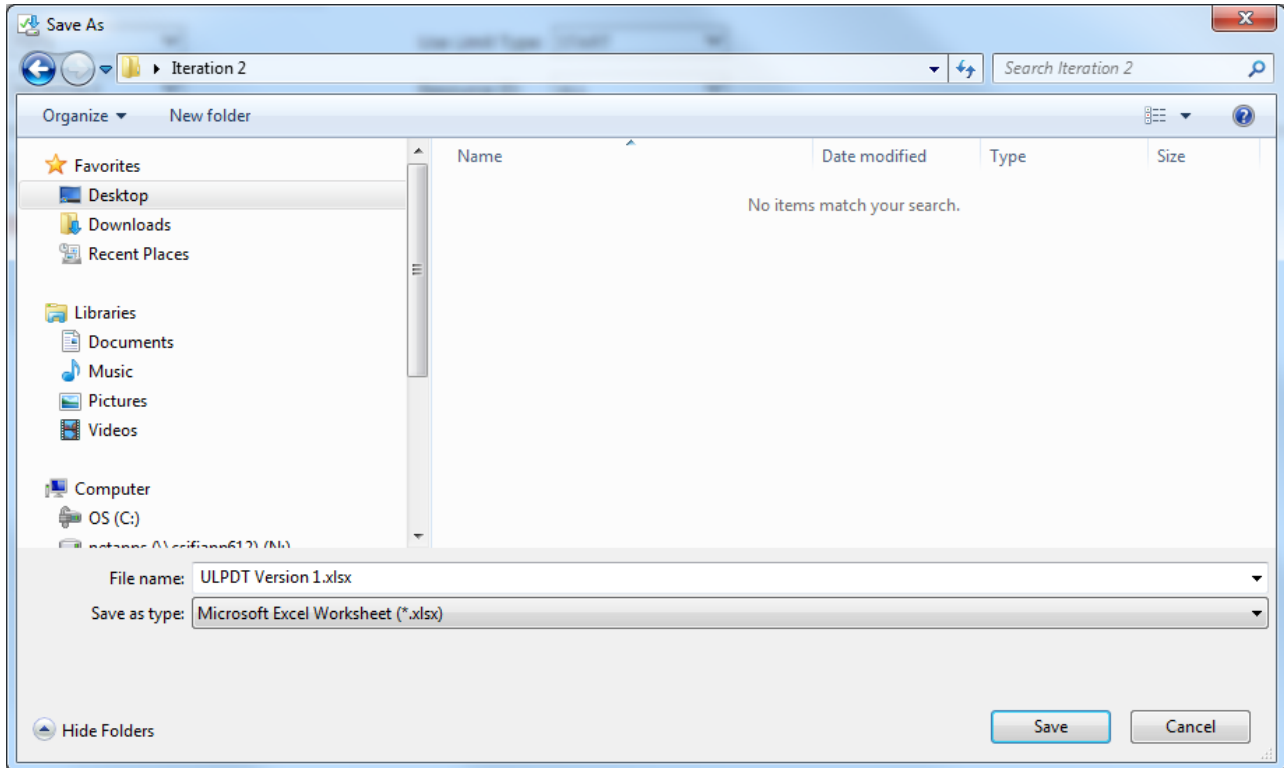


Figure 26: Save As – Browse Window

Note: You may rename the report file to a file name of your choice.

- When the file download is complete and the report has been saved to the selected destination folder, the 'Download Complete' pop-up window appears and you may click on the 'Open' button to view the report.

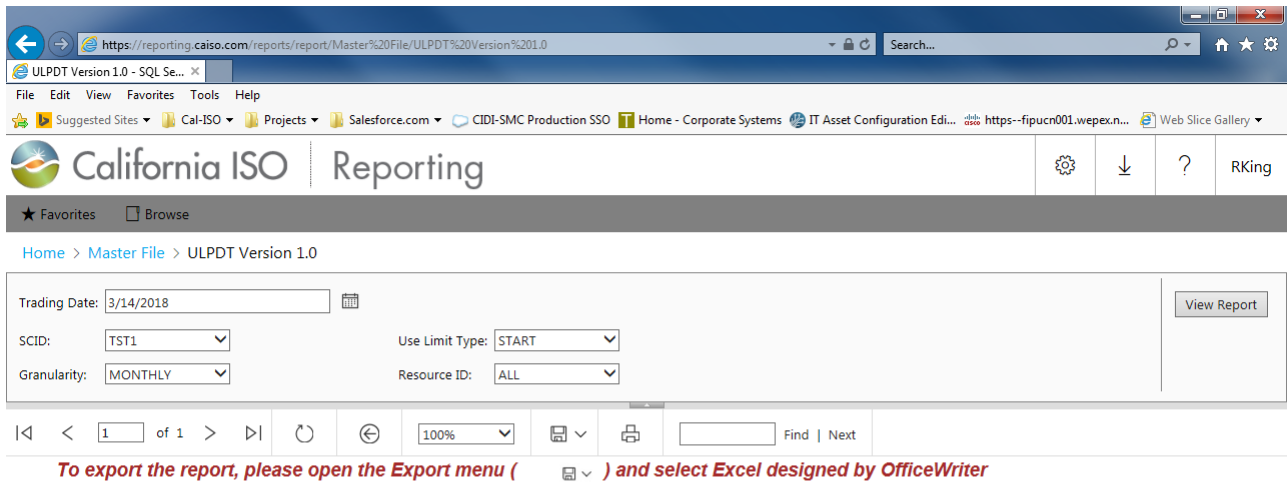


Figure 27: Download Complete

- The system will prompt user to select one certificate to use.

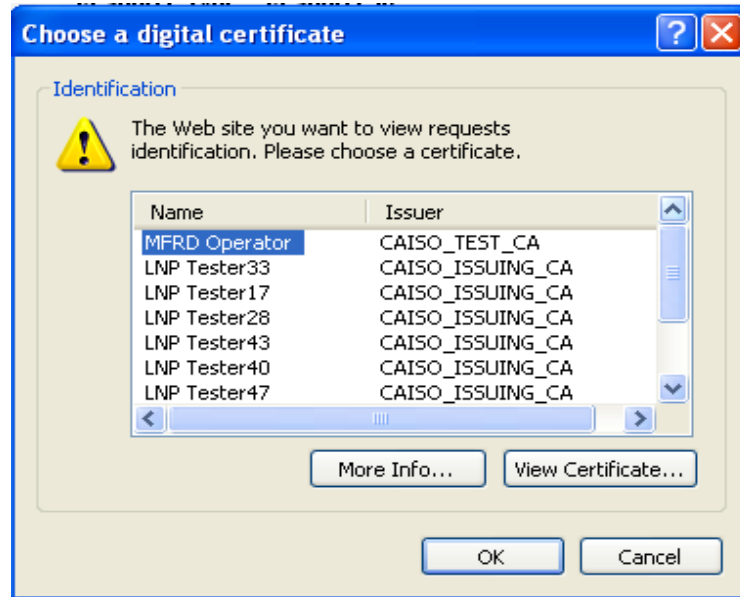


Figure 28: Choose Certificate

- Note:** If you have Excel already open, the request to choose a certificate may be hidden on the Excel Screen. If it seems like it is taking forever, click on the Excel icon and the prompt for certificate should come to the foreground.

California ISO
Shaping a Renewed Future

Generator Resource Data Template (GRDT)
Version GRDT.10.0

Report generation timestamp :
 SCID :
 Resource Type :
 Resource ID :
 Trade Date :

Version	Effective Date	Description of Change
9.1	Fall Release 2014	Add new columns: RESOURCE tab: Add new fields: EIM_PARTICIPATING, BAA Add new tab: GEN_RES_AGGR: Contains resource ID, name, and Pmax, of child units belonging to aggregate resources - Read-only
10.0	Fall Release 2015	Changes: RESOURCE tab: Add new field: GHG_COST MSG_CONFIG tab: Add new field: STARTUP_YN

Worksheet tabs: Instruction, Definition, Code, RESOURCE, RAMPRATE, HEATRATE, STARTUP, FORE ...

Figure 30: View Report – Instruction sheet

- Click on the relevant worksheet tab to view the data within the worksheet

1	PGA Name	Scheduling Coordinator ID	Resource ID	Resource Name	Resource Type	Aggregate?	Energy Type	Fuel Type	Prime Mover Technology	Generator Type	Fuel Region	Air Quality Management District	Maximum Generation
2	PGA NAME	SC_ID	RES_ID	RES_NAME	RES_TYPE	AGGREGATE_YN	ENERGY_TYPE	FUEL_TYPE	GEN_TECH_TYPE	GEN_TYPE	FUEL_REGN_TYPE	AQM_DIST_TYPE	MAX_GEN
3	WILE E ENERGY	SC9C	1TESTUNIT001	TEST_UNIT_001	GEN	N		OTHR			SC9C		100
4		SC9C	1TESTUNIT002	TEST_UNIT_002	GEN	N		OTHR			SC9C		100
5	WILE E ENERGY	SC9C	1TESTUNIT003	TEST_UNIT_003	GEN	N		OTHR			SC9C		100
6	WILE E ENERGY	SC9C	1TESTUNIT004	TEST_UNIT_004	GEN	N		OTHR			SC9C		100
7		SC9C	1TESTUNIT005	TEST_UNIT_005	GEN	N		OTHR			SC9C		100
8		SC9C	1TESTUNIT006	TEST_UNIT_006	GEN	N		OTHR			SC9C		100
9		SC9C	1TESTUNIT007	TEST_UNIT_007	GEN	N		OTHR			SC9C		100
10		SC9C	1TESTUNIT008	TEST_UNIT_008	GEN	N		OTHR			SC9C		100
11	WILE E ENERGY	SC9C	1TESTUNIT009	TEST_UNIT_009	GEN	N		OTHR			SC9C		100
12	WILE E ENERGY	SC9C	1TESTUNIT010	TEST_UNIT_010	GEN	N		OTHR			SC9C		100
13	WILE E ENERGY	SC9C	1TESTUNIT011	TEST_UNIT_011	GEN	N		OTHR			SC9C		100
14	WILE E ENERGY	SC9C	1TESTUNIT012	TEST_UNIT_012	GEN	N		OTHR			SC9C		100
15		SC9C	1TESTUNIT013	TEST_UNIT_013	GEN	N		OTHR			SC9C		100
16		SC9C	1TESTUNIT014	TEST_UNIT_014	GEN	N		OTHR			SC9C		100
17	WILE E ENERGY	SC9C	1TESTUNIT015	TEST_UNIT_015	GEN	N		OTHR			SC9C		100
18	WILE E ENERGY	SC9C	1TESTUNIT016	TEST_UNIT_016	GEN	N		OTHR			SC9C		100
19		SC9C	1TESTUNIT017	TEST_UNIT_017	GEN	N		OTHR			SC9C		100
20	WILE E ENERGY	SC9C	1TESTUNIT018	TEST_UNIT_018	GEN	N		OTHR			SC9C		100
21	WILE E ENERGY	SC9C	1TESTUNIT019	TEST_UNIT_019	GEN	N		OTHR			SC9C		100
22		SC9C	1TESTUNIT020	TEST_UNIT_020	GEN	N		OTHR			SC9C		100
23	WILE E ENERGY	SC9C	1TESTUNIT021	TEST_UNIT_021	GEN	N		OTHR			SC9C		100
24	WILE E ENERGY	SC9C	1TESTUNIT022	TEST_UNIT_022	GEN	N		OTHR			SC9C		100
25		SC9C	1TESTUNIT023	TEST_UNIT_023	GEN	N		OTHR			SC9C		100
26		SC9C	1TESTUNIT024	TEST_UNIT_024	GEN	N		OTHR			SC9C		100
27	WILE E ENERGY	SC9C	1TESTUNIT025	TEST_UNIT_025	GEN	N		OTHR			SC9C		100
28		SC9C	1TESTUNIT026	TEST_UNIT_026	GEN	N		OTHR			SC9C		100
29	WILE E ENERGY	SC9C	1TESTUNIT027	TEST_UNIT_027	GEN	N		OTHR			SC9C		100
30		SC9C	1TESTUNIT028	TEST_UNIT_028	GEN	N		OTHR			SC9C		100
31	WILE E ENERGY	SC9C	1TESTUNIT029	TEST_UNIT_029	GEN	N		OTHR			SC9C		100
32	WILE E ENERGY	SC9C	1TESTUNIT030	TEST_UNIT_030	GEN	N		OTHR			SC9C		100
33	WILE E ENERGY	SC9C	1TESTUNIT031	TEST_UNIT_031	GEN	N		OTHR			SC9C		100
34		SC9C	1TESTUNIT032	TEST_UNIT_032	GEN	N		OTHR			SC9C		100
35		SC9C	1TESTUNIT033	TEST_UNIT_033	GEN	N		OTHR			SC9C		100
36	WILE E ENERGY	SC9C	1TESTUNIT034	TEST_UNIT_034	GEN	N		OTHR			SC9C		100
37		SC9C	1TESTUNIT035	TEST_UNIT_035	GEN	N		OTHR			SC9C		100

Figure 31: View Report – Resource sheet

Resource ID	Segment Type	Segment Number	Operating Level	Worst Operational Ramp Rate	Best Operational Ramp Rate	Comment
1TESTUNIT001	RAMP	1	0	10	50	
1TESTUNIT002	RAMP	2	100	51	100	
1TESTUNIT003	RAMP	1	0	10	50	
1TESTUNIT004	RAMP	1	100	51	100	
1TESTUNIT005	RAMP	2	0	10	50	
1TESTUNIT006	RAMP	2	100	51	100	
1TESTUNIT007	RAMP	1	0	1	9	
1TESTUNIT008	RAMP	2	100	10	100	
1TESTUNIT009	RAMP	2	0	10	50	
1TESTUNIT010	RAMP	2	100	51	100	
1TESTUNIT011	RAMP	1	0	10	50	
1TESTUNIT012	RAMP	1	100	51	100	
1TESTUNIT013	RAMP	1	0	10	50	
1TESTUNIT014	RAMP	2	100	51	100	
1TESTUNIT015	RAMP	1	0	10	50	
1TESTUNIT016	RAMP	1	100	51	100	
1TESTUNIT017	RAMP	1	0	10	50	
1TESTUNIT018	RAMP	2	100	51	100	
1TESTUNIT019	RAMP	1	0	10	50	
1TESTUNIT020	RAMP	2	100	51	100	
1TESTUNIT021	RAMP	1	0	10	50	
1TESTUNIT022	RAMP	2	100	51	100	
1TESTUNIT023	RAMP	1	0	10	50	
1TESTUNIT024	RAMP	2	100	51	100	
1TESTUNIT025	RAMP	1	0	10	50	
1TESTUNIT026	RAMP	2	100	51	100	
1TESTUNIT027	RAMP	1	0	10	50	
1TESTUNIT028	RAMP	2	100	51	100	
1TESTUNIT029	RAMP	1	0	10	50	
1TESTUNIT030	RAMP	2	100	51	100	
1TESTUNIT031	RAMP	1	0	10	50	

Figure 32: View Report – Segment sheet

7.3 Resources with Approved Changes Becoming Effective

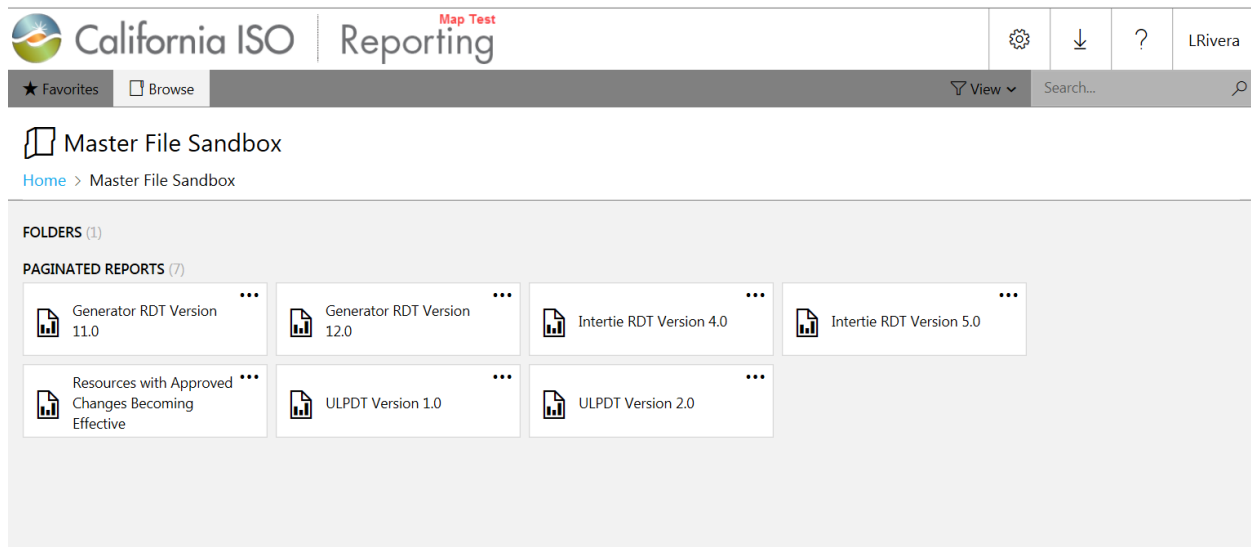


Figure 33: Main Reporting Screen

1. To display a list of resources that will have changes during a particular time frame, the Resources with Approved Changes Report may be generated. This report is useful for identifying when a bid may need to be modified. The report does not include the actual changes, but will show the effective data of a change. An RDT can then be generated for that effective date to see the actual latest data. The largest range of days that may be selected when generating this report is 30 days.
2. The default date criterion is as follows:
 - From Date: Today
 - Through Date: Today + 7 days
 - SC ID: Is Required
3. Please Note: The Approved Changes Report will not show resources with changes until the day after the change was approved.

7.3.1 Search Criteria

★ Favorites □ Browse

Home > Master File > Resources with Approved Changes Becoming Effective

SCID:

From Date: Through Date:

Figure 34: Enter Report Search Criteria

7.3.2 Report Output

Resources with Approved Changes Becoming Effective									
Effective Date	Resource ID	Resource Name	Resource Type	Submission Date	File Name	Approval Date	Batch ID		
10/1/2008	SC9C_RIKER_E_F_ALPHA	SC9C_RIKER_E_F_ALPHA	ETIE						
10/1/2008	SC9C_RIKER_E_F_BAKER	SC9C_RIKER_E_F_BAKER	ETIE						
10/1/2008	SC9C_RIKER_E_F_CHARLIE	SC9C_RIKER_E_F_CHARLIE	ETIE						
10/1/2008	SC9C_RIKER_E_F_DELTA	SC9C_RIKER_E_F_DELTA	ETIE						
10/1/2008	SC9C_RIKER_E_F_FOXTROT	SC9C_RIKER_E_F_FOXTROT	ETIE						
10/1/2008	SC9C_RIKER_E_NF_ALPHA	SC9C_RIKER_E_NF_ALPHA	ETIE						
10/1/2008	SC9C_RIKER_E_NF_BAKER	SC9C_RIKER_E_NF_BAKER	ETIE						
10/1/2008	SC9C_RIKER_E_NF_CHARLIE	SC9C_RIKER_E_NF_CHARLIE	ETIE						
10/1/2008	SC9C_RIKER_E_NF_DELTA	SC9C_RIKER_E_NF_DELTA	ETIE						
10/1/2008	SC9C_RIKER_E_NF_FOXTROT	SC9C_RIKER_E_NF_FOXTROT	ETIE						
10/1/2008	SC9C_RIKER_E_I_ALPHA	SC9C_RIKER_E_I_ALPHA	ITIE						
10/1/2008	SC9C_RIKER_E_I_BAKER	SC9C_RIKER_E_I_BAKER	ITIE						
10/1/2008	SC9C_RIKER_E_I_CHARLIE	SC9C_RIKER_E_I_CHARLIE	ITIE						
10/1/2008	SC9C_RIKER_E_I_DELTA	SC9C_RIKER_E_I_DELTA	ITIE						
10/1/2008	SC9C_RIKER_E_I_FOXTROT	SC9C_RIKER_E_I_FOXTROT	ITIE						
10/1/2008	SC9C_RIKER_I_NF_ALPHA	SC9C_RIKER_I_NF_ALPHA	ITIE						
10/1/2008	SC9C_RIKER_I_NF_BAKER	SC9C_RIKER_I_NF_BAKER	ITIE						
10/1/2008	SC9C_RIKER_I_NF_CHARLIE	SC9C_RIKER_I_NF_CHARLIE	ITIE						
10/1/2008	SC9C_RIKER_I_NF_DELTA	SC9C_RIKER_I_NF_DELTA	ITIE						
10/1/2008	SC9C_RIKER_I_NF_FOXTROT	SC9C_RIKER_I_NF_FOXTROT	ITIE						
10/1/2008	BASKERVILLE	SMALL QF AGGREGATION - BASKERVILLE	GEN						

Figure 35: Report Output

The report output is presented in an Excel Spreadsheet with a default sort order of ascending by effective date (smallest date to largest). To see the details of the changed Approved data, the RDT report must be generated for the Effective Date listed in the Approved Changes report.

7.4 Program Limitations

1. Reports can only be run one specific resource. At this time, the reports do not allow for multiple Resource Id selections.
2. Reports include only "Approved" data.
3. "Approved" data is included in reports beginning on the calendar day following the day a data change has been approved by ISO staff.

8. Data Load

8.1 Uploading using the Data Load feature (internal users only)

1. Click the “Data Load” tab from the home page.
2. The system displays the “Data Load Page” as below.

The screenshot shows the 'Data Load' page within the 'Master File' application. At the top left is the California ISO logo with the tagline 'Shaping a Renewed Future'. To the right of the logo, the text 'Master File' is displayed. Further right, a user greeting reads '>> Welcome [redacted] - January 22, 2015'. Below the header is a horizontal navigation bar with tabs for 'Upload', 'Reports', 'Status', 'Actions', 'Data Load', 'Rates', 'Notifications', and 'Help'. The 'Data Load' tab is active. The main content area is titled 'Data Load' and contains a form with the following elements: a 'File Name' label followed by a 'Browse...' button and the text 'No file selected.'; a 'File Type' label followed by a dropdown menu showing 'Association'; and a 'Load' button.

Figure 36: Data Load Page

3. Interact with the following elements on the data load screen:
 - a. **File Type** – Select the type of file that needs to be uploaded. The options are:
 - Association
 - Contract

- Group
- Group Detail
- Participant
- Resource

Each file type from the above list uses a different template and the uploaded file is validated against a different set of rules based on this selection once the file is accepted for processing.

- File Name** – Use the “Browse” button to locate and select the file that you want uploaded and the “Load” button to upload the selection for processing. When Load is selected, the system will perform basic validation on the file. For example, it will verify that the file name is not more than 100 characters and the extension is either .xls or .xlsx for “Resource” and .csv for the other options. If these validations fail, the file will not be accepted and an error message explaining the reason will display on the upper left hand corner of the screen. The errors can be addressed and the file can be re-uploaded.

Once the upload is successful, a “zip” file will be presented to the user with information related to the basic validation on the data. The batch will be set to “Fail” status if the data does not meet the criteria.

9. Actions

9.1 Actions related to Batch

Purpose: The purpose of this tab is to let internal admins review and take action on a batch.

1. Click on the “Actions” tab on the header block.
2. The system responds by showing the “Actions” screen.

Figure 37: Actions page

3. The following actions are available to be performed on a batch:
 - Approve (RDT)
 - Approve non-RDT Batch
 - Cancel Batch
 - Compare Report
 - Compare Report ULP
 - Get RDT File
 - Validation Report

The “Approve (RDT)” option mandates a Change Request Id to be put in the system for tracking purposes.

4. Errors related to the action will be displayed on the upper left hand side of the screen.

10. Rates

10.1 Updating the Rates

Purpose: The purpose of this tab is to let internal admins establish the rate that should be used for a specific rate type and the effective date range.

1. Click on the “Rates” tab on the header block.
2. The system responds by showing the “Rates” screen.

The screenshot shows the 'Rates' page in the California ISO Master File interface. At the top, there is a navigation bar with tabs for Upload, Reports, Status, Actions, Data Load, Rates, Notifications, and Help. The 'Rates' tab is selected. Below the navigation bar, the page title 'Rates' is displayed. A filter dropdown is set to 'BIDSGMNT'. A table lists existing rates with columns: Rate Type, Start Date, End Date, Rate, Change Request Id, Updated By, Last Updated, and Comment. The table contains four rows, with the last row highlighted in green. Below the table is a form to add or update a rate, with fields for Rate Type, Effective Start Date, Effective End Date, Rate, Change Request Id, and a Comment box. The form also includes 'Save' and 'Cancel' buttons and a character count of 255 characters remaining.

Rate Type	Start Date	End Date	Rate	Change Request Id	Updated By	Last Updated	Comment
BIDSGMNT	Oct 16, 2013	Oct 31, 2013	0			Oct 29, 2013	Pre-Activation ...
BIDSGMNT	Nov 01, 2013	Dec 31, 2013	0			Dec 26, 2013	GMC rates for 2013
BIDSGMNT	Jan 01, 2014	Dec 31, 2014	0			Dec 26, 2013	GMC rates for 2014
BIDSGMNT	Jan 01, 2015	Dec 31, 2015	0			Dec 30, 2014	GMC rates for 2015

Figure 38: Rates page

3. The internal admin user will select the appropriate rate type and the effective dates between which the rate shall be valid along with a comment. The change request id is a mandatory field and must be provided to update the rate.

11. Notifications

11.1 Show notifications

Purpose: The purpose of this tab is to let internal admins enter a notification or message that will be displayed on the bottom of the screen for all users. This feature can be used to keep the users informed of any upcoming activities specific to the application such as planned maintenance.

1. Click on the “Notifications” tab on the header block.
2. The system responds by showing the “Notifications screen.

The screenshot shows the California ISO Master File interface. At the top, there is a navigation bar with the California ISO logo and the text "Shaping a Renewed Future". To the right, it says "Master File" and "Welcome: [redacted]". Below the navigation bar, there are several tabs: Upload, Reports, Status, Actions, Data Load, Rates, Notifications, and Help. The "Notifications" tab is selected.

The main content area is titled "Notifications" and contains a table of messages for participants. The table has the following columns: Start Date, End Date, Updated By, Last Updated, and Message. There are two rows of data in the table.

Messages For Participants				
Start Date	End Date	Updated By	Last Updated	Message
Dec 24, 2014	Dec 30, 2014		Dec 24, 2014	MF freeze planned for FNM DB73 deployment: Dec.31-Jan.13, UI/API submission black-out period; Jan.8-15, effective date black-out period (registered cost updates can be made effective Jan.9, 12 or 13).
Dec 31, 2014	Jan 13, 2015		Dec 24, 2014	MF freeze in progress for FNM DB73 deployment:Dec.31-Jan.13, UI/API submission black-out period; Jan.8-15, effective date black-out period (registered cost updates can be made effective Jan.9,12 or 13

Below the table is a form to add a new notification. The form has the following fields and controls:

- Effective Start Date:** A date input field with a calendar icon.
- Effective End Date:** A date input field with a calendar icon.
- Message:** A large text area for entering the notification message.
- Buttons:** "Save" and "Cancel" buttons.
- Character Count:** "200 characters remaining."

Figure 39: Notifications page

3. The internal admin user can upload the message not more than 200 characters and the effective dates between which the notification will be shown

12. Help

12.1 Help on the Master File User Interface

The help page is pointed to the Master File Homepage that includes key information about Master File as well as this User Manual. A sample picture of the site is shown below. Here is the link to the Master File Homepage: <http://www.caiso.com/market/Pages/NetworkandResourceModeling/Default.aspx>

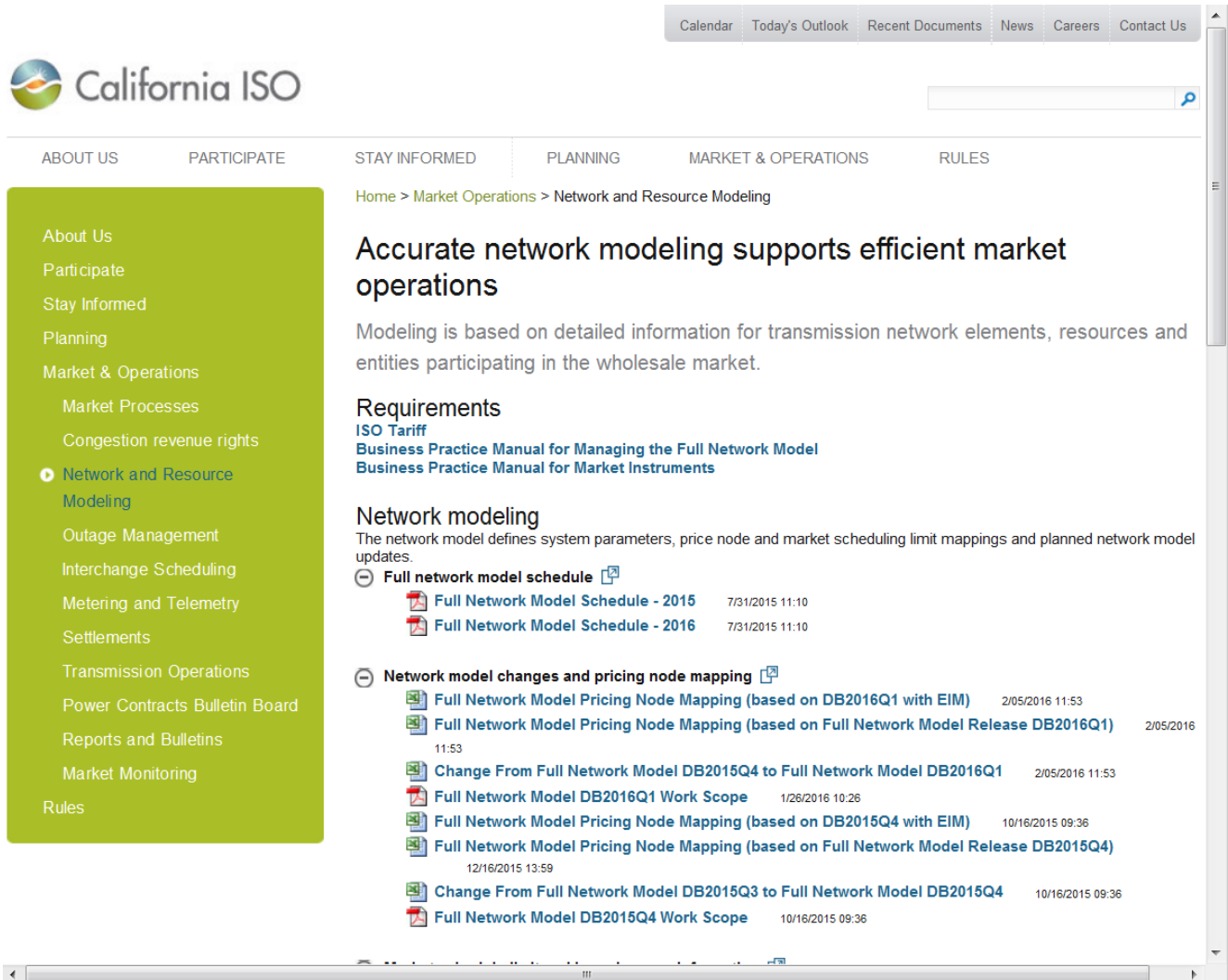


Figure 40: Help Web Page

13. Troubleshooting/FAQ

13.1 *In the RDT Upload function what is an acceptable file name for the upload?*

Any standard Windows file names are acceptable. While spaces are allowed in the file name, the following characters should be avoided: &, @, and ;

13.2 *How do I see the report parameters once the report has been saved?*

The report parameters are displayed on the Instruction sheet of the report. The instruction sheet also displays the Report Generation Timestamp which shows the time at which the data was queried.

13.3 *Do the reports display pending data?*

No, the reports display only 'Approved' data.

13.4 *Do the reports display resources that do not have an association with an SCID?*

No, the reports display only those resources that have an active association with the selected SCID for a selected trade date.

13.5 *Why can't I see all the resources in the RESOURCE_ID drop down list?*

The report screen's drop-down-list of Resource IDs displays only those resources that have an active association with the selected SC ID for the specified resource type and trade date.

13.6 *Can the report be generated for multiple SC IDs into a single output?*

No, the reports can be generated for only one SCID at a time.

13.7 *In what order is the data sorted in the reports?*

The reports display the data based on the following sort order:

For the Intertie RDT Report, the resource records shall be sorted on the following fields in an ascending order

- RES_TYPE
- RES_ID

For the Generator RDT Report, the resource records shall be sorted on the following fields in an ascending order:

- RES_TYPE
- RES_ID

For segments data on the Generator RDTs, the records shall be sorted on the following fields in an ascending order:

- RES_ID
- SEG_TYPE worksheets to appear in this order (RAMP, HEAT, STRT, FRBD, REG, RREG, ROPR)
- SEG_NUM

13.8 *Which application sources the RA / MOO values? Is it Master File?*

1. The GRDT no longer displays RA data. RA data is available via CIRA
2. The MOO *Qualified* flag is sourced from Master File.

14. Contact Information

- *During Testing please follow the Issue Reporting Information instructions in the Master File Data Exchange External Testing instructions*

Appendix A – External User Access

A.1 Digital Certificate

A Digital Certificate must be obtained and installed before you can access the Master File User Interface for the first time.

Please submit your request utilizing the current User Application Access Request Form. The User Application Access Request Form can be found at the following link:

<http://www.caiso.com/pubinfo/info-security/certs/index.html>

When requesting application access, please download the latest form from the website every time. The User Application Access Request Form continues to be very dynamic as new applications and environments are rolled out. By accessing the current form every time, you will be able to select from all the available applications and environments, and all the necessary information will be collected.

- **Fill out** the form following the instructions, as shown below.
- **Save** as an Excel file to your drive.
- **Email** the completed form to CertRequest@caiso.com

A.2 Certificate Installation

Once approved, Certificate Request replies via e-mail with the Digital Certificate and password. A password is required for the initial login only. All ensuing accesses automatically connect you.

- **Save** the certificate file and installation PIN in a secure location for possible future use **and follow** the installation instructions provided.

A.3 Accessing the Master File User Interface

- Type the appropriate URL address into your browser address bar.

Master File Production Environment

<https://portal.caiso.com>

Select **Master File**



Master File

or

<https://portal.caiso.com/mf>

Port number is 443

Appendix B – User Messages

User Messages

Message Name	Message Text	When Message will be shown
<u>RDT Upload</u>		
rdtUpload_fileName_required_msg	RDT input file is required	No input file has been provided
rdtUpload_fileName_validation_msg	RDT input file name must be < 100 characters	File name entered is > 100 chars
rdtUpload_scid_required_msg	SC Id required	SC Id not entered
rdtUpload_rdtType_required_msg	RDT type is required	RDT Type is not selected (Gen or Intertie)
rdtUpload_effectiveDate_required_msg	Effective date is required	Effective date is not entered or selected
rdtUpload_effectiveDate_msg	Effective date must be set to a minimum of today + 5 business days	Effective date rule has been broken
rdtUpload_comments_validation_msg	Comments must be < 255 characters	More than 255 bytes has been entered
rdtUpload_success_msg	RDT file was successfully uploaded	All is good
rdtUpload_processing_error_msg	Errors encountered trying to process RDT; see errors below	Errors in the RDT data
rdtUpload_archiving_error_msg	Error archiving RDT	Internal Error
rdtUpload_transformation_error_msg	Error transforming RDT	Internal Error
rdtUpload_calendar_error_msg	Error calling calendar service	Internal Error
rdtUpload_error_msg	Errors processing request; see log files for details	Bad system error, contact ISO Support with time error occurred and by who
submitRdtDescription	{0} ¹ updates were successfully received.	API – When submission is successful. The parameter is the number of updates submitted.
submitRdtResult	Records received={0} ¹ , batchId={1} ¹	API – When submission is successful, the API returns this as a message. The first parameter is the number of records, second is the batch id.
submitRdtResultError	Errors encountered	API – when any errors are detected, this will be the message that the API will show.
rdtProcessorUserComment	Updated via the {0} ¹	This is the default User Comment that will be applied to all resources in the batch. The parameter will have 'UI' or 'API' as its possible values.

¹ The curly braces mean that a value will be substituted, multiple substitutions per message are possible

Master File User Interface User Guide

Internal message	Invalid Spreadsheet	This error would be displayed if you passed it a file that is not a XLS file or the XLS file is corrupted / can not be read
Internal message	{sheetMapping.sheetName} sheet not found in xls.	The required sheets are defined in the XML config file and if one sheet is not found in the XLS you will receive this message
Internal message	Missing sheet {sheetName}	This error is redundant and will not occur. It will be caught by the check in previous line's validation .
Internal message	{segment}, {resId}{sheetMapping.resIdCol}{row}, Parent resource not found	This error will be displayed if segment data for a Resource Id is being updated but there is no record of the Resource Id on the Resource sheet
Internal message	Missing segment sheet {segment}	This error is redundant and will not occur. The existence of worksheets has already been validated.
Internal message	Value required for {mappingEntry.description}	This error would occur if the XML config file has a field set to required = true. Currently the Resource Id field is the only field that is required on Intertie/Generator submissions
Internal message	{Resource ID}: RDT resource does not exist in approved status for a given start date	This error would occur if a submitted resource does not have an Approved version that matches the given start date.
Internal message	{Resource ID}: RDT resource does not belong to selected SC for a given start date	This error would occur if a submitted resource doesn't have an Association to the Market Participant that the submitter is authorized to submit for on the given start date.
RDT Status		
rdtStatus_no_records_found_msg	No status records found for scid {0} ¹	Status query can't find any submissions, the parameter is the SC_ID that was searched for
rdtStatus_error_msg	Errors processing request; see log files for details	System Error, contact ISO support
rdtStatus_scid_required_msg	SC Id required	You must enter an SC ID
Common Messages		
missingUserId	You are not authorized for this request	You shouldn't see this message since you shouldn't be able to choose any option that is not valid for your use.
missingScId	A valid Scheduling Coordinator is required	When a SC_ID is presented that doesn't match the security certificate of the User.
serviceError	Error accessing service: {0} ¹	API – trying to access one of the API Services that doesn't exist or

		you provided inappropriate input to. The parameter is the name of the service that you are trying to use.
noResultsFound	No results were found	API – When no records match the record you are searching for.

¹ The curly braces mean that a value will be substituted; multiple substitutions per message are possible

Generator RDT Field Error Messages

Field Name	Message Text	When Message will be shown
Resource		
PGA Name	PGA Name > 80 characters	More than 80 chars are present
Resource ID	Resource ID > 32 characters	More than 32 chars are present
Resource Name	Resource Name > 40 characters	More than 40 chars are present
Resource Type	Resource Type needs to be 'GEN', 'TG', or 'LOAD'	Invalid Res Type presented
Aggregate Resource	Aggregate? Needs to be 'Y' or 'N'	Invalid value presented
Energy Type	Energy Type needs to be 'DYN', 'FIRM', or null	Invalid value presented
Gen Tech Type	Prime Mover Technology needs to be 'CCYC', 'GTUR', 'HYDR', 'OTHR', 'PHOT', 'PTUR', 'PUMP', 'RECP', 'STUR', 'SYNC', or 'WIND'	Invalid value presented
Gen Type	Generator Type must be must be 'H' or 'T'	Invalid value presented
Fuel Region	Fuel Region needs to be 'CISO', 'PGE2', 'SCE1', 'SCE2', 'SDG1', or 'SDG2'	Invalid value presented
Air Quality Management District	Air Quality Management District > 4 characters	More than 4 chars are present
Max Gen	Maximum Generation Capacity needs to be a valid number	Not a proper number
Min Gen	Minimum Generation Capacity needs to be a valid number	Not a proper number
Min Dispatchable Level	Minimum Dispatchable Level needs to be a valid number	Not a proper number
Min On Time	Minimum On Time needs to be a valid number	Not a proper number
Max On Time	Maximum On Time needs to be a valid number	Not a proper number
Max Off Time	Maximum Off Time needs to be a valid number	Not a proper number
Max Startups Per Day	Maximum Startups Per Day needs to be a valid number	Not a proper number
Min Load Cost	Minimum Load Cost needs to be a valid number	Not a proper number
Cost Basis	Cost Basis values are 'PRXC' or 'REGC'	Invalid value presented
Max Pump Capacity	Maximum Pump Capacity needs to be a valid number	Not a proper number
Pump Min Cost	Pump Minimum Cost needs to be a valid number	Not a proper number
Pumping Factor	Pumping Factor needs to be a valid number	Not a proper number
Pump Max Daily Startups	Maximum Pump Capacity needs to	Not a proper number

	be a valid number	
Pump Min Up Time	Pump Minimum Up Time needs to be a valid number	Not a proper number
Pump Min Down Time	Pump Minimum Down Time needs to be a valid number	Not a proper number
Pump Max Shutdown Cost	Pump Maximum Shutdown Cost needs to be a valid number	Not a proper number
Pump Shutdown Time	Pump Shutdown Time needs to be a valid number	Not a proper number
Variable Cost Option	Variable Cost Option needs to be '1', '2' or '3'	Invalid value presented
Negotiated Rate Option	Negotiated Rate Option needs to be '1', '2' or '3'	Invalid value presented
LMP Option	LMP Option needs to be '1', '2' or '3'	Invalid value presented
Reserve Capacity: Spin	Reserve Capacity: Spin needs to be a valid number	Not a proper number
Reserve Capacity: NSpin	Reserve Capacity: Non-Spin needs to be a valid number	Not a proper number
Certified PIRP	Certified PIRP needs to be 'Y' or 'N'	Invalid value presented
RA Flag	Resource Adequacy Flag needs to be 'Y' or 'N'	Invalid value presented
MOO Flag	Must Offer Obligation Flag needs to be 'Y' or 'N'	Invalid value presented
RA Capacity	Resource Adequacy Capacity needs to be a valid number	Not a proper number
MOO Qualified	Must Offer Obligation Qualified Flag needs to be 'Y', 'N' or 'R'	Invalid value presented
Startup Code Type	Startup Code Type > 4 characters	More than 4 chars are present
PGA Flag	Participating Generator Agreement Flag needs to be 'Y' or 'N'	Invalid value presented
COG	Constrained Output Generator Flag needs to be 'Y' or 'N'	Invalid value presented
Certified RUC	Certified for RUC? needs to be 'Y' or 'N'	Invalid value presented
LMPM Flag	Market Power Mitigation Participation Flag needs to be 'Y' or 'N'	Invalid value presented
Certified for AS: Regulation	Certified for AS: Regulation needs to be 'Y' or 'N'	Invalid value presented
Certified for AS: Spin	Certified for AS: Spin needs to be 'Y' or 'N'	Invalid value presented
Certified for AS DAM: NSpin	Certified for AS DAM: Non-Spin needs to be 'Y' or 'N'	Invalid value presented
Certified for AS RTM: NSpin	Certified for AS RTM: Non-Spin needs to be 'Y' or 'N'	Invalid value presented
MSS Load Following Down	MSS Load Following Down needs to be 'Y' or 'N'	Invalid value presented
MSS Load Following Up	MSS Load Following Up needs to be 'Y' or 'N'	Invalid value presented
QF Flag	FERC Qualifying Facility Flag needs to be 'Y' or 'N'	Invalid value presented
Use Limit Flag	Use Limit needs to be 'Y' or 'N'	Invalid value presented
Operating Maintenance Cost	Operating Maintenance Cost needs to be a valid number	Not a proper number

Master File User Interface User Guide

Priority Type	Priority Type > 4 characters	More than 4 chars are present
Dispatchable Flag	Dispatchable needs to be 'Y' or 'N'	Invalid value presented
RMR Flag	RMR needs to be 'Y' or 'N'	Invalid value presented
Max Ramp Rate	Maximum Ramp Rate needs to be a valid number	Not a proper number
Price Setter – DAM	Price Setter - DAM needs to be 'Y' or 'N'	Invalid value presented
Price Setter – RTM	Price Setter - RTM needs to be 'Y' or 'N'	Invalid value presented
RAMP RATE Segments		
Resource Id	Resource ID > 32 characters	More than 32 chars are present
Segment Number	Segment Number needs to be a valid number	Not a proper number
Operating Level	Operating Level needs to be a valid number	Not a proper number
Worst Operational Ramp Rate	Worst Operational Ramp Rate needs to be a valid number	Not a proper number
Best Operational Ramp Rate	Best Operational Ramp Rate needs to be a valid number	Not a proper number
HEAT RATE Segments		
Resource Id	Resource ID > 32 characters	More than 32 chars are present
Segment Number	Segment Number needs to be a valid number	Not a proper number
Heat Rate Operating Level	Heat Rate Operating Level needs to be a valid number	Not a proper number
Heat Rate	Heat Rate needs to be a valid number	Not a proper number
Heat Emission Rate	Heat Emission Rate needs to be a valid number	Not a proper number
Average Cost	Average Cost needs to be a valid number	Not a proper number
STARTUP Segments		
Resource Id	Resource ID > 32 characters	More than 32 chars are present
Segment Number	Segment Number needs to be a valid number	Not a proper number
Registered Cooling Time	Registered Cooling Time needs to be a valid number	Not a proper number
Start-Up Time	Start-Up Time needs to be a valid number	Not a proper number
Start-Up Cost	Start-Up Cost needs to be a valid number	Not a proper number
Start-Up Aux	Start-Up Aux needs to be a valid number	Not a proper number
Start-Up Fuel	Start-Up Fuel needs to be a valid number	Not a proper number
FORBIDDEN Segments		
Resource Id	Resource ID > 32 characters	More than 32 chars are present
Segment Number	Segment Number needs to be a valid number	Not a proper number
Lower MW of Forbidden Region	Lower MW of Forbidden Region needs to be a valid number	Not a proper number
Upper MW of Forbidden Region	Upper MW of Forbidden Region needs to be a valid number	Not a proper number

Crossing Time	Crossing Time of Forbidden Region needs to be a valid number	Not a proper number
REGULATION Segments		
Resource Id	Resource ID > 32 characters	More than 32 chars are present
Segment Number	Segment Number needs to be a valid number	Not a proper number
Lower MW of Regulation	Lower MW for Regulation needs to be a valid number	Not a proper number
Upper MW of Regulation	Upper MW for Regulation needs to be a valid number	Not a proper number
REG RAMP RATE Segments		
Resource Id	Resource ID > 32 characters	More than 32 chars are present
Segment Number	Segment Number needs to be a valid number	Not a proper number
Worst Regulation Ramp Rate	Worst Regulation Ramp Rate needs to be a valid number	Not a proper number
Best Regulation Ramp Rate	Best Regulation Ramp Rate needs to be a valid number	Not a proper number
OPER RES RAMP RATE Segments		
Resource Id	Resource ID > 32 characters	More than 32 chars are present
Segment Number	Segment Number needs to be a valid number	Not a proper number
Worst Operating Res Ramp Rate	Worst Operating Res Ramp Rate needs to be a valid number	Not a proper number
Best Operating Res Ramp Rate	Best Operating Res Ramp Rate needs to be a valid number	Not a proper number

Intertie RDT Field Error Messages

Field Name	Message Text	When Message will be shown
Resource		
Res ID	Resource ID > 32 characters	More than 32 chars are present
Energy Type	Energy Type needs to be 'FIRM', 'NFRM', 'WHL', or 'UCTG'	Invalid value presented
Min Hourly Block Limit	Minimum Hourly Block Limit needs to be a valid number	Not a proper number
Certified for AS: Spin	Certified for A/S: Spin needs to be 'Y' or 'N'	Invalid value presented
Certified for AS DAM: Non-Spin	Certified For A/S Non Spin DAM needs to be 'Y' or 'N'	Invalid value presented
Certified for AS RTM: Non-Spin	Certified for A/S Non Spin RTM needs to be 'Y' or 'N'	Invalid value presented
Spinning Reserve Capacity	Spinning Reserve Cap needs to be a valid number	Not a proper number
Non-Spinning Reserve Capacity	Non-Spinning Reserve Cap needs to be a valid number	Not a proper number
Certified for RUC	Certified for RUC needs to be 'Y' or 'N'	Invalid value presented
RA Resource	RA Resource needs to be 'Y' or 'N'	Invalid value presented
MOO Flag	MOO Resource needs to be 'Y' or 'N'	Invalid value presented
RA Capacity	Resource Adequacy Capacity needs to be a valid number	Not a proper number

MOO Qualified	Must Offer Obligation Qualified needs to be 'Y', 'N',	Invalid value presented
Wheeling Ref Number	Wheeling Reference Number > 32 characters	More than 32 chars are present

Use Limit Plan (ULPDT) Field Error Messages

Field Name	Message Text	When Message will be shown
Resource		
Scheduling Coordinator	SC '[value provided in the template]' is not available to current user.	SC ID not valid for authenticated user.
	Value required.	Value not provided
	For use limit plan data, the submitting SC must own the resource on the start date of the plan.	ULPDT SC not associated to the Resource on the Plan Start Date
Resource ID	Resource '[value provided in the template]' does not exist or is not active.	Resource doesn't exist with status of 'A'.
	Value required.	Value not provided
Use Limit Type	The provided use limit type '[value provided in the template]' is not valid. Valid values [list of available values]	Invalid Use Limit Type is entered.
	Resource '[value provided in the template]' does not belong to SC '[value provided in the template]'.	Resource is not provisioned to SC represented by authenticated user.
	Value required.	Value not provided
Granularity	The provided granularity '[value provided in the template]' is not valid. Valid values [ANNUALLY, DAILY, MONTHLY, OTHER, ROLL_12]	Invalid Granularity is entered.
	Value required.	Value not provided
	ULPs with granularity of ANNUALLY must span a multiple of 12 months	Annual Plan does not span a full year (or several full years)
	ULPs with granularity of ROLL_12 must cover twelve or more whole calendar months	Rolling 12 Plan does not span 12 or more full months
Effective Start Date	Value required.	Value not provided

Master File User Interface User Guide

	Similar ULP with overlapping dates exists with a use limit plan status of Incomplete (I) or Completed (C).	Submitted Plan overlaps a similar Plan (same Resource ID, Limit Type, Granularity, and Configuration, if applicable) that is in 'I' (Incomplete) or 'C' (Complete) status.
	ULPs start date overlaps similar approved ULP	Submitted Plan start date overlaps a similar approved Plan (same Resource ID, Limit Type, Granularity, and Configuration, if applicable)
	The plan start date for '[value provided in the template]' must fall between start and end date of an approved configuration	A Plan with a Configuration has a start date that does not fall within the effective dates of an approved Configuration
	The effective start date for the same Resource ID, Use Limit Type and Granularity is within the effective start date and effective end date in row '[value provided in the template]'	Two or more submitted ULPs have overlapping dates
	Effective start date must align with the first day of the month unless granularity is 'DAILY'	A non-DAILY ULP has a start date other than the first of the month.
	ULPs must have a start and end effective dates	A Plan was submitted with a null start date and/or a null end date
Effective End Date	Effective end date must be after effective start date	Invalid date presented
	Value required.	Value not provided
	Effective end date must align with the last day of the month unless granularity is 'DAILY'	A non-DAILY ULP has an end date other than the last day of the month.
	The end date of the submitted use limit plan must be greater than or equal to the submission date	A Plan was submitted for a date range in the past.
	ULPs end date overlaps similar approved ULP	Submitted Plan end date overlaps a similar approved Plan (same Resource ID, Limit Type, Granularity, and Configuration, if applicable)
Limitation Number	Limitation number must be a valid non-negative number	Invalid value presented
	Value required.	Value not provided

	Limitation number must be a valid non-negative number	A negative Limitation was submitted
	Limitation number is 0; ULP will be deleted	A Limitation of 0 was submitted
	Limitation number for START type must be a whole number	A fraction was entered for the Limitation on a Plan with Limitation Type of START
Minimum Capacity Level	Minimum Capacity Level must be a valid non-negative number	Invalid value presented
Maximum Capacity Level	Maximum Capacity Level must be a valid non-negative number.	Invalid value presented
	Maximum capacity level has to be greater than minimum capacity.	Invalid value presented
Documentation Name	Documentation Name is required and cannot be greater than 255 characters	Value is missing or too large
Configuration ID	Configuration '[value provided in the template]' does not exist or is not effective on plan start date	Resource does not have an approved Configuration at the time of the Plan start date
	Resource '[value provided in the template]' does not have an approved configuration	Resource does not have an approved Configuration at the time of the Plan start date

Use Limit Plan (ULPDT) File Error Messages

Message Text	When Message will be shown
ULPDT file is required.	File Name not provided
'Instruction' sheet not found in xls. Could not determine ULPDT version.	Instruction worksheet not included in ULPDT submitted.
ULPDT version [uploaded version number] is not supported. Support version(s) [supported version number(s)]	Invalid version number specified in Instruction worksheet of ULPDT.
Could not determine ULPDT version on A2 in the 'Instruction' sheet. The version for ULPDT data should be in the format VERSION ULPDT.X.X	Version number provided in Instruction worksheet is not of the correct format.
The resource use limit flag is not set to 'Y'.	Resource Use Limit Flag must be 'Y' prior to Use Limit Plan submittal for a Resource. (Use Limit Flag can be updated in GRDT.)
ULPDT contains deletion. Limitation number is 0; ULP will be deleted.	A ULP was submitted with a Limitation Number of 0.