

# Market Simulation Call - Fall 2020 Release

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August 27, 2020

## Recordings

Calls and webinars are recorded for stakeholder convenience, allowing those who are unable to attend to listen to the recordings after the meetings. The recordings will be publicly available on the ISO web page for a limited time following the meetings. The recordings, and any related transcriptions, should not be reprinted without the ISO's permission.



## Agenda

- MAP Stage Availability
- Fall 2020 Release Market Simulation Initiatives & Timelines
- Known Issues ADS
- Upcoming change for ADS
- Known Issues DRRS, MF
- Initiatives
  - Energy storage and distributed energy resources phase 3
  - Market settlement timeline transformation
  - Excess behind the meter production
  - Automated Dispatch System (ADS) replacement
  - FERC Order No. 841 requested adjustments
  - Commitment costs and default energy bid enhancements
  - Commitment cost enhancements tariff clarifications
  - Dispatch operating target tariff clarification
- Next Steps



## Fall 2020 Release MAP Stage Availability

- Refer to MAP Stage portal <a href="https://portalmap.caiso.com">https://portalmap.caiso.com</a> for system availability information
- Current MAP Stage Maintenance
  - None
- Upcoming MAP Stage Maintenance
  - 8/28-8/31: Network testing, potential brief interruptions
  - 8/28 MF API 8/28: CMRI UI/API for Fall 2020 Release deployment Closure, system will be unavailable
  - Thu 9/3-Fri 9/4: ADS UI/API
    - · ADS UI closure, system will be unavailable
    - ADS API brief interruption
- MAP Stage Weekly Maintenance Window
  - Friday



## Fall 2020 Release Market Simulation Initiatives & Timelines

Fall 2020 Release Initiatives	Start Date	Start Date (Trade Date)	End Date	Structured Simulation Start (Trade Date)
Fall 2020 Release Market Simulation Phase 1	07/27/20	07/28/20	09/04/20	08/11/20
Automated Dispatch System (ADS) replacement				08/11/20 (Completed) Rerun on 8/18 per MP request - Complete
Commitment costs and default energy bid enhancements				NA
Dispatch operating target tariff clarification				08/12/20 (Completed)
Energy storage and distributed energy resources phase 3				08/19/20 (Complete) Rerun on 9/2
FERC Order No. 841 requested adjustments				08/12/20 (Settlement statement published)
Commitment cost enhancements tariff clarifications				NA
Fall 2020 Release Market Simulation Phase 2	07/27/20	07/28/20	09/18/20	08/25/20
Market settlement timeline transformation				08/25/20 ( TD 8/25 under Settlements processing )
Excess behind the meter production				08/25/20 ( TD 8/25 under Settlements processing )

#### Market Simulation Plan:

http://www.caiso.com/Documents/MarketSimulationPlan-Fall2020Release.pdf



## Known Issues - ADS

#	System	Summary	Status	Estimated Fix Date
1	ADS	Continuous Alarm Change to repeat every x seconds (recommend 5 seconds)	Open	9/4
2	ADS	Trajectory grid shrinks (Grid Auto resize does not work properly)	Open	9/4
3	ADS	'Reset Audio Profile' does not refresh automatically, user needs to refresh or reopen the window	Open	9/4
4	ADS	Multiple criteria not saved, it only persist the last filter condition when user re-launch the client	Open	9/4
5	ADS	Advance filter does not persist all the applied filters in several cases	Open	9/4
7		'Validated' & 'Validated By' Columns are keep updating for batches other than 'Operating Instructions'	Open	9/4
8	ADS	AS TEST column on interval grid shows active for SCs without AS TEST instructions	Open	9/4
9	ADS	System must categorize the Resource type properly for Import/Export Resources(Transaction IDs)	Open	9/4
10	ADS	Column Picker should sort list of checkboxes alphabetically	Open	TBD



## Upcoming change for ADS

- Based on several feedback we planned to make some changes for 'FMM AS/EN' from Interval Grid and how it's filter the data when user click on 'Filter Resource' checkbox. Summary is given below:
  - Proposed change:
    - Renamed the 'FMM AS/EN' as 'FMM AS'
    - Checkbox must filter only the operating reserve (Non-zero SR, NR, RU & RD).
  - Notes
    - For FMM AS, keep processing and displaying all productType (SR, NR, RU, RD, FRU, FRD, LFU, LFD as applicable) for
      - Visual alert (pop-up/dialogue) FMM AS
      - Visual alert (Flashing) No change
      - Audio alert No Change
    - For FMM Energy, keep processing and displaying productType (EN)
      - Visual alert (pop-up/dialogue) FMM Energy
      - Visual alert (Flashing) No Flashing
      - Audio alert No Change
    - The audio alert for FMM energy will still be able to be configured for no alarm, 1 time, or continuous
    - Batch types will remain two separate (batchType = 11 for 'FMM Energy', batchType = 3 for 'FMM AS' ('RT AS') also known as 'AS Awards')
    - The message will show as own message in message history.
    - API remains same (FMM energy dispatches & intertie bid type available)



## Known Issues - DRRS

#	System	Summary	Status	Estimated Fix Date
1	DRRS	UI: Advanced filter input controls do not automatically close as the user is clicking from one control to another, causing the controls (date picker, text fields, dropdown lists, etc) to stack on top of each other.	Open	TBD
		User must click on the control to make it disappear.		
2	DRRS	<ul> <li>UI: The application disconnect/connect icon and its respective display text are not in-sync:</li> <li>When the application is disconnected caused by a timeout, the text displays as "Connected" where it should display as "Disconnected".</li> <li>When the application reconnects, the icon does not display as connected</li> </ul>	Open	TBD
		<ul> <li>While there is an issue with the visual feedback, the application functionality is not impacted.</li> </ul>		



## Energy storage and distributed energy resources phase 3

- Timeline: July 27 September 04
- Structured: August 19 Complete (Rerun on 9/2)
- Setup needed:
  - PDR-LSR Curtailment.
    - If market participant wants to see only energy award, then, submit very cheap energy bids
    - If market participant wants to see AS award, say Spin, submit very expensive energy bids and 0\$ Spin bid
  - PDR-LSR Consumption.
    - Avoid submitting large negative energy bid. Suggested bid around \$ -1

#### Structured Scenarios document -

http://www.caiso.com/Documents/ESDER3MarketSimulationScenariosFall2019.pdf

#### Training -

http://www.caiso.com/Documents/EnergyStorage\_DistributedEnergyResources\_Phase3B.pdf



#### Market settlement timeline transformation

- Timeline: July 27 September 18
- Structured: August 25
- Note:
  - MSTT cutover TD 8/24/20 (Corresponds to Production TD 1/1/21)
  - Phase 2 (MSTT, EBTMP) Structured Scenarios first Settling TD 8/25

Structured Scenarios document - <a href="http://www.caiso.com/Documents/MarketSimulationScenarios">http://www.caiso.com/Documents/MarketSimulationScenarios</a> <a href="mailto:sMarketSettlementTimeline.pdf">sMarketSettlementTimeline.pdf</a>

Training - <a href="http://www.caiso.com/Documents/Presentation-MarketSettlementsTimelineTransformationTraining.pdf">http://www.caiso.com/Documents/Presentation-MarketSettlementsTimelineTransformationTraining.pdf</a>



## Excess behind the meter production

- Timeline: July 27 September 18
- Structured: August 25
- Note:
  - MP needs to submit meter data by 8/28 for initial and 9/2 for Recalc statement
  - MSTT cutover TD 8/24/20 (Corresponds to Production TD 1/1/21)
  - Phase 2 (MSTT, EBTMP) Structured Scenarios first Settling TD 8/25

Structured Scenarios document - <a href="http://www.caiso.com/Documents/MarketSimulationScenariosexcessBehindtheMeterProduction.pdf">http://www.caiso.com/Documents/MarketSimulationScenariosexcessBehindtheMeterProduction.pdf</a>

Training - <a href="http://www.caiso.com/Documents/Presentation-Excess-Behind-Meter-Production-Training.pdf">http://www.caiso.com/Documents/Presentation-Excess-Behind-Meter-Production-Training.pdf</a>

## Automated Dispatch System (ADS) replacement

- Timeline: July 27 September 04
- Structured: August 11 (Completed)

Rerun on 8/18 per Market Participant Request - Complete

Structured Scenarios document -

http://www.caiso.com/Documents/MarketSimulationScenarios -ADSReplacement.pdf

### Training -

- http://www.caiso.com/Documents/AutomatedDispatchSyste mReplacementPart1.pdf
- http://www.caiso.com/Documents/AutomatedDispatchSyste mReplacementPart2.pdf



## FERC Order No. 841 requested adjustments

- Timeline: July 27 September 04
- Structured: August 12 (Settlement statement published)

Structured Scenarios document - <a href="http://www.caiso.com/Documents/FERC841RequestedAdjustm">http://www.caiso.com/Documents/FERC841RequestedAdjustm</a> entsMarketSimulationStructuredScenariosFall2020.pdf

Training - <a href="http://www.caiso.com/Documents/FERC841Training.pdf">http://www.caiso.com/Documents/FERC841Training.pdf</a>



## Commitment Costs and Default Energy Bid Enhancements

Timeline: July 27 – September 04

Training - <a href="http://www.caiso.com/Documents/Presentation-CommitmentCosts-DefaultEnergyBidEnhancements.pdf">http://www.caiso.com/Documents/Presentation-CommitmentCosts-DefaultEnergyBidEnhancements.pdf</a>



### Commitment cost enhancements tariff clarifications

• Timeline: July 27 – September 04



## Dispatch operating target tariff clarification

- Timeline: July 27 September 04
- Structured: August 12 (Completed)

Structured Scenarios document - <a href="http://www.caiso.com/Documents/MarketSimulationScenarios-">http://www.caiso.com/Documents/MarketSimulationScenarios-</a>
-DispatchOperatingTargetTariffClarification.pdf

Training - <a href="http://www.caiso.com/Documents/Presentation-Dispatch-Operating-Target-Clarification-Training-Jul16-2020.pdf">http://www.caiso.com/Documents/Presentation-Dispatch-Operating-Target-Clarification-Training-Jul16-2020.pdf</a>



## **Next Steps**

 The next teleconference is scheduled on Monday, August 31 at 1400 PDT



## Reference Slides



## Market Simulation Issue Management

- Submit all issues to the CIDI case management system
- CIDI tickets must have "Functional Environment" =
   "Market Simulation Fall 2020" to be reviewed by ISO
   SMEs



## **ISO Market Simulation Support**

- Hours: Monday thru Friday 0900-1800 PDT
- ISO's 24x7 Service Desk: (916) 351-2309 (Connectivity
   UI or API)
  - Issues called in after hours will be worked on during the next business day
- Email: MarketSim@caiso.com



#### Fall 2020 Release Communication Plan

#### Schedule

Monday	Tuesday	Thursday
July 27	September 8	July 23, 30
August 3, 10, 17, 24, 31		August 6,13, 20, 27
September 14		September 3, 10, 17

#### Connection Information

#### Web Conference Information

Web Address: <a href="https://caiso.webex.com/meet/MarketSim">https://caiso.webex.com/meet/MarketSim</a>

Meeting Number: 962 067 710

Audio connection instructions will be available after connecting to the web conference. When
prompted, select "Call me" and enter the phone number you will use during the call. You will be called
by the conference shortly.

#### Conference Call Information

Dial-in Number: 866-528-2256

International Dial-in: 216-706-7052

Access Code: 202 249 0



## Structured Scenario Registration Details

MP's will need to register their request with the ISO to participate in this simulation via the <a href="MarketSim@caiso.com">MarketSim@caiso.com</a> mailbox.

Date of registration July 3, 2020.

We will do our best to accommodate for late registration



## Fall 2020 Release MAP Stage Connectivity Testing

- Timeline Phase 1: July 27 August 10
- Timeline Phase 2: July 27 August 10



## Energy imbalance market enhancements 2020 - Independent 2020

- Timeline
  - Phase 1: August 31 October 14
  - Phase 2: September 21 October 14
- Structured: N/A market simulation will now be tested as unstructured with a CAISO issued guide for market participants

Structured Scenarios document - <a href="http://www.caiso.com/Documents/MarketSimulationScenarios">http://www.caiso.com/Documents/MarketSimulationScenarios</a> <a href="mailto:EnergyImbalanceMarket2020Enhancements.pdf">EnergyImbalanceMarket2020Enhancements.pdf</a>



## Energy imbalance market enhancements 2020

System	Phase 1: 8/31	Phase 2: 9/21			
ВААОР	<ul> <li>Allow EIM entity override activation for the contingencies up to 15 in NA contingency list</li> <li>Add visibility of other adjacent BAA's ETSR locks and reasons</li> <li>Add Static ETSR transfer data to RTD Dispatch Control Display (ETSR tab). Add Static ETSR transfer data to BAAOP ETSR Detail Display (in RTD)</li> <li>In RTD/RTPD Dispatch Control display, in Dispatch Instruction Review table, add columns for UP and DN remaining ramp capacity (5/15 minute respectively). In addition, include the sum of these columns at bottom of table. Example Calculation: RTD UP Ramp = MIN(5MinRampRate, [UpperLim-CurrentDispatch].</li> <li>Add Supplemental DOT to VER resources to Dispatch Control displays; Detail: In BAAOP RTD/RTPD Dispatch Control, add SUPP DOT column</li> <li>Fix the functionality for Manual Dispatches - users should be able to utilize MSG functions, such as designating a specific configuration, and users should be able to do commitment override</li> <li>EIM Entities have a notification status of market inputs, showing if BAAOP received the latest payload of critical market inputs. Example Critical data submissions: (not all inclusive)</li> </ul>	Fix/Improve SVG One Lines. Request to be able to view SE and telemetry values for all substation flows and elements			
BSAP	<ul> <li>Add Manual Dispatch information to BSAP Resource Bal Viewer. Add any applicable deviations that used in the test to BSAP BAA Bal Viewer.</li> <li>For the Bid Range Capacity Test Results report, Requirement Amount Column needs to publish the true requirement, not just the INCREMENTAL/DECREMENTAL requirement</li> </ul>	N/A			
RTM	<ul> <li>Publish the data of the MW infeasibility data and ABC Up and Down Dispatches of RTPD/RTD</li> <li>Publish the effective ETSR import and export limits for the market run for RTPD and RTD</li> <li>Support Pump Storage for EIM BAAs</li> </ul>	<ul> <li>Publish the effective load conforming for the market run for RTPD and RTD for Binding and Advisory</li> </ul>			
CMRI	<ul> <li>Display and publish, download the data of the MW infeasibility data and ABC Up and Down Dispatches of RTPD/RTD</li> <li>For the Bid Range Capacity Test Results report, Requirement Amount Column needs to display and publish, download the true requirement, not just the INCREMENTAL/DECREMENTAL requirement. Only upstream has changes with regards to the data that is sends to CMRI.</li> </ul>	<ul> <li>Display and publish, download the data of the effective load conforming for the market run for RTPD and RTD for</li> <li>1.CMRI Load Conforming Binding rpt</li> <li>2. CMRI Load Conforming Advisory rpt</li> </ul>			



## Trouble-shooting tips to access ADS

- Check your firewall settings.
- Clear the browser cache & cookies.
- Pop-up blockers on your browser may lead to issues accessing CAISO ADS.
- If you use a pop-up blocker, you must whitelist the CAISO domain (caiso.com)



## Energy storage and distributed energy resources phase 3 - CIRA changes



- PDR\_LSR Consumption resources are not eligible for Resource Adequacy
- CIRA will not allow a PDR-LSR Consumption resource to submit a request for NQC



#### Master File GRDT v14 Submissions

- Please submit GRDT v14 to MAP Stage Master File UI/API
- GRDT 14.0
- UI: <a href="https://portalmap.caiso.com/mf">https://portalmap.caiso.com/mf</a>
- API:
  - https://wsmap.caiso.com/sst/runtime.asvc
    - RetrieveGeneratorRDT\_MFRDv5
    - RetrieveGeneratorRDT\_MFRDv5\_DocAttach
    - SubmitGeneratorRDT\_MFRDv5
    - SubmitGeneratorRDT\_MFRDv5\_DocAttach

Change
Add enumeration to GRDT: DR_TYPE of PDR_LSR
New GRDT attribute: Apply Wholesale Charge
New GRDT attribute: Meter Data Interval
Remove from GRDT: MIN_DISP_LEVEL
New GRDT attribute: Run of River
New GRDT attribute: Slow DR

Settlements Calendar

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Settlements Calendar

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## Fall 2020 Release - System Interface Changes - CCDEBE1

SIBR					
Project	oject Change Type API Service Name & Major Version, Artifacts		MAP Stage	Production	Technical Specifications
CCDEBE1	Modify	RetrieveCleanBidSet_SIBRv5_AP	<b>√</b> 10/16/19	✓ Deploy 3/26/20	13.2
CCDEREI	Modify	RetrieveCleanBidSet_SIBRv5_DocAttach_AP	10/16/19	Activation 10/1/20	15.2
CCDEBE1	Modity	RetrieveCurrentBidResults_SIBRv5_AP	10/10/10	✓ Deploy 3/26/20	13.2
CCDEBET		RetrieveCurrentBidResults_SIBRv5_DocAttach_AP	10/16/19	Activation 10/1/20	13.2
CCDEBE1	Modity	SubmitRawBidSet_SIBRv5_AP	<b>√</b> 10/16/19	✓ Deploy 3/26/20	13.2
CCDEBET		SubmitRawBidSet_SIBRv5_DocAttach_AP	10/16/19	Activation 10/1/20	15.2

CMRI						
Project	Change Type	UI	API Service Name & Major Version, Artifacts	MAP Stage	Production	Technical Specifications
LMPME	Modify		RetrieveDefaultBidCurves_CMRIv2_AP RetrieveDefaultBidCurves_CMRIv2_DocAttach_AP	LMPME ✓ 9/12/19 CCDEBE1 ✓ 11/6/19	LMPME  ✓ 11/13/19  CCDEBE1  ✓ Deploy 3/26/20  Activation 10/1/20	3.9.4 Release Notes 1.2
CCDEBE1		Fyicting Report: Detaillt	RetrieveExternalDefaultCommitmentCost_CMRIv1_AP RetrieveExternalDefaultCommitmentCost_CMRIv1_DocAttach_AP	<b>✓</b> 11/11/19	✓ Deploy 3/26/20 Activation 10/1/20	3.9.4 Release Notes 1.2

https://developer.caiso.com

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Fall 2020 Release - System Interface Changes

ADS			9		
Project	Change Type	Summary	Technical Specifications	MAP Stage	Production
N/A	Decom	Decommission of deprecated versions	✓ 6/16/20, v8.1.0	7/27/20	10/1/20
ADS Replacement  DOTTC	New	APIWebService v8 APIResponseWebService v8	✓ 6/16/20, v8.1.0 ✓ 5/21/20, v8.0.0	7/27/20	10/1/20

DRRS	DRRS						
Project	Change Type	Summary	Technical Specifications	MAP Stage	Production		
	Modify	SubmitDRLocations_DRRSv2_AP					
		SubmitDRLocations_DRRSv2_DocAttach_AP					
		SubmitDRRegistrations_DRRSv2_AP					
ECDED3D		SubmitDRRegistrations_DRRSv2_DocAttach_AP		7/27/20	Damley 0/14/20		
ESDER3B		RetrieveDRLocations_DRRSv2_AP	√ 5/1/20, v3.2	7/27/20	Deploy 9/14/20		
		RetrieveDRLocations_DRRSv2_DocAttach_AP					
		RetrieveDRRegistrations_DRRSv2_AP					
		RetrieveDRRegistrations_DRRSv2_DocAttach_AP					

MRI-S	MRI-S				
Project	Change Type	Summary	Technical Specifications	MAP Stage	Production
ЕВТМР		For: - MRIS Meter: Submit Meter & - MRIS Meter: Retrieve Meter additionally include EBtMP measurement type values (as negative load) both Gross Load and EBtMP meter data would associate with same Load Resource ID	✓ 5/28/20, v2.5	7/27/20 Page 33	Activation 1/1/21



## Fall 2020 Release - System Interface Changes

Master File						
Project	Change	Change Type	Summary	Technical Specifications	MAP Stage	Production
ESDER3B	Add enumeration to GRDT: DR_TYPE of PDR_LSR		RetrieveGeneratorRDT_MFRDv5 RetrieveGeneratorRDT_MFRDv5_DocAtta ch  Modify SubmitGeneratorRDT_MFRDv5 SubmitGeneratorRDT_MFRDv5_DocAttac		7/27/20	10/1/20
FERC841 RA	New GRDT attribute: Apply Wholesale Charge	N 4 = d:£ .		✓ 6/12/20, v6.1		
EIM2020	New GRDT attribute: Meter Data Interval	Ινιοαιτγ		✓ 5/28/20, v6.0		
Other	Remove from GRDT: MIN_DISP_LEVEL					
CCE Tariff	New GRDT attribute: Run of River					
Slow DR	New GRDT attribute: Slow DR		11			

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## Fall 2020 Release - System Interface Changes

CMRI							
Project	Change Type	Summary	Technical Specifications	MAP Stage	Production		
N/A	Decom	Decommission of deprecated versions	✓ 5/29/20, v3.9.5	7/27/20	9/1/20		
EIM2020	IIXI (2 \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	RetrieveEIMInfeasibility_CMRIv1_AP RetrieveEIMInfeasibility_CMRIv1_DocAttach_AP	✓ 5/29/20, v3.9.5	7/27/20	10/1/20		
EIM2020	New	RetrieveLoadConfirming_CMRIv1_AP RetrieveLoadConfirming_CMRIv1_DocAttach_A P	✓ 5/29/20, v3.9.5	7/27/20	10/1/20		
EIM2020	New	Available Balance Capacity	7/2/20	7/27/20	10/1/20		

OASIS					
Project	Change Type	Summary	Technical Specifications	MAP Stage	Production
N/A	Decom	Decommission of deprecated versions	✓ 5/29/20, v5.1.13	7/27/20	9/1/20
EBTMP	New	<i>ENE_</i> EBTMP_PERF_DATA	✓ 6/22/20 ✓ 5/29/20, v5.1.13	7/27/20	Activation 1/1/21

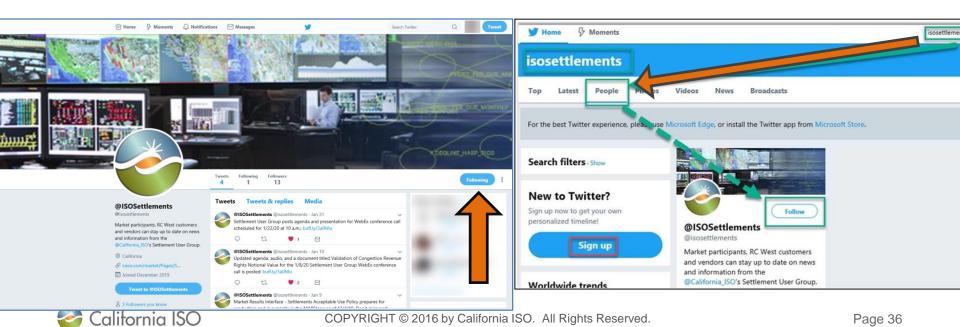
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## Introducing ISO Settlements Twitter Tool for Market Sim Updates

- Market sim updates will be made available
- Note: Will not replace any existing media communications
- Please take the opportunity to follow <u>@ISOSettlements on Twitter</u> by downloading the Twitter application to **any mobile device**
- Twitter feed can be accessed on any web browser
- No account required to view the Twitter feed and posts



## Updates that are tweeted

### **Tweets** Information

- Market Simulation MAP-STAGE Master File UI and API available for Fall 2020 Release connectivity
- http://www.caiso.com/Pages/documentsby group.aspx?GroupID=25991DEB-2F25-4976-8958-4F04745A59AA

**##** Submit updates to us: <a href="mailto:twitter.com/isosettlements.com">twitter.com/isosettlements.com</a>





#### **Recent Tweets**



Follow us on Twitter @ISO Settlements





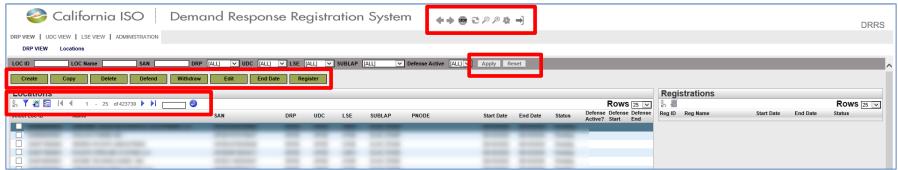
## Reminder: DRRS UI Upgrade features

- Image icons, control buttons, label fonts have a new different color scheme
- The "Apply" and "Reset" buttons appear on the far right side of the screen, as opposed to appearing after the last display input filter
- The data grid output export filename no longer contain the user certificate name
- The application window is not maximized by default, when launching the application
- The data grid columns are no longer adjustable
- Technical User Group Presentation 6/23



## Reminder: DRRS UI Upgrade features

#### Current Production/Pre-Fall 2020 Release



#### Fall 2020 Release currently in MAP-Stage:

