



# Market Simulation Call - Independent 2020 Release

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# Recordings

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# Agenda

- MAP Stage Availability
- Independent 2020 Releases Market Simulation Initiatives & Timelines
- Market Simulation Initiatives
- OMS Enhancements
- ADS Phase 3: Activation of New Features
- Next Steps

# MAP Stage Availability

- Refer to MAP Stage portal <https://portalmap.caiso.com> for system availability information
- Current MAP Stage Maintenance
  - None
- Upcoming MAP Stage Maintenance
  - OASIS UI/API closure until Monday 12/21
  - BAAOP UI brief interruption Today, Thursday, 12/17
  - CMRI UI/API closure Friday, 12/18 thru Monday 12/21
- MAP Stage Weekly Maintenance Window
  - Friday

# Independent 2020 Releases Market Simulation Initiatives & Timelines

| <b>Independent 2020 Release Initiatives</b>                  | <b>Start Date</b>   | <b>End Date</b> | <b>Structured Simulation Start (Trade Date)</b>                          |
|--------------------------------------------------------------|---------------------|-----------------|--------------------------------------------------------------------------|
| <b>Independent 2020 Release Market Simulation</b>            |                     |                 |                                                                          |
| Energy Imbalance Market (EIM) Enhancements 2020 - CMRI       | 12/15/20            | 12/29/20        | N/A                                                                      |
| Commitment Costs and Default Energy Bid Enhancements Phase 1 | 7/27/20<br>12/04/20 | 12/18/20        | N/A                                                                      |
| Intertie Deviation Settlement                                | 12/1/20             | 1/15/21         | 1 <sup>st</sup> attempt- 12/1 and 12/2<br>2 <sup>nd</sup> attempt- 01/05 |
| Symmetrical Wheeling                                         | 11/17/20            | 1/15/21         |                                                                          |

## Market Simulation Settlements Calendar:

<http://www.caiso.com/Documents/MarketSimulationSettlementsCalendar-IndependentWinter2020Release.pdf>

# Market Simulation Initiatives

- Intertie Deviation Settlement

- **Timeline:** December 1 - January 15
- **Structured** : 1<sup>st</sup> attempt: December 1 and December 2  
2<sup>nd</sup> attempt : 01/05 (7AM-9AM) and (3:30PM – EOD)
- Please use <https://demo.caiso.tag.oati.com/> to submit tags in MapStage environment
- Structured Scenarios document -  
<http://www.caiso.com/Documents/MarketSimulationScenariosIntertieDeviationSettlement.pdf>

- Symmetrical Wheeling

- **Timeline:** November 17 – January 15
- Business Requirements Specification -  
[http://www.caiso.com/Documents/BusinessRequirementsSpecification\\_SymmetricalSettlementForWheelingThroughEimBAAs.pdf](http://www.caiso.com/Documents/BusinessRequirementsSpecification_SymmetricalSettlementForWheelingThroughEimBAAs.pdf)
- Unstructured Scenarios document -  
<http://www.caiso.com/Documents/MarketSimulationScenariosSymmetricalSettlementForWheelingThroughEimBAAs.pdf>

# Market Simulation Initiatives

- **Commitment Costs and Default Energy Bid Enhancements**
  - **Timeline:** July 27 – December 18; December 4 - December 18 for new SIBR rules in market simulation
  - Training
    - <http://www.caiso.com/Documents/Presentation-CommitmentCosts-DefaultEnergyBidEnhancements.pdf>
  - SIBR business rules, release notes published 10/27
    - <http://www.caiso.com/Documents/SIBRBusinessRulesforBiddingv11042Post.xlsx>
    - <http://www.caiso.com/Documents/SIBRReleaseNotesRulesFall2020.pdf>
- **Energy Imbalance Market (EIM) Enhancements 2020**
  - **Timeline:** December 15 – December 29 (CMRI)
  - BAAOP & BSAP currently available in MAP-Stage
  - Unstructured Scenarios document
    - <http://www.caiso.com/Documents/MarketSimulationScenariosEnergyImbalanceMarket2020Enhancements.pdf>

# Known Issues

| # | System | Summary                                                                  | Status                                                           | Estimated Fix Date |
|---|--------|--------------------------------------------------------------------------|------------------------------------------------------------------|--------------------|
| 1 | ADS    | Fall Forward didn't refresh connection (CIDI 231456)                     | In progress                                                      | No Fix date yet    |
| 2 | ADS    | RT DOT breakdown is no longer showing ( CIDI 231483)                     | This feature was disabled intentionally due to security concerns | TBD                |
| 3 | OMS    | OMS Discovery Date error for In_Ok and Out_Ok requests                   | Defect                                                           | No Fix date Yet    |
| 4 | ITS    | Non-Reliability curtailments not getting published to ETS (tagging side) | Defect                                                           | Testing            |



# OMS Roadmap for 2020

| Release | Major Changes                                                                                                                                                                                            | Participant | MAPStage     | Production |
|---------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|--------------|------------|
| October | Remove defaulting discovery date<br>- For retro-active outages submit discovery date.<br>- Handle no discovery date if not previously submitted.                                                         | All         | ✓ 11/05/2020 | 1/11/2021  |
|         | Aggregate Resource Outage retrieve results changes<br>- Handle receiving only parent and impacted children.                                                                                              | All         |              |            |
|         | Transmission Retrieve Changes<br>- If moving to new version (= 10012020), consume new XSD and handle receipt of multiple change requests.                                                                | All         |              |            |
|         | Retrieve Resource/Transmission outage change request<br>- Limiting to 50<br>- Disable querying with participant ID & Date Range.<br>- Query by Outage ID, Change request ID and Equipment ID/Resource ID | All         |              |            |

# 2020 - System Interface Changes - OMS

| OMS     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                 |             |            |
|---------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|-------------|------------|
| Project | Service                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Summary                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Tech Spec       | MAP Stage   | Production |
| N/A     | RetrieveResourceOutageChangeRequest_OMSv2_AP & DocAttach<br>RetrieveResourceOutageChangeRequest_OMSv2_DocAttach_AP<br>RetrieveResourceOutageChangeRequest_OMSv3_AP<br>RetrieveResourceOutageChangeRequest_OMSv3_DocAttach_AP<br>RetrieveTransmissionOutageChangeRequest_OMSv2_AP<br>RetrieveTransmissionOutageChangeRequest_OMSv2_DocAttach_AP<br>RetrieveTransmissionOutageChangeRequest_OMSv3_AP<br>RetrieveTransmissionOutageChangeRequest_OMSv3_DocAttach_AP | <ul style="list-style-type: none"> <li>Performance Improvements:                             <ul style="list-style-type: none"> <li>Retrieve up to 50 outages by querying on outage ID)</li> <li>Retrieve based on Change Request ID</li> <li>Retrieve based on Equipment ID</li> <li>Removed capability of querying by participant ID</li> <li>Recommended use to sync data</li> </ul> </li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                            | ✓ 8/11/20, v2.1 | ✓ 11/5/2020 | 1/11/2021  |
| N/A     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <ul style="list-style-type: none"> <li>WebOMS system will not default the discovery date</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | ✓ 8/11/20, v2.1 | ✓ 11/5/2020 | 1/11/2021  |
| N/A     | SubmitResourceOutage_OMSv2_AP<br>SubmitResourceOutage_OMSv2_DocAttach_AP<br>SubmitResourceOutage_OMSv3_AP<br>SubmitResourceOutage_OMSv3_DocAttach_AP                                                                                                                                                                                                                                                                                                             | <ul style="list-style-type: none"> <li>Changes to aggregate resource outage submission for performance improvement                             <ul style="list-style-type: none"> <li>Submit de-rate for parent resource (required) and only the impacted child resources</li> <li>Retrieve results will not be include (for both v2 and v3 services) child resources that have no curtailment</li> <li>Parent resource availability points need not match with child resources' but will remain within the overall outage start and end date span</li> <li>Child resource outages can be added to existing outage if the outage has not commenced</li> <li>UI display and retrieve results for historical outages will be modified to support this model</li> <li>Changes are being done to enhance webOMS performance</li> </ul> </li> </ul> | ✓ 8/11/20, v2.1 | ✓ 11/5/2020 | 1/11/2021  |

<https://developer.caiso.com>

# ADS Phase 3: Activation of New Features

- ✓ 10/20: ADS Phase 1: Network
- ✓ 10/20: ADS Phase 2: New ADS UI, API v8 available
- ✓ 10/30: Close Stage, End Parallel Operations
  - MAP-Stage remains available with active features from now on
- **TBD: Activation of New Features**
  - Only available on New ADS UI, API v8
    - DOTT
    - AS Test
    - RTCD Commitment
- 2/1/21: ADS Phase 4: Decommission of Old ADS client, API v6

# ADS Phase 3: Activation of New Features

## ➤ **TBD: Activation of New Features**

- Only available on New ADS UI, API v8
- ISO Assisted Customer Cutover lines are closed now and we are inviting participants to submit CIDI tickets for any transition issues in order to allow us to assist in an efficient manner.
- Recommendation
  - Run ADS Client and new ADS UI in parallel for validation
  - Cutover to API v8 now, as it provides same functionality as v7

# Next Steps

- The next teleconference is scheduled on Monday, December 21<sup>st</sup> at 1400 PDT

# Reference Slides

# Independent 2020 Releases Structured Scenario Registration Details

MP's will need to register their request with the ISO to participate in this simulation via the [MarketSim@caiso.com](mailto:MarketSim@caiso.com) mailbox.

Date of registration October 9, 2020.

We will do our best to accommodate for late registration

# Independent 2020 Releases Communication Plan

- **Schedule**

| <b><i>Monday</i></b> | <b><i>Thursday</i></b> |
|----------------------|------------------------|
| Sep 28,              |                        |
| Oct 5,12,19, 26      | Oct 1,8,15, 22, 29     |
| Nov 2, 9, 16, 23, 30 | Nov 5, 12, 19          |
| Dec 7,14, 21         | Dec 3,10,17,24         |
| Jan 11               | Jan 7, 14              |

- **Connection Information**

- **Web Conference Information**

- Web Address: <https://caiso.webex.com/meet/MarketSim>
    - 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



# Market Simulation Issue Management

- Submit all issues to the CIDI case management system
- CIDI tickets must have “**Functional Environment**” = “**Market Simulation Independent 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](mailto:MarketSim@caiso.com)