Market Simulation Call - Independent 2020 Release

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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 & 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 11/30-12/2 (Tentative)

- MAP Stage Weekly Maintenance Window
    – Friday

Independent 2020 Releases Market Simulation Initiatives & Timelines

Independent 2020 Release Initiatives	Start Date	End Date	Structured Simulation Start (Trade Date)
Independent 2020 Release Market Simulation			
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 12/03/20	12/18/20	N/A
Intertie Deviation Settlement	12/1/20	12/18/20	12/1/20
Symmetrical Wheeling	11/17/20	12/18/20	

Market Simulation Settlements Calendar:
http://www.caiso.com/Documents/MarketSimulationSettlementsCalendar-IndependentWinter2020Release.pdf

Market Simulation Initiatives

- ## Intertie Deviation Settlement
  - **Timeline:** December 1 - December 18
  - **Structured** : December 1 (8AM - 9AM and 3:30PM onwards)
  - 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 – December 18
  - Business Requirements Specification - http://www.caiso.com/Documents/BusinessRequirementsSpecification_SymmetricalSettlementForWheelingThroughEimBAAs.pdf

  - Unstructured Scenarios document - http://www.caiso.com/Documents/MarketSimulationScenariosSymmetricalSettlementForWheelingThroughEimBAAs.pdf

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Market Simulation Initiatives

- ## Commitment Costs and Default Energy Bid Enhancements
  - **Timeline:** July 27 – December 18; December 3 - 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

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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 and will be available after the new patch	12/1 in Production
3	OMS	OMS Discovery Date error for In_Ok and Out_Ok requests	Defect	No Fix date Yet

OMS Roadmap for 2020

Release	Major Changes	Participant	MAPStage	Production
October	Remove defaulting discovery date - For retro-active outages submit discovery date. - Handle no discovery date if not previously submitted.	All	✓ 11/05/2020	1/11/2021
	Aggregate Resource Outage retrieve results changes - Handle receiving only parent and impacted children.	All		
	Transmission Retrieve Changes - If moving to new version (= 10012020), consume new XSD and handle receipt of multiple change requests.	All		
	Retrieve Resource/Transmission outage change request - Limiting to 50 - Disable querying with participant ID & Date Range. - 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
	RetrieveResourceOutageChangeRequest_OMSv2_DocAttach_AP
	RetrieveResourceOutageChangeRequest_OMSv3_AP
	RetrieveResourceOutageChangeRequest_OMSv3_DocAttach_AP
	
	RetrieveTransmissionOutageChangeRequest_OMSv2_AP
	RetrieveTransmissionOutageChangeRequest_OMSv2_DocAttach_AP
	RetrieveTransmissionOutageChangeRequest_OMSv3_AP
	RetrieveTransmissionOutageChangeRequest_OMSv3_DocAttach_AP
		• Performance Improvements:
		  • Retrieve up to 50 outages by querying on outage ID)
		  • Retrieve based on Change Request ID
		  • Retrieve based on Equipment ID
		  • Removed capability of querying by participant ID
		  • Recommended use to sync data
			✓ 8/11/20, v2.1	✓ 11/5/2020	1/11/2021

N/A		• WebOMS system will not default the discovery date	✓ 8/11/20, v2.1	✓ 11/5/2020	1/11/2021

N/A	SubmitResourceOutage_OMSv2_AP
	SubmitResourceOutage_OMSv2_DocAttach_AP
	SubmitResourceOutage_OMSv3_AP
	SubmitResourceOutage_OMSv3_DocAttach_AP
		• Changes to aggregate resource outage submission for performance improvement
		  • Submit de-rate for parent resource (required) and only the impacted child resources
		  • Retrieve results will not be include (for both v2 and v3 services) child resources that have no curtailment
		  • Parent resource availability points need not match with child resources' but will remain within the overall outage start and end date span
		  • Child resource outages can be added to existing outage if the outage has not commenced
		  • UI display and retrieve results for historical outages will be modified to support this model
		  • Changes are being done to enhance webOMS performance
			✓ 8/11/20, v2.1	✓ 11/5/2020	1/11/2021

https://developer.caiso.com

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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
- ➢ **12/16: Activation of New Features**
  - ▪ Only available on New ADS UI, API v8
    - • DOTT
    - • Unannounced AS Test
    - • RTCD Commitment
    - • Follow DOT Flag
    - • Operating Instructions
- • 2/1/21: ADS Phase 4: Decommission of Old ADS client, API v6

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ADS Phase 3: Activation of New Features

➢ **12/16: Activation of New Features**
  – Only available on New ADS UI, API v8
  – ISO invites customers to leverage ISO Assisted Customer Cutover lines
    • To transition to new ADS UI, API v8
    • To report transition plans, progress, issues
    • By phone: call 1-866-528-2256, access code: 1465216
    • Dates: 11/4, 11/11, 11/18, skip 11/26 due to holiday, 12/2, 12/9 and 12/16
    • Time: 1300-1400 PT
  – Recommendation
    • Run ADS Client and new ADS UI in parallel for validation
    • Cutover to API v8 now, as it provides same functionality as v7

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Next Steps

- The next teleconference is scheduled on Thursday, December 3rd at 1400 PDT

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Reference Slides

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Independent 2020 Releases Communication Plan

- ## Schedule

Monday	Thursday
Sep 28, Oct 5,12,19, 26 Nov 2, 9, 16, 23, 30 Dec 7,14	Oct 1,8,15, 22, 29 Nov 5, 12, 19 Dec 3,10,17

- ## 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

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 mailbox.

Date of registration October 9, 2020.

We will do our best to accommodate for late registration

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

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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