Resource Interconnection Management System (RIMS) Enhancements Training

January 12, 2022

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Customer Readiness

Updated: 1/6/2022
Housekeeping

- Keep yourself muted to minimize background noise
- Unmute to ask verbal questions or write questions in the chat pod
- Raise your hand using WebEx interactivity tools
Objective: RIMS Enhancements

- Changes being made to RIMS are to align the documentation due dates with the Full Network Model build cycle.

- Goal is to ensure that firm deadlines are understood and met in order to facilitate a smooth implementation process.

- Changes will be implemented the week of January 24, 2022.
  - Go-live date will be provided via notice posted to caiso.com and Customer Service Notice email to RIMS users.
Agenda

• This training will cover the following topics:
  – What we do today
  – What is changing
  – Questions
  – Wrap up
# Acronyms

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Term</th>
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<tbody>
<tr>
<td>DB</td>
<td>Database</td>
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<tr>
<td>FNM</td>
<td>Full Network Model</td>
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<tr>
<td>NRI</td>
<td>New Resource Implementation</td>
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<tr>
<td>PDF</td>
<td>Project Details Form</td>
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<tr>
<td>RIMS</td>
<td>Resource Interconnection Management System</td>
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WHAT WE DO TODAY
Getting started

1. Determine how to start a project at the ISO. Using the resource list below, determine how you will submit your project request to the ISO.

**Resource project types to be created through NRI:**
- Distributed Energy Resource (DERP)
- SCME EIM onboarding
- SCME EIM Updates
- Existing resources converting from ISOME to SCME

**Use:**
- New Resource Implementation Quick Start Guide
- Project Details Form

**All other project types to be created through RIMS:**
- RIMS Quick Start Guide
- RIMS Project Details Form
- Create RIMS Project

Focus of today’s session
Creating projects in RIMS: Today’s process

• Customer completes Project Details Form (PDF)
• Customer uploads PDF to RIMS
• RIMS creates a project using the following criteria:
  – RIMS validates project creation based on $\geq 84$ days from implementation date
  – Documentation buckets 1 & 2 due no less than 84 days from implementation
WHAT IS CHANGING
**NRI Bucket System and FNM Release Schedule**

- The ISO “bucket” system is derived from the Full Network Model database release schedule based on a generation project’s estimated implementation date.
- These due dates specify the **acceptance** deadline in order to be considered for the desired FNM model build.

**RIMS changes align Bucket 1 & 2 due dates to FNM build cycle**
# How does project creation align with FNM build schedule?

<table>
<thead>
<tr>
<th>FNM Label</th>
<th>Customer Model Document Submission Deadline</th>
<th>ISO Publishes Final Scope</th>
<th>Production Deployment</th>
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</thead>
<tbody>
<tr>
<td>22M1_DB110</td>
<td>10/14/2021</td>
<td>11/4/2021</td>
<td>Week of 1/10/2022</td>
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<td>1/5/2022</td>
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<tr>
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<td>2/23/2022</td>
<td>Week of 4/25/2022</td>
</tr>
<tr>
<td>22M6_DB113</td>
<td>3/17/2022</td>
<td>4/7/2022</td>
<td>Week of 6/13/2022</td>
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<tr>
<td>22M7_DB114</td>
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<td>5/26/2022</td>
<td>Week of 7/25/2022</td>
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<tr>
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<td>7/7/2022</td>
<td>Week of 8/29/2022</td>
</tr>
<tr>
<td>22M10_DB116</td>
<td>7/21/2022</td>
<td>8/11/2022</td>
<td>Week of 10/3/2022</td>
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<tr>
<td>22M11_DB117</td>
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* (Accurate as of June 21, 2021. Refer to FNM schedule on caiso.com for latest dates)
How do these date changes affect you, the RIMS customer?

- Updated version of PDF (version 12a) must be used going forward
- If you upload PDFs to RIMS using the old timelines, your projects may not be created
- Instead, you’ll receive an email indicating that there was an error with the submission
- You will need to select a new implementation date and re-upload the PDF
Creating projects in RIMS: New process

- Complete PDF (only new version 12a will be accepted)
- Upload to RIMS
- Project is created based on new criteria that checks:
  - Scope cut-off date (Customer Model Document Submission Deadline field), and
  - Implementation date is at least 15 calendar days past FNM build’s production deployment effective date
RIMS Project View: DB Model Info

- **Projected Model** is determined when project is created
- **Assigned Model** is determined when required documentation is accepted
EXAMPLES
Scenario 1 – Successful Creation

- Project is created
- Customer receives email with project code
Scenario 2 – Unsuccessful

- Customer receives email with error message
- Must select new implementation date and re-upload PDF

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3/1/2022 4/1/2022 5/1/2022 6/1/2022 7/1/2022 8/1/2022 9/1/2022

4/1 - 7/27 Project NOT created – scope open but imp date less than 15 days after prod eff date

PDF submitted with imp date of 7/27
Scenario 3 – Unsuccessful

- Customer receives email with error message
- Must select new implementation date and re-upload PDF
Key Points

• RIMS will be updated to align the documentation due dates with the Full Network Model build cycle

• When selecting project implementation date, ensure the following:
  1) FNM DB scope window is still open for targeted model build, and
  2) Implementation date is at least 15 days past the model build’s production deployment effective date

• The following items will be updated:
  – NRI Guide
  – RIMS Project Details Form
  – RIMS Quick Start Guide
Questions
Thank you for your participation!

For more detailed information on anything presented, please visit our website at:

www.caiso.com

Or send an email to:
CustomerReadiness@caiso.com
REFERENCE MATERIAL
Reference Material

- 2022 Full Network Model build schedule:

- Network and Resource Modeling webpage:

- New Resource Implementation process and requirements webpage:
    - (contains the NRI Guide, RIMS Project Details Form, and RIMS Quick Start Guide)