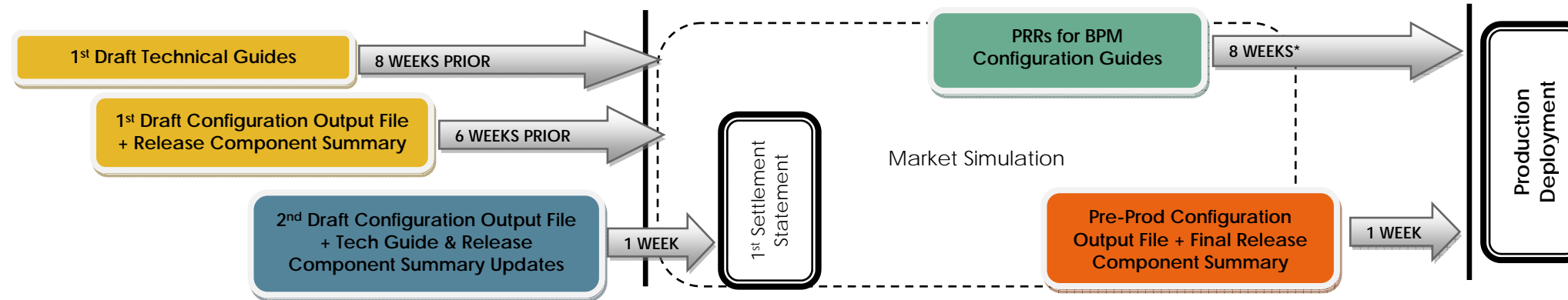


## Settlement Artifact Delivery Milestones & Market Simulation by Release Path

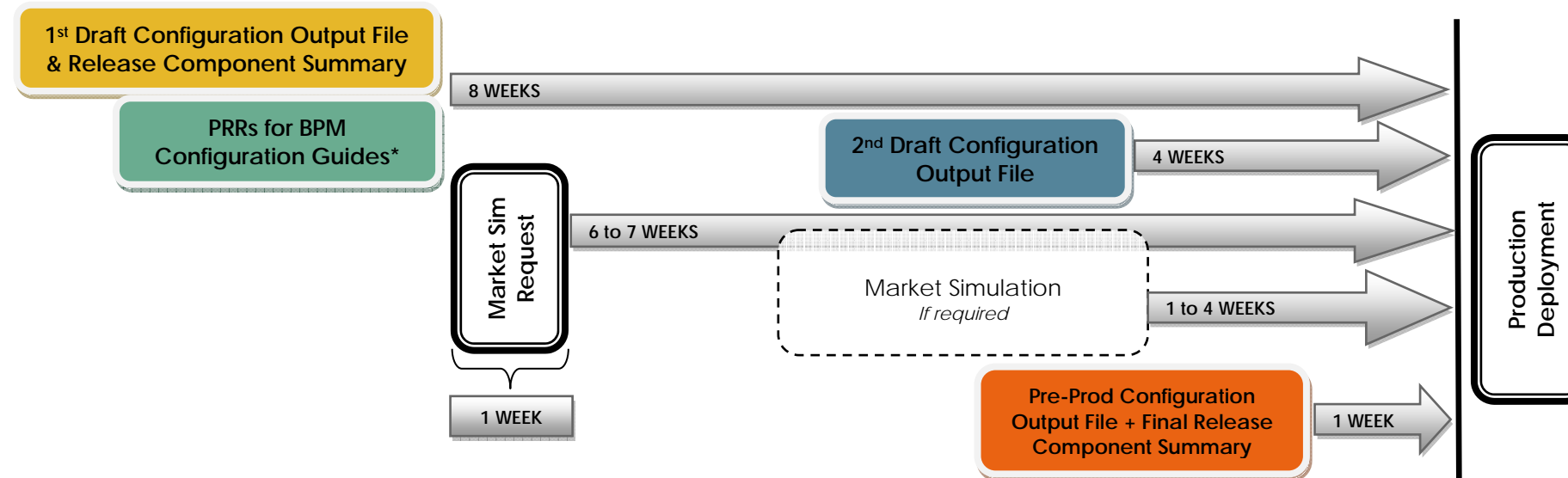
Settlement releases can follow three distinct release paths: a **project path**, a **production path**, and an **emergency path**. Project and production path releases have different artifact delivery milestones, but both types generally target an end-of-quarter production deployment.

**Project path:** For releases which address corporate-wide project initiatives, as well as enhancements and/or defects, the settlement artifact delivery and market simulation activities adhere to published corporate schedules and follow the milestone timelines as indicated below.



- 1<sup>st</sup> draft technical guides are provided 8 weeks prior to market simulation connectivity & a test dated 1<sup>st</sup> draft config output file is provided 6 weeks prior to connectivity.
- A 2<sup>nd</sup> draft configuration output file is provided 1 week prior to the 1<sup>st</sup> statement published during market simulation.
- Configuration output file revisions are provided as needed throughout market simulation.
- The PRRs detailing the BPM impacts are provided no later than 8 weeks before production deployment\*.
- A final summary of release components and the final pre-prod version is provided 1 week before production deployment.

**Production path:** For releases which address **only** enhancements and/or defects, artifact delivery and market simulation (if requested) occurs as indicated below. If production defects are included in a project path release, artifact delivery timelines may be accelerated, but no later than milestones outlined below.



- A 1<sup>st</sup> draft configuration output file, summary of release components and the PRRs detailing the BPM impacts are provided 8 weeks before production deployment.
- For the 1 week period which follows that communication, stakeholders can request a market simulation through [MarketSim@caiso.com](mailto:MarketSim@caiso.com).
- During that time, the ISO and stakeholders will collaboratively assess the need for a simulation and if required, define simulation scope and timing.
- If simulation is warranted, it will occur 1 to 4 weeks before production deployment.
- A 2<sup>nd</sup> draft configuration output file is provided at 4 weeks prior to production deployment; the pre-prod version is provided 1 week before deployment.

**Emergency path:** For un-planned releases, settlement artifact delivery occurs as soon as possible. Market simulation is not available as an implementation option and any required BPM content changes will complete the 8 week BPM Change Management cycle as 'emergency' PRRs\*.

\*If the BPM Change Management cycle cannot complete its full 8 week duration before the associated BPM content change becomes effective (which occurs at production deployment), then the associated PRR is categorized as an 'emergency'. An 'emergency' PRR for a BPM Configuration Guide does not mean the release is on the emergency path. An 'emergency' PRR can occur as part of **any** settlement release path: project, production or emergency.  
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