



California ISO

# Customer Partnership Group ADS Deployment/Cutover plan July 09, 2020

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# Agenda

- Preparation to access New ADS.
  - Certificate, ACLs & Provisioning
- Accessing New ADS.
  - One (1) Active session
- API Changes
- Updated ADS API V8 Artifacts
- New ADS (Events and Timelines).
  - Market Simulation
  - Parallel Operation
  - Production deployment
- Hard cutover
  - ADS Delphi Client ( Current ADS)
  - ADS API V6

# Preparation to access new ADS

- Make sure your existing ADS certificate is
  - Installed in a supported browser (Chrome or Edge with Chromium base),
  - Valid and if expiring soon, please plan to renew.
- Current ADS ACL groups will not be supported in the new tool. ADS users with ACL groups currently must make sure to:
  - Create ACL groups in AIM for each environment separately (Market SIM, Parallel Operation & Production).
  - Provision your users to ACL groups in AIM.
- All other ADS user's provisioning at the SCID level will work as is.
- Work with your UAA to ensure you have appropriate access for all environments.

# Accessing New ADS

- Only one (1) active session is allowed per user/certificate/environment combination.
- New ADS will be accessible from ISO Market Participant Portal (MPP) and from the splash page.
- The URL is different for each environment and access is required separately by environment.
- MPP URLs:
  - Production: <https://mpp.caiso.com/>
  - MapStage: <https://mppmap.caiso.com/>
  - Stage: <https://mppstage.caiso.com/>
- Splash page URLs:
  - Production: <https://portal.caiso.com>
  - Mapstage: <https://portalmap.caiso.com>
  - Stage: <https://portalstage.caiso.com>

# Market Simulation Events and Timelines

- Timeline: 07/27/2020 thru 9/04/2020 (Tentative), follow the RUG for latest information
- Mapstage environment will be available for market simulation, so please review all the market simulation scenarios and prepare your test and data for the following projects' scope:
  - Dispatch Operating Target Tariff Clarification (DOTT):  
<http://www.caiso.com/Documents/MarketSimulationScenarios-DispatchOperatingTargetTariffClarification.pdf>
  - ADS Replacement:  
<http://www.caiso.com/Documents/MarketSimulationScenarios-ADSReplacement.pdf>
  - Intertie Deviation Settlement (IDS):  
<http://www.caiso.com/Documents/MarketSimulationScenariosIntertieDeviationSettlement.pdf>
- Exit Criteria: please see the link below as applicable.  
<http://www.caiso.com/Documents/AnnualFunctionalReleaseLifecycle.pdf#search=quality%20review%20board>

# ADS API Changes

- Upon deployment of new ADS on each environment:
  - ADS API V6 will be retired.
  - ADS API V8 will be introduced.
- All new functionality will be available via ADS API V8 only.
- We will also support ADS API V7 for backward compatibility.
- During this time you will be able to retrieve data via ADS API versions - ADS API V7 & ADS API V8
- For V8 API artifacts please visit our developer site <https://developer.caiso.com/>

# ADS API V8 Artifacts Update

- We updated the ads.caiso.com.xsd for ADS API V8 to include
  - Element resourceBidOption
- We noticed our initial version of ADSAPIWebService\_v8.wsdl & APIResponseWebService\_v8.wsdl were pointing to V7 so updated both to point to correct version (V8).
- So, please make sure you get latest artifacts for V8 API from our developer side <https://developer.caiso.com/>

# Parallel Operation Events and Timelines

- Timeline: 09/01/2020 thru 09/30/2020(Tentative, Follow the RUG for latest information)
- Stage environment will be available for parallel operations.
- Data will be streamed from production environment.
- Customers can verify their dispatch instructions.
- Use ADS UI and API (V7 & V8).
- ADS API V6 will be retired.
  - Entrance Criteria – Successful completion of market simulations.
  - Exit Criteria – No unresolved issues that are critical for go live( usually severity 3 or higher defect)

# Production Events and Timelines

- Timeline: October 1, 2020
  - Entrance Criteria – Successful parallel operations.
- During deployment,
  - Current ADS Delphi tool users may see some reconnection issues.
  - API user may see some request errors.
  - Above issues may occur for approximately 5 minutes.
- Deployment window will be communicated in advance.

# Hard Cutover activity for Delphi Client

- Along with New ADS, Delphi Client will also work as-is without requiring any changes until the Hard Cutover of Delphi client.
- After the hard cutover, Delphi client will stop working and only new ADS will work.
- Cutover dates\* for Delphi client are given below:

Environment	Hard Cutover date
Market SIM (Mapstage)	11/4/2020
Parallel Operation (Stage)	11/4/2020
Production	2/1/2021

\* Follow the RUG for latest information.

# Hard Cutover activity for ADS API V6

- Upon deployment of new ADS in each environment, ADS API V6 will be retired/deprecated.
- Cutover dates\* for retiring ADS API V6 are given below:

Environment	Hard Cutover date
Market SIM (Mapstage)	7/27/2020
Parallel Operation (Stage)	9/01/2020
Production	10/1/2020

\* Follow the RUG for latest information.

# Query Tool Data Retention

- The external BRS for the ADS replacement project lists a 30 day data-retention period for the ADS query tool.
- The ISO received feedback at the April ADS CPG, as well as offline feedback that participants would need the data retention to go beyond 30 days, and up to 92 days, based on participants' business practices.
- The ISO is currently evaluating options to extend the data retention of the ADS query tool to cover these business practices.

## Stage Application Preview

- The Stage environment Application Preview has been realigned:
  - Will start after successful completion of market simulation in Mapstage
  - Will include all features including enhancements with DOTT and IDS project scope

## Questions?

- For follow-up questions or to suggest future topics please contact your client representative or submit via CIDI ticket.
- Please attend our other forums like RUG, TUG & associated trainings.