



California ISO

Scheduling Infrastructure Business Rules (SIBR) User Interface (UI) Update

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Objective

- By the end of this session, you will be able to:
 - Identify screen changes
 - Access data using in-line filters
 - Use right click functionality to access and copy data
 - Define new alert icons
 - Identify bid creation, viewing and copying bids

Spring 2018 – SIBR UI Upgrade

Project Info	Details/Date
Application Software Changes	<p>SIBR – The CASIO will be upgrading the underlying SDK platform utilized for displaying the Scheduling Infrastructure Business Rules (SIBR) user interface (UI). This latest SDK version will strengthen the security of the SIBR application and will improve compatibility with the latest version of Internet Explorer.</p> <p>It is anticipated no functional changes or API will be impacted by this upgrade.</p>

Milestone Type	Milestone Name	Dates	Status
Board Approval	Board Approval	N/A	
BPMs	Publish Final Business Practice Manuals	N/A	
External BRS	Post Draft BRS	N/A	
Config Guides	Configuration Guide	N/A	
Tech Spec	Publish Tech Specs	N/A	
User Guide	SIBR User Guide “Draft”	Dec 14, 2017	✓
Training	Conduct External Training	Feb 21, 2018	✓
Market Sim	Market Sim Window	Feb 27, 2018 – Apr 27, 2018	
Production Activation	SIBR WebSDK Upgrade	May 01, 2018	

Refer to the updated SIBR Users Guide



The **SIBR – Scheduling Coordinator Users Guide** explains each step along the way

California ISO
SIBR - Scheduling Coordinator Users Guide
DRAFT
February 2, 2018

Revision History

Date	Version	By	Description
2/2/2018	6.3	WT	Update with WebSDK 3.4 UI layout and functions for SIBR application.
1/18/2018	6.2	WT	Update with WebSDK 3.4 UI layout and functions for SIBR bidding. DRAFT in progress up to section 5 Convergence Bids.

Version: 6.3
Release Date: 2/2/2018

<http://www.caiso.com/informed/Pages/ReleasePlanning/Default.aspx>

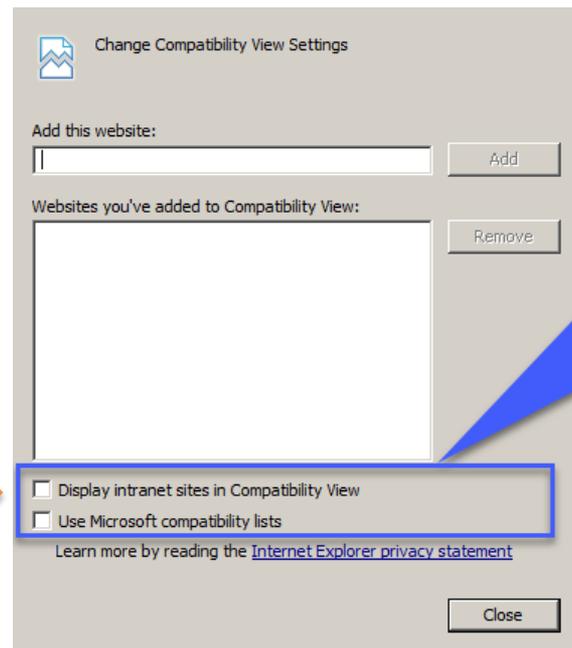
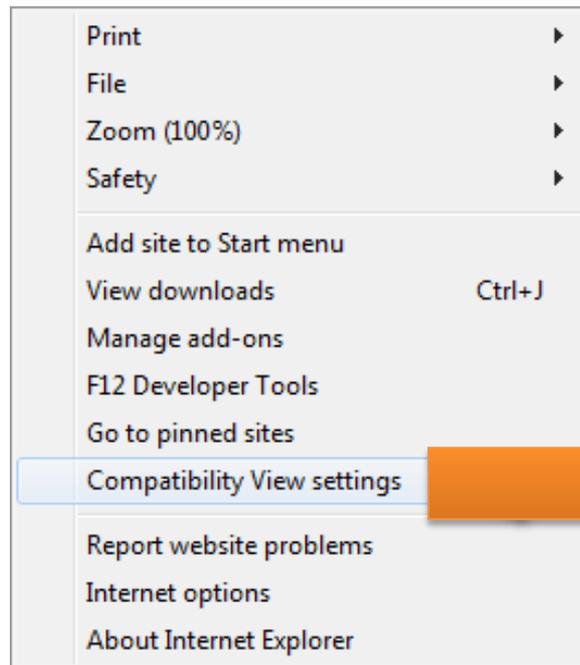


Confirm your IE11 compatibility settings

Important note: Only IE11 will be supported

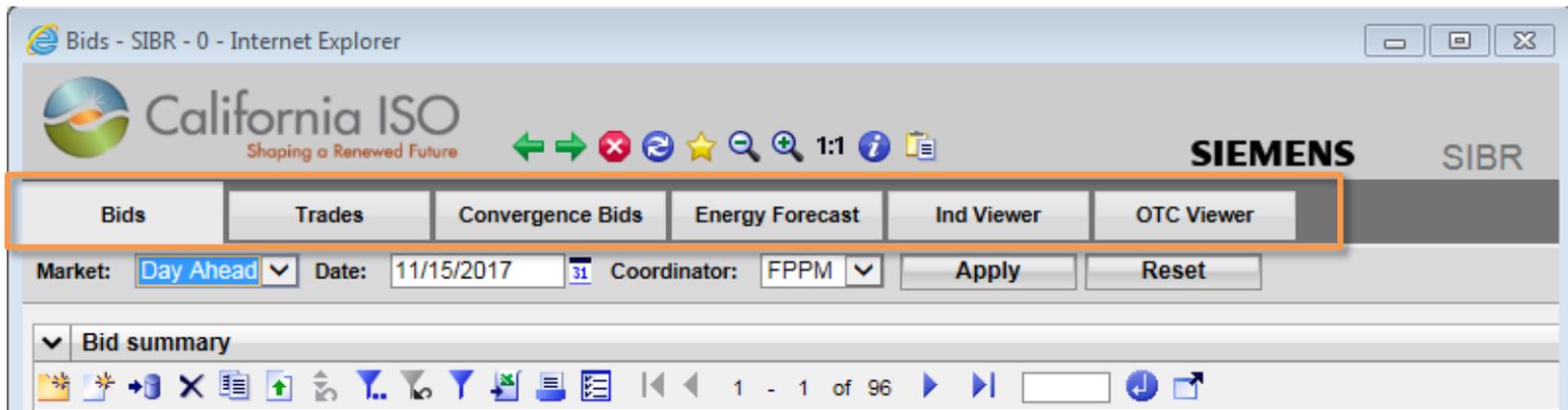
Select Compatibility View Settings from the menu:

Make sure the following boxes are NOT checked:



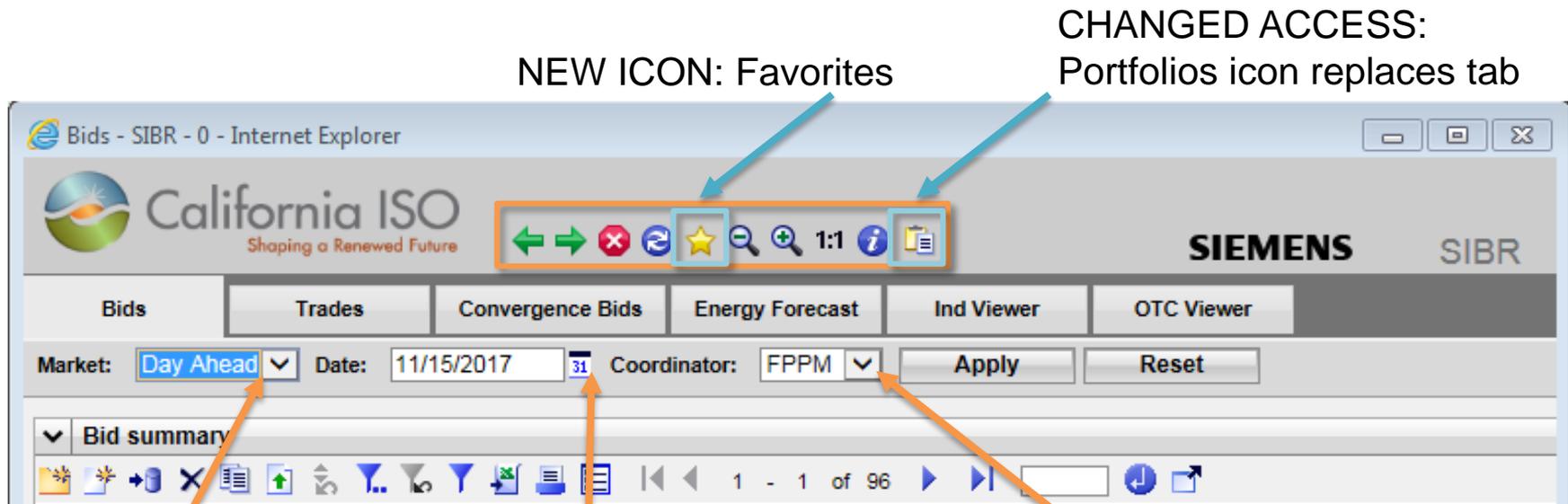
Be sure that these boxes are not checked

Application specific menu tabs



- BIDS: Submit, remove and view status of bids
- TRADES: Create and manage trades for Day-ahead (DA) and Real-time (RT) markets
- CONVERGENCE BIDS: Create, submit, and manage convergence bids (also known as Virtual Bids) for the day-ahead market
- ENERGY FORECAST: Submit energy forecasts for Variable Energy Resources (VER) and Load Serving Generators (LSG)
- IND VIEWER: Check imbalances on select resources in DA or RT markets for balancing (ETC/TOR/WHL and/or priority (ETC/TOR)
- OTC VIEWER: View a given date, by interchange, the Import and Export Limits received in SIBR and if there is an 'Isolated Tie Condition'

Application specific menu



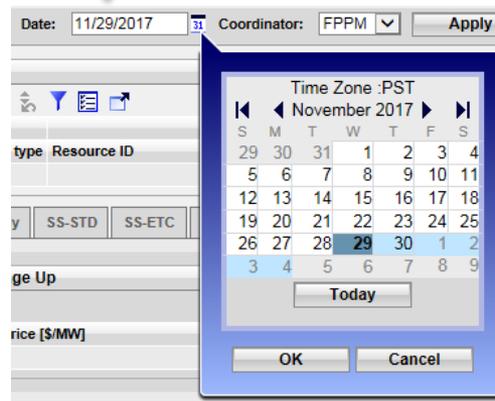
NEW ICON: Favorites

CHANGED ACCESS:
Portfolios icon replaces tab

Day Ahead
Real Time

Select Market
drop down for
market type

Select Calendar
to change date



- EDF7
- EDMS
- EEMU
- EMM1
- ETRA
- FPPM**
- GALT
- LDES
- MLGS
- MRNT
- NAGP
- NECB
- NVPM

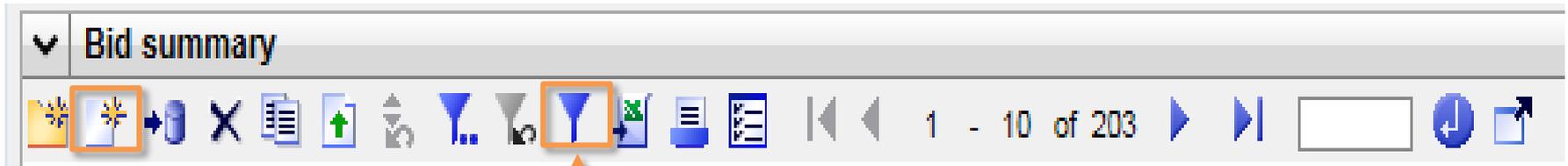
Available SC
based on
certificate
logged in

Application Content Area – 3 basic components

The screenshot shows the California ISO SIBR application interface. The top navigation bar includes tabs for Bids, Trades, Convergence Bids, Energy Forecast, Ind Viewer, and OTC Viewer. The main content area is divided into three sections:

- Filter pane:** Located at the top of the main content area, it contains a 'Bid summary' section with a search bar and navigation controls. An orange arrow points to this section with the label 'Filter pane'.
- Data grid with details:** A large table displaying bid data. The table has columns for Status, Hour, Resource type, Resource ID, and various bid parameters (Daily, Hourly, Energy, STD, ETC, ETP, TOR, TOP, RMT, BAS, LOF, LPT, LSG, Gen, Load, RU, RD, SR, NR, LFD, LFU, Down, Up, Submitted, Market status). Below the table are two summary tables: 'Regulation Mileage Up' and 'Regulation Mileage Down', each with columns for Hour and Price [\$/MW]. An orange arrow points to the table with the label 'Data grid with details'.
- Message bar:** A black bar at the bottom of the application showing 'CONNECTED' status, 'SSIBR | Read/Write' permissions, and the date '11/27/2017 14:06 PST'. An orange arrow points to this bar with the label 'Message bar'.

Application Content Area – In-line filters (continued)

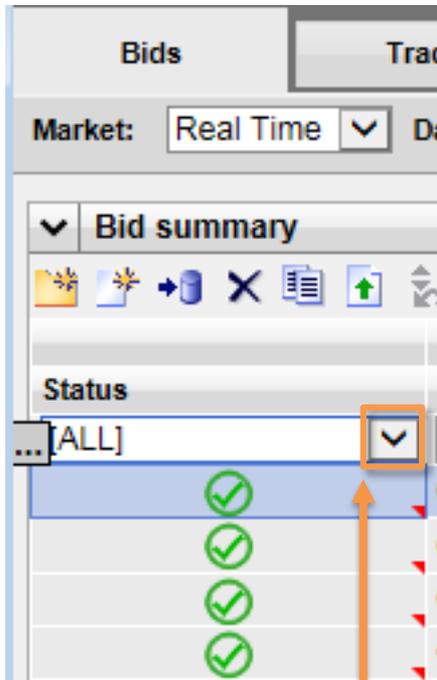


A screenshot of the application content area showing a table of bid data. The filter icon in the toolbar is highlighted with an orange box. A callout box with a white background and black text is overlaid on the table, pointing to the filter icon. The table has columns for Status, Hour, Resource type, Resource ID, Daily, Hourly, Energy, STD, Down, Up, Submitted, and Market status. The first row is highlighted in blue.

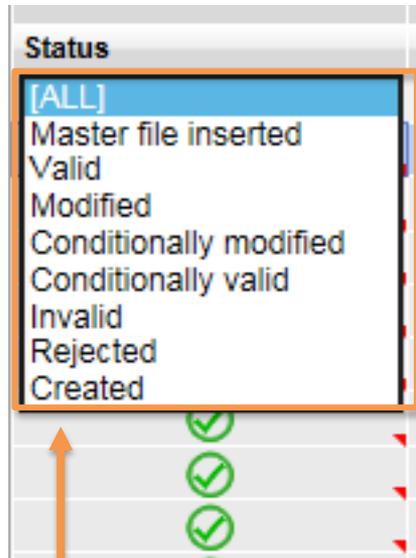
NEW: Click on the orange filter icon to turn off applied in-line filter

Status	Hour	Resource type	Resource ID	Daily	Hourly	Energy	STD	Down	Up	Submitted	Market status
[ALL]	[ALL]	[ALL]	[ALL]	[ALL]	[ALL]	[ALL]	[ALL]	[ALL]	[ALL]	[ALL]	[ALL]
✓	01h	Generator		✓	✓	✓	✓			11/26/2017 19:29	🔒 Closed
✓	01h	Inter-Tie		11	✓	✓	✓			11/26/2017 19:59	🔒 Closed
✓	01h	IT Transaction		N/A	✓		✓	N/A	N/A	11/26/2017 20:01	🔒 Closed
✓	01h	IT Transaction		N/A	✓		✓	N/A	N/A	11/26/2017 22:45	🔒 Closed
✓	01h						✓	N/A	N/A	11/26/2017 20:01	🔒 Closed
✓	01h						✓	N/A	N/A	11/26/2017 20:01	🔒 Closed
✓	02h						✓			11/26/2017 19:29	🔒 Closed
✓	02h						✓			11/26/2017 19:59	🔒 Closed
✓	02h	IT Transaction		N/A	✓		✓	N/A	N/A	11/26/2017 20:01	🔒 Closed
✓	02h	IT Transaction		N/A	✓		✓	N/A	N/A	11/26/2017 23:45	🔒 Closed

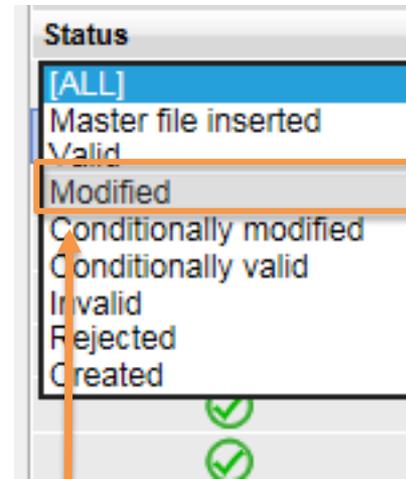
In-line drop down option examples



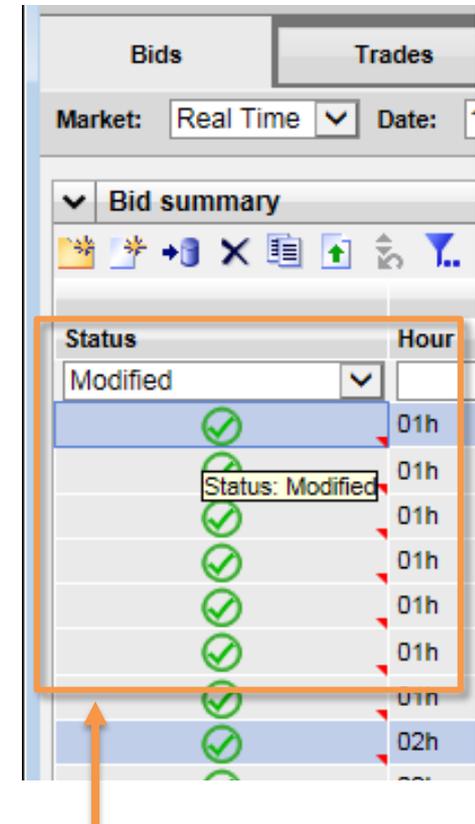
Click on the down arrow to view filter criteria



Available criteria will display

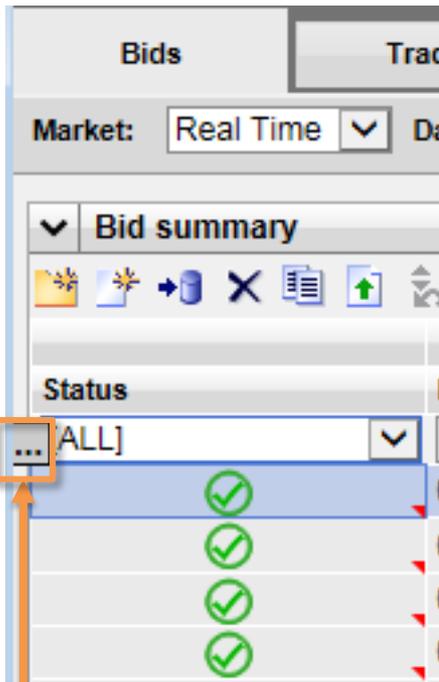


Select a status to refresh

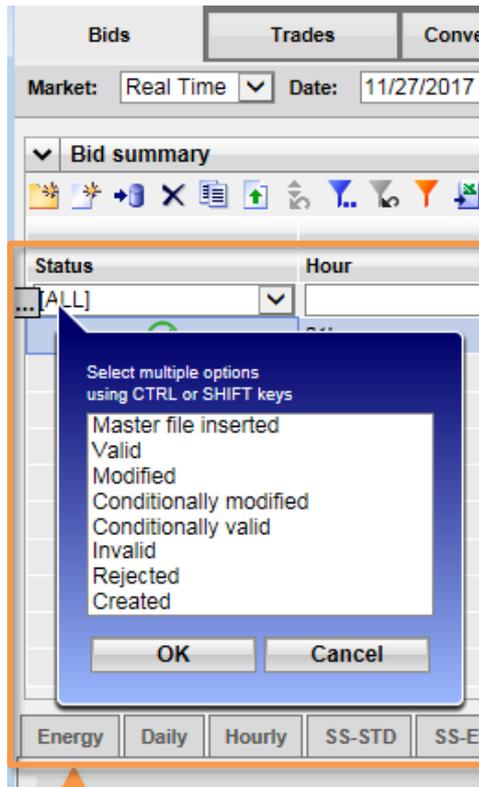


All modified bids will now show in data grid

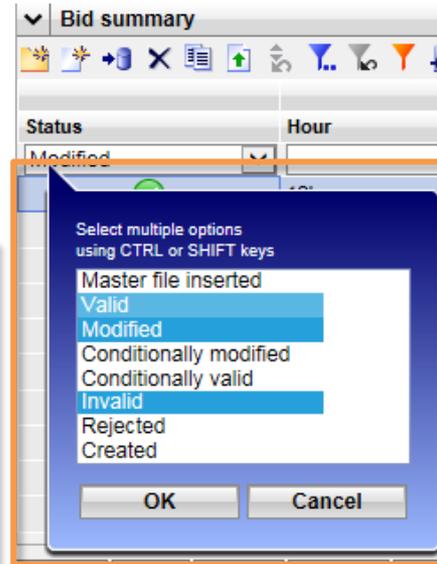
In-line multi select



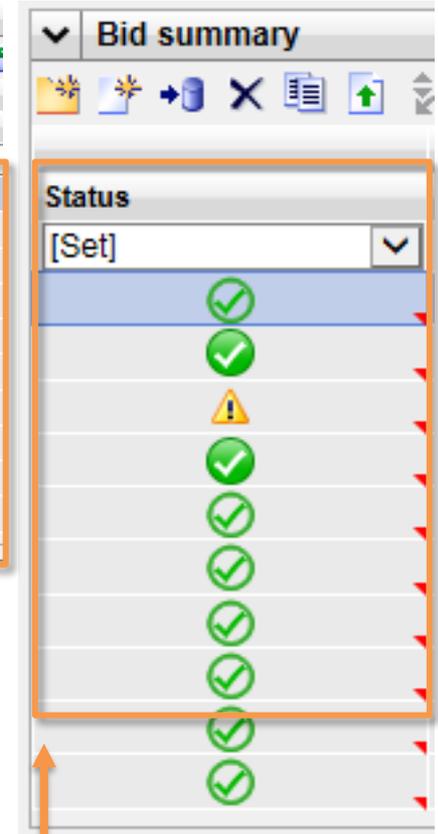
Click on the icon with 3 dots when mouse is in the filter column



Available criteria will display and user can select multiple using CTRL or SHIFT keys



Once selected click on OK to apply



Selected status will display; hover over icon to show status

Application Content Area – Data grid management features

The screenshot displays the California ISO Bids application interface. At the top, there are navigation tabs for Bids, Trades, Convergence Bids, Energy Forecast, Ind Viewer, and OTC Viewer. Below these are filters for Market (Real Time), Date (11/27/2017), and Coordinator (ANHM). The main area contains a data grid with columns for Resource type, Resource ID, and various scheduling parameters (Daily, Hourly, Energy, STD, ETC, ETP, TOR, TOP, RMT, BAS, LOF, LPT, LSG, Gen, Load, RU, RD, SR, NR, LFD, LFU, Down, Up, Submitted, Market status). Below the grid is a subtab bar with options like Energy, Daily, Hourly, SS-STD, SS-ETC, SS-ETP, SS-TOR, SS-TOP, SS-RMT, SS-BAS, SS-LOF, SS-LPT, SS-LSG, Gen SS, Load SS, AS-RU, AS-RD, AS-SR, AS-NR, AS-LFD, AS-LFU, and RM. Two annotations with orange arrows point to specific features: one points to a toolbar above the grid with the text "Refer to pages 37-38 for icon functionality", and another points to the subtab bar with the text "Selecting subtabs displays associated information".

Refer to pages 37-38 for icon functionality

Selecting subtabs displays associated information

Energy Details Displays tab - example

The screenshot shows a software interface with a top navigation bar containing tabs: Energy, Daily, Hourly, SS-STD, SS-ETC, SS-ETP, SS-TOR, SS-TOP, SS-RMT, SS-BAS, SS-LOF, SS-LPT, SS-LSG, and Gen SS. The 'Energy' tab is highlighted. Below the navigation bar, there are two main panes. The left pane is titled 'Energy details' and contains a table with the following columns: Hour, Price curve(s), Distribution pair, Level, Shutdown cost, Cost, Price, and Quantity. The right pane is titled 'Price curve(s)' and contains a table with the following columns: Quantity and Price [\$]. Below the 'Price curve(s)' pane is a 'Distribution Pair(s)' pane with columns for Dist. factor and Dist. location.

Hour	Price curve(s)	Distribution pair	Level	Shutdown cost	Cost	Price	Quantity
01h	39335956						
02h	39335956						
03h	39335956						
04h	39335956						
05h	39335956						
06h	39335956						
07h	39335956						
08h	39335956						
09h	39335956						
10h	39335956						
11h	39335956						
12h	39335956						
13h	39335956						
14h	39335956						
15h	39335956						
16h	39335956						

Quantity	Price [\$]
20.00	40.39
28.00	40.39

Dist. factor	Dist. location

The exact contents of this display will vary, depending upon the type of resource. These can include the following for both markets unless noted:

- Hour
- Price Curve(s) – The ID number, the curve is displayed in the Price Curve(s) pane to the right.
- Distribution pair – The ID for aggregated resources, details are in the Distribution Pair(s) pane to the right.
- Pumping - Level / Shutdown cost / Cost (Pump Storage Hydro units only).
- RUC - Price / Quantity (DAM only) – Resource must be certified for RUC.

Daily Details Displays tab - example

The screenshot shows a software interface with a top navigation bar containing tabs: Energy, Daily (highlighted), Hourly, SS-STD, SS-ETC, SS-ETP, SS-TOR, SS-TOP, SS-RMT, SS-BAS, SS-LOF, SS-LPT, SS-LSG, Gen SS, Load SS, and AS-RU. Below the tabs are three main panels:

- Daily details:** Contains two tables:
 - Energy limits:** Columns: Minimum load cost, Minimum, Maximum.
 - Charge limits:** Columns: Minimum, Maximum, Initial state, State.
- State transitions:** Table with columns: Initial, Final, Time [min], Cost [\$].
- Startup time curve:** Table with columns: Cooling time, Startup time.
- Startup cost curve:** Table with columns: Cost [\$].

The exact contents of this display will vary, depending upon the type of resource. These can include the following:

- Startup information (cost curve, time curve) (DAM and RTM)
- Minimum Load information. (DAM and RTM)
- Minimum and Maximum Energy Limit information. (Gen only)
- Minimum and Maximum Charge Limit information. (NGR only)
- Initial State of Charge Limit Information (Initial State) (NGR only)
- State Transitions (MSG only)

Input accelerators – new methods

- Two options:
 - Right-click menu
 - CTRL+C to copy
 - CTRL+V to paste
 - CTRL & SHIFT keys

The screenshot displays the 'Energy details' window in a software application. At the top, there are tabs for 'Energy', 'Daily', 'Hourly', 'SS-STD', 'SS-ETC', 'SS-ETP', 'SS-TOR', 'SS-TOP', 'SS-RMT', 'SS-BAS', and 'SS-LOF'. Below the tabs, there are 'Update' and 'Cancel' buttons, along with a refresh icon. The main area is a table with the following columns: 'Hour', 'Price curve(s)', 'Price', 'Quantity', and 'Block bid hours'. The table is titled 'RUC'. The 17th row is selected, and a context menu is open over it, showing options: 'Copy' (Ctrl+C), 'Set all values in column to this value', 'Paste' (Ctrl+V), 'Paste with Operation' (Ctrl+T), 'Update', and 'Cancel'. The status bar at the bottom left shows 'CONNECTED' with a green arrow icon.

Hour	Price curve(s)	Price	Quantity	Block bid hours
01h				1
02h				
03h				
04h				
05h				
06h				
07h				
08h				
09h				
10h				
11h				
12h				
13h				
14h				
15h				
16h				
17h	39119514			
18h	39119514			
19h	39119514			
20h	39119514			
21h	39119514			

Status alerts



In the current version of SIBR, the alert icon prompts you to look further...

New status icon definitions for bids and trades



Submitted data matches Master File



Rejected bids and trades



Added or modified data



Trades already processed through rules engine



Submitted / Recent submission



Added or modified components



Invalid bids or trades



Conditionally valid

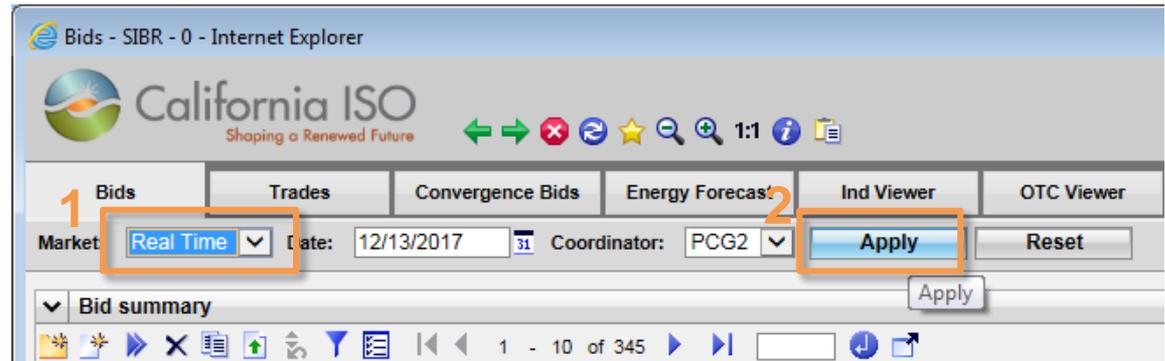


Edited trades

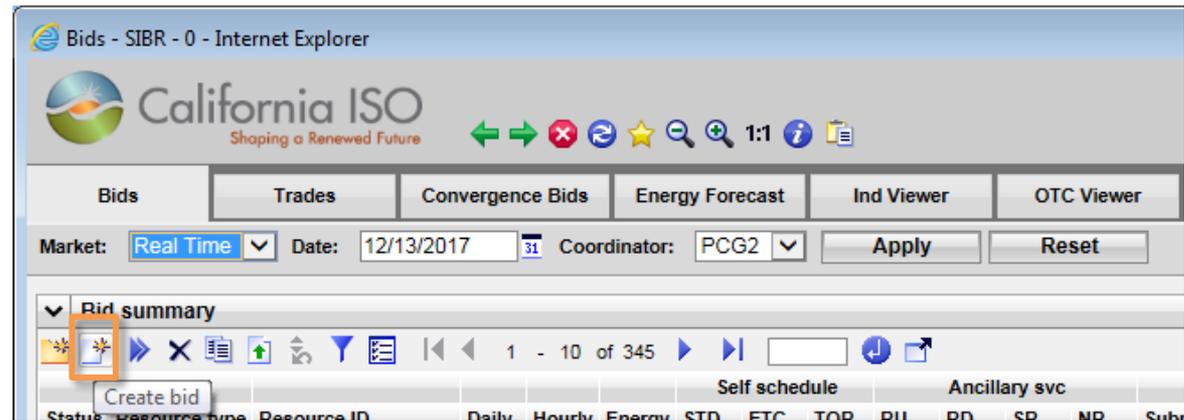
Refer to pages 40 & 41 of the User Guide for definitions

Creating bids in updated SIBR

- Select the market for the bid and apply



- Select the Create Bid icon



Creating bids in updated SIBR (continued)

- Date
- Type
- Product type
- Hours (RTM only)
- Coordinator
- Resource

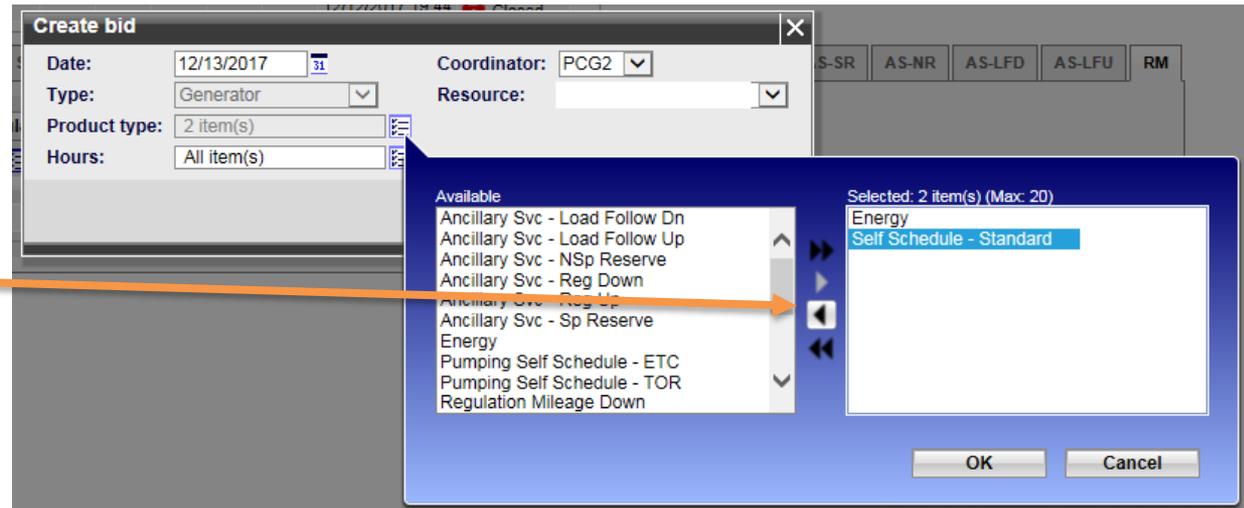
The screenshot shows a 'Create bid' dialog box with the following fields: Date (12/13/2017), Coordinator (PCG2), Type (Generator), Product type (2 item(s)), and Hours (All item(s)). There are 'Create' and 'Cancel' buttons at the bottom right.

- Product type
- Default set to Energy and Self Schedule Standard
- Select from Available then use move arrows to the Selected

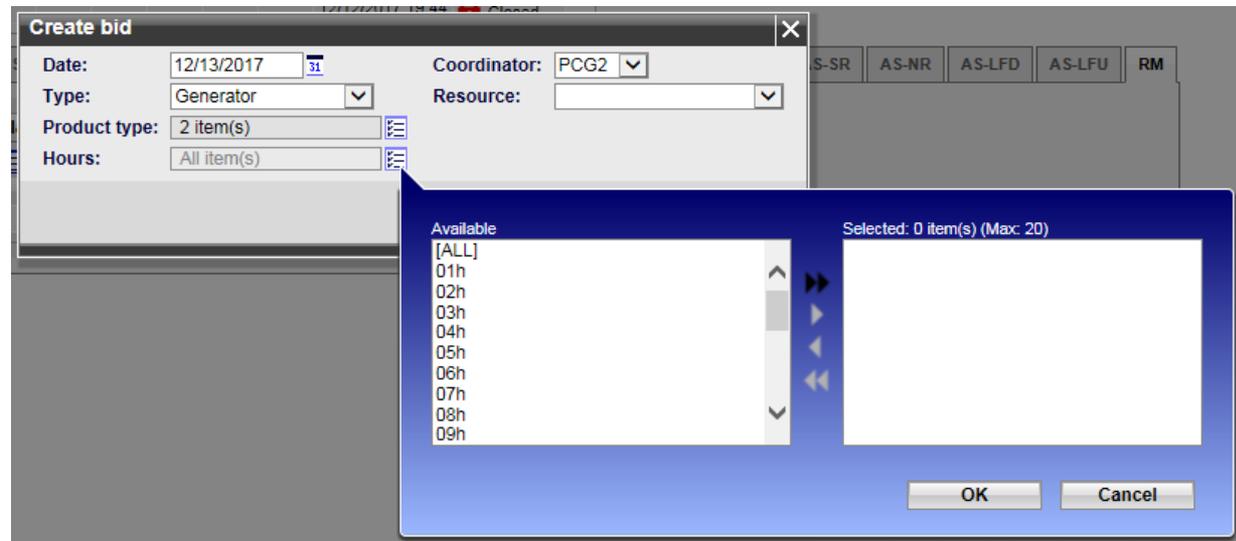
The screenshot shows the 'Create bid' dialog box with a sub-dialog for selecting product types. The sub-dialog has two panes: 'Available' and 'Selected: 2 item(s) (Max: 20)'. The 'Available' pane lists various services like Ancillary Svc - Load Follow Up, Energy, etc. The 'Selected' pane contains 'Energy' and 'Self Schedule - Standard'. An orange arrow points from the 'Product type' field in the main dialog to the sub-dialog.

Creating bids in updated SIBR (continued)

- You can also remove from the Selected by using the move arrow.



- Hours
- Can be ALL or a subset.



Creating bids in updated SIBR (continued)

- Select from Available then use move arrows to the Selected
- When Product and Hours are done click OK

The screenshot shows the 'Create bid' dialog box with the following fields: Date: 12/13/2017, Coordinator: PCG2, Type: Generator, Product type: 2 item(s), and Hours: All item(s). A sub-dialog box is open, showing a list of available hours (15h to 24h) and a 'Selected' list (0 item(s) Max: 20). An orange arrow points from the 'Available' list to the 'Selected' list. The 'OK' button is highlighted with an orange box.

- Once criteria has been set Click the Create button

The screenshot shows the 'Create bid' dialog box with the following fields: Date: 12/13/2017, Coordinator: PCG2, Type: Generator, Product type: 1 item(s), and Hours: 3 item(s). The 'Product type' and 'Hours' fields are highlighted in yellow. The 'Create' button is highlighted with an orange box.

Displaying the data

- Status
- Hour
- Resource type
- Applied on In-Line
 - Note HE20 is the selected row
 - Energy details shows HE20

The screenshot displays the California ISO Bids - SBR - 0 - Internet Explorer interface. The main window shows a 'Bid summary' table with the following columns: Status, Hour, Resource type, Resource ID, Daily, Hourly, Energy, and Market status. The row for '20h' is selected. Below the table, the 'Energy details' section shows 'HE20' selected in the 'Hour' column. The 'Price curve(s)' section shows a graph with 'No Data found'.

Status	Hour	Resource type	Resource ID	Daily	Hourly	Energy	Market status
Accepted	20h	Generator	HE20	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Open
Accepted	21h	Generator	HE20	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Open
Accepted	22h	Generator	HE20	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Open

Displaying the data (continued)

- If more than 1 row is selected:
 - Energy details now show 1 of 3
 - Using the arrow will move to the next record.

The screenshot displays the California ISO software interface. At the top, there are tabs for 'Bids', 'Trades', 'Convergence Bids', 'Energy Forecast', 'Ind Viewer', and 'OTC Viewer'. Below these, there are fields for 'Market: Real Time', 'Date: 12/13/2017', and 'Coordinator: PCG2'. The main area shows a 'Bid summary' table with columns for Status, Hour, Resource type, Resource ID, Daily, Hourly, Energy, STD, and ET. Three rows are selected, representing hours 20h, 21h, and 22h, all with 'Generator' resource type. Below the table, there are tabs for 'Energy', 'Daily', 'Hourly', and various SS- (Standard Service) options. The 'Energy details' window is open, showing a table with columns for Hour, Price curve(s), Distribution pair, Level, Shutdown cost, and Cost. The 'Hour' column is highlighted, and a navigation arrow is visible. To the right, there are sections for 'Price curve(s)' and 'Distribution Pair(s)'.

Users guide

Let's visit the guide for more information on bidding, including copying...

The following sections were discussed:

- Section 3 Bidding
- Section 9 Portfolios



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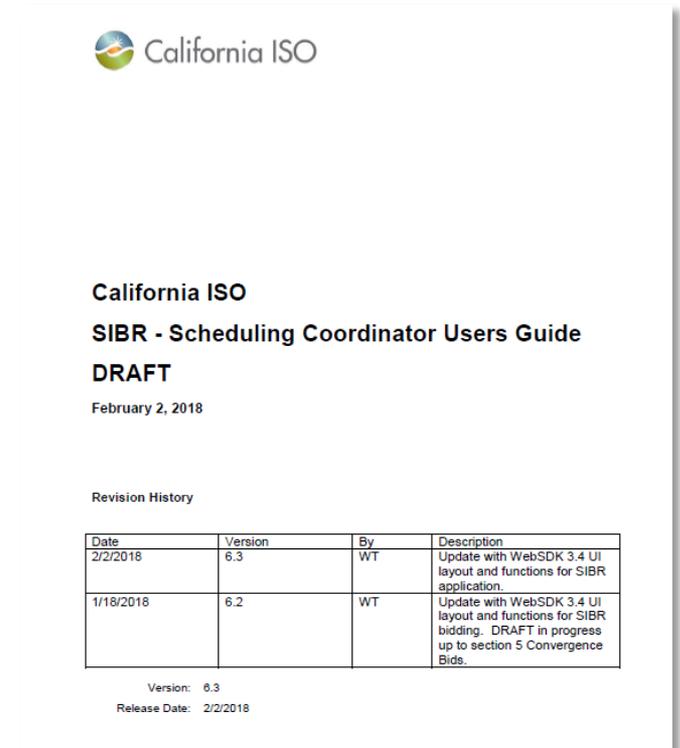
Have suggestions or questions?

Remember to refer to the Users Guide for:

- Detailed info
- Acronyms & definitions
- FAQs

Please log a CIDI ticket with:

- Suggestions
- Issues
- Concerns



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*Please allow up to 72 hours for
webinar recording to be posted

Learning tracks

Our courses are intended for market participants and the general public.

	Markets Learn about the day-ahead and real-time markets and other topics pertaining to participants inside the ISO's balancing authority area.	▶
	Western Energy Imbalance Market Explore topics pertaining to the real-time energy imbalance market that enables participants to buy and sell energy when needed.	▶
	Settlements and metering Courses for settlements and billing functions. Timelines for meter data submission, payment of invoices, and the process for submitting disputes.	▶
	Congestion revenue rights Overview of the creation, allocation and auction of congestion revenue rights and associated processes.	▶
Library		
	Computer based training Quick access to the library of computer-based training courses for all learning tracks.	▶

 Training calendar

New releases

- Reliability Services Initiative Training - Phase 1B & 2
- Bidding Rules Enhancements – Part B
- Metering Enhancements Training

If, after reading the course descriptions, you are unable to find a course that meets your organization's needs, the training and readiness group can customize a training curriculum to meet your needs. For customized training, email us at CustomerTraining@caiso.com

Course content is subject to change based on the implementation of new market functionality, rules or processes.
We are always looking for ways to improve the information on this page. We welcome your suggestions.

<http://www.caiso.com/participate/Pages/LearningCenter/default.aspx>

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System operating messages

The ISO control room issues messages that describe current operational conditions on the grid and in the market. Access these notices on OASIS under Quick Links.



Lots of great information in one daily message!

<http://www.caiso.com/informed/Pages/Notifications/Default.aspx>

Ways to participate in releases

- Visit the Release Planning page
 - <http://www.caiso.com/informed/Pages/ReleasePlanning/Default.aspx>
- Attend meetings
 - Release Users Group (RUG) bi-weekly meetings
 - Initiative status updates
 - System change updates on independent releases
 - Market Simulation calls
 - Visit the ISO calendar at www.caiso.com for meeting dates and times and add events to your calendar
 - Typically held on Mondays and Thursdays
 - Market sim calls for major releases will be market noticed

What to look for on the calendar...

Calendar of Meetings, Training and Events

Month: February Year: 2018 Calendar View List View Print View

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	5 WebCONF: Market Simulation 2:00pm - 3:00pm	6 Training: Get to Know the ISO - Day 1 9:00am - 4:00pm WebCONF: Imbalance Conformance Enhancements 10:00am - 12:00pm WebCONF: Technical User Group 10:00am - 11:00am	7 Deadline: Comments - Interconnection Process Enhancements 2018 - Issue Paper and Meeting Discussion Training: Get to Know the ISO - Day 2 9:00am - 4:00pm Meeting: Flexible Resource Adequacy Criteria Must Offer Obligation Phase 2 - Revised Draft Flexible Capacity Framework 10:00am - 4:00pm WebCONF: Market Settlement User Group 10:00am - 11:00am	8 Meeting: Audit Committee Teleconference (Executive) 3:30pm - 6:30pm Training: Settlements 101 9:00am - 4:00pm Meeting: 2017-2018 Transmission Planning Process 10:00am - 4:00pm WebCONF: Market Simulation 2:00pm - 3:00pm	9 Training: Settlements 201 9:00am - 4:00pm	10
11 WebCONF: Participating Transmission Owner Per Unit Cost Guides 10:30am - 12:00pm WebCONF: Market Simulation 2:00pm - 3:00pm	12 Meeting: Congestion Revenue Rights Auction Efficiency 10:00am - 4:00pm WebCONF: Release User Group 10:00am - 11:00am Call: Energy Imbalance Market Governing Body Teleconference (Executive) 11:30am - 12:30pm	13 Deadline: Submissions - April 2018 Monthly Resource Adequacy and Supply Plans Call: Congestion Revenue Rights 11:00am - 11:30am WebCONF: Outage Management System Customer Partnership Group 2:00pm - 3:00pm	14 Deadline: Comments - Review Transmission Access Charge Structure Straw Proposal and Meeting Discussion Call: Board of Governors Teleconference (General) 3:15pm - 6:00pm Call: Board of Governors Teleconference (Executive) 9:00am - 10:00am Call: Market Update 10:15am - 11:00am WebCONF: Market Simulation	15	16	17

Market Sim



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Release Users Group (RUG)



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