



California ISO

OMAR Decommissioning External Cutover Plan

Version 1.2

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Revisions

Date	Version	Description	Author
05/09/2017	1.0	Initial draft; OMAR Online decommissioning	Michael Lucas
06/02/2017	1.1	Revisions to reflect the ability to use either application	Indu Nambiar
07/25/2017	1.2	Updated to include information related to dynamic netting and station power reallocation	Indu Nambiar

Introduction

Executive Summary

On September 1, 2017, the California ISO will deactivate and decommission the Operational Meter Analysis and Reporting (OMAR) Online application. Replacing OMAR Online is the Market Results Interface – Settlements (MRI-S) - application, first introduced into production on October 1, 2016. A subsequent release of MRI-S Metering on May 2, 2017 has fully rendered OMAR Online obsolete. The three-month parallel production window, wherein OMAR Online and MRI-S Metering are both available in Production for upload of meter data, will come to a close on September 1st.

Project Description - OMAR Online Replacement

The OMAR Online Replacement project produced the following:

1. Provided market participants with a new Common User Interface (CUI)-based interface, replacing the one now over ten years old, and thereby improving the customer experience.
2. Replaced the OMAR interface for market participants with a new and efficient integration API standard, thus replacing the 10+ year old OMAR external interface. The incoming Energy Imbalance Market (EIM) entities will immediately benefit from this change by developing their application programming interfaces on a forward-looking and lasting standard.
3. Eliminated the current use of non-CAISO Multi-Application (CMA) certificates by replacing with CMA certificate functionality, saving both market participants and the ISO effort and certificate expense, and increasing the security of market participant information.

More information can be found at the Release planning – previous releases page, under 2016 releases, OMAR online replacement folder at:

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

Cutover Strategy

Cutover Schedule

Effective on the following date, OMAR Online will be deactivated as a means of uploading or viewing/retrieving meter data. In its place is MRI-S, which will be in production towards the conclusion of the MRI-S Metering Enhancements market simulation testing period, on or about the middle of June 2017.

Description	Deployment
OMAR Online Deactivated and Decommissioned	September 1, 2017

Cutover Times, Outages, and Market Participant Actions

Pre-Cutover

Prior to OMAR Online being decommissioned, following is the high level guidelines on how data will be handled between OMAR Online and MRI-S:

- MRI-S and OMAR Online are both available for SCs to submit and retrieve meter data until August 31, 2017. However, the ISO strongly encourages SCs to complete their transition to MRI-S by July 31, 2017 in order for the ISO to address any issues that they may face during the cutover.
- Data submitted to OMAR Online, including SC submitted and ISO polled, will be available in OMAR Online and MRI-S for data retrieval.
- Data submitted to MRI-S will only be available in MRI-S for data retrieval.
- If for the same trade interval and resource ID, data is submitted to both OMAR Online and MRI-S, the data will be versioned in the order in which it was processed into Settlements.
- Data submitted to OMAR Online will be available in MRI-S within one hour of submission.
- Resources that participate in dynamic netting and station power reallocation programs will be available only on OMAR Online until the final cutover due to the dependency with MV90 data. These resources will become available in MRI-S on 9/1 when OMAR Online will be decommissioned.

Environment	Cutover Activity Date	Outage	Market Participant Action
MAP Stage Market Sim	Prior to 6/30/17	N/A	Gather list of users who will need access to MRI-S Meter Data in test environment
			Identify Entity Types (aka SC ID) for each user
			Identify ACL Groups for each user, if required
			Create ACL Groups in MAP Stage, if required. Please see page 25 of AIM user guide:

Environment	Cutover Activity Date	Outage	Market Participant Action
			http://www.caiso.com/Documents/AccessandIdentityManagement_AIM_UserGuide.pdf Initiate provisioning process via AIM
	7/6/17	NA	Testing the environment and capabilities to submit meter data into MRI-S in the market simulation environment. Recommended testing should include submittal of meter data, revising meter data and reviewing error codes for additional action. Please see the Market Simulation Plan for additional details: http://www.caiso.com/Documents/MarketSimulationPlan_Fall_Independent2017Releases.pdf
Production	6/21/17 & 7/31/17	OMAR On-line	In an effort to provide a smooth transition from OMAR-Online to MRI-S, the provisioning of new or renewals of OMAR certificates will be as follows: <ul style="list-style-type: none"> • No renewal certificates will be issued after 7/31/2017 expiration date. • After June 21, 2017 we will encourage that only new certificates be issued for MRI-S; however, on a case-by-case basis the ISO will work with the participant if an OMAR certificate is needed. • No new OMAR certificates will be issued, for any reason, after July 31, 2017
	7/6/17	N/A	After successful completion of the SC's market simulation testing, begin processing production SQMD data in MRI-S. SCs should not simultaneously submit the same data set (same trade date, intervals and resource ID) in both MRI-S and OMAR Online as one value will be replaced with the other depending on the order of processing. SQMD for a given Trading Day can be submitted in either application, but the versioning will be based on the order of processing. To accommodate a smooth cutover, the ISO is suggesting: <ul style="list-style-type: none"> • July 31, 2017 is the last day to submit SQMD data for production in OMAR On-Line. This will help the ISO to work through any issues during SCs transition to MRI-S for a month before the final cutover <p>Please note that SQMD for a given trade date that was originally submitted to OMAR Online can be subsequently submitted to MRI-S for corrections. The data that was first submitted to OMAR Online will be marked as "PREVIOUS" and the new set submitted to MRI-S will be stored as "CURRENT"</p>

Environment	Cutover Activity Date	Outage	Market Participant Action
			<p>version. Depending on the meter data submission deadline for each settlement run, the data that is "CURRENT" will be used for the settlement calculations.</p> <p>Please refer to the CAISO Payment Calendar for additional details on meter data submission deadline: http://www.caiso.com/Documents/CaliforniaISOPaymentsCalendar2017_updated.pdf</p>
	Prior to 9/1/17 (suggest by 8/18/17)	MRI-S	<p>Gather list of users who will need access to MRI-S Meter Data in Production environment</p> <p>Identify Entity Types (a.k.a. SC ID) for each user</p> <p>Identify ACL Groups for each user, if required</p> <p>Create ACL Groups in Production, if required. Please see page 25 of AIM user guide: http://www.caiso.com/Documents/AccessandIdentityManagement_AIM_UserGuide.pdf</p> <p>Initiate provisioning process via AIM</p> <p>Assure Third-Party entities are identified on the SC's Metered Entity Meter Service Agreement</p>
	9/1/17	OMAR On-line	<p>Decommission OMAR On-line</p> <p>Resources participating in dynamic netting and station power reallocation programs become available on MRI-S for current and past trade dates</p>

Cutover

Environment	Cutover Activity Date	Outage	Market Participant Action
Production	9/1/17	9/1/17	Cease using OMAR Online for meter data submittal/retrieval
			Adjust to internal business processes that employ MRI-S instead of OMAR Online
			Submit, view and retrieve meter data via the MRI-S application

Post-Cutover

System	Date/Time	Outage	MP Action

Communication and Support

Description	Method	Frequency	Responsible
OMAR Online Cutover Market Notice	E-mail www.caiso.com	As Needed	ISO
Release Users Group (RUG)	(866) 528-2256 5251941	Every Other Week	ISO

Market Notices

- http://www.caiso.com/Documents/MRI-SMeterDataUserInterfaceReopenedToday0502-MarketSimulation_CustomerPartnershipGroupCall0511.html

Routine Issues and Support

All normal support processes should be followed for support functions. The ISO Help Desk can be reached at (916) 351-2309, and your ISO customer service representative can assist with logging CIDI tickets for market simulation issues.