

Business Requirements Specification

WEIM FAB Enhancements

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Revision History

Date	Version	Description
05/31/2024	1.0	Document Created
12/11/2024	1.1	Updated BRQ040 Added BRQ041, and BRQ042 Note: Changes red-lined. Note: MSIM Requirements for Dynamic ETSR Safety Net shall be added to the next EXT BRS.


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1 Introduction

1.1 Purpose

Disclaimer:

All information contained in this draft Business Requirements Specification (BRS) as provided by the California Independent System Operator Corporation (ISO) is prepared for discussion and information purposes only. The draft BRS is provided “as is” without representation or warranty of any kind, including, without limitation, a representation or warranty as to accuracy, completeness, or appropriateness for any particular purpose. The draft BRS shall be revised as the development and review of the business requirements progresses. The ISO assumes no responsibility for the consequences of any errors or omissions. The ISO may revise or withdraw all or part of this information at any time at its discretion without notice.


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2 Details of Business Need/Problem


2.1 Description

Business Opportunity/Problem Statement:	
What:	<p>This initiative with the WEIM Fab-5 consists of (3) enhancements, (1) improvement only requiring internal resources and (1) project to improve RTM robustness and minimize Market Isolations. The Fab-5 collectively – align with (2) strategic indicators of success in 1a “Modernize Tools and Support Control Center Operations and (1) strategic indicator of success in 4b “<i>Provide highly accurate, easily accessible, clear information to ensure customer preparedness and to deepen understanding about the reliability needs of the grid.</i>”</p> <p><i>WEIM Fab-5 List:</i></p> <ol style="list-style-type: none"> 1. <i>Congestion Management Full Transparency (enhancement, RTM - UI)</i> 2. <i>Hourly Base ETSR Schedule Redundancy (project, RTM payload). Note: This item is being pursued as its own stand alone project.</i> 3. <i>External WEIM Commitment Override (enhancement, RTM - UI)</i> 4. <i>Dynamic ETSR Limits – Safety Net (enhancement, RTM)</i> 5. <i>System Net ITC Definitions (MasterFile definitions only)</i> <p>Note: SDLC routing includes item 1, 3, and 5. Item 4 shall be CR'd in at later point in time based on resource availability. Item 2 shall have purpose its own project.</p>
Why do we have this opportunity/problem?	<p>Primary business case is for reliability, control center improvements, situational awareness and transparency.</p> <p>The following are reasons for delivering these enhancements.</p> <ol style="list-style-type: none"> 1. Congestion Management Full Transparency. Lack of situational awareness to WEIM BA Operators is a reliability risk. This enhancement will help address seams issues that multiple WEIMs and RCs have been dealing with. 2. Hourly Base ETSR Schedule Redundancy. Without this enhancement there will be prolonged Market Disruptions, Market Isolations, Settlement implications and most

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Business Opportunity/Problem Statement:	
	<p>importantly very high risk to reliability for many WEIMs. Due to the complexity of this item it is slated as its own project instead of being included here as an enhancement.</p> <ol style="list-style-type: none"> 3. External WEIM Commitment Override. This enhancement streamlines WEIM entities with the ability to directly enter WEIM commitment overrides. 4. Dynamic ETSR Limits – Safety Net. This enhancement addresses a reliability concern. Note: This item is still being scope will be included with more detail in the next External BRS posting. 5. System Net ITC Definitions. System Net ITC definitions create the most effective and fastest way for WEIMs to manage ETSRs in the RTM.
<i>Who does this opportunity/problem impact?</i>	WEIM entities, WEIM BA Operators (CAISO included), RTMO, and Customer Service.
<i>When</i>	Refer to RUG slides for updated implementation dates.


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3 Project Impact Assessment (IA)


3.1 Business Practice Manuals (BPM)

BPM	Description of Impact(s)
Market Operations	Update to reflect that WEIM shall perform commitment overrides themselves instead of CAISO performing this in BAAOP.
BPM Change Management	Not Impacted
Candidate CRR Holder Registration	Not Impacted
Compliance Monitoring	Not Impacted
Congestion Revenue Rights	Not Impacted
Credit Management and Market Clearing	Not Impacted
Definitions and Acronyms	Not Impacted
Demand Response	Not Impacted
Direct Telemetry	Not Impacted
Distributed Generation for Deliverability	Not Impacted
Energy Imbalance Market	Not Impacted
Generator Interconnection and Deliverability Allocation Procedures	Not Impacted
Generator Interconnection Procedures	Not Impacted
Generator Management	Not Impacted
Managing Full Network Model	Not Impacted
Market Instruments	Not Impacted
Metering	Not Impacted
Outage Management	Not Impacted
Reliability Coordinator Services	Not Impacted
Reliability Requirements	Not Applicable

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BPM	Description of Impact(s)
Rules of Conduct Administration	Not Impacted
Settlements and Billing	Not Applicable
Scheduling Coordinator Certification and Termination	Not Impacted
Transmission Planning Process	Not Impacted

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3.2 Other

Impact	Description (optional)
Market Simulation	Yes <u>Unstructured</u> Market Simulations: <ul style="list-style-type: none"> Transmission Resource Congestion External WEIM Commitment Override.
Market Participant Impact	Yes See Customer Readiness impact below.
External Bid Publication	No
User Acceptance Testing (UAT)	Yes
Internal Training	Yes
Customer Readiness Impact	Yes , see below.
<ul style="list-style-type: none"> External Communication Needed 	Yes <ul style="list-style-type: none"> Transmission Resource Congestion External WEIM Commitment Override System Net ITC Calculations
<ul style="list-style-type: none"> External Onboarding and Maintenance 	No
<ul style="list-style-type: none"> External Training 	Yes
<ul style="list-style-type: none"> External Computer Based Training 	Yes
Policy Initiative	No

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4 Business Requirements


The sections below describe the business processes and the associated business requirements involved in the project. These may represent high-level functional, non-functional, reporting, and/or infrastructure requirements. These business requirements directly relate to the high-level scope items determined for the project.

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4.1 General: FAB5 Enhancements

4.1.1 Business Requirements: Congestion Management Full Transparency


ID#	Business Feature	Req. Type	Potential Application(s) Impacted
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FAB – BRQ010	<p><i>Transmission Resource Congestion</i></p> <p>Within System (RTM), the RTD, RTPD, and STUC UIs must display to CAISO and WEIM Operators their BAA's resources in the "Congested Resources" table (left side).</p> <p>Implementation note: these are existing UIs but must display the resources based on operators and their BAA's. UI updates only for displaying existing data that is not currently shown. No AD or integration requested at this time.</p> <p>Implementation note: See Mockup in Appendix C.</p> <p>Implementation note: This requirement applies to any WEIM BAA with existing access to RTM. No new access provisioning needed in AIM, no updates to roles needed in AIM.</p> <p>WEIM Note: "WEIMs must follow the code of conduct as CAISO is not recommending any additional attestations. The controls are that an entity would see on congestion that impacts or moves their own generation, not all entities congestion."</p> <p>Impacted: BPM, UIs, External Training, Unstructured Market Sim, and Access Provisioning for existing entities.</p>	Core	RTM – RTD RTPD STUC
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FAB – BRQ011	<p><i>Transmission Resource Congestion</i></p> <p>Within System (RTM) in the RTD, RTPD, and STUC UIs, must have functionality for CAISO and WEIM Operators to select any of their resources from the left side of the table and on “Constraints causing Congestion” table (right side).</p> <p>Implementation note: See Mockup in Appendix C.</p> <p>Implementation note: UI updates only no AD or integration requested at this time.</p> <p>WEIM Note: “WEIMs must follow the code of conduct as CAISO is not recommending any additional attestations. The controls are that an entity would see on congestion that impacts or moves their own generation, not all entities congestion.”</p> <p>Impacted: BPM, UIs, External Training, Unstructured Market Sim, Access Provisioning for existing entities</p>	Core	RTM – RTD RTPD STUC
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FAB – BRQ012	<p><i>Transmission Resource Congestion</i></p> <p>Within System (RTM), the RTD, RTPD, and STUC UIs must display to CAISO and WEIM Operators any constraint in the system that is moving their resource and not just within their own BAA.</p> <p>Implementation note: This BRQ is in relation to BRQ010 and BRQ011. See Mockup in Appendix C.</p> <p>Implementation note: UI updates only no AD or integration requested at this time.</p> <p>WEIM Note: “WEIMs must follow the code of conduct as CAISO is not recommending any additional attestations. The controls are that an entity would see on congestion that impacts or moves their own generation, not all entities congestion.”</p> <p>Impacted: BPM, UIs, External Training, Unstructured Market Sim, Access Provisioning for existing entities</p>	Core	RTM – RTD RTPD STUC
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FAB – BRQ013	<p><i>Binding Transmission Constraints Flowgates</i></p> <p>Within System (RTM), the RTD, RTPD, and STUC UIs must display to CAISO and WEIM Operators their BAA’s resources in the “Binding Transmission Constraints Flowgates” table (left side).</p> <p>Implementation note: these are existing UIs but must display the resources based on operators and their BAA’s.</p> <p>Implementation note: See Mockup in Appendix C.</p> <p>Implementation note: UI updates only no AD or integration requested at this time.</p> <p>WEIM Note: “WEIMs must follow the code of conduct as CAISO is not recommending any additional attestations. The controls are that an entity would see on congestion that impacts or moves their own generation, not all entities congestion.”</p> <p>Impacted: BPM, UIs, External Training, Unstructured Market Sim, Access Provisioning for existing entities</p>	Core	RTM – RTD RTPD STUC
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FAB – BRQ014	<p><i>Binding Transmission Constraints Flowgates</i></p> <p>Within System (RTM) in the RTD, RTPD, and STUC UIs, must have functionality for CAISO and WEIM Operators to select any of their resources from the left side of the table and on “Constraints Causing Congestion” table (right side).</p> <p>Implementation note: Add new column “BAA” to Resource Participation table.</p> <p>Implementation note: See Mockup in Appendix C.</p> <p>Implementation note: UI updates only no AD or integration requested at this time.</p> <p>WEIM Note: “WEIMs must follow the code of conduct as CAISO is not recommending any additional attestations. The controls are that an entity would see on congestion that impacts or moves their own generation, not all entities congestion.”</p> <p>Impacted: BPM, UIs, External Training, Unstructured Market Sim, Access Provisioning for existing entities</p>	Core	RTM – RTD RTPD STUC
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FAB – BRQ015	<p><i>Binding Transmission Constraints Flowgates</i></p> <p>Within System (RTM), the RTD, RTPD, and STUC UIs must display to CAISO and WEIM Operators any constraint in the system that is moving their resource and not just within their own BAA.</p> <p>Implementation note: This BRQ is in relation to BRQ013 and BRQ014. See Mockup in Appendix C.</p> <p>Implementation note: UI updates only no AD or integration requested at this time.</p> <p>WEIM Note: “WEIMs must follow the code of conduct as CAISO is not recommending any additional attestations. The controls are that an entity would see on congestion that impacts or moves their own generation, not all entities congestion.”</p> <p>Impacted: BPM, UIs, External Training, Unstructured Market Sim, Access Provisioning for existing entities</p>	Core	RTM – RTD RTPD STUC
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FAB – BRQ016	<p><i>Binding Transmission Constraints Nomograms</i></p> <p>Within System (RTM), the RTD, RTPD, and STUC UIs must display to CAISO and WEIM Operators their BAA’s resources in the “Binding Transmission Constraints Nomograms” table (left side).</p> <p>Implementation note: these are existing UIs but must display the resources based on operators and their BAA’s.</p> <p>Implementation note: See Mockup in Appendix C.</p> <p>Implementation note: UI updates only no AD or integration requested at this time.</p> <p>WEIM Note: “WEIMs must follow the code of conduct as CAISO is not recommending any additional attestations. The controls are that an entity would see on congestion that impacts or moves their own generation, not all entities congestion.”</p> <p>Impacted: BPM, UIs, External Training, Unstructured Market Sim, Access Provisioning for existing entities</p>	Core	RTM – RTD RTPD STUC
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FAB – BRQ017	<p><i>Binding Transmission Constraints Nomograms</i></p> <p>Within System (RTM) in the RTD, RTPD, and STUC UIs, must have functionality for CAISO and WEIM Operators to select any Nomograms from the left side of the table and on “Resource Participation” table (right side).</p> <p>Implementation note: Add new column “BAA” to Resource Participation table.</p> <p>Implementation note: See Mockup in Appendix C.</p> <p>Implementation note: UI updates only no AD or integration requested at this time.</p> <p>WEIM Note: “WEIMs must follow the code of conduct as CAISO is not recommending any additional attestations. The controls are that an entity would see on congestion that impacts or moves their own generation, not all entities congestion.”</p> <p>Impacted: BPM, UIs, External Training, Unstructured Market Sim, Access Provisioning for existing entities</p>	Core	RTM – RTD RTPD STUC
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FAB – BRQ018	<p><i>Binding Transmission Constraints Nomograms</i></p> <p>Within System (RTM), the RTD, RTPD, and STUC UIs must display to CAISO and WEIM Operators any resource in the system that is being moved due to congestion and not just within their own BAA.</p> <p>Implementation note: This BRQ is in relation to BRQ015 and BRQ016. See Mockup in Appendix C.</p> <p>Implementation note: UI updates only no AD or integration requested at this time.</p> <p>WEIM Note: “WEIMs must follow the code of conduct as CAISO is not recommending any additional attestations. The controls are that an entity would see on congestion that impacts or moves their own generation, not all entities congestion.”</p> <p>Impacted: BPM, UIs, External Training, Unstructured Market Sim, Access Provisioning for existing entities</p>	Core	RTM – RTD RTPD STUC
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4.1.2 Business Requirements: External WEIM Commitment Override

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FAB – BRQ030	<p><i>External WEIM Commitment Override</i></p> <p>System (RTM) within BAAOP, must have the capability for external WEIM BA Operators to enter commitment overrides directly in the RTM Market UI.</p> <p>Implementation note: This would be similar functionality as CAISO BA Operations (Generation Dispatcher) having this ability.</p> <p>Implementation note: use the External BAA Operator role for BAAOP.</p> <p>Implementation note: Currently, external WEIM entities call the RTMO to request the commitment override and the RTMO enters the override into the RTM via BAAOP. The RTMOs do not have the authority to deny the request from the external WEIM entity.</p> <p>Implementation note: This requirement applies to any WEIM BAA with existing access to RTM. No new access provisioning needed in AIM, no updates to roles needed in AIM.</p> <p>Implementation note: UI updates only no AD or integration requested at this time.</p> <p>Impacted: BPM, UIs, External Training, Unstructured Market Sim</p>	Core	RTM - BAAOP
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4.1.3 Business Requirements: System NET ITC Definitions

ID#	Business Feature	Req. Type	Potential Application(s) Impacted
FAB – BRQ050	<p><i>System NET ITC Definitions (MF Definitions Only)</i></p> <p>Model and Contracts Implementation team to update definitions in MasterFile for all existing WEIM entities.</p> <p>Implementation note: Definitions would be updated as currently performed during onboarding WEIM entities, in this case would be for existing entities.</p> <p>Impacted: Customer Outreach</p>	Existing, Business Process	MF

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4.1.4 Business Requirements: Dynamic ETSR Limits – Safety Net

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FAB – BRQ040	<p><i>Dynamic ETSR Limits – Safety Net</i></p> <p>In the event of payload send/receive issues or null values being sent to Dynamic Limits Interface (DLI) in RTM - BAAOP, System (RTM - BAAOP) must have a global default logic for ramping down the transfers to 0 MW for all WEIMs.</p> <p>Implementation note: Default value of ramping down to 0MW. This would apply to all entities in the event of issues with only entity submitting null values to RTM.</p> <p>Implementation note: This enhancement is only for WEIM entities (not CAISO BAA) for paths with Dynamic ETSR limits with failed broadcast/receive on specific transfers.</p> <p>Implementation note: The default value shall be applied regardless whether it is an issue from WEIM broadcast or CAISO receive. Utilizing the default shall not result in a price correction.</p> <p>Implementation note: It is the sole responsibility of WEIMs to ensure implementation of default does not conflict with their OATT. If default limit is utilized it is the responsibility of the WEIM to fulfill or curtail which may compete with other WEIM entity transfers.</p>	Core Phase 1	RTM - BAAOP
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FAB – BRQ041	<p><i>Dynamic ETSR Limits – Safety Net</i></p> <p>In the event of payload send/receive issues or null values being sent to Dynamic Limits Interface (DLI) in RTM - BAAOP for the next four hour horizon, System (RTM - BAAOP) must have the capability to alert or display to WEIMs and CAISO internal BAAOP users.</p> <p>Implementation note: The alert would be sent at the individual BAA level.</p>	Core Phase 1	RTM – BAAOP
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FAB – BRQ042	<p>Dynamic ETSR Limits – Safety Net</p> <p>In the event of payload send/receive issues or null values being sent to Dynamic Limits Interface (DLI) in RTM - BAAOP, System (RTM - BAAOP) must have a configurable global default logic for ramping down the transfers to set MW for all WEIMs.</p> <p>Implementation note: Default value of ramping down to configured set MW. This value would be set by associated entity, and would leverage most restrictive value between BAAs.</p> <p>Implementation note: This enhancement is only for WEIM entities (not CAISO BAA) for paths with Dynamic ETSR limits with failed broadcast/receive on specific transfers.</p> <p>Implementation note: The default value shall be applied regardless whether it is an issue from WEIM broadcast or CAISO receive. Utilizing the default shall not result in a price correction.</p> <p>Implementation note: It is the sole responsibility of WEIMs to ensure implementation of default does not conflict with their OATT. If default limit is utilized it is the responsibility of the WEIM to fulfill or curtail which may compete with other WEIM entity transfers.</p>	<p>Core</p> <p>Phase 2</p>	RTM – BAAOP
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4.2 Business Process: Market/Business Simulation

This section shall provide a basis for the development of the Market/Business Simulation Scenarios. These requirements will provide guidance on the market participant impacts, inputs into the Scenarios, endpoints to the Scenarios and reasons for potential Scenarios. The guidance on market participant impacts shall be gathered from the requirements that impact rules, interfaces, applications/reports, new system processes, new/modified data models, and new user roles. The source and sink systems shall be determined through the development of the system context diagram and the web service requirements. The Reason for the Potential Scenario column will be to offer guidance regarding what potential scenarios, and their context, may be needed for this project. This section applies to all policy development projects, market enhancements, technology enhancements, operation enhancements, Energy Imbalance Market (EIM) implementations, and Reliability Coordination (RC) service implementations.


In the Reason for Potential Scenario column, select one or more of the following reasons:

1. **Rule Impacts:** Generalized changes in market rules, bidding rules, settlements rules, market design changes, or other business rules.
2. **Interface changes:** Changes that impact templates (e.g., the Resource Adequacy (RA) supply plan), user interface (UI), and application programming interface (API) (e.g., retrievals of new shadow settlement data).
3. **New application/report:** Changes that cause addition/modification of market software or reports, especially when market data input is required by the market participant.
4. **New system process:** Modification of data flow in systems, especially if the new process requires the market participant to demonstrate proficiency prior to production.
5. **New/Modified model data:** Addition or substantial modification of model data as a market solution or export provided by the ISO.
6. **New user role:** The addition or modification of access permissions for a user role applied to specific business units within an EIM entity or market participant organization (e.g., Load Serving Entity (LSE) as a Local Regulatory Authority (LRA) role). Scenarios are beneficial for market participants taking on a new function or process within their organization.


4.2.1 Business Requirements

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ID#	Guidance on Market Participant Impacts	Source System	Sink System	Reason for Potential Scenario
MKT - 001	Unstructured Market Sim – Congestion Management Full Transparency WEIM Operators must be able to see on the RTD, RTPD, and STUC UIs their BAA's resources in the "Congested Resources" table (left side). Note: See BRQ010.	N/A	RTM – RTD RTPD STUC	Changes to UI and display of data
MKT - 002	Unstructured Market Sim – Congestion Management Full Transparency WEIM Operators must be select, on the RTD, RTPD, and STUC UIs, any of their resources from the left side of the table and on "Constraints causing Congestion" table (right side). Note: See BRQ011.	N/A	RTM – RTD RTPD STUC	Changes to UI and display of data
MKT - 003	Unstructured Market Sim – Congestion Management Full Transparency WEIM Operators must be able to see, on the RTD, RTPD, and STUC UIs, any constraint in the system that is moving their resource and not just within their own BAA. Note: See BRQ012.	N/A	RTM – RTD RTPD STUC	Changes to UI and display of data

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ID#	Guidance on Market Participant Impacts	Source System	Sink System	Reason for Potential Scenario
MKT - 004	Unstructured Market Sim – Congestion Management Full Transparency WEIM Operators must be able to see, on the RTD, RTPD, and STUC UIs, their BAA's resources in the "Binding Transmission Constraints Flowgates" table (left side). Note: See BRQ013.	N/A	RTM – RTD RTPD STUC	Changes to UI and display of data
MKT - 005	Unstructured Market Sim – Congestion Management Full Transparency WEIM Operators must be able to select, on the RTD, RTPD, and STUC UIs, any of their resources from the left side of the table and on "Constraints Causing Congestion" table (right side). Note: See BRQ014.	N/A	RTM – RTD RTPD STUC	Changes to UI and display of data
MKT - 006	Unstructured Market Sim – Congestion Management Full Transparency WEIM Operators must be able to see, on the RTD, RTPD, and STUC UIs, any constraint in the system that is moving their resource and not just within their own BAA. Note: See BRQ015.	N/A	RTM – RTD RTPD STUC	Changes to UI and display of data

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ID#	Guidance on Market Participant Impacts	Source System	Sink System	Reason for Potential Scenario
MKT - 007	Unstructured Market Sim – Congestion Management Full Transparency WEIM Operators must be able to see, on the RTD, RTPD, and STUC UIs, their BAA's resources in the "Binding Transmission Constraints Nomograms" table (left side). Note: See BRQ016.	N/A	RTM – RTD RTPD STUC	Changes to UI and display of data
MKT - 008	Unstructured Market Sim – Congestion Management Full Transparency WEIM Operators must be able to select, on the RTD, RTPD, and STUC UIs, any Nomograms from the left side of the table and on "Resource Participation" table (right side). Note: See BRQ017.	N/A	RTM – RTD RTPD STUC	Changes to UI and display of data
MKT - 009	Unstructured Market Sim – Congestion Management Full Transparency WEIM Operators must be able to see, on the RTD, RTPD, and STUC UIs, any resource in the system that is being moved due to congestion and not just within their own BAA. Note: See BRQ018.	N/A	RTM – RTD RTPD STUC	Changes to UI and display of data

 California ISO	Technology	Template Version:	6.8
		Document Version:	1.1
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ID#	Guidance on Market Participant Impacts	Source System	Sink System	Reason for Potential Scenario
MKT - 010	Unstructured Market Sim – WEIM External Commitment Override External WEIM BA Operators must have the capability within RTM - BAAOP to enter commitment overrides directly in the RTM Market UI. Note: See BRQ030.	N/A	RTM – BAAOP	Changes to UI
	MSIM Requirements for Dynamic ETSR Safety Net for BRQ040, BRQ041, and BRQ042 shall be added to the next EXT BRS.			

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4.3 Business Process: Market Monitoring and Reporting

4.3.1 Business Requirements

ID#	Business Feature	Requirement Type	Business Unit(s) Affected	Manual Or Auto	Application(s) Impacted
	Not Applicable				