EDAM Onboarding System Integration & Testing

March 24, 2025

Trang Vo

Release Manager

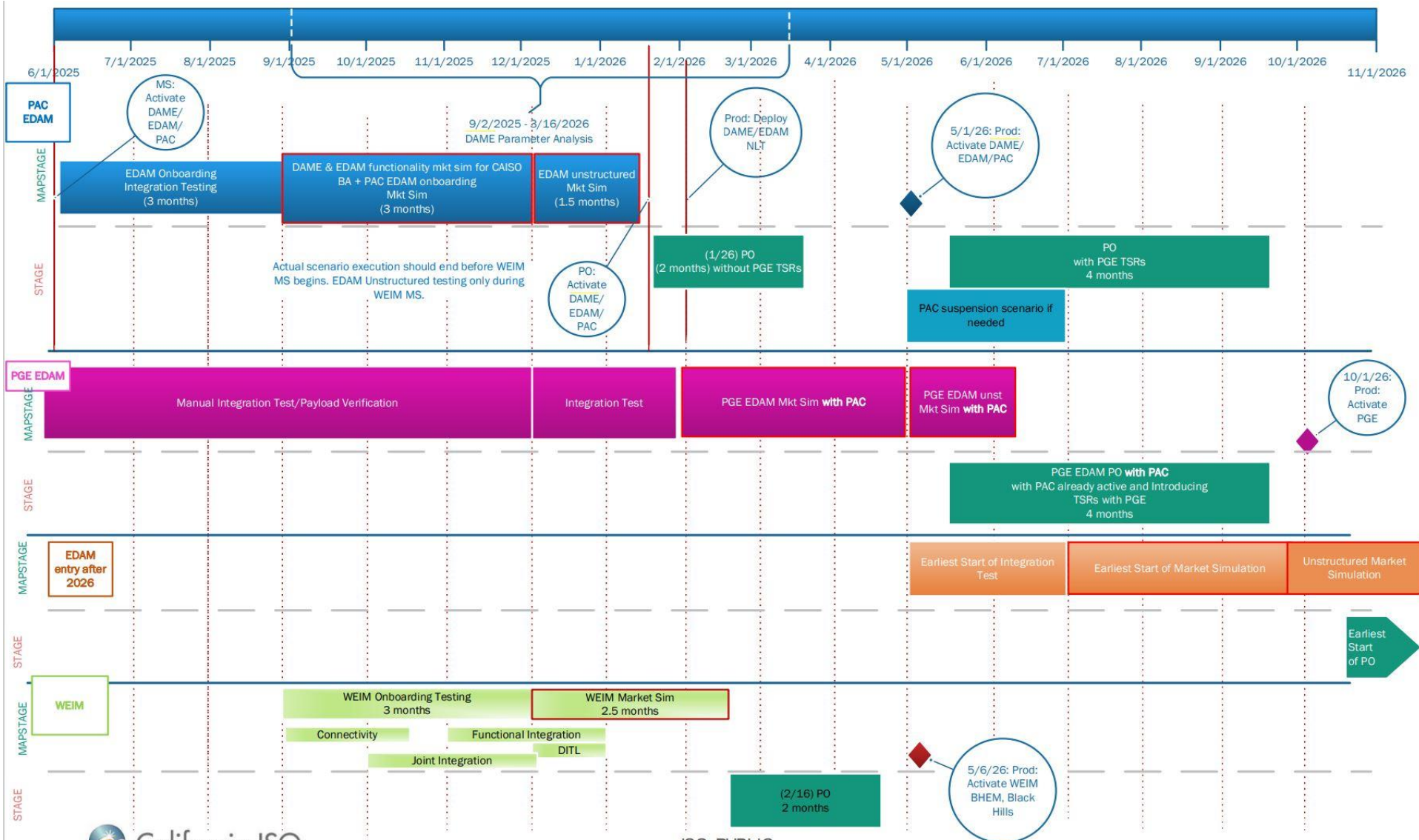Martin Kraynov

Market Simulation Coordinator

Overview

- Project Timeline Overview
- Connectivity Testing Overview
- Integration Testing Overview
- Market Simulation Overview
- Parallel Operations Overview
- Activation Overview
- Next Steps

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DAME / EDAM / WEIM – Timeline

Initiative	Connectivity Testing	Integration Testing	Structured Market Sim	Unstructured Market Sim	Parallel Operations	Activation
Day-Ahead Market Enhancements	06/01/25 – 09/01/25	NA	09/01/25 – 12/01/25	12/01/25 – 01/15/26	01/26/26 – 03/26/26 (EDAM OB)	05/01/26
Extended Day-Ahead Market	06/01/25 – 09/01/25	NA	09/01/25 – 12/01/25	12/01/25 – 01/15/26	01/26/26 – 03/26/26 (EDAM OB)	05/01/26
EDAM ISO BAA Participation Rules Track A	06/01/25 – 09/01/25	NA	09/01/25 – 12/01/25	12/01/25 – 01/15/26	01/26/26 – 03/26/26 (EDAM OB)	05/01/26
Extended Day-Ahead Market On-Boarding - Pacificorp	05/01/25 – 05/31/25	06/01/25 – 09/01/25	09/01/25 – 12/01/25	12/01/25 – 01/15/26	01/26/26 – 03/26/26	05/01/26
Extended Day-Ahead Market - PGE	11/01/25 – 11/30/25	12/01/25 – 01/31/26	02/01/26 – 04/30/26	05/01/26 – 06/12/26	05/18/26 – 09/04/26	10/01/26
WEIM - Berkshire Hathaway Energy Montana	09/01/25 – 10/17/25	10/01/26 – 11/30/26	12/01/25 – 02/13/26	NA	02/16/26 – 04/17/26	05/06/26
WEIM – Black Hills	09/01/25 – 10/17/25	10/01/26 – 11/30/26	12/01/25 – 02/13/26	NA	02/16/26 – 04/17/26	05/06/26

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DAME / EDAM / WEIM – Timeline

Connectivity Testing Overview – May 2, 2025

- Covers network testing & certificate provisioning

- Participants without certificates are expected to reach out to their User Access Administrator (UAA) for proper provisioning.

- Participants must attain MAPSTAGE provisioning for the following applications: MF, SIBR, MRI-S, ETCC - PLC, webOMS, OASIS, and ALFS.

- Participants must update their firewall settings to ensure proper connections to applications. Refer to Connectivity Testing success criteria slide for more information.

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Connectivity Testing Success Criteria

Certificate	Success Criteria

YES	• Successful upon completion of following criteria:
	   • Access application via User Interface (UI) and login
	   • Access application via API

NO	• Successful upon completion of following criteria: • Access network via UI and/or API and receive error message about provisioning
NO	• Not successful if: • Attempt to access network via UI and/or API and receive error message other than request for provisioning

• Participants must perform connectivity testing for MAPSTAGE for all of the following applications: MF, SIBR, MRI-S, ETCC - PLC, webOMS, OASIS, and ALFS.

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Integration Testing Overview – June 1, 2025

- Participants have successfully attained certificate provisioning and have successfully completed Connectivity Testing

- Participants are to test submission and retrieval of data

- For the purposes of Integration Testing ISO shall ensure the following:

  - MAPSTAGE code is completed

  - Availability of MAPSTAGE environment applications externally

  - Mock data for testing of submissions and retrievals

Note: The quality of data at this point in time is not ensured for the purposes of Integration Testing for submission and retrieval

Integration Testing Success Criteria – Mock Data

Certificate	Success Criteria
YES	• Successful upon completion of connectivity testing • Successful submission and retrieval via UI • Successful submission and retrieval via API
YES	• Not successful if: • Receiving submission or retrieval error messages. Submit CIDI and email marketsim@caiso.com for support.

Note: ISO to provide From/To checklist and Day In the Life (DITL) document for purposes of participant Integration Testing readiness.

Integration + Settlements Overview – July 1, 2025

- Upon completion of successful Integration Testing participants can continue Integration Testing with live data and Settlement results beginning on 7/1/25 Participants are to test submission and retrieval of data

- For the purposes of Integration Testing ISO shall ensure the following:

  - Live data for testing of submissions and retrievals

  - Publishing of Settlements Statements once a week

Note: Participants must review Settlement Statements to ensure understanding of proper format required for submission.

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Integration Testing Success Criteria – Live Data

Certificate	Success Criteria
YES	• Successful completion of connectivity testing and Integration Testing (mock data) • Successful submission and retrieval via UI of live data • Successful submission and retrieval via API of live data
YES	• Not successful if: • Receiving submission or retrieval error messages. Submit CIDI and email marketsim@caiso.com for support.

Note: ISO to provide Settlement Statements weekly.

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Market Simulation Overview - Sept. 1, 2025

- Covers activities in the MAP Stage environment

- MAP Stage is an integrated Production-like environment that is available to customers with provisioned access

- Allows customers to experience ISO release/project implementations prior to Production implementation

- Market Simulation will allow customers and the CAISO to conduct specific market scenarios in a test environment prior to the Production activation to ensure that all system interfaces are functioning as expected and to produce simulated market results

- Customers may also use MAPSTAGE to validate the interaction of customer-driven changes with the ISO systems

Reasons for Market Simulation

- **Rule impacts**: Generalized changes in market rules, bidding rules, settlements rules, market design changes, or other business rules.

- **Interface changes**: Changes that impact templates (RA Supply Plan, Master File RDT, etc.), User Interfaces (UI), Application Programming Interface (API) / Web Service.

- **New/modified application/report**: Changes that cause addition/modification of ISO systems or reports, especially when data input is required by the customer

- **New/modified system process**: Modification of data flow in systems, especially if the new/modified process requires the customer to demonstrate proficiency prior to Production

- **New/modified model data**: Addition or substantial modification of model data as a market solution or export provided by the ISO

- **New/modified user role**: The addition or modification of access permissions for a user role

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Market Simulation MAP Stage Availability

- *MAP Stage weekly maintenance window is Friday**

System	UI	API	Comments
ADS			
ALFS	Not Available		
CIRA			
CRR			
MF			
OASIS			
webOMS			
PLC		Not Available	
RIMS		Not Available	
SIBR			
MRIS			

AVAILABLE

MAINTENANCE

*Maintenance may also occur after 1600 PT on other days and may deviate from the weekly maintenance window as necessary

Market Simulation Success Criteria – Sept. 1, 2025

Certificate	Success Criteria
YES	• Successful completion of Market Simulation Scenarios
YES	• Not successful if: • Receiving submission or retrieval error messages. Submit CIDI and email marketsim@caiso.com for support.

Note: ISO to provide Market Simulation Scenario document.

Parallel Operations Overview – Jan. 1, 2026

- Covers activities in the STAGE environment

- STAGE is an integrated Production-like environment that is available to customers with provisioned access

- Allows customers to experience ISO release/project implementations prior to Production implementation

- Parallel Operations testing will allow customers and the CAISO to conduct specific market scenarios in a test environment prior to the Production activation to ensure that all system interfaces are functioning as expected and to produce simulated market results

- Customers may also use STAGE to validate the interaction of customer-driven changes with the ISO systems

- ISO to provide updated criteria and quality of data after MAPSTAGE ahead of Parallel Operations Testing

Parallel Operations Success Criteria – Jan. 1, 2026

Certificate	Success Criteria
YES	• Successful completion of Parallel Operations Scenarios
YES	• Not successful if: • Receiving submission or retrieval error messages. Submit CIDI and email marketsim@caiso.com for support.

Note: ISO to update criteria and ensure highest data quality ahead of Parallel Operations. ISO to provide Parallel Operations documents for participant use throughout Parallel Operations testing.

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Activation – May 1, 2026

- Complete successful Connectivity, Integration, Market Simulation, and Parallel Operations ahead of Activation on 5/1/26

- Participants to confirm to Market Simulation and Customer Readiness team their readiness for activation

- ISO to support participants throughout testing and thereafter for participant readiness

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Next Steps

- Work with your UAA to provision your organization's access to MAP Stage for access to the systems to execute Market Simulation

- Review BRS Market Simulation requirements, Market Simulation Plans, Market Simulation Scenarios and provide any feedback

- Register for participation in Market Simulation

- Attend the Release User Group Forums, every other week, for implementation updates, including active and upcoming Market Simulation activities

- During active Market Simulations, attend the weekly Market Simulation Forums

Market Simulation Registration

- **Please register for your participation in Market Simulation activities for each Market Simulation initiative as appropriate**
  - If you have intent to actively engage in MAP Stage testing of access, systems, functionality, processes, and/or review of results/data
- **This informs CAISO Market Simulation to provide more specific support for your efforts**, including
  - Data setup for your testing
  - More immediate communication and coordination impacting your testing/review
  - More detailed information for the applicable initiatives
- **How to register**
  - Submit CIDI with 'Functional Environment' = "Market Simulation"
    - Identify the Market Simulation initiative(s) you will participate in
    - Identify any specific resources as applicable
    - List the contacts and e-mail addresses that you would like to include
  - CIDI is preferred and if you don't have CIDI, you can e-mail marketsim@caiso.com with the same information

Market Simulation Support

- Email general questions to marketsim@caiso.com

- Submit market simulation specific issues and questions in CIDI with subject: "Project Name: System Name – Issue Title" with Functional Environment set to Market Simulation.
  - If not related to a Project submit subject as "NA: System Name – Issue Title"

- Service Desk: (916) 351-2309