

Session 1 – New CAISO Website Overview Webinar Training



Today's Trainer

Dottie Vance
Customer Readiness
Trainer

Housekeeping



REMAIN MUTED

Keep yourself muted to minimize background noise



ASKING QUESTIONS

Unmute to ask verbal questions or write in the chat pod



RAISING HAND

Raise your hand using WebEx interactivity tools

The information contained in these materials is provided for general information only and does not constitute legal or regulatory advice. The ultimate responsibility for complying with the ISO FERC Tariff and other applicable laws, rules or regulations lies with you. In no event shall the ISO or its employees be liable to you or anyone else for any decision made or action taken in reliance on the information in these materials.

Our meeting agenda



Review important details for the new CAISO website



Compare the previous website to the new website



Demonstration of the new CAISO website for users



Question & Answer (Q&A) session and wrap-up

Road to the new CAISO website

Internal discussions on enhancement



Stakeholder feedback and collaboration

Modernization of website features



Enhance efficiency and transparency



May 2024 – Key upcoming dates

| MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY | SATURDAY | SUNDAY |
|--------|---------|--|---|--|----------|--------|
| 20 | 21 | 22 |  23 External Training @ 9am PPT | 24 | 25 | 26 |
| 27 | 28 |  29 External Training @ 10am PPT New CAISO website cutover starts |  30 New CAISO Website launches! | <i>Post launch: continued user support. Submit questions via CIDI or Contact Us page.</i> | | |

The new website will take over the “caiso.com” address.
 The previous CAISO website will remain available as an archive until 6/30/2024. (www.archive.caiso.com)

Impacts to consider



REALLY SIMPLE SYNDICATION (RSS)

The really simple syndication (RSS) functionality is being decommissioned.

You can still receive all the same messaging, please visit the **Subscriptions** page.



UPDATE BOOKMARKS

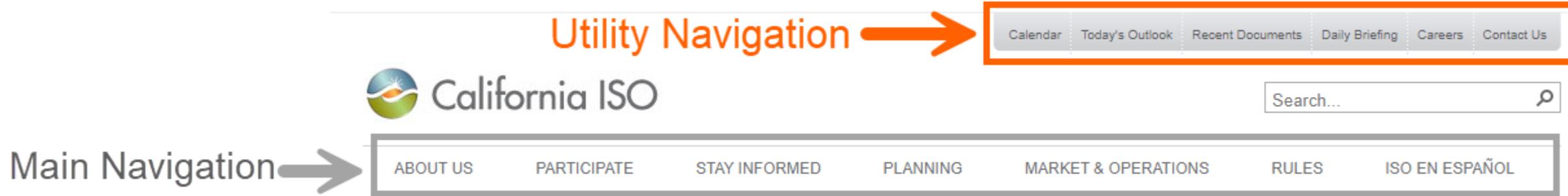
While we will have redirects in place with the new site launch, you're highly encouraged to update any bookmarked pages.

Comparing Previous CAISO Website to New CAISO Website

Section Focus

- High-level review of previous CAISO website to the new CAISO website.
- Resources for users to utilize for website switch over.

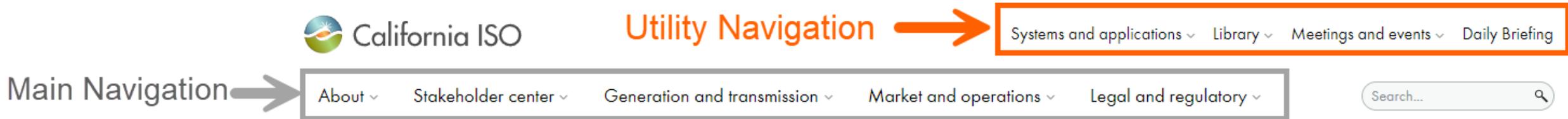
Previous CAISO website navigations



Users had the ability to select from the utility and main navigation sections.

- **Utility navigation** provides users with links to access commonly utilized pages.
- **Main navigation** provides users with a list of drop-down pages to select from.
 - Users had the ability to select each main navigation title and be brought to a landing page.

New CAISO website navigations (as of 5/30/24)



Similar to the previous website, the new website has utility and main navigation features.

- **Utility navigation** will now show users a list drop-down pages to select from.
 - Systems and applications (*user access, portals, release planning*)
 - Library (*recent documents, topics*)
 - Meetings and events (*calendar, events, meetings*)
 - Daily Briefing (*no change*)
- **Main navigation** will provide users with a list of drop-down pages to select from.

Previous website > About Us > Our Leadership

ABOUT US PARTICIPATE

Our Business Careers

Our Leadership Industry Insights

Our Commitment

News

Publications and Financials



About Us

- Our Business
- Our Leadership**
- Our Commitment
- News
- Publications and Financials
- Careers
- Industry Insights

Participate

Stay Informed

Planning

Market & Operations

Rules

ISO En Español

Our leadership

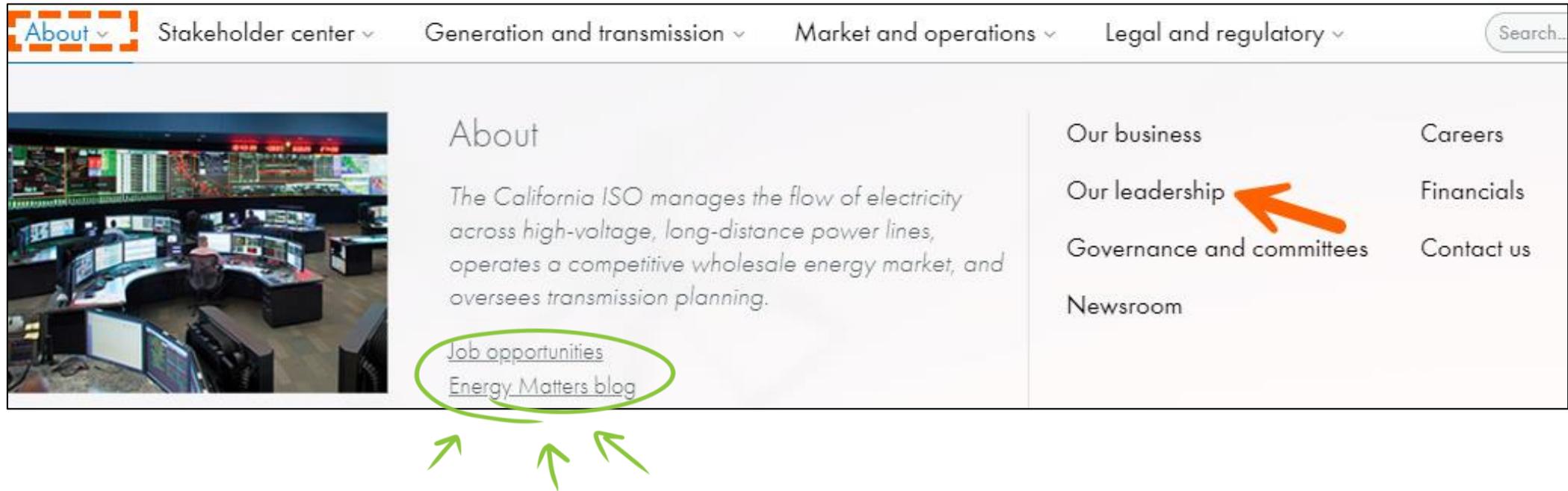
The ISO is led by an experienced Board of Governors and executive management team that set policies that ensure the reliable performance of the high-voltage electricity grid, open access to participants, and a transparent, competitive market for energy.

Executive team

California ISO Organizational Chart 2/09/2024 13:12

| | | |
|---|---|--|
|  Elliot Mainzer President, and Chief Executive Officer |  Mark Rothleder Senior Vice President, and Chief Operating Officer | |
|  Khaled Abdul-Rahman Vice President, Power System |  Roger Collanton Vice President, General Counsel |  Stacey Crowley Vice President, External Affairs |

New website > About > Our leadership



About section should look very familiar, as little has changed. We will review a few pages in greater detail during the demo. Note: The new website has quick, hyper-links under sections for easy access.

New website > About > Our leadership > On page navigator

The screenshot shows the 'Our leadership' page on the California ISO website. At the top, there is a navigation menu with links for 'About', 'Stakeholder center', 'Generation and transmission', 'Market and operations', and 'Legal and regulatory', along with a search bar. Below the menu, the breadcrumb trail reads 'About / Our leadership'. The main heading is 'Our leadership', followed by a paragraph: 'The ISO is led by an experienced Board of Governors and executive management team that set policies that ensure the reliable performance of the high-voltage electricity grid, open access to participants, and a transparent, competitive market for energy.' Below this is the 'Executive team' section, which features a portrait of Elliot Mainzer, President and Chief Executive Officer, and a short biography. On the right side of the page, an 'On this page' section lists three links: 'Executive team', 'Board of Governors', and 'WEIM Governing Body'. An orange mouse cursor is pointing at the 'WEIM Governing Body' link, and several orange arrows point towards this section from the right. At the bottom right, there are two buttons: 'Back to top' and 'On this page' with a dropdown arrow.

New website > About > Our leadership > On page navigator cont.

Western Energy Imbalance Market (WEIM) Governing Body

The WEIM is governed by a five member body with delegated authority from the ISO Board of Governors on rules specific to participation to the WEIM. Designed by regional stakeholders, members of the governing body are nominated by a committee of western stakeholders. [View Western EIM Governing Body for more information.](#)



Andrew G. Campbell - Chair

Andrew Campbell is Executive Director of the Energy Institute at Haas at the University of California, Berkeley. Prior to joining the Western Energy Imbalance Market (WEIM) Governing Body, he was a member of the WEIM Governance Review Committee, which recommended the adoption of a shared-governance framework with the California Independent System Operator (ISO) Board of Governors over issues applicable to the WEIM. That governance framework was adopted by the WEIM

On this page

- [Executive team](#)
- [Board of Governors](#)
- [WEIM Governing Body](#)

[↑ Back to top](#)

[On this page](#)

[Executive team](#)

[Board of Governors](#)

[WEIM Governing Body](#)



Previous website > Participate > Application access

PARTICIPATE STAY INFORMED PLA

| | |
|--------------------------------------|------------------------------|
| Resource Interconnection Guide | Transmission |
| Scheduling Coordinator | Utility Distribution Company |
| Western Energy Imbalance Market | Metering and Telemetry |
| Generation | Market Products |
| Demand Response and Load | Application Access |
| Distributed Energy Resource Provider | Learning Center |
| Dynamic Transfers | |
| Storage | |
| Metered Subsystem | |



About Us
Participate

- Resource Interconnection Guide
- Become a Scheduling Coordinator
- Scheduling Coordinator Ongoing Obligations
- Energy Imbalance Market
- Generation
- Demand Response and Load
- Distributed Energy Resource Provider
- Dynamic Transfers
- Storage
- Metered Subsystem
- Transmission
- Utility Distribution Company

Application access

Confidential information and data communicated between the ISO and its participants during the course of planning and market activities are protected through robust system and application security. Find access requirements as well as application technical specifications and user information here.

Featured documents

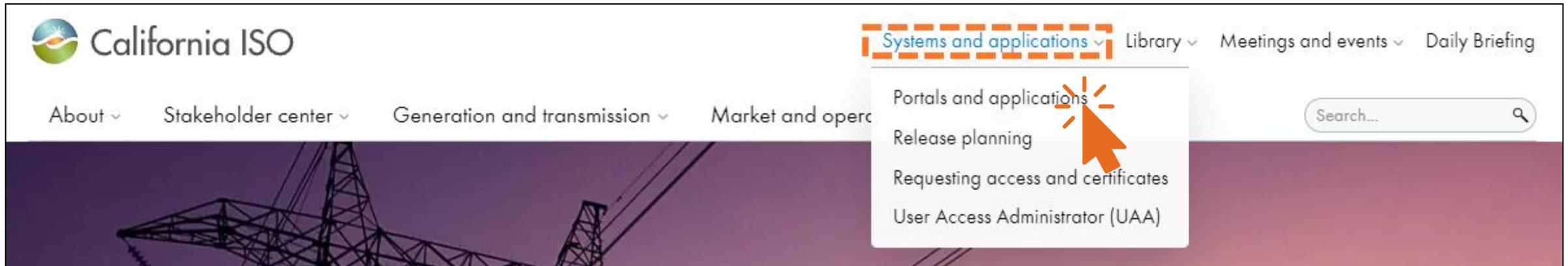
- ISO Production Maintenance and Outage Schedule 4/17/2024 11:59
- Daylight Saving Time Long Day Information 11/04/2023 16:05
- Daylight Saving Time Short Day Information 3/07/2024 14:07
- ISO Secure File Transfer Protocol (SFTP) Provisioning and Setup Procedure 12/01/2021 14:52
- Digital certificates [\[PDF\]](#)
Digital certificates and instructions.
- Application access request forms and reference guide [\[PDF\]](#)

User access administrator guide [\[PDF\]](#)

Customers must designate one or more user access administrators (*formerly points of contact*) to manage the process of requesting user access to ISO applications. Please use the web-based agreement form below to submit a designation. Refer to the [User access administrator guide](#) for step-by-step process and forms. Questions? Contact UAARquests@caiso.com.

Participate pages have been moved to fit under their correlating topics. For example, the Transmission page can now be found under the **Generation and transmission** section on the new website.

New website > Systems and applications



Systems and applications section is a great resource for users interacting with ISO applications, requesting access, and for those who are actively involved in initiative/project releases.

New website > Systems and applications > Portals and applications

Documentation for applications

The following links are to supporting documentation for the applications. For direct access to specific applications, go to the [Market Participant Portal](#). All applications, excluding OASIS, require a certification. [Find out more about requesting access and certificates.](#)

Additional documentation for the Western Energy Imbalance Market and RC West specific applications can be found within their respective portals (certificate required) under the 'Training' tab.

On this page

- [Portals](#)
- [Applications](#)

| | | |
|---|--|--|
| AIM Access Identity Management | ADS Automated Dispatch System | CIDI Customer Inquiry, Dispute and Information |
| CIRA Customer Interface for Resource Adequacy | DRRS Demand Response Registration System | MFRD MasterFile |
| MMD Market Modeling Data | MNS Market Notification Service | MPP Market Participant Portal |

Users can click on each application to review how to access the application, helpful documentation (e.g., user guides), and related training materials.

Previous website > Stay Informed

| STAY INFORMED | PLANNING | MARKET & |
|---------------------------------|---------------------------------|----------|
| Board and Committees | Stakeholder Symposium | |
| Policy Initiatives | Subscriptions and notifications | |
| Recurring Stakeholder Processes | Meetings and Events | |
| Release Planning | Recent Documents | |
| Going Green | Bulletins Reports and Studies | |
| Managing Oversupply | Regulatory Filings and Orders | |
| Regional Collaboration | Daily Briefing | |
| Western Energy Imbalance Market | | |
| RC West | | |
| Regional Solutions | | |

Stay Informed housed hyperlinks, informative papers, and stakeholder processes. To allow for greater efficiency, these items have been relocated to sections that correlate to the topic and are easy to find.

New Website > Stakeholder center

California ISO

Systems and applications ▾ Library ▾ Meeti

About ▾ **Stakeholder center ▾** Generation and transmission ▾ Market and operations ▾ Legal and regulatory ▾



Stakeholder center

Stakeholders are essential to the California energy market and the ISO is committed to providing centralized access to transparent information.

[Participate with the ISO](#)

- Policy initiatives
- Commenting tool
- Recurring processes
- Training center

Stakeholder center is a useful resource for users who are involved in the stakeholder process and for those looking for training. Note: Participate with the ISO hyperlink holds an abundance of information for users looking to become involved with the ISO.

Previous website > Planning and Market & Operations

| PLANNING | MARKETS & OPERATIONS |
|---|----------------------|
| Generator Interconnection | |
| Reliability Requirements | |
| Transmission Planning | |
| Interregional Transmission Coordination | |
| Reports and Bulletins | |

| MARKET & OPERATIONS | RULES |
|-------------------------------|--------------------------------|
| Market Processes and Products | Transmission Operations |
| Network and Resource Modeling | Power Contracts Bulletin Board |
| Outage Management | Reports and Bulletins |
| Interchange Scheduling | Market Monitoring |
| Metering and Telemetry | |
| Settlements | |

Planning pages have been relocated and organized to fit under the **Generation and transmission** section on the new website. **Markets & Operations** will continue to have its own section on the new website.

Note: “Reports and Bulletins” under each section have been moved to the **Library** on the new website.

New Website > Generation and transmission & Market and operations

The image shows two screenshots of the California ISO website's navigation menu. The top screenshot highlights the 'Generation and transmission' section, which includes a description of the ISO's role in providing access to the transmission grid and a list of sub-topics: Generation, Transmission, Load, Resource adequacy, and Metering and telemetry. The bottom screenshot highlights the 'Market and operations' section, which includes a description of procedures and reports for grid and market operations, and a list of sub-topics: Today's Outlook, Outages, Products and services, Settlements, Network and resource modeling, Interchange scheduling, Scheduling coordinator, and Market monitoring. Both screenshots show a search bar and a navigation bar with dropdown menus for 'About', 'Stakeholder center', 'Generation and transmission', 'Market and operations', and 'Legal and regulatory'.

Generation and transmission

The ISO provides open and non-discriminatory access to the transmission grid, supported by a competitive energy market for resources generating one megawatt or more.

[Power Contracts Bulletin Board](#)

Generation
Transmission
Load
Resource adequacy
Metering and telemetry

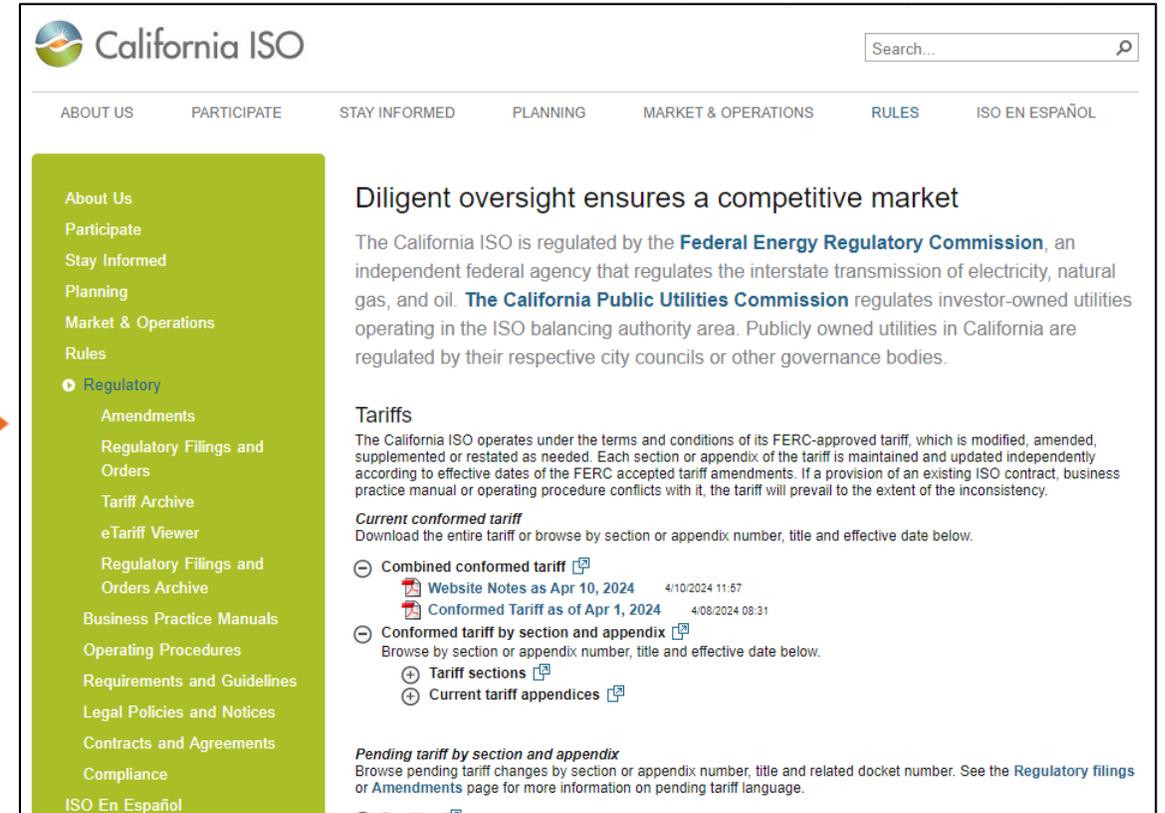
Market and operations

Procedures, reports and reference information pertinent to grid and market operations.

[Market reports](#)
[Dynamic transfers](#)

Today's Outlook
Outages
Products and services
Settlements
Network and resource modeling
Interchange scheduling
Scheduling coordinator
Market monitoring

Previous website > Rules



The pages under **Rules** will be carried over to the new website under the **Legal and regulatory** section. To ensure this page is user friendly, the new website pages are clearly titled.

For example, if you were looking for the **Tariff**, where would you go on the previous website?

New website > Legal and regulatory

Legal and regulatory section has clearly labeled pages that will help users navigate more efficiently.



The screenshot shows a website navigation menu with the following items: About, Stakeholder center, Generation and transmission, Market and operations, and Legal and regulatory. The 'Legal and regulatory' menu item is highlighted with a dashed orange border. To the right of the menu is a search bar labeled 'Search...'. Below the menu, the 'Legal and regulatory' section is displayed. It features a photograph of classical columns on the left. The main heading is 'Legal and regulatory', followed by a descriptive paragraph: 'Research legal policies, notices as well as ISO contracts and agreements. Business practice manuals and operating procedures are also found here.' To the right of this text is a list of sub-sections: Tariff, Regulatory filings and orders, Business Practice Manuals, Legal policies and incorporation, Contracts and agreements, Compliance, and Operating procedures.

Navigation menu: About, Stakeholder center, Generation and transmission, Market and operations, **Legal and regulatory**, Search...

Legal and regulatory

Research legal policies, notices as well as ISO contracts and agreements. Business practice manuals and operating procedures are also found here.

- Tariff
- Regulatory filings and orders
- Business Practice Manuals
- Legal policies and incorporation
- Contracts and agreements
- Compliance
- Operating procedures

Resource to find previous pages – Crosswalk documentation

This spreadsheet will walk users through where pages were located on the previous CAISO website and where to find them on the new CAISO website.

| Page | Previous Path | New Path |
|------------------|---|---|
| Calendar | Utility navigation -> Calendar | Utility Navigation -> Meetings and events -> Calendar |
| Today's Outlook | Utility navigation ->Today's Outlook | Main Navigation -> Market and Operations -> Today's Outlook Homepage |
| Recent Documents | Utility navigation -> Recent Documents | Utility Navigation -> Library --> Recent documents |
| Daily Briefing | Utility navigation -> Daily Briefing | Utility Navigation -> Daily Briefing and page footer |
| Careers | Utility navigation -> Careers | Main Navigation -> About -> Careers Footer -> California ISO -> Careers |
| Contact Us | Utility navigation -> Contact Us | Main Navigation -> About -> Contact us Footer -> Support -> Contact us |
| About Us | Main Navigation -> About Us | Main Navigation -> About |
| Our Business | Main Navigation -> About Us -> Our Business | Main Navigation -> About -> Our Business |
| Our Leadership | Main Navigation -> About Us -> Our Leadership | Main Navigation -> About -> Our Leadership |

What happens to bookmarked pages? Users will need to update their bookmarks with the new URLs.

What Questions Do You Have?



Unmute yourself

or



Raise your hand

Demonstration of new CAISO website

Section Focus

- Pull up the new website to walkthrough together.

Question and Answer (Q&A)



**Unmute
yourself**

OR



**Raise Your
Hand**

**Questions for website specifics: CIDI or Contact Us page.
Knowledge Article FAQ to be shared.**



Wrap Up

Summary, Q&A

- What's happening next.



Located on the Training Center

Computer Based Trainings (CBTs)

- About section
- Legal and regulatory
- Library (recent documents and topics)
- Meetings and events (calendar, events, and meetings)
- Participating with the ISO
- Systems and applications

Additional Resources

- Crosswalk document (paths to find specific pages)
- Presentation and recording



Tell us how we did

Takes 3-5 minutes to complete

Helps us improve future training

Link: <https://www.surveymonkey.com/r/caisocoursesurvey>

Instructor: Dottie

Training course: Session 1 – New CAISO Website Overview Webinar Training

Thank you for your participation!



For clarification on anything presented in this training, send an email to:
CustomerReadiness@caiso.com

For any other questions or stakeholder specific questions or concerns, please
[submit a CIDI ticket](#) or Contact Us Submission.