

Release Notes – SIBR Rules Version 4.2.7 (Convergence Bidding)

This set of Release Notes covers the changes going forward from SIBR Rules Version 4.2.1 through 4.2.7.

These are all rule changes tracked for revision to be included in the Convergence Bidding (CB) deployment set. Not all rules are specific to CB.

Revision History for Rules:

4.2.2	6/30/2010	Added term for Pending Bid Approval Option.
4.2.2	6/30/2010	Modified 50006 to use the Pending Bid Approval Option.
4.2.3	8/4/2020	Carried forward changes from MSG rule sets 3.12.5.1 thru 3.12.5.4.
4.2.4	8/9/2010	Bounded from below the Position Limit in 35107-35110 and 36107-36110 to the Minimum Energy Bid Segment Size.
4.2.5	9/17/2010	Ported 3.12.5.5-7 changes.
4.2.6	9/20/2010	Clarified in 35109-35110 and 36109-36110 (Aggregate Position Limit Validation) that all Virtual Supply/Demand Bids from the offending CB Entity must become Invalid when the rule fails.
4.2.7	9/29/2010	Modified 10022 changed to \$750
4.2.7	9/30/2010	Modified 65003 and 66003 for ETCC CUTOFF time for OTC reduction on Virtual Bid
4.2.7	9/30/2010	Added Term ETCC CUTOFF Time (new parameter)
4.2.7	9/30/2010	Modified 60005, 60007, 60011, 60013 for ETCC CUTOFF time for Entitlement change

Summary of Impacted Rules:

Rules impacted		
Modified		10022,35107,35108,35109,35110,36107,36108, 36109,36110,50006,60005,60007,60011,60013, 65003,66003

Rule changes for the SIBR BR 4.2.7 (CB) are listed below on the following pages.

Modified:

Market	Business Rule ID	Description	Comments
ALL	10022	The configurable Energy Bid Ceiling must be initialized to \$750/MWh.	
DAM	35107	If the Location specified in a Virtual Supply Resource Bid is not an Inter-Tie Scheduling Point, the last (highest) Energy Bid Quantity of the Energy Bid Curve specified in the Energy Bid Component for a Trading Hour in that Bid must not be greater than the higher of the Minimum Energy Bid Segment Size and the lower of a) the product of the Virtual Generator Position Limit Factor and the registered Maximum Generating Capacity (MW) for that Location, or b) the Virtual Resource Position Limit (MW) for that Location and the Convergence Bidding Entity associated with the Scheduling Coordinator specified in that Bid.	MFR: Maximum Generating Capacity (MW) registry by Virtual Supply Resource Location that is not an Inter-Tie Scheduling Point. SIBR: Temporary administrative Virtual Resource Position Limit (MW) shall be persistently maintained by CB Entity and Virtual Resource Location.

Market	Business Rule ID	Description	Comments
DAM	35108	If the Location specified in a Virtual Supply Resource Bid is an Inter-Tie Scheduling Point, the last (highest) Energy Bid Quantity of the Energy Bid Curve specified in the Energy Bid Component for a Trading Hour in that Bid must not be greater than the higher of the Minimum Energy Bid Segment Size and the lower of a) the product of the Virtual Import Position Limit Factor and the Maximum Import Capacity (MW) for that Location, or b) the Virtual Resource Position Limit (MW) for that Location and the Convergence Bidding Entity associated with the Scheduling Coordinator specified in that Bid.	ETCC: Maximum Import Capacity (MW) provided for each Trading Hour and Virtual Supply Resource Location that is an Inter-Tie Scheduling Point.
DAM	35109	If the Location specified in a Virtual Supply Resource Bid is not an Inter-Tie Scheduling Point and the sum of the last (highest) Energy Bid Quantities of the Energy Bid Curves specified in the Energy Bid Components for a Trading Hour in all Virtual Supply Resource Bids at the same Location, where the Scheduling Coordinators specified in these Bids are associated with the Convergence Bidding Entity associated with the Scheduling Coordinator specified in that Bid, is greater than the higher of the Minimum Energy Bid Segment Size and the lower of a) the product of the Virtual Generator Position Limit Factor and the registered Maximum Generating Capacity (MW) for that Location, or b) the Virtual Resource Position Limit (MW) for that Location and Convergence Bidding Entity, all these Virtual Supply Resource Bids must become Invalid.	
DAM	35110	If the Location specified in a Virtual Supply Resource Bid is an Inter-Tie Scheduling Point and the sum of the last (highest) Energy Bid Quantities of the Energy Bid Curves specified in the Energy Bid Components for a Trading Hour in all Virtual Supply Resource Bids at the same Location, where the Scheduling Coordinators specified in these Bids are associated with the Convergence Bidding Entity associated with the Scheduling Coordinator specified in that Bid, is greater than the higher of the Minimum Energy Bid Segment Size and the lower of a) the product of the Virtual Import Position Limit Factor and the Maximum Import Capacity (MW) for that Location, or b) the Virtual Resource Position Limit (MW) for that Location and Convergence Bidding Entity, all these Virtual Supply Resource Bids must become Invalid.	

Market	Business Rule ID	Description	Comments
DAM	36107	If the Location specified in a Virtual Demand Resource Bid is not an Inter-Tie Scheduling Point, the last (highest) Energy Bid Quantity of the Energy Bid Curve specified in the Energy Bid Component for a Trading Hour in that Bid must not be greater than the higher of the Minimum Energy Bid Segment Size and the lower of a) the product of the Virtual Load Position Limit Factor and the registered Maximum Load Capacity (MW) for that Location, or b) the Virtual Resource Position Limit (MW) for that Location and the Convergence Bidding Entity associated with the Scheduling Coordinator specified in that Bid.	MFR: Maximum Load Capacity (MW) registry by Virtual Demand Resource Location that is not an Inter-Tie Scheduling Point.
DAM	36108	If the Location specified in a Virtual Demand Resource Bid is an Inter-Tie Scheduling Point, the last (highest) Energy Bid Quantity of the Energy Bid Curve specified in the Energy Bid Component for a Trading Hour in that Bid must not be greater than the higher of the Minimum Energy Bid Segment Size and the lower of a) the product of the Virtual Export Position Limit Factor and the Maximum Export Capacity (MW) for that Location, or b) the Virtual Resource Position Limit (MW) for that Location and the Convergence Bidding Entity associated with the Scheduling Coordinator specified in that Bid.	ETCC: Maximum Export Capacity (MW) provided for each Trading Hour and Virtual Demand Resource Location that is an Inter-Tie Scheduling Point.
DAM	36109	If the Location specified in a Virtual Demand Resource Bid is not an Inter-Tie Scheduling Point and the sum of the last (highest) Energy Bid Quantities of the Energy Bid Curves specified in the Energy Bid Components for a Trading Hour in all Virtual Demand Resource Bids at the same Location, where the Scheduling Coordinators specified in these Bids are associated with the Convergence Bidding Entity associated with the Scheduling Coordinator specified in that Bid, is greater than the higher of the Minimum Energy Bid Segment Size and the lower of a) the product of the Virtual Load Position Limit Factor and the registered Maximum Load Capacity (MW) for that Location, or b) the Virtual Resource Position Limit (MW) for that Location and Convergence Bidding Entity, all these Virtual Demand Resource Bids must become Invalid.	
DAM	36110	If the Location specified in a Virtual Demand Resource Bid is an Inter-Tie Scheduling Point and the sum of the last (highest) Energy Bid Quantities of the Energy Bid Curves specified in the Energy Bid Components for a Trading Hour in all Virtual Demand Resource Bids at the same Location,	

Market	Business Rule ID	Description	Comments
		where the Scheduling Coordinators specified in these Bids are associated with the Convergence Bidding Entity associated with the Scheduling Coordinator specified in that Bid, is greater than the higher of the Minimum Energy Bid Segment Size and the lower of a) the product of the Virtual Export Position Limit Factor and the Maximum Export Capacity (MW) for that Location, or b) the Virtual Resource Position Limit (MW) for that Location and Convergence Bidding Entity, all these Virtual Demand Resource Bids must become Invalid.	
DAM	50006	A Valid Bid with Credit Status of "Pending Response" must become an Invalid Bid if the Pending Bid Approval Option is "No", otherwise its Credit Status must be set to "Approved" and it must be promoted to a Clean Bid.	Virtual Resource Bids only. 30022 must fire after this rule. SIBR: Administrative Pending Bid Approval Option shall be persistently maintained.
DAM	60005	If there is a TOR Entitlement change for a TOR for a Trading Hour in the Active Day, the registered DAM Right Indicator for that TOR indicates physical rights, the Balancing Indicator for that TOR is set to "Yes" for that Trading Hour, the current time is before the ETCC CUTOFF Time for that Active Day, that TOR is not a TOR Chain, and the sum of all TOR Self-Schedule Quantities specified in the TOR Self-Schedule Bid Components with the same TOR Reference or a TOR Reference of any TOR Chain that includes that TOR, over all Generating and Import Resource Bids for that Trading Hour, is greater than the TOR Entitlement for that TOR and Trading Hour, the Priority Indicator for that TOR and Trading Hour must be set to "No," otherwise it must be set to "Yes."	TOR Entitlement for TOR Link.
DAM	60007	If there is a TOR Entitlement increase for a TOR for a Trading Hour in the Active Day, the registered DAM Right Indicator for that TOR indicates physical rights, the Balancing Indicator for that TOR is set to "Yes" for that Trading Hour, the current time is before the ETCC CUTOFF Time for that Active Day, that TOR is not a TOR Chain, and the sum of all TOR Self-Schedule Quantities specified in the TOR Self-Schedule Bid Components with the same TOR Reference or a TOR Reference of any TOR Chain that includes that TOR, over all Generating and Import Resource Bids for that Trading Hour, is greater than the TOR Entitlement for that TOR and Trading Hour, the Priority Indicator for that TOR and Trading Hour must be set to "No," otherwise it must be set to	TOR Entitlement for TOR Link.

Market	Business Rule ID	Description	Comments
		"Yes."	
DAM	60011	If there is a ETC Entitlement change for a ETC for a Trading Hour in the Active Day, the registered DAM Right Indicator for that ETC indicates physical rights, the Balancing Indicator for that ETC is set to "Yes" for that Trading Hour, the current time is before the ETCC CUTOFF Time for that Active Day, that ETC is not a ETC Chain, and the sum of all ETC Self-Schedule Quantities specified in the ETC Self-Schedule Bid Components with the same ETC Reference or a ETC Reference of any ETC Chain that includes that ETC, over all Generating and Import Resource Bids for that Trading Hour, is greater than the ETC Entitlement for that ETC and Trading Hour, the Priority Indicator for that ETC and Trading Hour must be set to "No," otherwise it must be set to "Yes."	ETC Entitlement for ETC Link.
DAM	60013	If there is a ETC Entitlement increase for an ETC for a Trading Hour in the Active Day, the registered DAM Right Indicator for that ETC indicates physical rights, the Balancing Indicator for that ETC is set to "Yes" for that Trading Hour, the current time is before the ETCC CUTOFF Time for that Active Day, that ETC is not an ETC Chain, and the sum of all ETC Self-Schedule Quantities specified in the ETC Self-Schedule Bid Components with the same ETC Reference or a ETC Reference of any ETC Chain that includes that ETC, over all Generating and Import Resource Bids for that Trading Hour, is greater than the ETC Entitlement for that ETC and Trading Hour, the Priority Indicator for that ETC and Trading Hour must be set to "No," otherwise it must be set to "Yes."	ETC Entitlement for ETC Link.
DAM	65003	If there is a Maximum Import Capacity reduction for a Virtual Supply Resource Location that is an Inter-Tie Scheduling Point for a Trading Hour in the Active Day and the current time is before the ETCC CUTOFF Time, for that Active Day, the Bid Validation rules (35108 and 35110) must re-fire for all Virtual Supply Resource Bids at that Virtual Supply Resource Location.	Special Bid Processing for Maximum Import Capacity reduction.
DAM	66003	If there is a Maximum Export Capacity reduction for a Virtual Demand Resource Location that is an Inter-Tie Scheduling Point for a Trading Hour in the Active Day and the current time is before the ETCC CUTOFF Time, for that Active Day, the Bid Validation rules (36108 and 36110) must re-fire for all Virtual Demand Resource Bids at that Virtual Demand	Special Bid Processing for Maximum Export Capacity reduction.

Market	Business Rule ID	Description	Comments
		Resource Location.	

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