



OASIS Phase II

Approaching the Problem

General Discussion on Strategy and Philosophy
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Presented to the NAESB ESS and ITS
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How did we get here?

- OASIS 1A
 - Fax Tagging
 - E-Mail Tagging
 - Electronic Tagging
 - XML Electronic Tagging
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- OASIS Phase II/Electronic Scheduling ANOPR



Core Objectives

- Customer-driven Development
- Incremental Value
- Cost Effective
- Market Design Neutral
- Encourage “seamless” boundaries whenever possible
- Leverage Existing Tools...
without being bound by those tools



How do we start?

- Begin with the ESC Use Cases
- Evaluate and Define OASIS functionality
- Identify Modular Components
- Determine Architecture
- Develop Approach

- This should NOT necessarily be a discussion on technical issues
- Focus should be on deployment strategy that meets core objectives
- Identify modular groups where appropriate

- Should focus on incremental deliverables to provide ongoing value
- Staged approach to functionality will allow amortized cost burden to companies
- Can also be utilized to address regional diversity
 - If upgrades can be done on an incremental basis, we can work to ensure backward compatibility where possible



Ongoing Efforts

- IDC – Next Generation
 - No dependence on tags
- CIM Market Extensions
 - Coordination between RTOs
- PJM/MISO Congestion Management
 - Quantifying internal dispatch
- Information Technology Council
 - Facilitated Checkouts, Other Initiatives

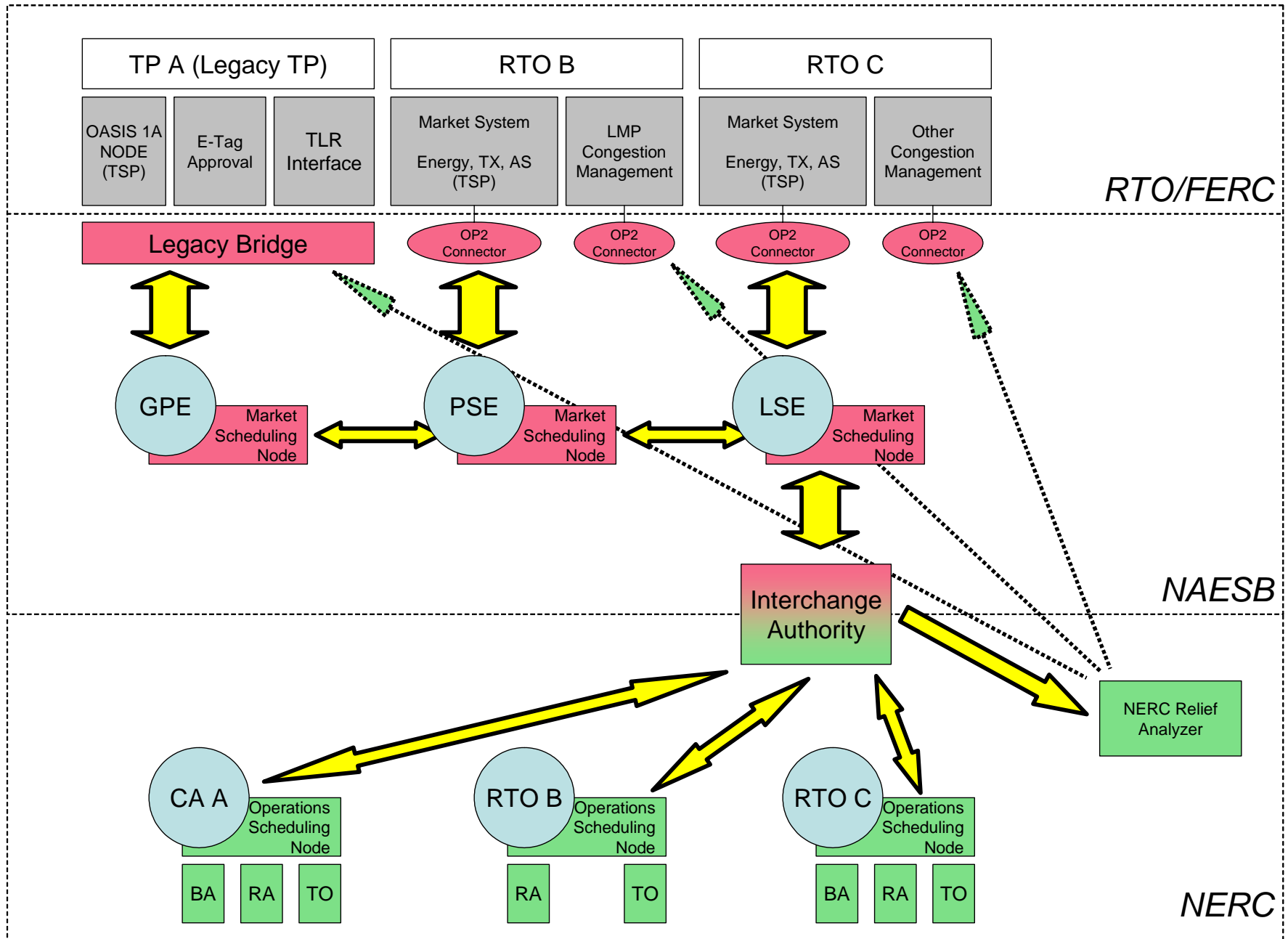
- Should encourage participation to meet openness goals and ensure coordinated attack – minimal duplication of effort
 - NAESB Groups
 - Seams Collaborative
 - Information Technology Subcommittee
 - NERC Community
 - Interchange Subcommittee
 - Transaction Information Systems Working Group
 - Operations Reliability Subcommittee
 - Interchange Distribution Calculator Working Group
 - ISO/RTO Council
 - Information Technology Committee



What is OASIS (my thoughts)?

- A market-oriented solution that optimizes the market interchange scheduling function
 - *This would be developed by NAESB*
- A reliability-oriented solution that meets the needs of the functional model with regard to operational interchange scheduling
 - *This would be developed by NERC*
- A set of interfaces to allow for market activity within a ISO/RTO/TP
 - *This would be developed by the ISO/RTO/TP, but would align with the NAESB functions*
- A “market/reliability interface” between the two, called the Interchange Authority, that would tie markets and reliability together
 - *This would jointly be developed by NERC, NAESB, and the IRC*

Proposed Vision





Suggested Timeline

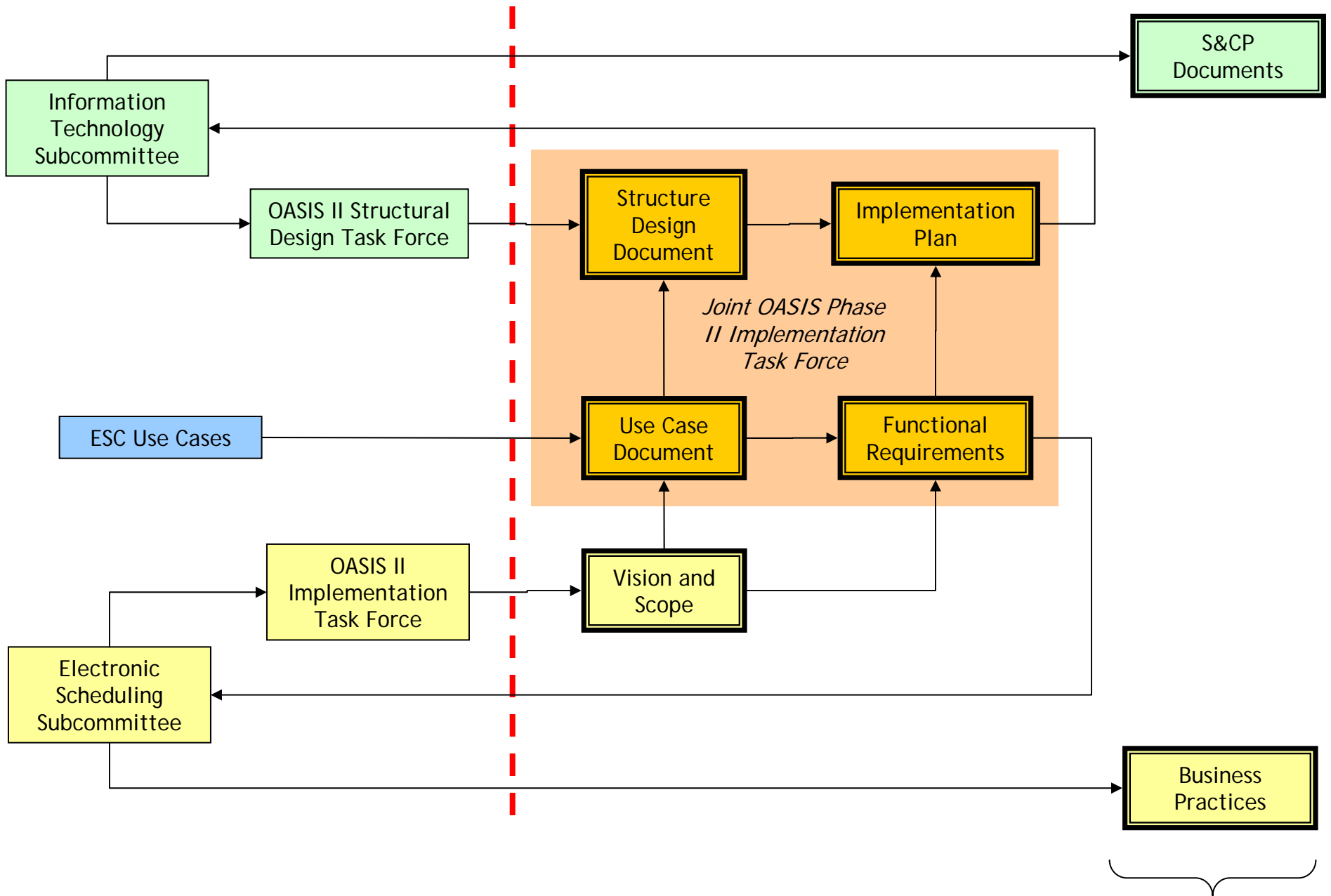
- Spring/Summer 2004 – Develop Functional Design Documents
 - Detailed Scope
 - ESC Use Cases
- Summer/Fall 2004 – Develop Strategic Architecture Plan
 - Modules
 - Compatibility plans and requirements
- Winter 2004 – Identify Implementation Plan
- 2005 – Design Stage I Components
- 2006 – Implement Stage I Components, Design Stage II Components
- 2007 – Implement Stage II Components, Design Stage III Components
- 2008 – Implement Stage III Components

- Stage I
 - OASIS Phase I Legacy Bridge
 - E-Tag Legacy Bridge (replace Authority with limited IA functionality)
 - IDC Architectural Split (Impact Calculator vs. TLR Process)
- Stage II
 - OASIS Phase II Functions
 - Legacy Bridge Upgrades
 - Operations Scheduling Tools (Functional Model)
 - Enhanced IA to Reliability Interface
 - IDC Next Generation
- Stage III
 - Electronic Scheduling
 - Market to IA Interface

- Do we agree upon the core principles?
 - Customer-driven Development
 - Incremental Value
 - Cost Effective
 - Market Design Neutral
 - Encourage “seamless” boundaries whenever possible
 - Leverage Existing Tools without being bound by those tools

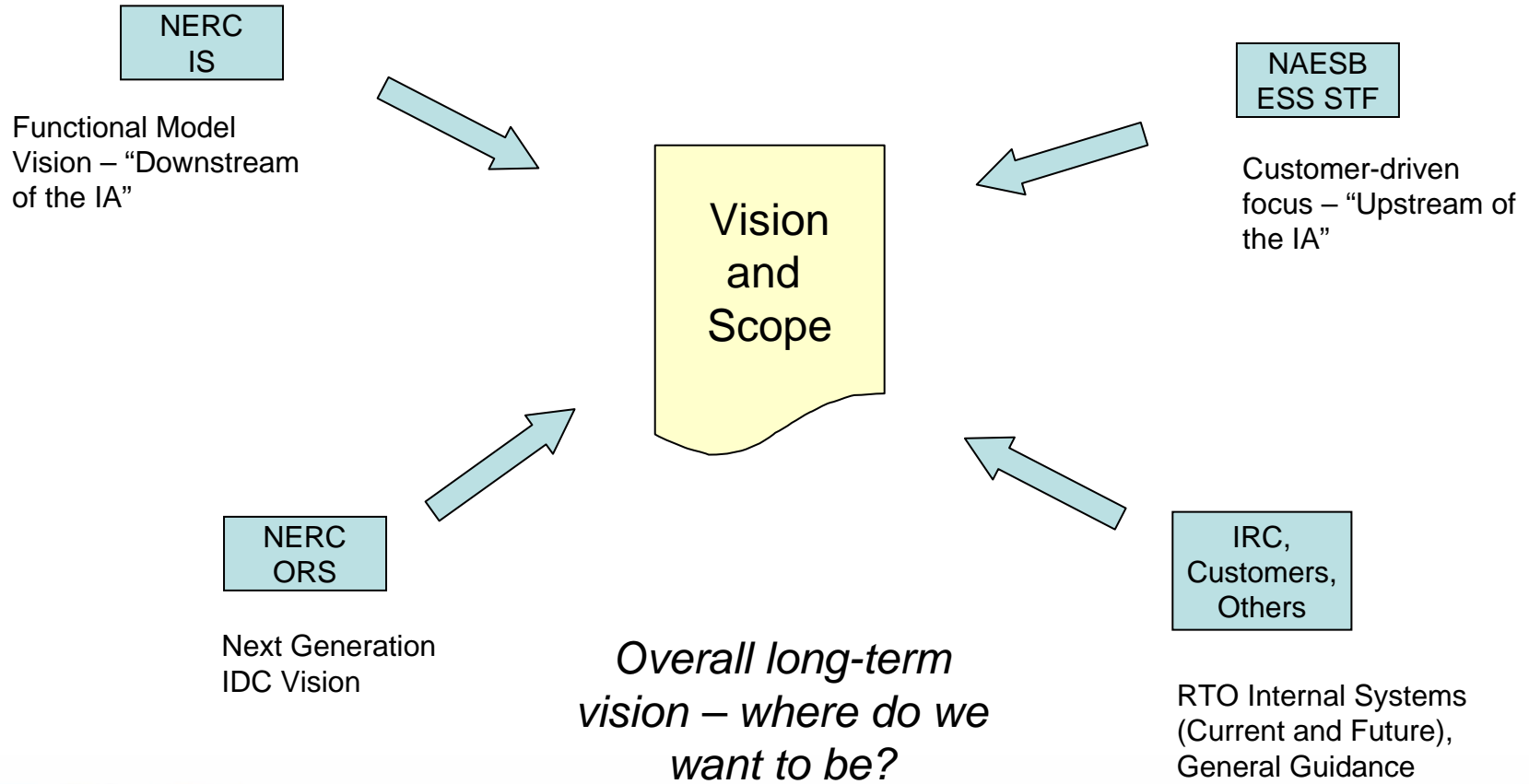
- Does everyone agree with these next steps?
 - Functional Design Work
 - Begin with the ESC Use Cases
 - Evaluate and Define OASIS functionality
 - Identify Modular Components
 - Identify key components
 - Determine Architecture
 - Group components logically based on dependencies
 - Develop Approach
 - Build implementation plan for staged approach

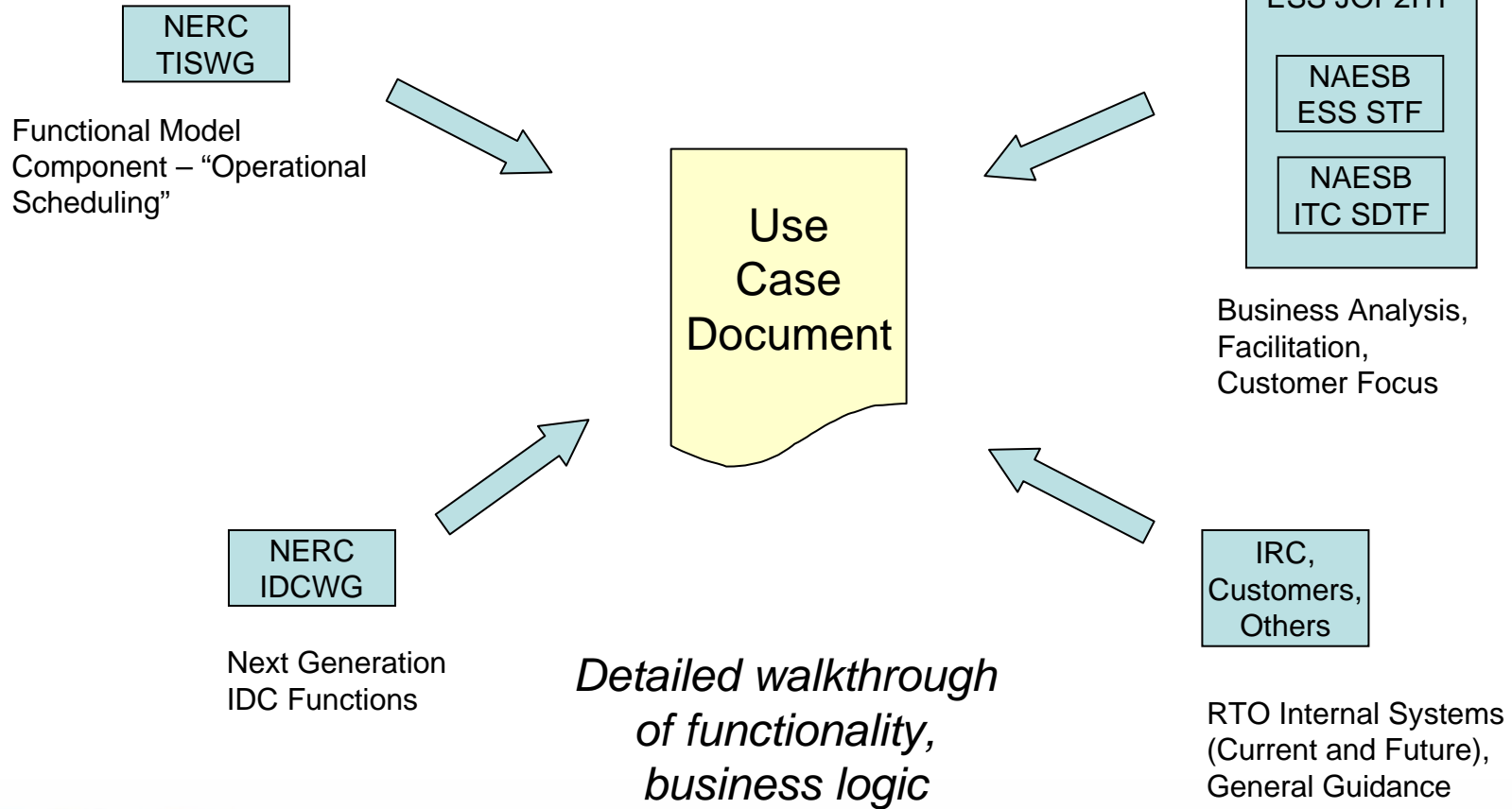
- Develop appropriate representation across the industry
- Establish “governance” issues
 - Identify leadership
 - Determine other key liaisons and roles
 - Set up meeting schedules
 - Agree to vision and scope
 - Establish milestones and deliverables

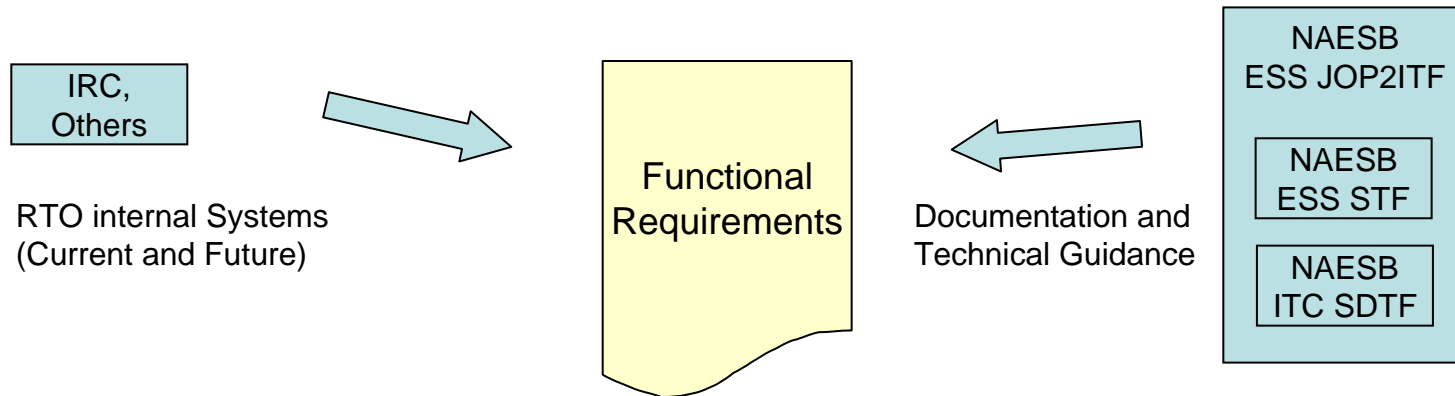


NAESB OASIS II Development Overview

FERC Filed Documents

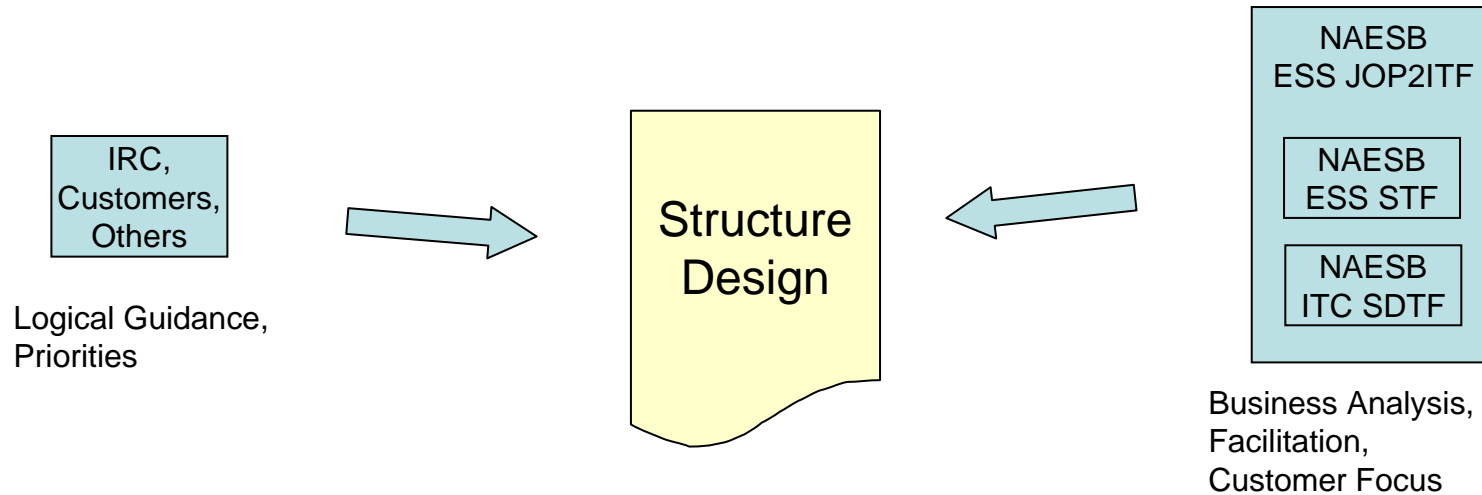




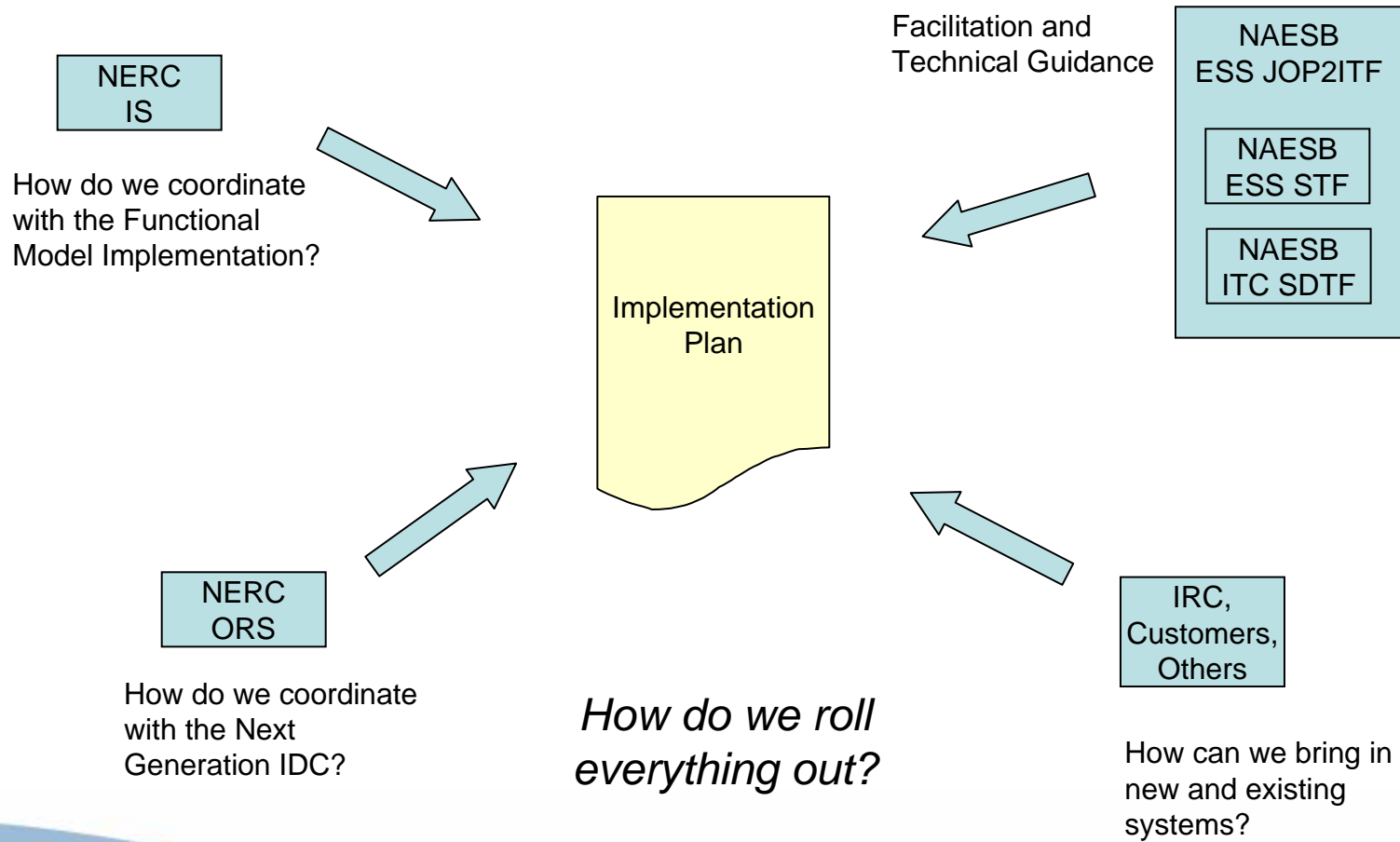


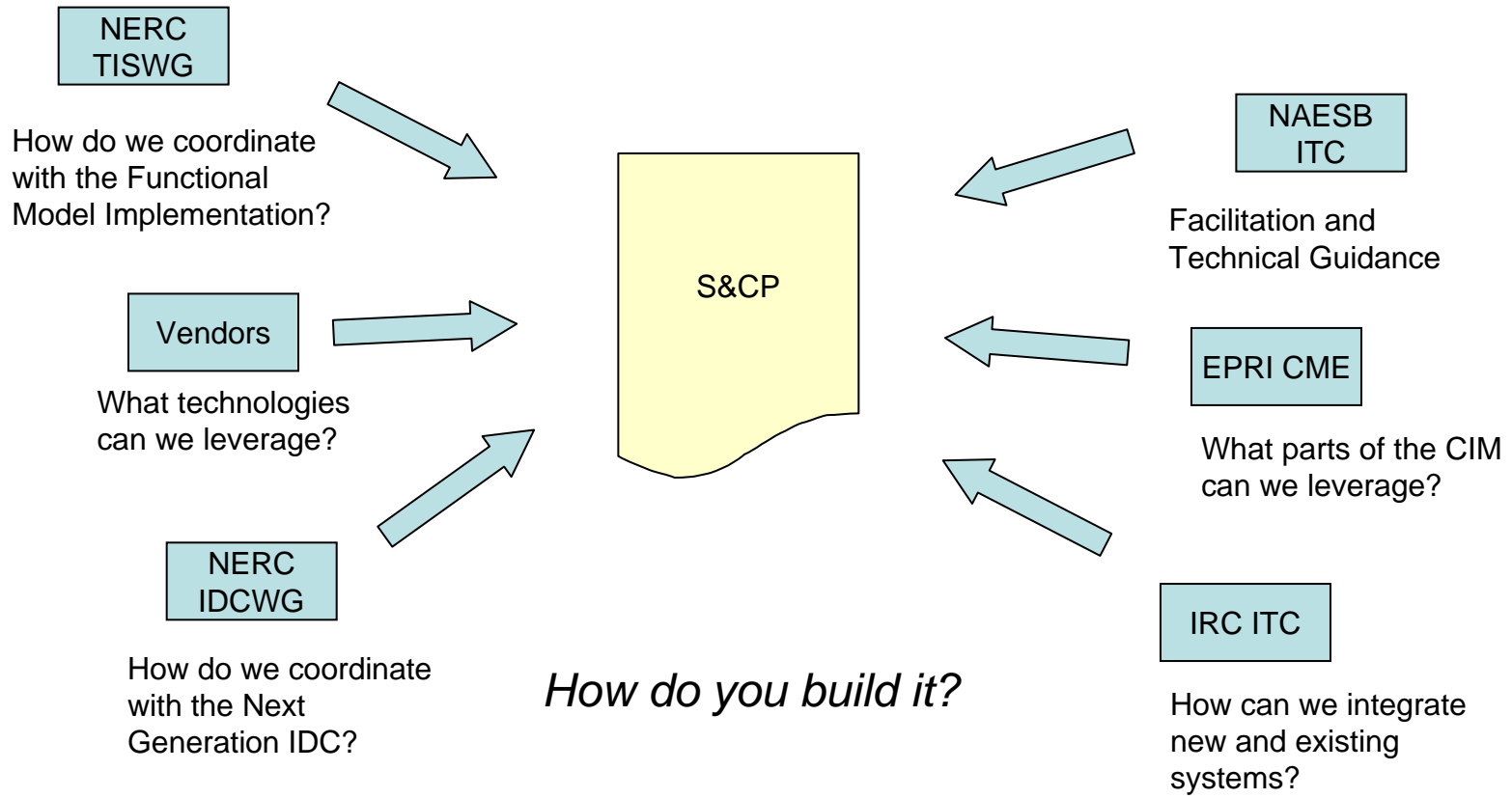
*Beyond Use Cases –
“blueprints” for S&CP*

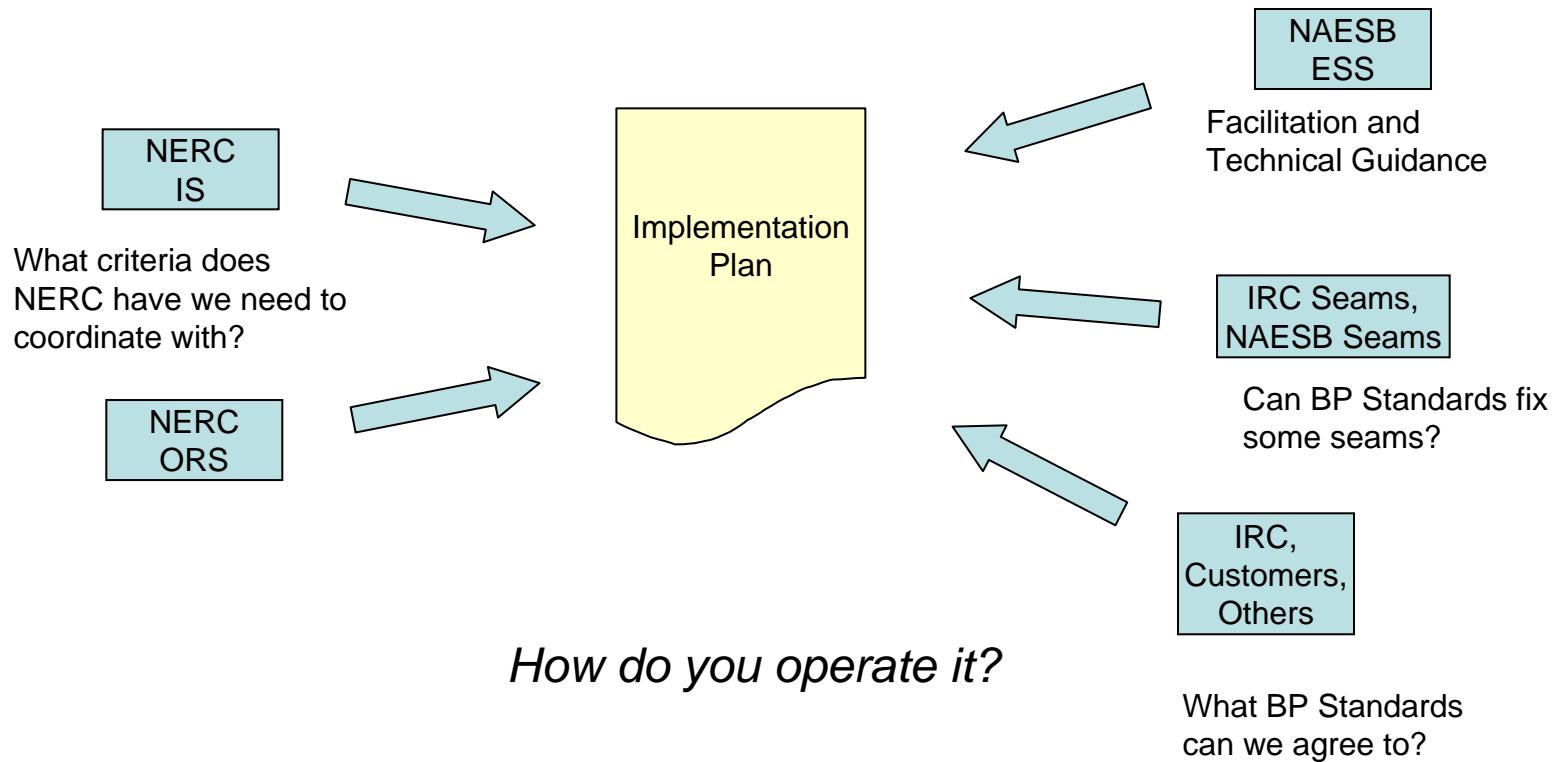
*Includes System
Requirements*



*How do we want to
organize the functional
pieces?*









Questions?