



OASIS Phase II

Approaching the Problem

General Discussion on Strategy and Philosophy
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Presented to the NAESB
OASIS Phase II Scope and Vision Task Force
February 20, 2004



How did we get here?

- OASIS 1A
- Fax Tagging
- E-Mail Tagging
- Electronic Tagging
- XML Electronic Tagging

- 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

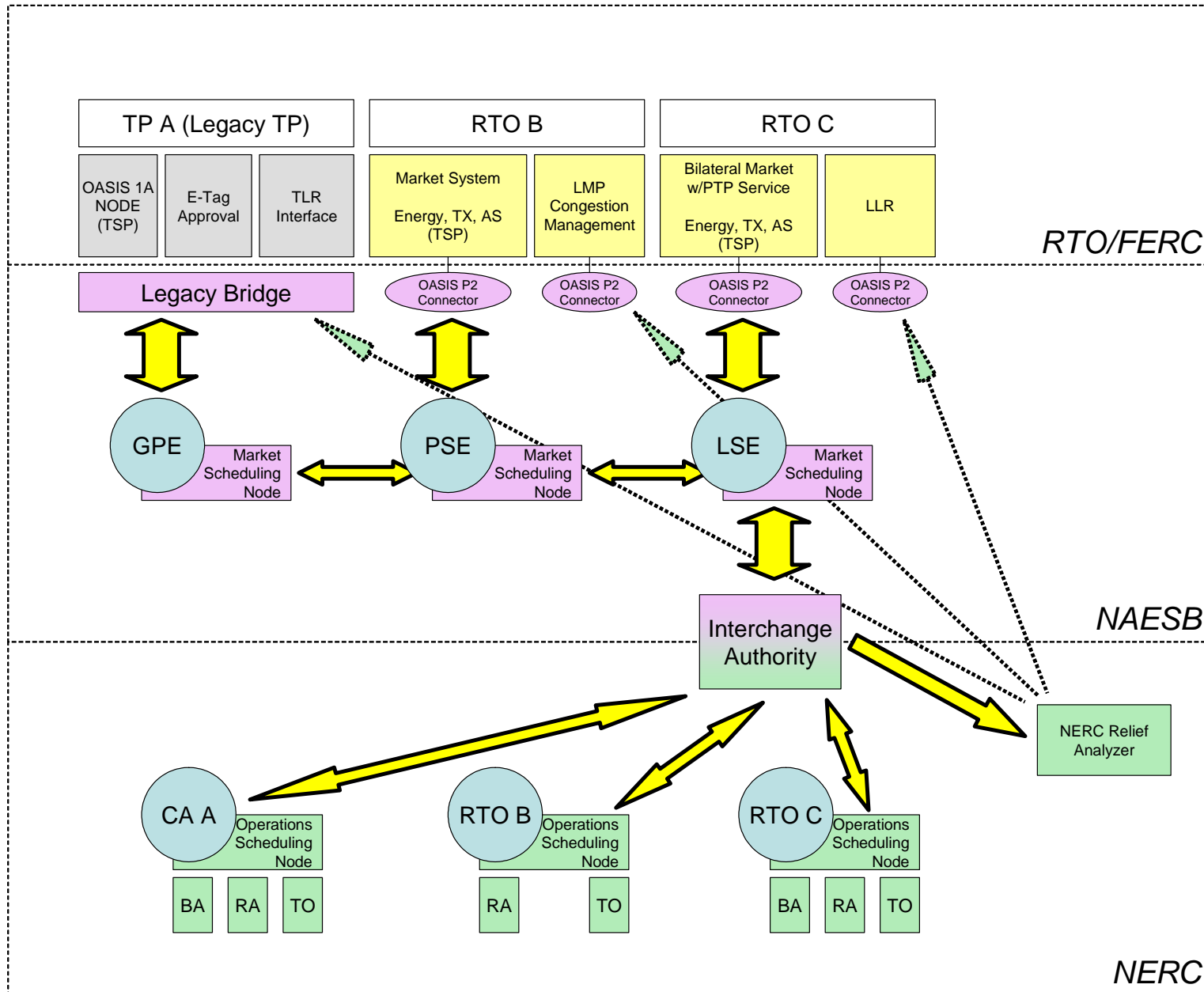
- Should encourage participation to meet openness goals and ensure coordinated attack – minimal duplication of effort
 - NAESB Groups
 - Seams Collaborative
 - Information Technology Subcommittee
 - NERC Community
 - Interchange Subcommittee
 - Transaction Information Systems Working Group
 - Operations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



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 Process Steps

Time (not sequential)	Deliverable(s)
5 months	Vision and Scope
5 months	Use Cases
6 months	Functional Requirements
4 months	Structure Design Document
3 months	Implementation Plan
8 months	Stage 1 S&CPs, BPs
11 months	Implement Stage 1
	Legacy Bridge for OASIS Phase 1
	Legacy Bridge for E-Tag (including Tag Authority to IA)
	Strategic Split of IDC (Impact Calculator and TLR Process)

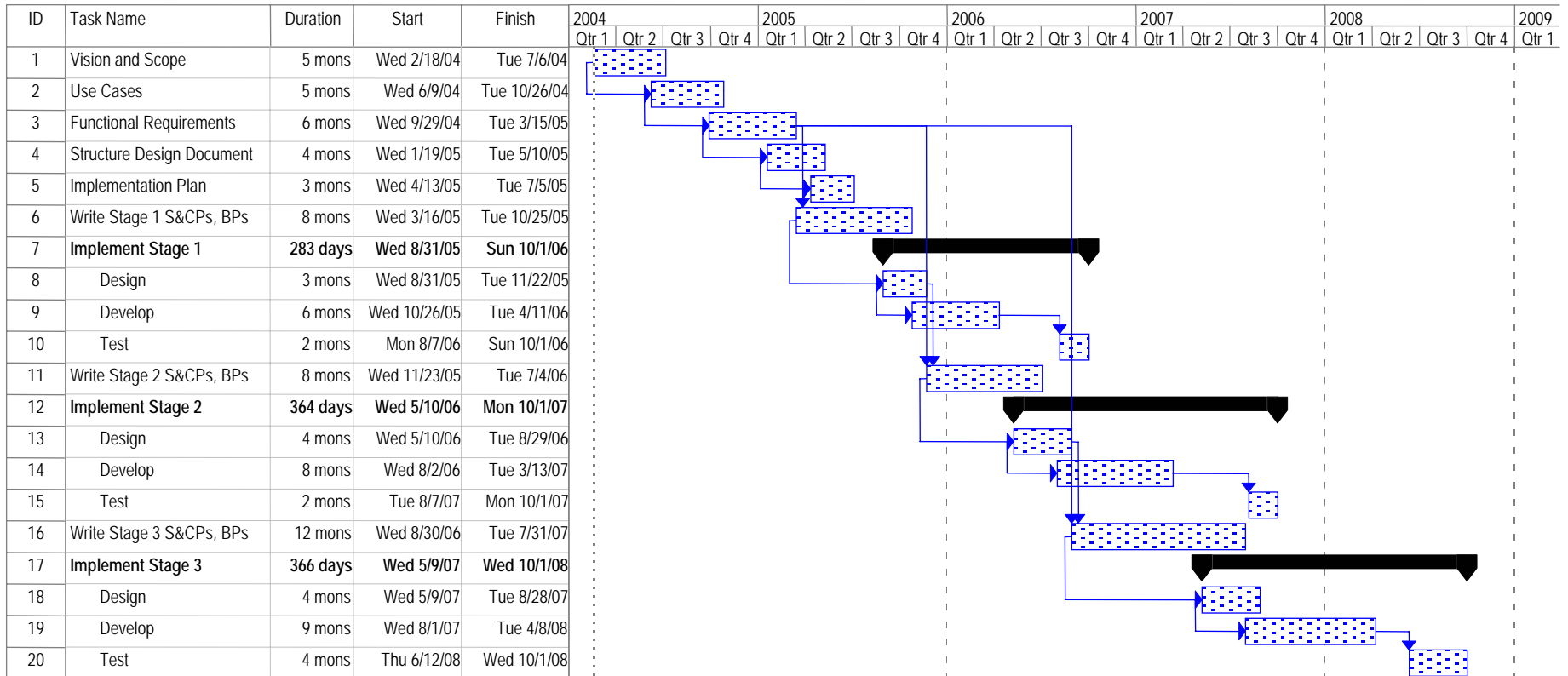


Suggested Process Steps

Time (not sequential)	Deliverable(s)
8 months	Stage 2 S&CPs, BPs
14 months	Implement Stage 2
	Enhanced OASIS Functions (OP2)
	Operations Scheduling Tools (to support FM)
	Enhanced IA to Ops Sched Interface
	Enhanced Legacy Bridge (v2)
	IDC Next Generation
12 months	Stage 3 S&CPs, BPs
17 months	Implement Stage 3
	Market Scheduling
	Enhanced Market to IA Interface(v2)

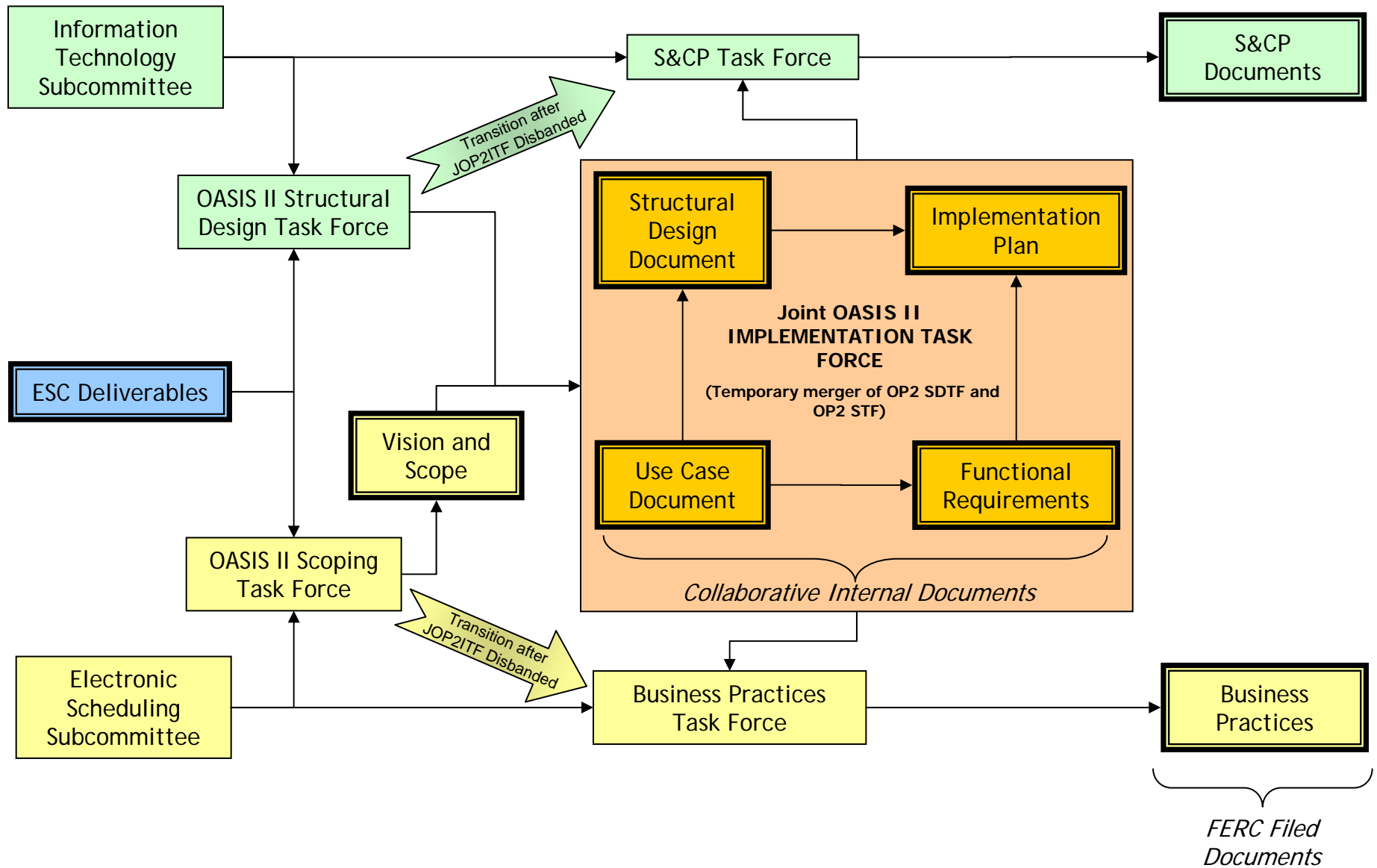


Suggested Schedule

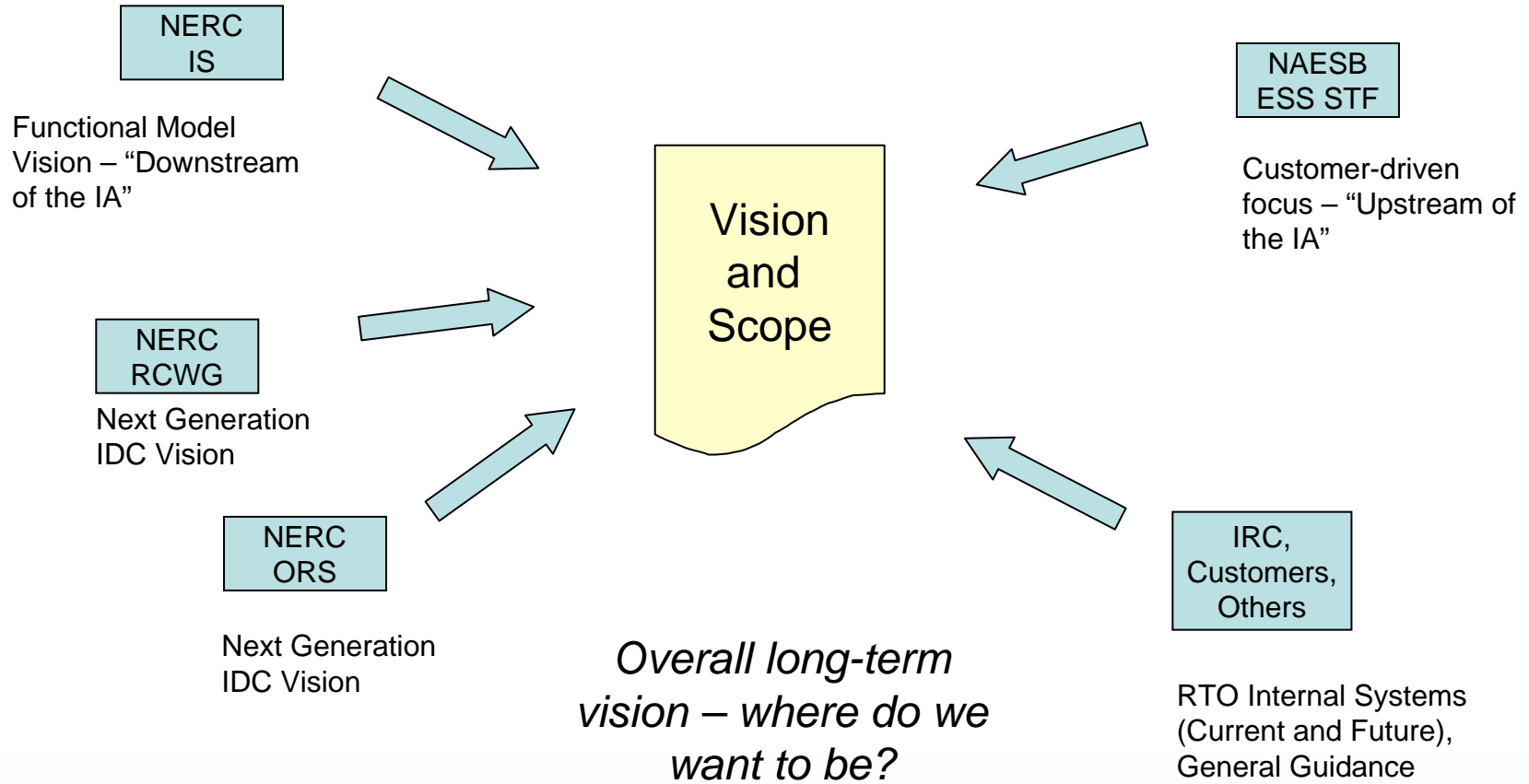


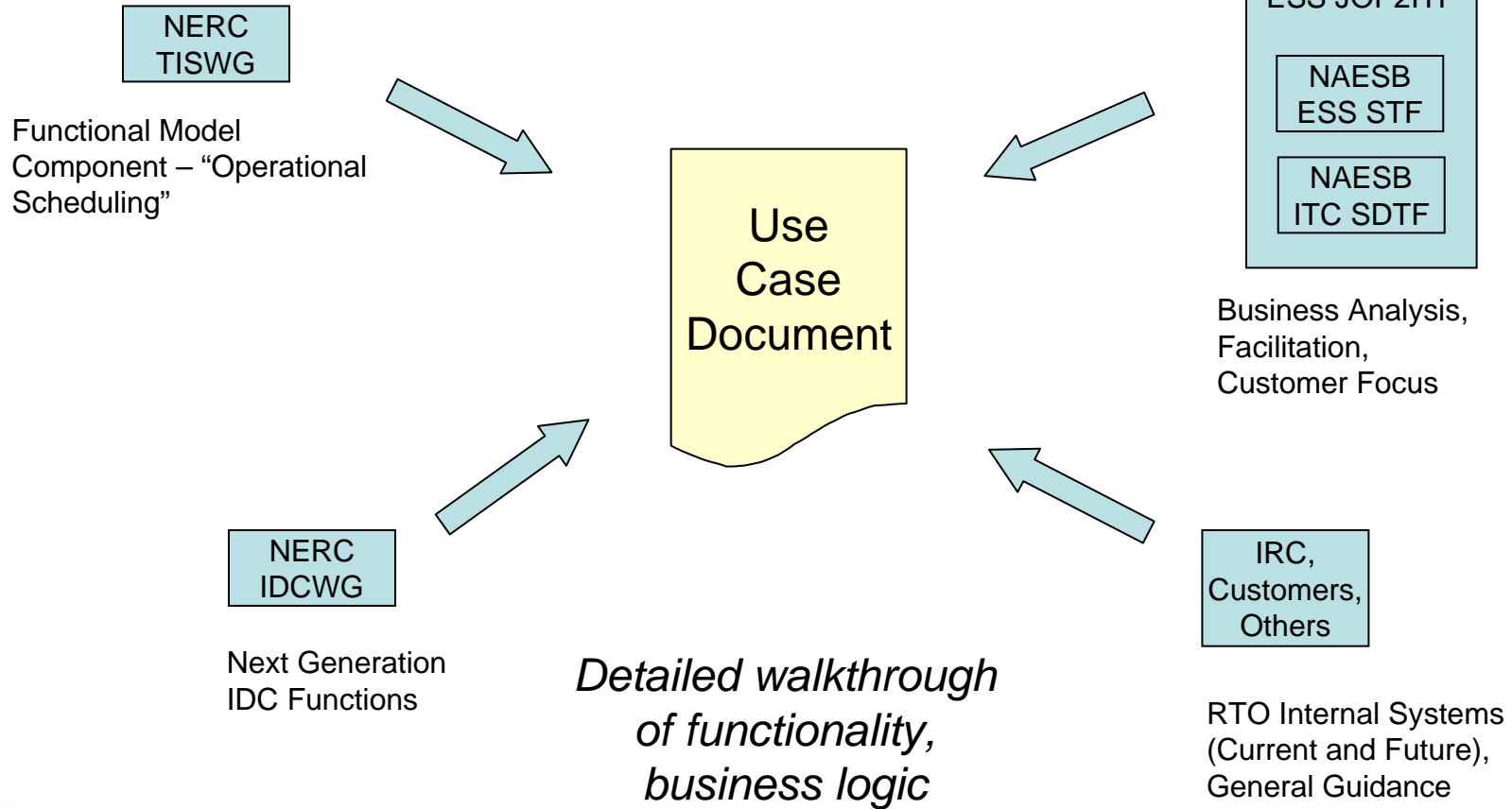
Note: Schedule Must Not Implement During Summer or Winter peaks

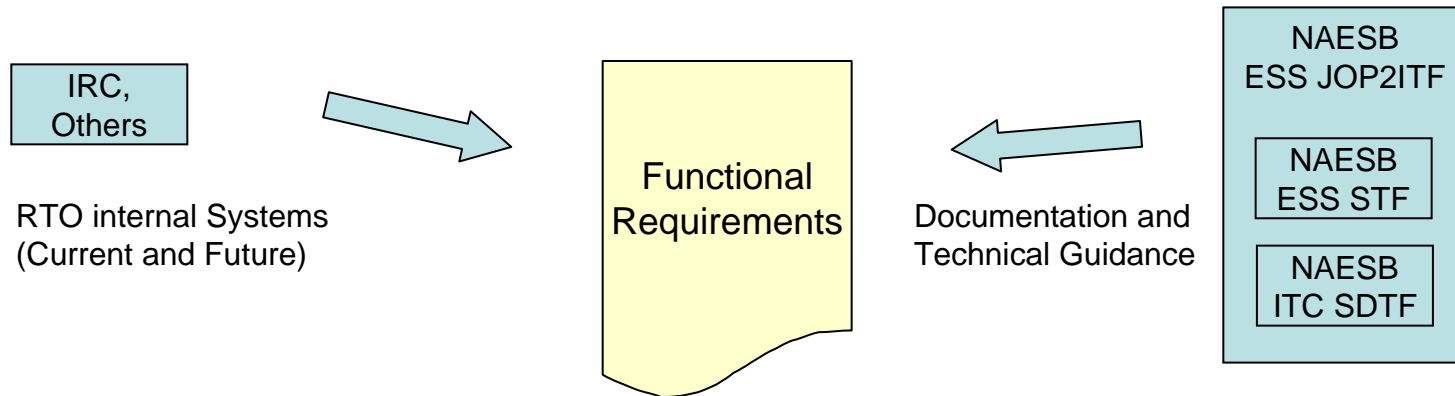
- Develop appropriate representation across the industry
- Establish “governance” issues
 - Identify leadership
 - Determine other key liaisons and roles
 - Set up meeting schedules
 - Agree to vision and scope
 - Establish milestones and deliverables



NAESB OASIS II Development Overview

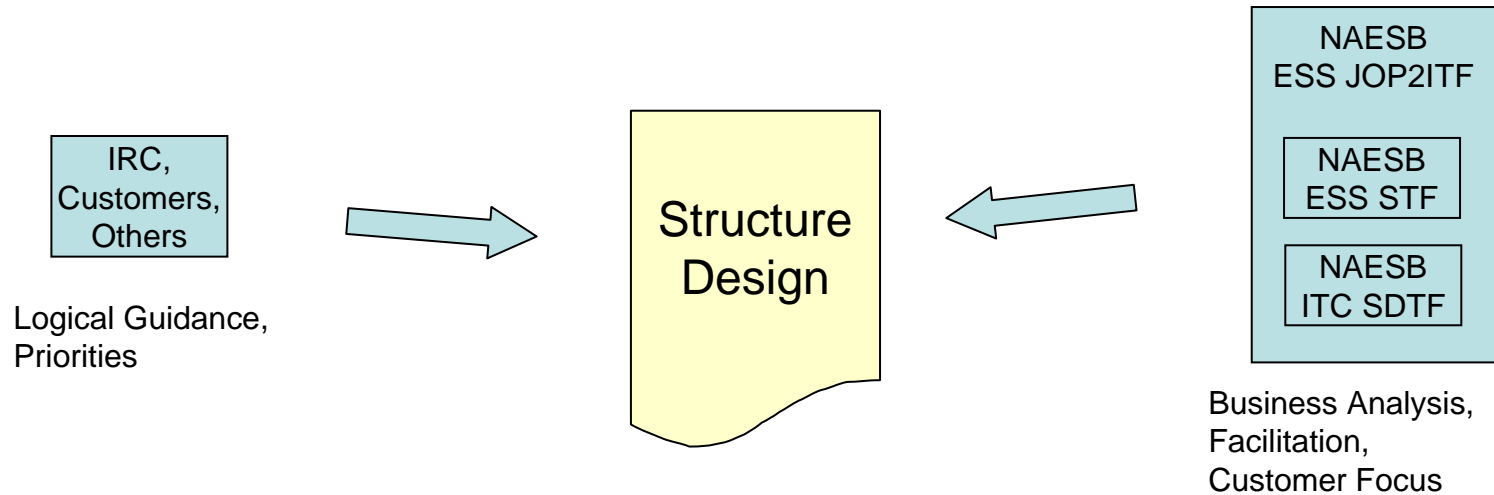




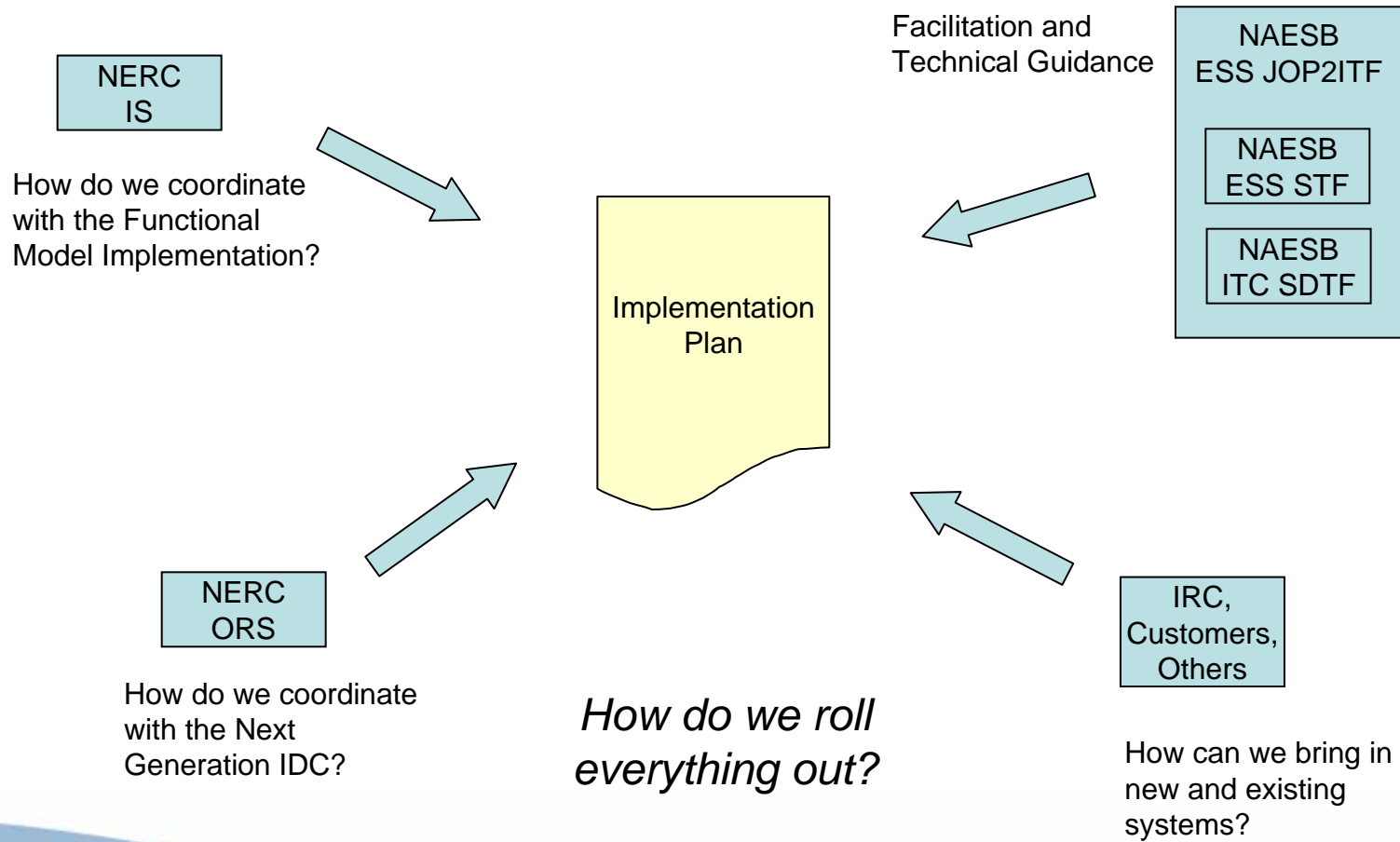


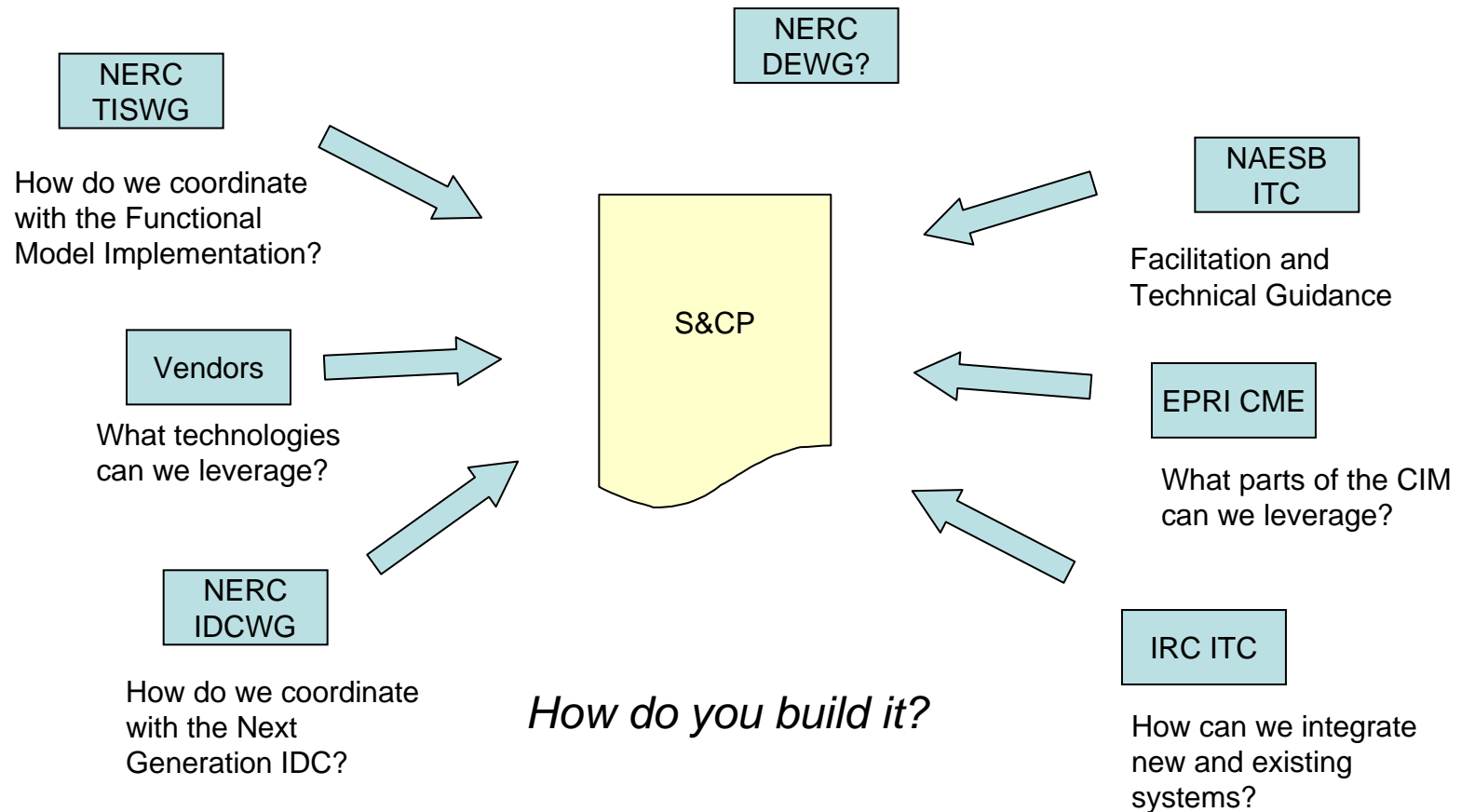
*Beyond Use Cases –
“blueprints” for S&CP*

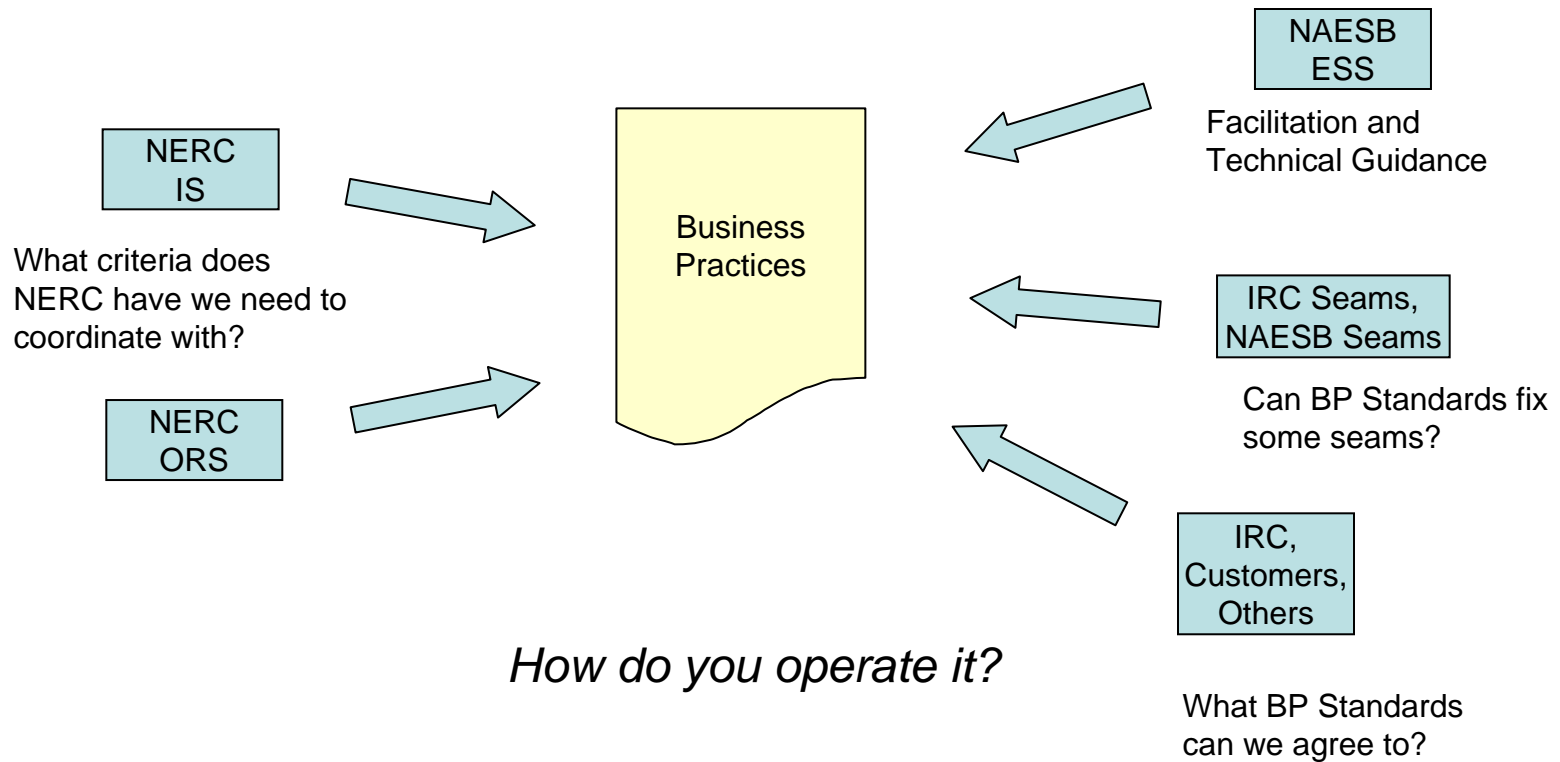
*Includes System
Requirements*



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









Questions?