

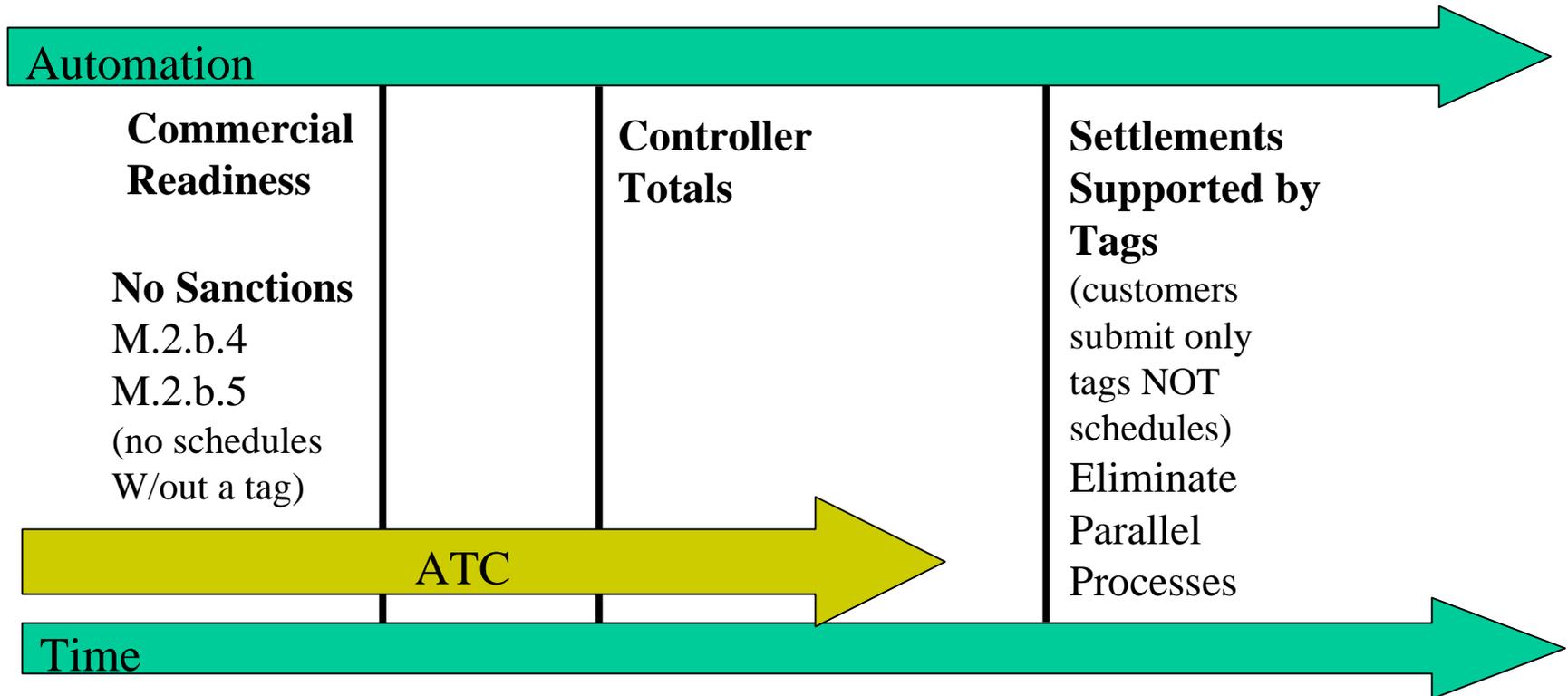
# Scheduling Automation Update

September 15, 2004

# Outline

- Road Map
- Progress
- Process Implementation
- Cutover Strategy
- Posting Strategy
- Next Steps
- Summary

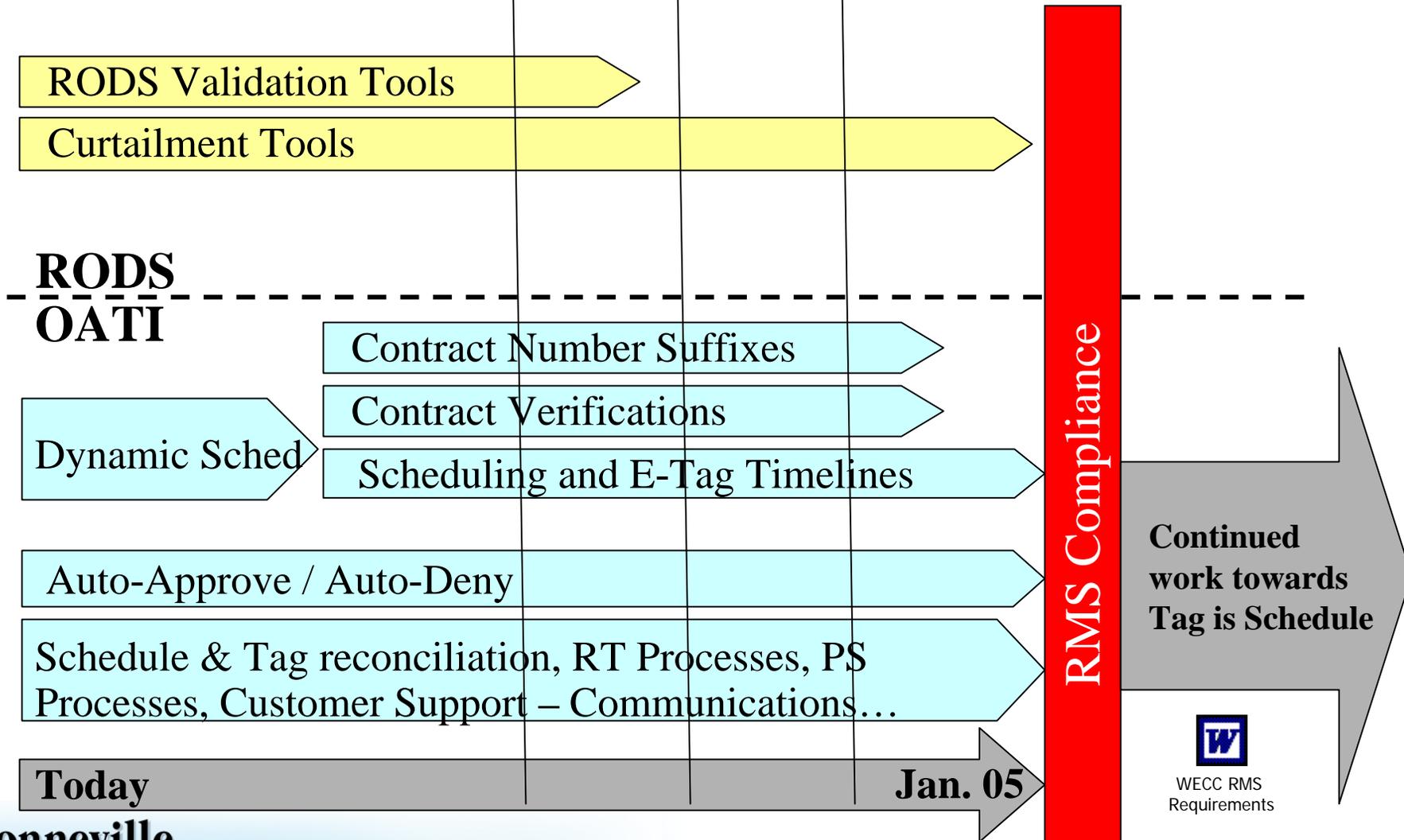
# Scheduling Automation Roadmap



Jan 05,  
RMS  
compliance

# Under Development

Cutover Cutover Cutover



# Progress

- Signed agreement with OATI for ASP services
- Factory Acceptance Test designed
- Continuing ETPS/ETMS application through to November 9
- Dedicated team of 24 business and IT staff
  - Requirements,
  - Testing,
  - Communication/Change Management,
  - Technical/IT

# Progress

- Process revisions scoped and discussed during 9/1/04 Customer Conference Call, posting soon
- Implementation/cutover strategy developed
- Strategy for postings completed
- Extensive internal training regimen
  - Desk procedures drafted
  - Training sessions defined and scheduled
- Preliminary network/infrastructure complete

# Process Implementation

## ● Preschedule Processes

- Timelines
- Accounts
- 15-minute troubleshooting
- Resolutions if not balanced

## ● Real Time Processes

- Timelines
- Accounts
- Order of submittal
- 5-minute troubleshooting
- Resolutions if not balanced

# Implementation/Cutover Strategy

- Strategy: phase in implementation prior to January
- 3 cutovers initiating with 11/9 and running through 1/3
- Implementation occurs in phases
  - 11/9 cutover to OATI as Tag Authority & Approval service, initiate test period with customers, work to attain tag/schedule resolution
  - 12/6 cutover to tag/schedule resolutions, TBL takes corrective actions
  - 1/3 cutover to curtailment via tags procedures

# Posting Strategy

- Objectives

- Prepare all participants for changes
- Provide as much opportunity to raise questions and clarify as possible
- Minimize surprises

- Strategy

- Provide numerous communications that identify new processes in advance of implementation
- Send implementation notices as milestones are about to be achieved
- Send implementation reminders

# Involvement

- Approaches/venues

- Bi-weekly conference calls – Wed. 10:30-12:00
  - 9/16, 9/29, 10/13, 10/27, etc.
  - (503)230-5566, pass code 2008#
- Business Practice Forums
- Regular postings
- [etag@bpa.gov](mailto:etag@bpa.gov)
- NWPP Schedulers Conference

# Posting Topics

- Suffixes on E-tags ... assuring tags differentiate products
- Overview ... describe goal, processes, consequences
- Tag-2-Schedule ... more depth on tag/schedule synching
- Timelines ... describe NERC and Scheduling integration
- Cutovers ... describe turning on OATI, assessment and feedback (preparation), implementation of curtailments
- Curtailments ... address how curtailments are done
- Special issues (dynamic schedules) ... more insight

# Next Steps

- Extensive customer engagement
- Tool releases and TBL staff training
- Extensive schedule/tag integration
- Prepare plans for next phases
  - ATC management
  - Migrate from RODS
  - OASIS (FERC audit)
  - Re-dispatch

# Summary

- Proceeding with meeting WECC requirements by January, 2005
- Require tags AND schedule submittals
- Phasing in implementation starting November 9
- Emphasis on customer preparedness and communications
  - Customer conference calls
  - Forums, meetings, etc.
  - Postings
  - NWPP Schedulers Conference
  - etag@bpa.gov