

# Phase 2 (Firm ATC Activation)

**WE WILL BEGIN IN A MOMENT!**

**Future Customer Training Session Dates & Times:**

JUNE 6	8:00AM – 9:30AM	~ OR ~	1:00PM – 2:30PM
JUNE 7	11:00AM – 12:30PM	~ OR ~	3:00PM – 4:30PM
JUNE 8	10:00AM – 11:30AM	~ OR ~	1:00PM – 2:30PM



# OASIS Training

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BPA Customer Training

Phase 2 (Firm ATC Activation)



# Topics

- Transmission Service Start Dates & Timing Rules
- ATC (Data, Calculations, Terms & Reports)
- Outage Information
- Short-Term Market Changes
- Phase 3 – Automated Hourly Sales

# Transmission Service Start Dates

- Daily, Weekly & Monthly Service can begin on ANY day of the month
- Yearly Service must begin on the FIRST day of the month

# Transmission Service Lead Time Rules

Service	Maximum Lead Time	Minimum Lead Time
Daily	7 days	1 day; prior to 08:00
Weekly	14 days	1 day; prior to 08:00
Monthly	60 days	1 day; prior to 08:00
Yearly	10 years	2 months

For example, a daily reservation could be made as early as seven days prior to the start of service or as late as 1 day prior to 08:00 prior to the start of service.

# Transmission Service Duration Timing Rules

Service	Maximum Duration	Minimum Duration
Daily	6 days	1 days
Weekly	27 days	7 days
Monthly	364 days	28 days
Yearly	30 years	1 year

For example, a weekly reservation could be as long as twenty-seven days or short as 7 days.

# Customer Confirmation Timing Rules

Service	Non-WECC Preschedule Day
Daily	24 hours
Weekly	48 hours
Monthly	96 hours
Yearly	2 days

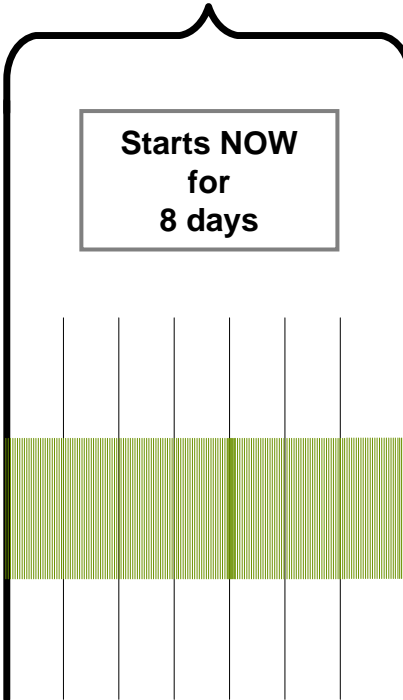
For example, a customer must confirm a request on a Non-WECC Preschedule day within 24 hours of submitting a daily request.

# ATC Calculation & Reports

## HOURLY SERVICE

8 DAYS  
(HOURLY INCREMENTS)

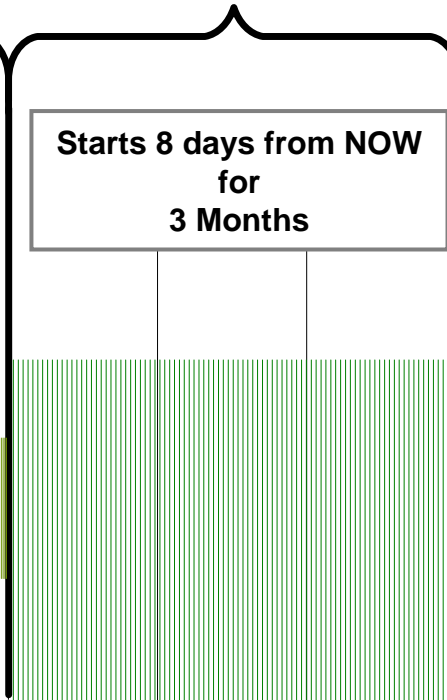
Starts NOW  
for  
8 days



## DAILY SERVICE

3 MONTHS  
(DAILY INCREMENTS)

Starts 8 days from NOW  
for  
3 Months



## MONTHLY SERVICE

10 YEARS  
(MONTHLY INCREMENTS)

Starts 8 days and 3 months from NOW  
for  
10 Years



# AFC/ATC Acronyms

- AFC = Available Flowgate Capability (Network)
  
- ATC = Available Transmission Capability (Interties)
  
- Glossary of Terms on BPAT CPBI Web Site
  - [http://www.transmission.bpa.gov/Business/Customer\\_Forum\\_and\\_Feedback/Scheduling\\_Automation/documents/OASIS\\_Terminology.pdf](http://www.transmission.bpa.gov/Business/Customer_Forum_and_Feedback/Scheduling_Automation/documents/OASIS_Terminology.pdf)

# LTF ATC Calculation & Terms

LTF AFC/ATC	What Acronym Stands For	Definition
TFC/TTC	Total Transmission Capability	The amount of electric power that can be transferred over the interconnected transmission network in a reliable manner while meeting all of a specific set of defined pre- and post-contingency system conditions. References to TTC shall also mean BPA Transmission Services' share of defined paths.
- TRM	Transmission Reliability Margin	That amount of transmission transfer capability necessary to provide a reasonable level of assurance that the interconnected transmission network will be secure under a broad range of uncertainties.
- CBM	Capacity Benefit Margin	BPAT's methodology does not currently use Capacity Benefit Margins (CBM) in the calculation of ATC and ATC is not decremented by CBM for either normal or emergency Conditions.
- NETC	Non-recallable Existing Transmission Commitments	Firm Committed uses; variable is used to adjust contract accounting impacts to the impacts derived from the annual base case ; Also known as: LETC.
- (LRES+)	Positive Long-term REServations	Long-term firm reservations that have either positive (LRES+) or negative (LRES-) impact on the AFC/ATC.
- (LRES-)	Negative Long-term REServations	
= LAFC/LATC	Long-term Available Flowgate/Transmission Capability	A measure of the transfer capability remaining in the physical transmission network/interties for further commercial activity, over and above already committed uses for the Long-Term Firm market.

# STF ATC Calculation & Terms

<b>STF AFC/ATC</b>	<b>What Acronym Stands For</b>	<b>Definition</b>
= LAFC/LATC	Long-term Available Flowgate/Transmission Capability	A measure of the transfer capability remaining in the physical transmission network/interties for further commercial activity, over and above already committed uses for the Long-Term Firm market.
+ TRM	Transmission Reliability Margin	That amount of transmission transfer capability necessary to provide a reasonable level of assurance that the interconnected transmission network will be secure under a broad range of uncertainties.
- SETC	Short-term Existing Transmission Commitments	Limited LTF ATC. See definition for Limiting LTF ATC within Short-Term Firm ATC methodology.
+ SADJ	Short-term firm ADJustment	AFC/ATC added back for STF market. Compensates for LTF reservations that do not begin on the original start date. IE: BPAT encumbers AFC/ATC on a reservation for a generator that has NOT been built.
- (SRES+)	Positive Short-term firm REServations	Short-term firm reservations that have either a positive (SRES+) or negative (SRES-) impact on the AFC/ATC.
- SOVR	Short-term firm de minimis OVerAge	De minimus impacts that exceed de minimus limit (SDLM; Short-term De minimus LiMit).
= SAFC/SATC	Short-term Available Flowgate/Transmission Capability	A measure of the transfer capability remaining in the physical transmission network/interties for further commercial activity, over and above already committed uses for the Short-Term Firm market.

# System Data Summary



Path Code	TTC	TRM	FIRM	NON-FIRM	Start Time ↓	Stop Time	Posting Ref
AC_N>S	1854	0	3213	3213	2007-04-26 00:00:00 PD	2007-04-26 01:00:00 PD	<a href="#">318317753</a>
AC_N>S	1854	0	3213	3213	2007-04-26 01:00:00 PD	2007-04-26 02:00:00 PD	<a href="#">319188609</a>
AC_N>S	1854	0	3213	3213	2007-04-26 02:00:00 PD	2007-04-26 03:00:00 PD	<a href="#">319188608</a>
AC_N>S	1854	0	3213	3213	2007-04-26 03:00:00 PD	2007-04-26 04:00:00 PD	<a href="#">319188607</a>
AC_N>S	1854	0	3213	3213	2007-04-26 04:00:00 PD	2007-04-26 05:00:00 PD	<a href="#">319188606</a>
AC_N>S	1854	0	3213	3213	2007-04-26 05:00:00 PD	2007-04-26 06:00:00 PD	<a href="#">319188605</a>
AC_N>S	1854	0	3213	3213	2007-04-26 06:00:00 PD	2007-04-26 07:00:00 PD	<a href="#">319188604</a>
AC_N>S	1854	0	3213	3213	2007-04-26 07:00:00 PD	2007-04-26 08:00:00 PD	<a href="#">319188603</a>
AC_N>S	1854	0	3213	3213	2007-04-26 08:00:00 PD	2007-04-26 09:00:00 PD	<a href="#">319188602</a>
AC_N>S	1854	0	3213	3213	2007-04-26 09:00:00 PD	2007-04-26 10:00:00 PD	<a href="#">319188601</a>
AC_N>S	1854	0	3213	3213	2007-04-26 10:00:00 PD	2007-04-26 11:00:00 PD	<a href="#">319188600</a>
AC_N>S	1854	0	3213	3213	2007-04-26 11:00:00 PD	2007-04-26 12:00:00 PD	<a href="#">319188599</a>
AC_N>S	1854	0	3213	3213	2007-04-26 12:00:00 PD	2007-04-26 13:00:00 PD	<a href="#">319188598</a>
AC_N>S	1854	0	3213	3213	2007-04-26 13:00:00 PD	2007-04-26 14:00:00 PD	<a href="#">319188597</a>
AC_N>S	1854	0	3213	3213	2007-04-26 14:00:00 PD	2007-04-26 15:00:00 PD	<a href="#">319188596</a>

Numbers for Demonstration Purposes Only

# Posting Ref Data

Submit	Close	Audit
Posting Ref	318317753	
Provider	BPAT	
Path	W/BPAT/AC_N>S//	
POR		
POD		
Path Code	AC_N>S	
Optional Code		
TTC	<input type="text" value="1854"/>	
CBM	<input type="text" value="0"/>	
TRM	<input type="text" value="0"/>	
FIRM	<input type="text" value="3213"/>	
NON-FIRM	<input type="text" value="3213"/>	
Attribute Units	<input type="text" value="MW"/>	
Start Time	2007-04-26 00:00:00 PD	
Stop Time	2007-04-26 01:00:00 PD	
Last Updated (PD)	2007-04-20 00:02:55	
Modified By	BPAT_WEBTRANS	
Submit	Close	

Detailed revision data  
(Next Slide)

- The "Posting Ref" display contains details regarding the ATC posting

# System Data Audit View

**System Data Audit View**

Close Columns

Time Of Last Update	Revision	Path Name	Point Of Receipt	Point Of Delivery	TTC	CBM	TRM	NATC	RATC
20070325075949PD	I	W/BPAT/AC_N>S//			2824	0	0	0	0
20070326074056PD	U	W/BPAT/AC_N>S//			4335	0	0	694	694
20070327123327PD	U	W/BPAT/AC_N>S//			255	0	0	0	0
20070403123828PD	U	W/BPAT/AC_N>S//			2551	0	0	3910	3910
20070406120649PD	U	W/BPAT/AC_N>S//			864	0	0	3213	3213
20070420000255PD	U	W/BPAT/AC_N>S//			1854	0	0	3213	3213

Numbers for Demonstration Purposes Only

The "System Data Audit View" display contains detailed revision data regarding the ATC posting.

# Locating BPAT ATC Reports

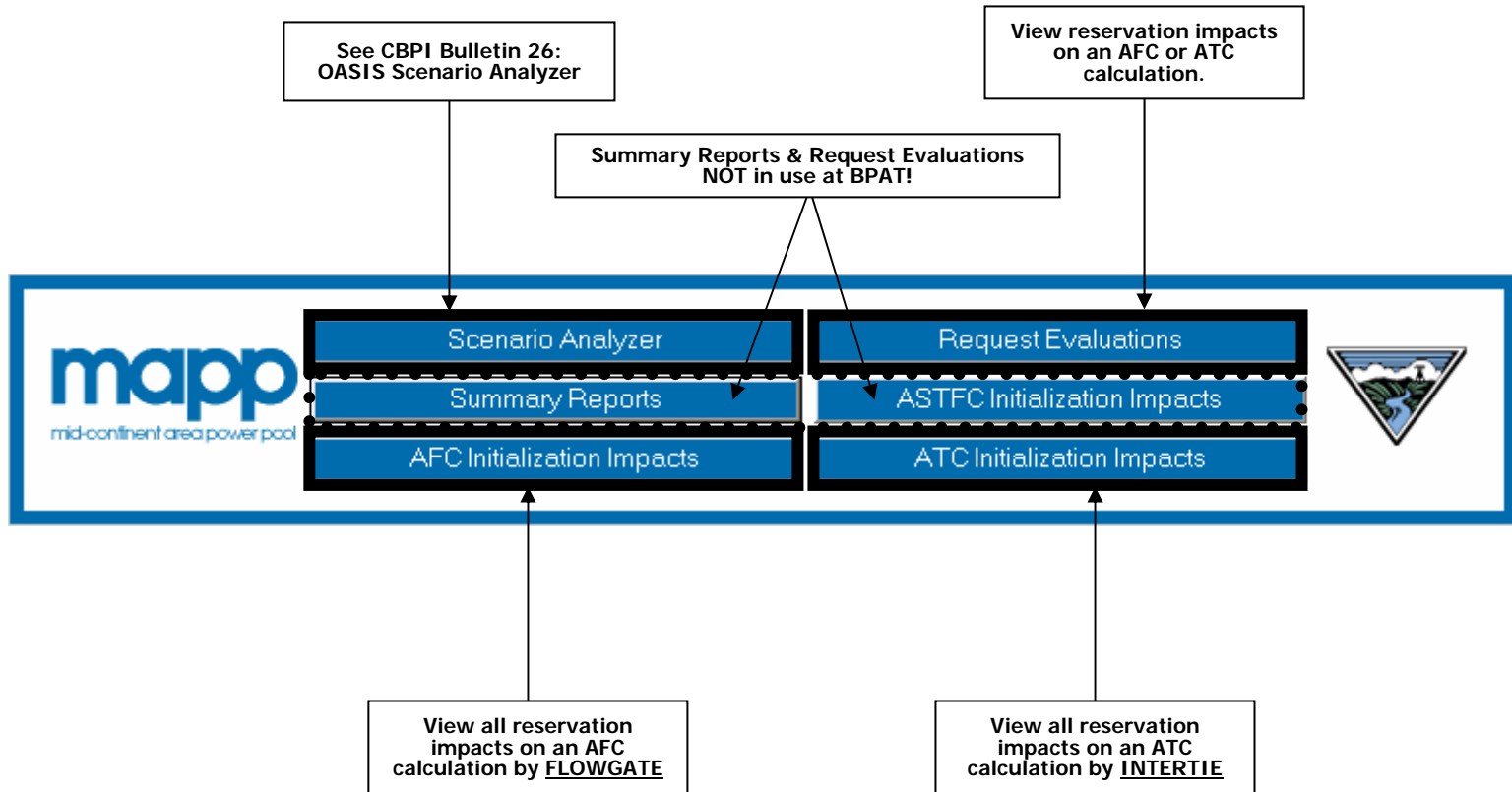


1. Click "Reservations" button.

A screenshot of the OATI report generation interface. It features several filter fields: Cust (ALL), Incr (ALL), Path, TP (WestTra), Class (ALL), Status (ALL), Seller (ALL), Type (ALL), and Time (Queued). Below these fields are buttons for 'New TSR', 'More Filtering', 'User Range', and 'Columns'. At the bottom, there is a checkbox for 'AFC/Flowgate Reports' (highlighted in red) and a button for 'Hourly Summary'. An arrow points from a text box below to the 'AFC/Flowgate Reports' checkbox.

2. Click "AFC/Flowgate Reports" checkbox.

# Understanding BPAT ATC Reports



# Request Evaluation Reports

**Request Evaluation Viewer**

Provider  AssignRef    
 CalcType  Time

Selected time range: 2007-05-04 00:00:00 PD to 2007-05-04 23:59:59 PD

Provider	AssignRef	Evaluation Date ↓	CalcType
BPAT	69801369	2007-05-04 07:42:07 PD	ATC
BPAT	69801369	2007-05-04 07:42:07 PD	AFC
BPAT	69801369	2007-05-04 07:41:33 PD	ATC
BPAT	69801369	2007-05-04 07:41:33 PD	AFC
<b>Total: 4 Request Evaluations</b>			

Detailed request evaluation data  
(Next Slide)

# AFC/ATC Initialization Reports

- Time horizon reports in use:
  - Daily Pre-Schedule
  - Hourly Pre-Schedule
  - Hourly Real Time
  - Monthly Pre-Schedule
  
- Yearly Pre-Schedule, Planning and Operating time horizon reports not in use.

# Request Evaluation Reports (continued)

Request Evaluation Detail							
Evaluation Id	Provider	AssginmentRef	Result	Calc. Type			
353085	BPAT	69801369	Pass	ATC			
Start Date	Stop Date	Provider	Segment Name	CAP	Dir Coeff	DF	Final ATC
2007-05-05	2007-05-06	BPAT	WOH_E>W	100.00	1.00	1.0000	879.00

# AFC Initialization Reports

## AFC Initialization Summary

Provider       Flowgate   
Horizon       Init. Date

(Time: 2007-05-01 00:00 to 2007-06-01 00:00 PD)

Init. Date	Horizon	Provider	Flowgate				
2007-05-01 00:01:13	Monthly Pre-Schedule	BPAT	6 NOJDAY	<a href="#">Summary</a>	2007-05-31	2008-05-31	2009-05-31
2007-05-01 13:56:49	Monthly Pre-Schedule	BPAT	6 NOJDAY	<a href="#">Summary</a>	2007-05-31	2008-05-31	2009-05-31
2007-05-02 00:01:25	Monthly Pre-Schedule	BPAT	6 NOJDAY	<a href="#">Summary</a>	2007-05-31	2008-05-31	2009-05-31
2007-05-02 08:16:07	Monthly Pre-Schedule	BPAT	6 NOJDAY	<a href="#">Summary</a>	2007-07-31	2008-07-31	2009-07-31
2007-05-02 08:25:22	Monthly Pre-Schedule	BPAT	6 NOJDAY	<a href="#">Summary</a>	2007-07-31	2008-07-31	2009-07-31
2007-05-02 10:50:38	Monthly Pre-Schedule	BPAT	6 NOJDAY	<a href="#">Summary</a>	2007-07-31	2008-07-31	2009-07-31
2007-05-02 11:00:14	Monthly Pre-Schedule	BPAT	6 NOJDAY	<a href="#">Summary</a>	2007-07-31	2008-07-31	2009-07-31
2007-05-02 14:41:43	Monthly Pre-Schedule	BPAT	6 NOJDAY	<a href="#">Summary</a>	2007-07-31	2008-07-31	2009-07-31
2007-05-02 15:05:34	Monthly Pre-Schedule	BPAT	6 NOJDAY	<a href="#">Summary</a>	2007-07-31	2008-07-31	2009-07-31
2007-05-02 15:30:03	Monthly Pre-Schedule	BPAT	6 NOJDAY	<a href="#">Summary</a>	2007-07-31	2008-07-31	2009-07-31

# AFC Initialization Reports (continued)

## AFC Initialization Impact Detail

Init. Id	Init. Date	Horizon	Provider	Flowgate No.	Flowgate Name	Result	Report Date
631534	2007-05-01 14:56:49.000	Monthly Pre-Schedule	BPAT	6	NOJDAY	TSR Detail	2007-06-01 00:00:00.000

Provider	Assignment Ref	Status	POR	POD	Source	Sink	Priority	Roll Over	Long Term	Capacity	2007-06-01 Impact	Factor	Capacity	2007-06-01 Capacity
BPAT	315807	CONFIRMED	BPAT.CHPD	BPAT.GCPD	COLMBIA230CHPD	COLMBIA115	7	No	Yes	5.0	0.025	0.005	5.0	
BPAT	315829	CONFIRMED	SLATT	JOHNDAY	SLATT500PGE	JOHNDAYINTI500	7	No	Yes	75.0	-0.773	-0.010	75.0	
BPAT	315831	CONFIRMED	BOUNDARY	POPD	BOUNDRY230SCL	USK230	7	No	Yes	48.0	-0.005	~	48.0	
BPAT	321890	CONFIRMED	STATELINEBPA	BPAPOWER	JOSOTP115	JOHNDAY500	7	No	Yes	90.0	49.923	0.555	90.0	
BPAT	324020	CONFIRMED	MIDCREMOTE	BPAT.PSEI	VANTAGE230MIDC	MAPLEVY230PSEM	7	No	Yes	5.0	-0.043	-0.009	5.0	
BPAT	324023	CONFIRMED	AVA.BPAT	BPAT.PSEI	WESTSIDE230	KITENP115	7	No	Yes	23.0	13.662	0.594	23.0	
BPAT	324024	CONFIRMED	KLICKITAT	BPAT.PSEI	SPEARFISH12	MAPLEVY230PSEM	7	No	Yes	6.0	-4.584	-0.764	6.0	
BPAT	324487	CONFIRMED	BPAT.DOPD	BPAT.DOPD	FSTRCRK115DOPD	NILES CRNR115	7	No	Yes	2.0	0.002	0.001	2.0	
BPAT	339396	CONFIRMED	CHEHALIS PWR	COLUMBIA230	NAPAVIN500CHEH	COLMBIA115IMPRP	7	No	Yes	250.0	-178.350	-0.713	250.0	-1
BPAT	343058	CONFIRMED	BPAPOWER	CLARK	FCRPS	CLARKNTDP	7	No	Yes	650.0	348.806	0.537	688.0	3
BPAT	371137	CONFIRMED	BPAPOWER	BONNERSFERRY	FCRPS	BONNERSFNTPD	7	No	Yes	10.0	-2.112	-0.211	9.0	

Numbers for Demonstration Purposes Only

# ATC Initialization Reports

## ATC Initialization Summary

Provider  Init. Date   
 Path  Horizon

(Time: 2007-05-18 00:00 to 2007-05-19 00:00 PD)

Init. Date	Horizon	Provider	Segment	Reports						
2007-05-18 00:01:55	Monthly Pre-Schedule	BPAT	AC_N>S	<a href="#">Summary</a>	<a href="#">2007-07-31</a>	<a href="#">2008-07-31</a>	<a href="#">2009-07-31</a>	<a href="#">2010-07-31</a>	<a href="#">2011-07-31</a>	<a href="#">2012-07-31</a>
2007-05-18 08:16:47	Monthly Pre-Schedule	BPAT	AC_N>S	<a href="#">Summary</a>	<a href="#">2007-07-31</a>	<a href="#">2008-07-31</a>	<a href="#">2009-07-31</a>	<a href="#">2010-07-31</a>	<a href="#">2011-07-31</a>	<a href="#">2012-07-31</a>
2007-05-18 08:28:35	Monthly Pre-Schedule	BPAT	AC_N>S	<a href="#">Summary</a>	<a href="#">2007-07-31</a>	<a href="#">2008-07-31</a>	<a href="#">2009-07-31</a>	<a href="#">2010-07-31</a>	<a href="#">2011-07-31</a>	<a href="#">2012-07-31</a>
2007-05-18 11:57:08	Monthly Pre-Schedule	BPAT	AC_N>S	<a href="#">Summary</a>	<a href="#">2007-07-31</a>	<a href="#">2008-07-31</a>	<a href="#">2009-07-31</a>	<a href="#">2010-07-31</a>	<a href="#">2011-07-31</a>	<a href="#">2012-07-31</a>

# ATC Initialization Reports (continued)

## ATC Initialization Impact Detail

Init. Id	Init. Date	Horizon	Provider	Path	Result	Report Date
694270	2007-05-18 01:01:55.000	Monthly Pre-Schedule	BPAT	AC_N>S	TSR Detail	2007-08-01 00:00:00.000

Provider	Assignment Ref	Status	POR	POD	Source	Sink	Priority	Roll Over	Long Term	Capacity	2007-08-01 Impact	Factor	Capacity	2007-09-01 Impact	Factor
BPAT	321873	CONFIRMED	JOHNDAY	COB	JOHNDAYINTI500	CALIFOREBRDR	7	No	Yes	700.0	700.000	1.000	700.0	700.000	1.000
BPAT	321875	CONFIRMED	JOHNDAY	COB	JOHNDAYINTI500	CALIFOREBRDR	7	No	Yes	150.0	150.000	1.000	150.0	150.000	1.000
BPAT	427472	CONFIRMED	JOHNDAY	COB	JOHNDAYINTI500	CALIFOREBRDR	7	No	Yes	93.0	93.000	1.000	93.0	93.000	1.000
BPAT	449487	CONFIRMED	JOHNDAY	COB	JOHNDAYINTI500	CALIFOREBRDR	7	No	Yes	33.0	33.000	1.000	33.0	33.000	1.000
BPAT	449491	CONFIRMED	JOHNDAY	COB	JOHNDAYINTI500	CALIFOREBRDR	7	No	Yes	100.0	100.000	1.000	100.0	100.000	1.000
BPAT	449493	CONFIRMED	JOHNDAY	COB	JOHNDAYINTI500	CALIFOREBRDR	7	No	Yes	100.0	100.000	1.000	100.0	100.000	1.000
BPAT	483765	CONFIRMED	JOHNDAY	COB	JOHNDAYINTI500	CALIFOREBRDR	7	No	Yes	50.0	50.000	1.000	50.0	50.000	1.000
BPAT	865972	CONFIRMED	JOHNDAY	COB	JOHNDAYINTI500	CALIFOREBRDR	7	No	Yes	400.0	400.000	1.000	400.0	400.000	1.000
BPAT	1190923	STUDY	JOHNDAY	COB	JOHNDAYINTI500	CALIFOREBRDR	7	No	Yes	100.0	100.000	1.000	100.0	100.000	1.000
BPAT	1349223	STUDY	JOHNDAY	COB	JOHNDAYINTI500	CALIFOREBRDR	7	No	Yes	100.0	100.000	1.000	100.0	100.000	1.000
BPAT	1349225	STUDY	JOHNDAY	COB	JOHNDAYINTI500	CALIFOREBRDR	7	No	Yes	100.0	100.000	1.000	100.0	100.000	1.000

Numbers for Demonstration Purposes Only

# Outage Information

- Curtailments & Interruptions:
  - <http://www.transmission.bpa.gov/oasis/bpat/outages/oasiscontent.shtm>
- Outage Events:
  - [http://www.transmission.bpa.gov/Business/Reserve\\_and\\_Schedule\\_Transmission/outages.cfm](http://www.transmission.bpa.gov/Business/Reserve_and_Schedule_Transmission/outages.cfm)
- Outage Plans with Capacity Index:
  - <http://www.transmission.bpa.gov/OASIS/BPAT/outagecoord/febout.htm>
- Outage Manager Report on OASIS home page
- OASIS Notices
- See bulletin: 10. Reviewing Outages Impacting TTC

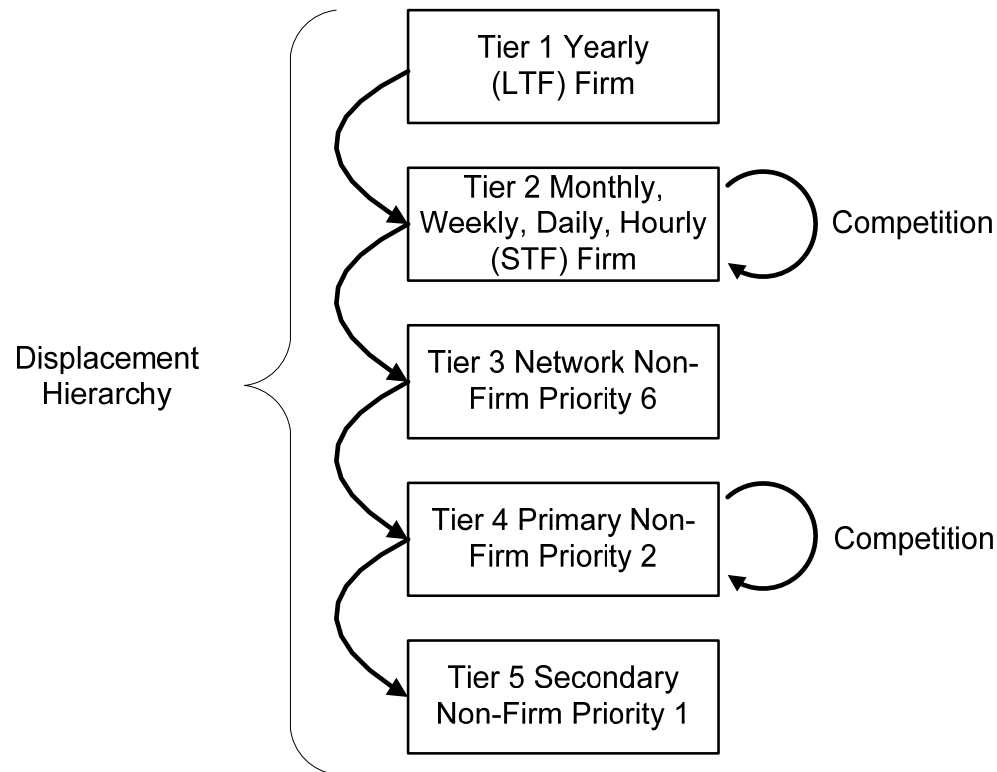
# Short-Term Market Changes

- Continuous Short-Term Market
- Bulletin: 22. Submitting and Processing STF Requests

# Competitions

- Displacement Hierarchy (recap)
- Short-Term Firm Competition Market (recap)
- Automated Competitions

# Displacement Hierarchy



# STF Market Competition Rules

STF market competition confined to Short-Term Firm services:

Monthly, Weekly and Daily

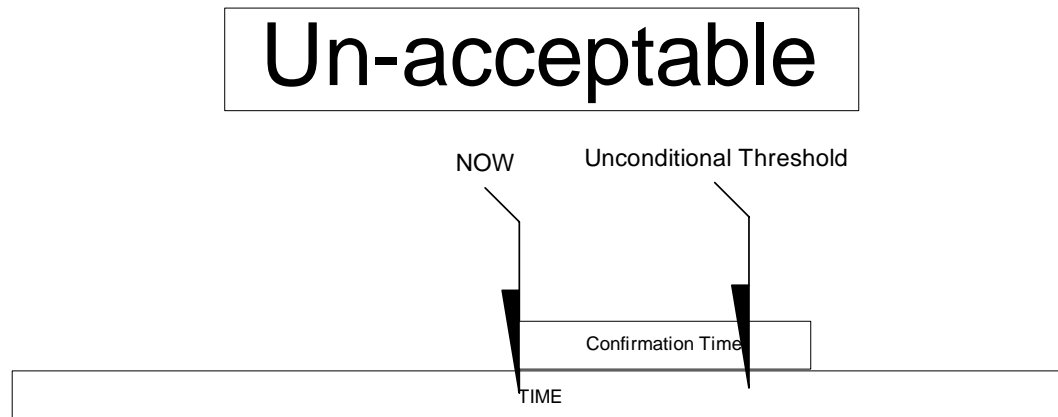
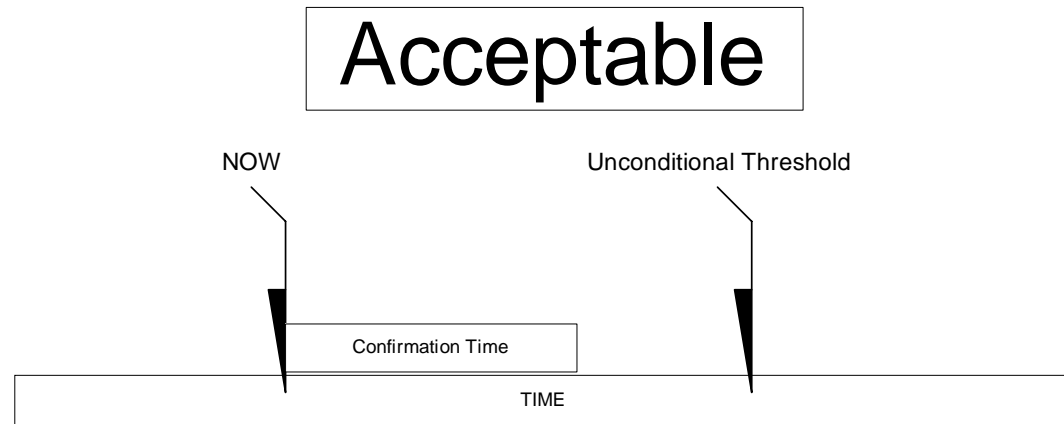
Competition initiated IF **ALL** of the following conditions are met:

1. There is not enough ATC to grant a Full Offer to a new request.
2. ATC is available for the defender to match the challenger's duration.
3. The defending request is conditionally CONFIRMED.
4. The challenging request is of longer duration than the defending request.
5. If the defending request were displaced in competition, the TP would be able to increase the offer to the Challenger.
6. The amount of time between now and the Defender's Conditional threshold is greater than the competition response time.

# STF Competition Market Rules

## Clarification of Rule 6:

The amount of time between now and the Defender's Conditional threshold is greater than the competition response time.



# After Competition Is Initiated

1. The challenger is passive and does not need to take any actions with regard to the competition. A FULL OFFER, COUNTEROFFER or REFUSAL will be based on the final result of all competitions initiated by the challenger.
2. A Defending request that is not CONFIRMED or not Pre-Confirmed will be SUPERSEDED by the challenger.
3. A CONFIRMED Defending request will have the right to submit a MATCHING type request with the same duration as the Challenger.
4. The Matching request must have the same start time as the ORIGINAL Defender request.
5. The profile of the MATCHING request must be a flat profile at the peak MW of the original profile.
6. If the Challenging request reaches a final state other than CONFIRMED, the RECALL of capacity from applicable defending request will be lifted.
7. If the defender does not submit and CONFIRM a valid MATCHING type request within the Customer Competition Response Time Limit, a RECALL of the competed MW will be performed against the Defending request. Any MATCHING type requests that are not CONFIRMED when the competition time limit expires will be RETRACTED.
8. Matching requests **MUST** be PRE-CONFIRMED

# Competition Timing Rules

See Bulletins:

Short-Term Firm, V.2 Bulletin #22; Sections: 2.2 and 2.3

Transmission Products Reservation Timelines, V.2 Bulletin #6;  
Section: 2.2



# Phase 3

## Automated Hourly Sales

