

The logo for AISO Open Scheduling System. It features the letters 'AISO' in a bold, yellow, sans-serif font with a black outline. To the right of 'AISO', the words 'Open Scheduling System' are written in a smaller, black, italicized sans-serif font.

AISO *Open Scheduling System*

The OSS Program Plan for 2003

Market Structures Working Group
February 18, 2003

OSS – High Level Program Plan on 12/4/02

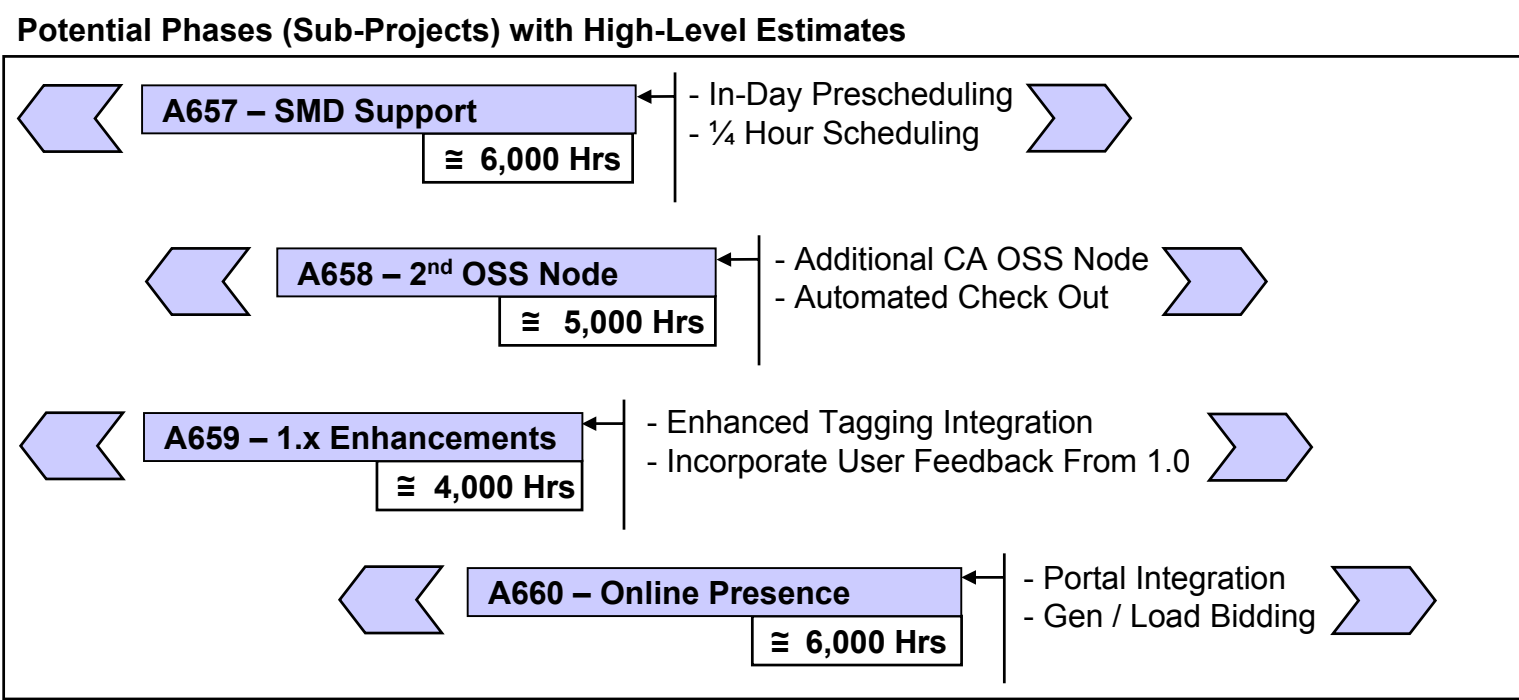


A545 – OSS Release I
 3,045 Hrs Remaining

- PJM Integration
- Internal / External Bilateral Transactions
- Prescheduling with Ramp / ATC Visibility

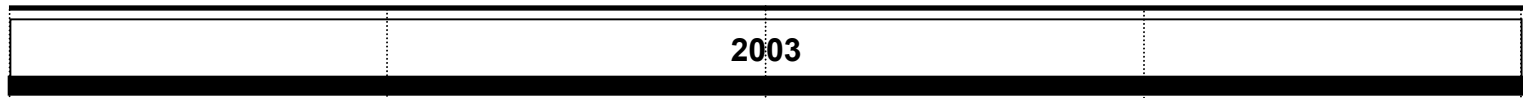
OSS Strategic Project (hours formerly represented in A550)
 12,800 Hrs

Revised To ...



OSS – High Level Program Plan on 2/7/03

Track



0 – R 1.0

A545 – OSS Release I

- PJM Integration
- Internal / External Bilateral Transactions
- Prescheduling with Ramp / ATC Visibility

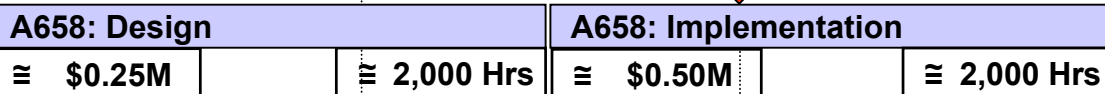
1 – SMD Support

- 1/4 Hour Scheduling -
- Facilitated Checkout -
- In-Day Prescheduling -



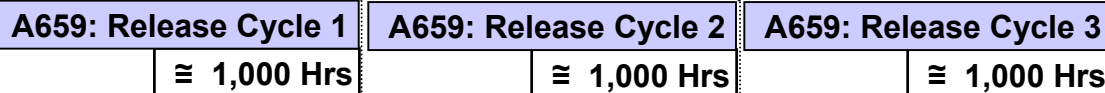
2 – Ops Coordination

- Facilitated Checkout -
- Additional CA Com. -
- Economy Int. Support -



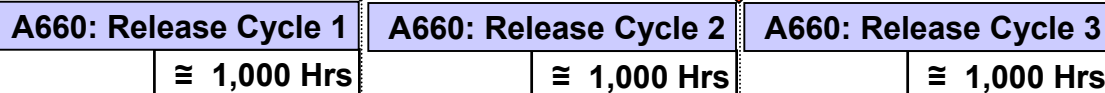
3 – One Stop Shop

- PJM Ramp/ATC -
- PJM OASIS -
- PJM 2-Settlement -
- OATI Tagging -



4 – OSS Expansion

- Rich Content -
- Portal Integration -
- Outage Scheduling -
- Gen / Load Bidding -



Project Planning Approach

Stakeholder Interviews

Market Participants

- Feedback from OSS 1.0 Market Trials
- Con Edison, Northern States Power, NYSEG, PG&E, Select Energy NY

Operations and Market Design

- NYISO Operators & Economists
- Seams Team
- SMD Team

Neighboring Control Areas

- IMO
- ISO-NE
- PJM

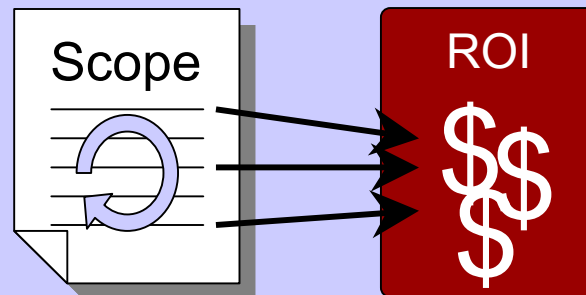
NYISO Team

- Vice Presidents
- Managers
- Supervisors



Three Day Workshop

OSS Purpose and Vision



High Level Project Plan

ID	Task Name	2003			
		Q1	Q2	Q3	Q4
1	Track 1	[Progress bar]			
2	Track 2	[Progress bar]			
3	Track 3	[Progress bar]			
4	Track 4	[Progress bar]			

OSS Program Vision

What?

OSS is an easily adopted set of tools for coordinating information between energy market operators and participants in the Northeast.

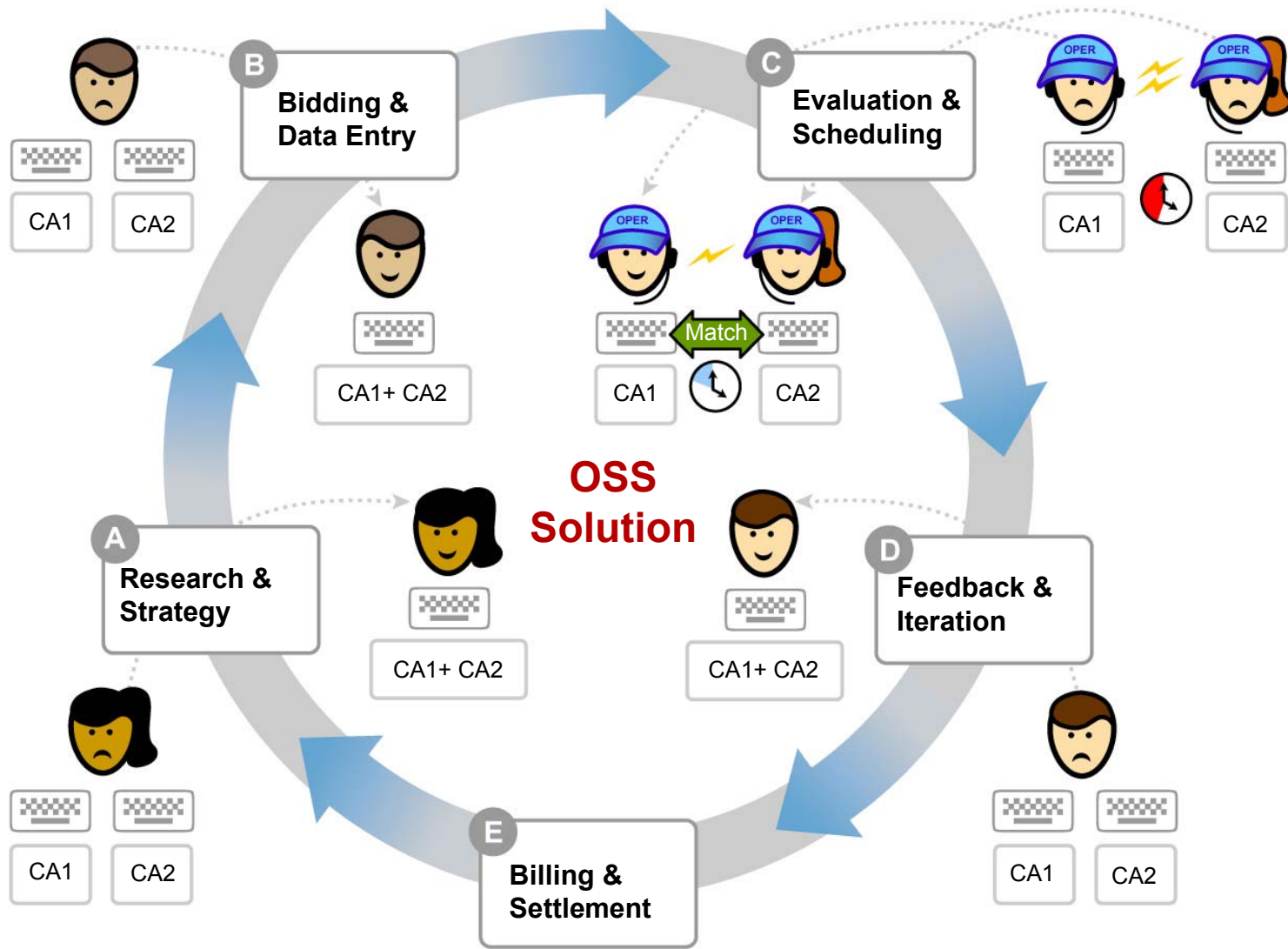
Why?

OSS improves scheduling efficiency and market transparency by reducing the impact of control area seams.

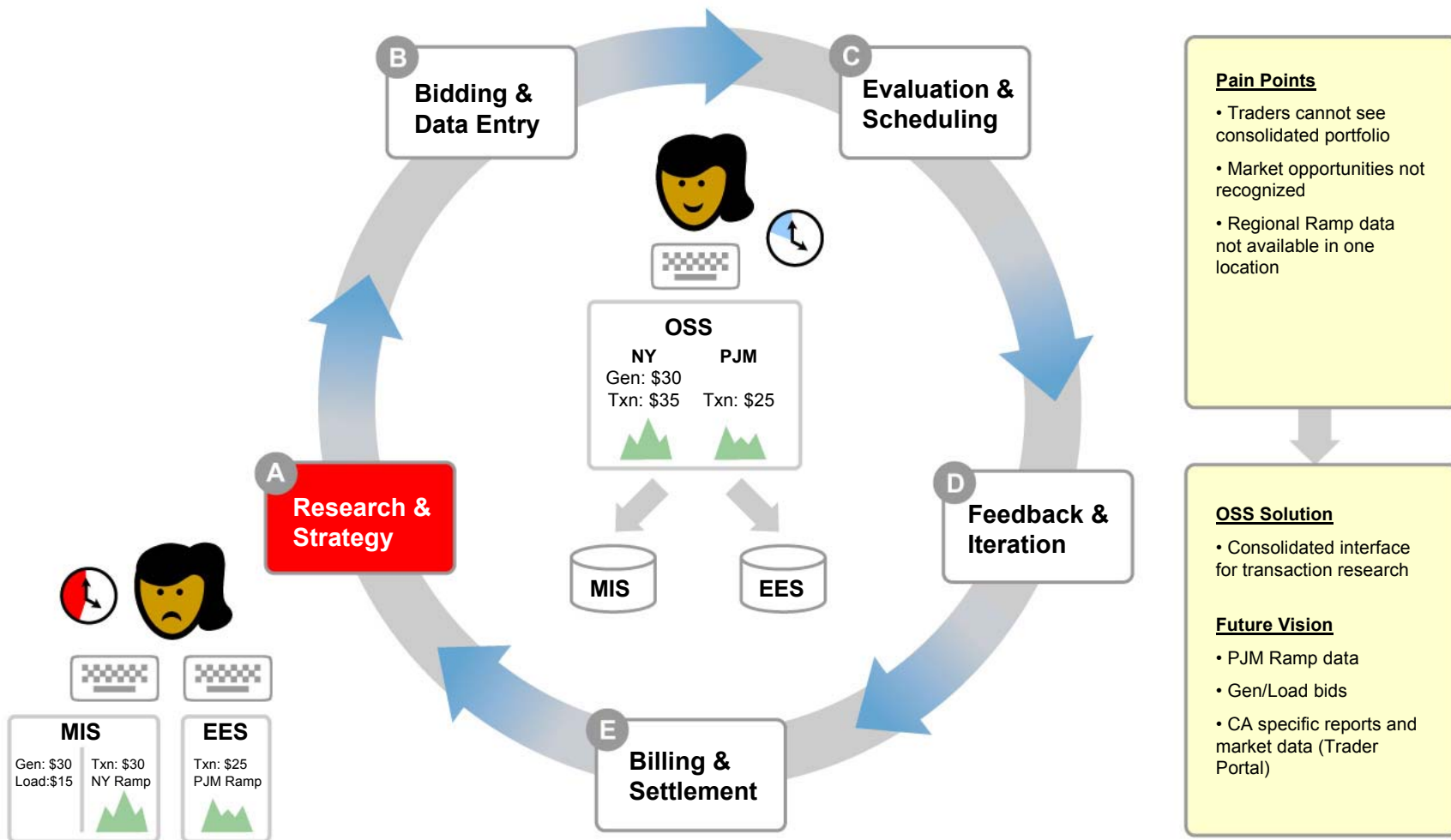
How?

OSS uses open and industry-accepted communication protocols and is consistent with current and evolving market design standards.

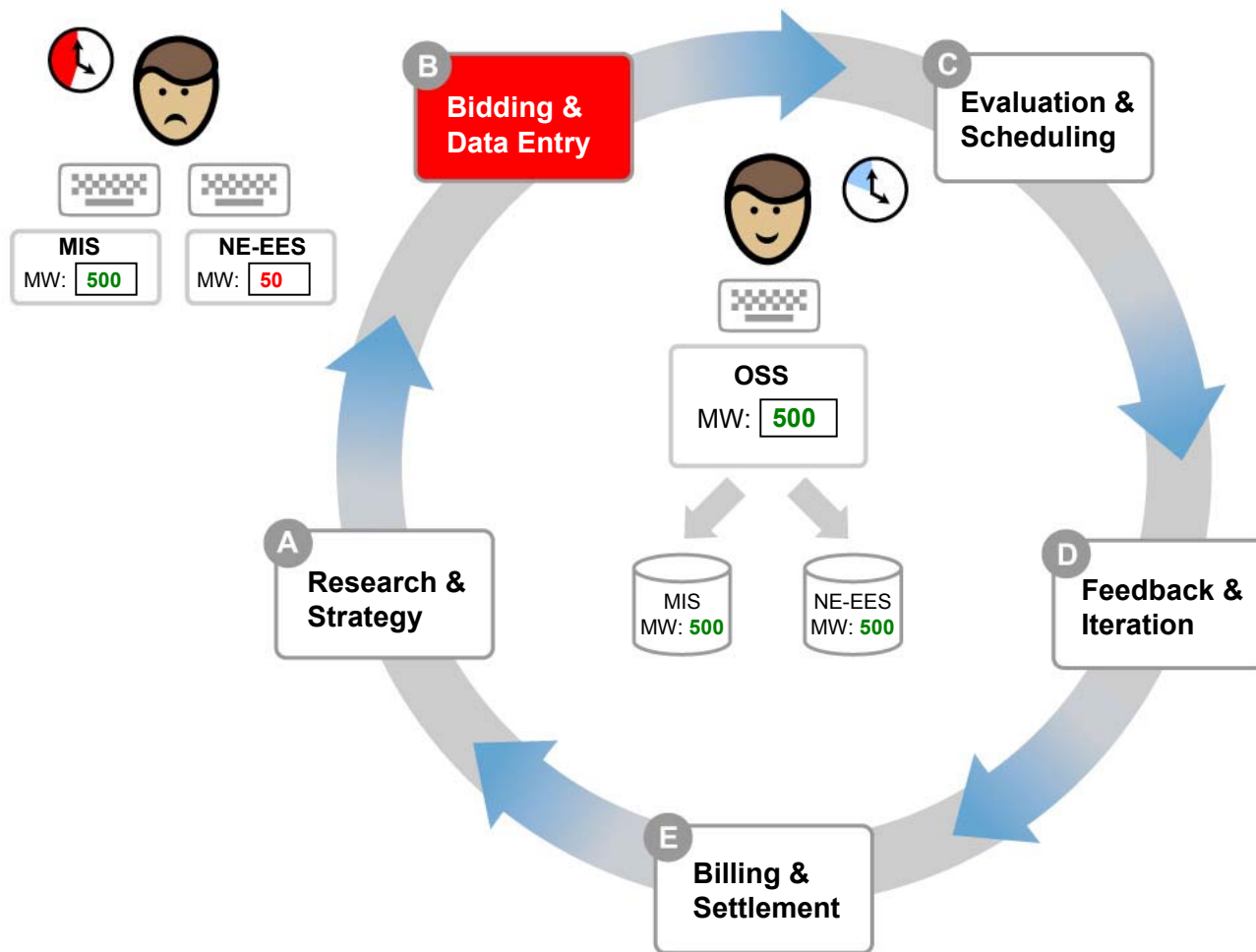
Lifecycle of a Power Market Transaction



A - Research & Strategy



B - Bidding & Data Entry



Pain Points

- Multiple entries of same data
- Data inconsistent across control areas
- Evaluation is uncertain
- MPs cannot work efficiently across control areas

OSS Solution

- Consolidated interface for bid entry

Future Vision

- OASIS reservation
- NERC tag integration
- One stop Txn Entry with ISO-NE and IMO

C - Evaluation & Scheduling

Pain Points

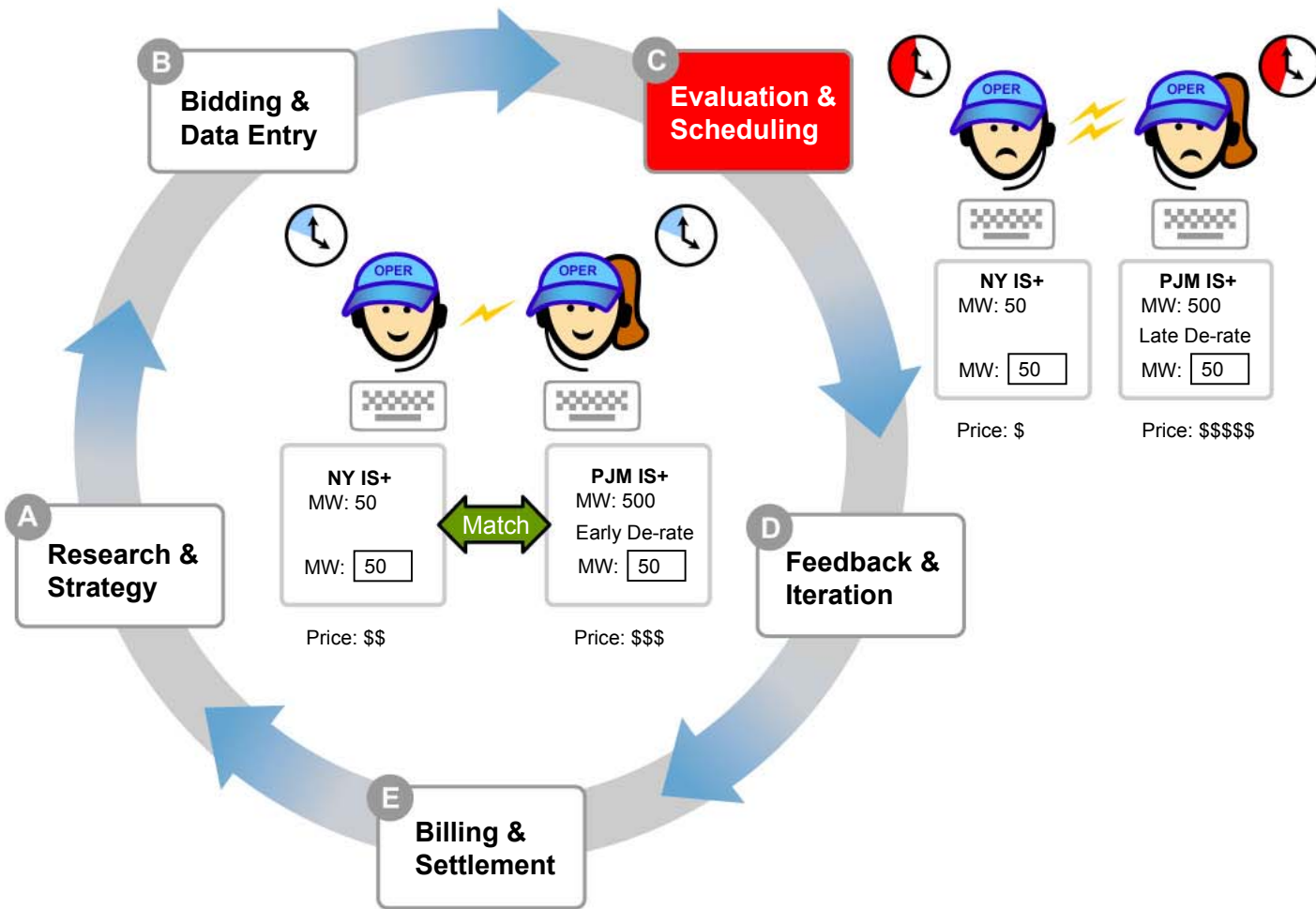
- Accurate dispatch hurt by inconsistent data
- Prices not economically balanced by region
- Unnecessary txns derated or failed - emergency actions required
- Lengthy checkout process

OSS Solution

- Facilitated checkout process
- Consolidated bid entry

Future Vision

- Inter control room messaging for facilitated checkout process
- One stop Txn Entry with ISO-NE and IMO



D - Feedback & Iteration

Pain Points

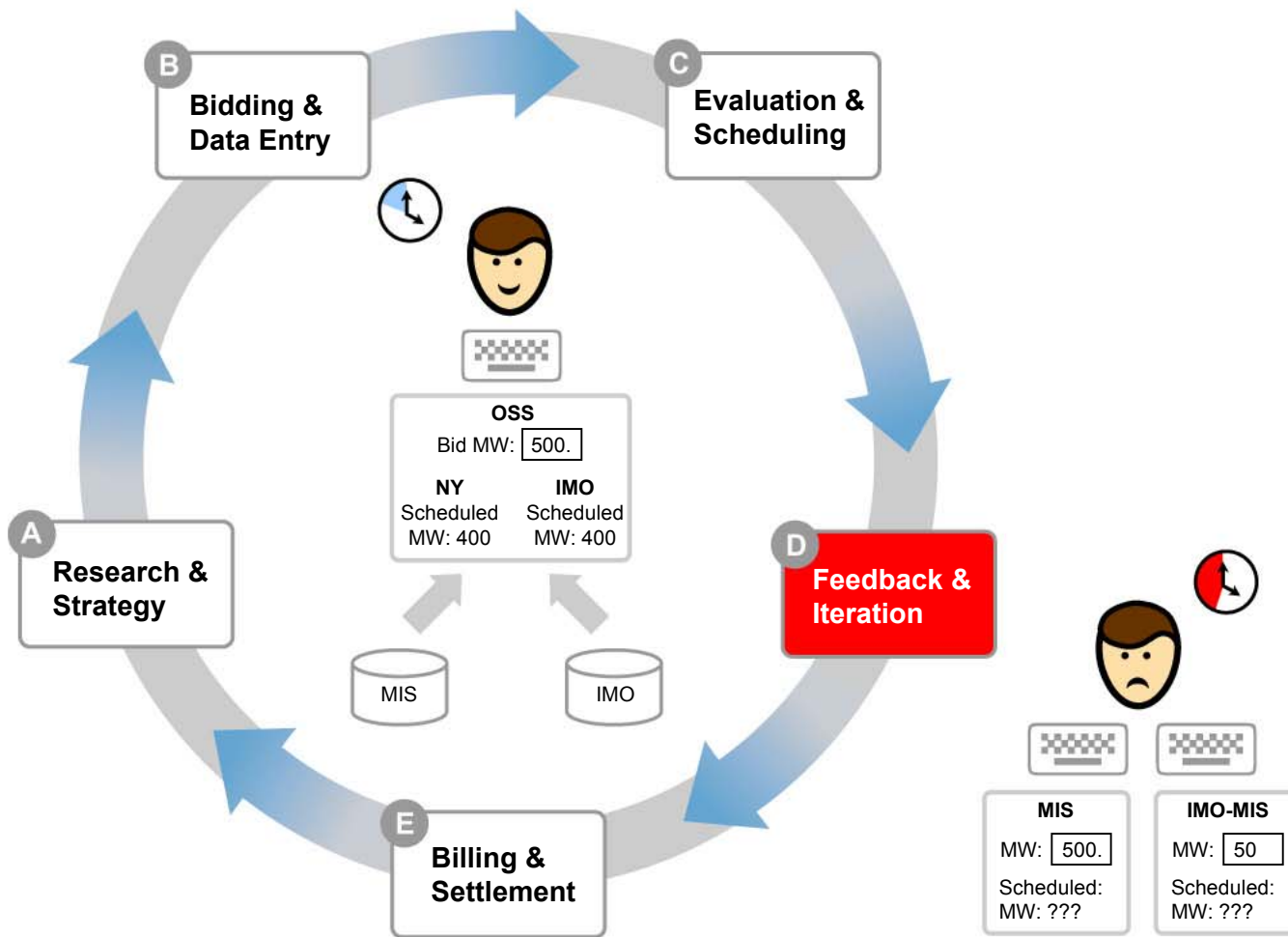
- MPs do not know where their transaction stands
- MPs do not know about a de-rated transaction until checkout is complete

OSS Solution

- Consolidated feedback vehicle
- Facilitated checkout

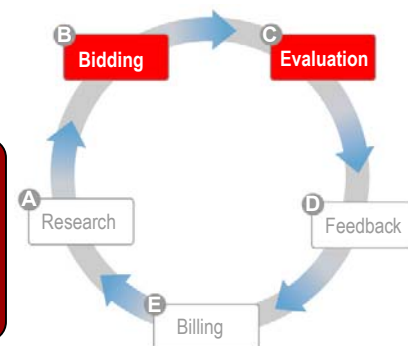
Future Vision

- Inter control room messaging for facilitated checkout and schedule updates
- Integration with ISO-NE and IMO



Track 1 – SMD Support

Support approved project A510 – “SMD 2.0 Planning and Specification” by providing a bidding platform for 15-minute intervals and in-day pre-scheduling.



Supporting Scope

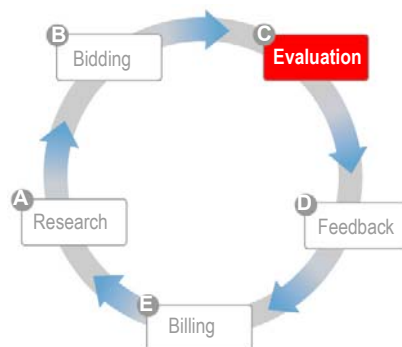
- 15-Minute intervals and 15-Minute starts and stops for all types of bids and transactions, allowing for simultaneous:
 - Hour-long economic bids
 - 15-Minute non-economic bids
 - 15-Minute external bilaterals with neighbors who support them
 - Hour-long external bilaterals with neighbors who do not support 15-minute
 - 15-Minute scheduling of all bids and transactions
- In-day pre-scheduling

Additional SMD-related enhancements

- E-Schedules
 - After-the-fact match of an internal bilateral transaction to a load prior to the initial billing run
- Outage schedule information

Track 2 – Operations Coordination

Create a facilitated checkout to increase cross-visibility and transparency of Transactions across the Control Rooms of NYISO and PJM, ISO-NE, or IMO. This will enable pre-checkout and speed up the checkout cycle.



Scope

- Extending the OSS data exchange to include the sharing of Operations data through Web Services or other agreed-upon standards
- Modifying the Control Room applications (e.g. IS+) to show the matching and highlight the non-matching transactions and enable updates between CA's.

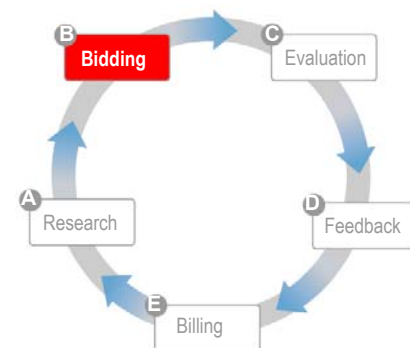


Business Value

- Expediting the Checkout process shortens the time between market close and scheduling
- Reduced checkout burden allows operators to focus on important reliability issues
- Fewer last minute surprises from failed transactions reduces the need for higher cost generation and emergency purchases
- Opportunity to provide advance warning to MPs of pending transaction de-rates (pre-checkout) – if possible
- Control Area data exchange provides a foundation that enables future seams related initiatives

Track 3 – One Stop Shop

The complete entry of a transaction between NYISO and PJM through OSS. Without OSS, the process requires multiple system interactions: PJM OASIS, PJM EES, NYISO MIS, and NERC Tagging.



Scope

- Enabling auto-reservation of capacity in PJM’s OASIS
- Enabling auto-assignment and creation of NERC tags to OSS transactions
- Providing current Ramp and ATC data from PJM in OSS
- Providing an interface into PJM’s Two-Settlement Market

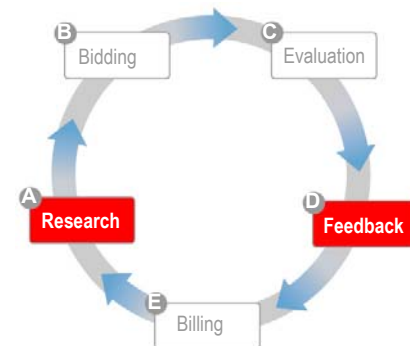


Business Value

- MP’s will save time – reducing redundant data entry and interaction with multiple systems
- Increase the certainty of Evaluation by ensuring complete and consistent data across Control Areas
- Improved data consistency between Control Areas will reduce transaction failures that currently require extensive reaction and follow-up time from NYISO and the Market Participants.
- Fewer last minute surprises from a failed transaction reduce the need for higher cost generation and emergency purchases

Track 4 – Expanding the OSS App

Information and usability enhancements to Market Participants enabling a more robust bidding experience via regular releases that expand the value of the OSS Application



Scope

- Providing current Ramp and ATC data from PJM in OSS
- Adding enriched Market Data (e.g. prices) to the OSS User Interface
- Adding Outage Information to the OSS User Interface
- Porting the MIS UI to OSS and supporting profile functionality
- Expanding the OSS UI to a consolidated Dashboard where MPs can view and manage their complete market position (including Load and Gen bids)



Business Value

- Providing more information to ease the decision making process and easily execute strategies through bids and transactions
- Better tools lead to a greater volume of transactions, resulting in a more efficient use of the transmission system
- Combine the MIS and OSS UI's to reduce support costs of both applications

Executive Summary

- Seams issues are a consistent problem in the Northeast region
- There are different types of seams issues for each of the different stages in the lifecycle of a power market transaction
- Seams issues manifest themselves differently for different stakeholders
 - Market Participants
 - Control Room Operators
- Solving seams issues is top priority for FERC and the NYISO
- OSS is solving seams issues by attacking the problem from four different angles
- Each OSS solution track will generate a different level of business value depending on the interests of the stakeholder
- Collectively, the set of OSS solutions will make tremendous progress in solving seams issues in the Northeast region
- This progress will drive market efficiency and operations reliability that produces tangible benefits for ISOs / RTOs and Market Participants



AISO *Open Scheduling System*

Questions