



Supplemental OASIS User Guide

Version 1.4

8/15/2024

This user guide is provided to Customers as a courtesy and is for information purposes only. It includes OASIS steps not covered in other user guides (*e.g.*, PTP, ST ATC, Preemption, *etc.*). The user guide contains Open Access Technology International System (OATI) screenshots which are proprietary and are not to be used outside the context of this document. Do not distribute without specific authorization from OATI.

For more information on the types of submittals identified, refer to the applicable business practice or submit questions to tblresdesk@bpa.gov.

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A. Subscribing to OASIS Email Notifications

OASIS sends emails to provide notification of the following events on OASIS.


- Note: Because BPAT is still using TSRs to secure transmission for NT Customers, PTP events are used to subscribe to notifications for NT TSRs and reservations.

Notification Event	Description
PTP_CUSTOMER	Status change on any TSR or reservation (PTP or NT) in which the registered entity is the CUSTOMER_CODE.
PTP_SELLER	Status change on any PTP TSR or reservation in which the registered entity is the SELLER_CODE (e.g., Reseller of a Resale).
PTP_RENEWAL	Renewal Date for a PTP or NT reservation is approaching for the company identified as the CUSTOMER_CODE. Must define: <ul style="list-style-type: none"> Lead Days: Number of days prior to the Renewal Date when OASIS sends the first email notification. Repeat Days: Number of days between subsequent reminders. Notifications will continue for a reservation until the Renewal Date is reached or until the notification is acknowledged (see section B).
SECURITY_LIMITS	Reliability Limit added or updated on a PTP or NT reservation.
PREEMPTION	Used for PCM. See the Preemption and ROFR User Guide.
NITS	Status change on any NITS request in which the registered entity is the CUSTOMER_CODE, such as a DNR, Resource, etc. Note: This is distinct from notifications used for the associated NT TSR or reservation.
AS_SELLER	Not used by BPA.

Users can subscribe themselves to the email notifications as follows on OASIS. Agents can subscribe to notifications for their own Company Code, as well as for their clients. Clients can subscribe for their own Company Code only.

- Users must have OASIS permissions “Edit Company/Customer” to be able to manage subscriptions.
- Access OASIS > Admin > Notification.
- Search for an existing notification record. Filter by ‘Company Code’ (your own or your client’s if you are acting as an Agent).

Company Code	Notification Event	Notification Method	Notification Address	Notification Format	Enabled
CPSE					<input type="checkbox"/>

- If a record exists for the desired Notification Event from the table above, then double-click that record to open the Update Notification panel for that Notification Event.
- If no record already exists for the desired Notification Event, then create a new notification record by clicking the ‘Add New’ icon in the upper right corner. 
- Add or update the fields as follows:

- a. Company Code: Customers will only have permission for their own Company Code. Agents be able to select their own or their client's Company Code.
- b. Notification Event: Select the event from the table above. Separate records are needed for each Notification Event.
- c. Notification Format: CSV is a comma separated format. OTHER provides a tabular output that is more readable.
- d. Enabled: Check this box to subscribe. Notification records cannot be deleted. If emails are no longer desired for a given Notification Event, uncheck this box to disable notifications.
- e. Lead Days and Repeat Days: Used for event PTP_RENEWAL only per table above.
- f. Notification Address: Enter a single valid email address per entry field. Add or Delete rows as necessary for multiple email addresses.

- 7. Save changes using the button in the upper right corner.
- 8. Refer to OASIS online Help for more information on OASIS Notifications.

Instead of using the NITS Event Notification above, NT Customers can also subscribe to status changes on NITS components such as DNRs by using the Status Notification on the NITS Customer. Use the ModifyNITSCustomer transaction to add an email to this field. However, this method is not recommended because it only supports a single email address.


B. Acknowledge a Renewal Notification

Once the Renewal notification has been triggered for an NT or PTP reservation, the notification will continue until the Renewal Date is reached or until the notification is acknowledged as follows:

1. Access OASIS -> Transactions -> Reservation Summary.
2. Open the reservation from Reservation Summary by clicking the 'Assign Ref' hyperlink.
3. Under the Additional Information section of the Transmission Reservation Detail screen, click the 'Rollover' hyperlink for the 'Provisions' field.

4. This opens the Rollover Rights screen. On the far right of this display, there is a field called 'Renewal Acknowledged'. To acknowledge the Renewal notification, select 'Yes' from the drop-down box.

MW		Renewal Acknowledged
9	0	NO
		NO
		YES

5. Save changes using the button in the upper corner. 
6. This will stop all subsequent Renewal notification emails for this specific reservation.

C. Curtailment Posting on OASIS

Curtailment information is available on OASIS as follows:

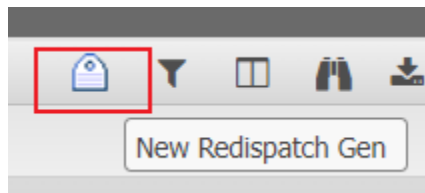
1. Summary data for BPA curtailments on 1:1 paths and Interconnection-wide curtailments on WECC paths.
 - a. Access OASIS > Notices > Security Summary.
 - b. Filter on Event ID = "BPAT" or "ECC" to see curtailments from BPA or the Reliability Coordinator, respectively.
 - c. API access via OASIS template: **security**
 - d. Data is posted within an hour of the curtailment.
2. Tag-level data for BPA curtailments on 1:1 paths only.
 - a. Access OASIS > Reports > Schedule Summary
 - b. The tag is listed under the Transaction ID field.
 - c. No information for Interconnection-wide curtailments.
 - d. API access via OASIS template: **scheduledetail**
 - e. Data is posted 7 days after the curtailment.
3. Summary data for Interconnection-wide curtailments issued by a Reliability Coordinator such as RC West on WECC paths.
 - a. Access OASIS > Notices > Interconnection Security Event.
 - b. Does not contain data for any curtailments issued by BPA or any tag data.
 - c. Does contain data for Interconnection events across North America (not just WECC). Filter on System = "ECC" for data from WECC and then use the Event ID.
 - d. API access via OASIS template: **securitysummary**
 - e. Data is posted within an hour of the curtailment.
4. Tag-level data for Interconnection-wide curtailments issued by a Reliability Coordinator such as RC West.
 - a. Access OASIS > Notices > Interconnection Security Detail.
 - b. For each Event ID listed on the Interconnection Security Event screen, there will be one or more records here in the associated Detail screen.
 - c. The tag is listed under the Transaction ID field.



- d. Does not contain information on curtailments issued by BPA. However, filter on Impacted TPs = “BPAT” for curtailments that cross BPAT as the Transmission Provider.
- e. Does contain data for Interconnection events across North America. Filter on System = “ECC” for data from WECC.
- f. API access via OASIS template: **securitydetail**
- g. Data is posted within an hour of the curtailment.

D. Offers of 3rd party Planning Redispatch

OASIS provides a bulletin board for the sharing of information related to the possible offering of 3rd party Planning Redispatch service. Generation owners can post 3rd party offers to provide Planning Redispatch service. Customers can search for those offers.

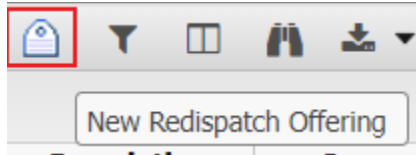
1. A generation owner must first register the generation asset that is available for Planning Redispatch service.
 - a. Access OASIS > Notices > Redispatch Gen Summary.
 - b. Click the ‘New Redispatch Gen’ icon in the upper right corner.





- c. Populate the required fields as follows:
 - i. Gen Name: The name of the generation asset.
 - ii. Gen Area: The BAA where the generation asset is located.
 - iii. Gen Location: The location of the generation asset within the BAA.
 - iv. Seller Phone: Contact phone number for the generation owner.
 - v. Status: Defaults to ‘ACTIVE’. Can be set to ‘INACTIVE’ if the generation asset is temporarily or permanently unavailable.
- d. Populate the optional fields to provide more information:
 - i. Gen Operator: The name or registered entity code of the entity responsible for operating the generation asset.
 - ii. Gen Description: Provide any further details that describe the nature of the generation asset.
- e. Save changes using the button in the upper corner.  Modify using .
- f. The ‘Gen Ref’ will be automatically assigned by OASIS. The ‘Gen Ref’ will then be used when posting an offer of Planning Redispatch service. See D.2.
- g. The OASIS template **redispatchgenpost** can be used to register a generation asset instead of using the OASIS user interface.

2. A generation owner may post an offer of Planning Redispatch service on OASIS using the generation asset(s) defined above.

- a. Access OASIS > Notices > Redispatch Offering Summary.
- b. Click the 'New Redispatch Gen' icon in the upper right corner.



- c. Populate the required fields as follows:
 - i. Provider: Select 'BPAT' if this service is for BPA transmission service.
 - ii. MW: Capacity available to support Planning Redispatch service.
 - iii. Gen Ref Inc and/or Gen Ref Dec: Select the 'Gen Ref' for the generation asset available to provide the INC or DEC capability. An INC or a DEC is required. If both are specified, it must be for different generation assets. A generation asset must be valid and ACTIVE to be selected.
 - iv. Seller Phone: Contact phone number for the offer owner.
 - v. Profile Start/Stop Times: The start and stop times of the Planning Redispatch service that can be provided up to the MW specified.
 - vi. Offer Start/Stop Times: The start and stop time that the seller will entertain offers.
- d. Populate the optional fields to provide more information:
 - i. Price: The offer price.
 - ii. Congestion Relief: May be used to describe the part of the transmission system that would see congestion relief from the use of Planning Redispatch service.
 - iii. Description: Provide any additional information or other terms and conditions associated with the offer of Planning Redispatch service.
- e. Save changes using the button in the upper corner.  Modify using .
- f. The 'Posting Ref' will be automatically assigned by OASIS.
- g. The OASIS template **redispatchpost** can be used to post an offer instead of using the OASIS user interface.

3. A Customer may search for an offer of Planning Redispatch service or the associated generation asset as follows.

- a. Access OASIS > Notices > Redispatch Offering Summary.
- b. Set the following initial filters: 'Provider' = "BPAT" and 'Time' = "Offer Stop Today Forward". This will show offers that are still available or will be available in the future.
- c. Set other filters as desired to narrow or expand the results.

- d. Click the 'Posting Ref' hyperlink to see full details of a particular offer, including the contact information for the seller.
- e. To see the details for the associated generation asset(s), make note of the 'Gen Ref Inc' and/or 'Gen Ref Dec' value. Then search for this generator using the 'Gen Ref' field on the OASIS -> Notices -> Redispatch Gen Summary screen.
- f. The OASIS template ***redispatchoffering*** can be used to search for offers of Planning Redispatch instead of using the OASIS user interface.
- g. The OASIS template ***redispatchgen*** can be used to view the details for a registered generation asset instead of using the OASIS user interface.

Revision History

Version	Date	Change
1.0	03/15/23	Initial document with sections A and B regarding Email Subscriptions and Curtailment Postings.
1.1	03/20/23	Updated section A with the required permission to subscribe to Email Notifications.
1.2	05/09/23	Move Curtailment Posting to section C. Added new section B for acknowledging a Renewal notification.
1.3	05/15/23	Added new section D for posting offers of 3 rd party Planning Redispatch service.
1.4	08/15/24	Minor update to one of the pictures.