



**EUCI Presents:**

## **UIC2007: 4th Annual Utility Integration Conference**

**Transform Performance and Compliance**

**SEPTEMBER 11 – 12, 2007**

**Produced By:**



*Utility Integration Solutions, Inc.*

### **Share Experiences of Industry Leaders**

British Columbia Transmission Corporation  
California ISO  
ERCOT  
ISO New England  
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Pacific Gas and Electric  
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### **Pre-Conference Workshop**

September 10, 2007

**Transforming Utility Performance and Compliance Through  
Business Process Management (BPM)**

**See Pages 7-8**



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SEPTEMBER 11 – 12, 2007



## The Quest for Improved Performance

Dear Colleague,

In 2004, EUIC and UISOL joined forces to bring you UIC2004 in Denver. In 2005 and 2006, we brought you UIC2005 and UIC2006 in San Francisco. We now present UIC2007, our 4th annual Utility Integration Conference aimed at transforming utility performance and compliance.

UIC is focused on business improvement solutions for utilities and ISOs that harness the power of integration. These are people-process-technology solutions that result in total business integration by bridging organizational silos, streamlining end-to-end business processes, and connecting IT applications.

Credible case studies suggest that such business integration can result in increased customer satisfaction, reliability, productivity, agility, and compliance. UIC provides a forum for sharing experiences of industry leaders who have begun integrating their business.

UIC promotes excellence in the utility industry by challenging you with the following questions about the “maturity” of your business processes. Are they...

- Consistent and repeatable?
- Well documented and auditable?
- Favorably compared with best practices?
- Compliant with business rules and regulations?
- Instrumented to easily monitor, measure, and manage?
- Easy to learn?
- Easy and efficient to execute?
- Easy to change, improve, and optimize?

Today, not many utilities can say YES to most of these questions. We can do better.

UIC2004, UIC2005, and UIC2006 showcased pioneering work of leading utilities who have applied business integration to improve processes such as outage restoration, asset management, maintenance management, work management, automated meter reading, demand response, and customer service.

UIC2007 will present a wealth of additional case studies from leading utilities. You will also hear from business integration experts about valuable strategies, concepts, and tools such as Business Transformation, Organization Change Enablement, BPM Frameworks, Process Simulation, Business Intelligence, Predictive Enterprise, SOA Governance, and Semantics Integration. Technology vendors will share with you the latest innovations in integration technologies.

The pre-conference training workshop will provide the requisite background and share best practices for implementing business integration at utilities.

I want to acknowledge the critical role that the UIC2007 Advisory Board members have played in shaping this year's conference. I am grateful to them for their invaluable contributions.

I invite you to join our quest for improved performance of utilities. I look forward to meeting you in Houston at UIC2007.

Ali Vojdani, Ph.D.  
Conference Chair  
President, UISOL

4TH ANNUAL UTILITY INTEGRATION CONFERENCE

TIME	MONDAY 9/10	DAY 1: TUESDAY 9/11	DAY 2: WEDNESDAY 9/12
8:00 a.m.- 12:00 p.m.		<b>Chair Address:</b> The Business Case for Business Process Management <b>Ali Vojdani, UISOL</b>	<b>Standards Roundtable:</b> Experience with Integration Standards: <b>Bob Saint, NRECA</b> <b>Dave Becker, EPRI</b> <b>Scott Neumann, UISOL</b>
		<b>Case Study:</b> Business Transformation and Enterprise Process Management at PG&E, <b>Tara Agid, PG&amp;E</b>	<b>Presentation:</b> Enterprise Architecture Standards (EAS) of the ISO/RTO Council, <b>Dick Brooks, ISO-New England and EAS Project Director</b>
		<b>Case Study:</b> Advanced Metering Infrastructure (AMI) Integration at SDG&E, <b>Enrique Villalobos, SDG&amp;E</b>	<b>Presentation:</b> The New CIGRE Working Group on Future EMS Architectures <b>Alain Steven, PJM</b>
		<b>Case Study:</b> Lessons from Business Process Analysis in the CAISO Market Redesign and Technology Upgrade (MRTU) Program, <b>Walter Johnson CAISO</b>	<b>Case Study:</b> Integration Challenges of PJM Advanced Control Center Project <b>Tom O'Brien, PJM</b>
		<b>Case Study:</b> Getting Ready for CAISO Market Redesign and Technology Upgrade (MRTU), <b>David Tucker, WAPA</b>	<b>Case Study:</b> Challenges of Integration in the Texas Nodal Program <b>Jeyant Tamby, ERCOT</b>
		<b>Case Study:</b> SOA and Integration Lifecycle Quality: It's About Building Trust, <b>John Michelsen, iTKO LISA</b>	<b>Case Study:</b> Experience with Integration at Midwest ISO—Addressing the Performance, Resilience, and Maintenance Issues <b>Jay Bonnet, Midwest ISO</b>
		Group Luncheon	Group Luncheon
		<b>Case Study:</b> Exposing Real-time SCADA Information Via a Web Service <b>Ken Newberry, TVA</b>	<b>Case Study:</b> EMS Integration at British Columbia Transmission Corporation <b>Vidya Vankalaya, Lucas Malesku BCTC</b>
		<b>Case Study:</b> Automating IT User Access Control Processes at PG&E, <b>Jim Porter PG&amp;E</b>	<b>Presentation:</b> BPM Best Practices & Case Studies from Other Industries <b>Colin Teubner, Forrester Research</b>
		<b>Case Study:</b> SOA, Process Integration, and Integration Governance, <b>Joe Tellez Sempra</b>	<b>Panel Session:</b> How to Get Started with BPM <b>Moderated by Ali Vojdani, UISOL</b>
12:00- 1:00 p.m.	<b>Training Workshop:</b> Transforming Utility Performance and Compliance Through Business Process Management (BPM), <b>UISOL</b>	<b>Case Study:</b> Automating Processing of Excavation Requests using GIS, Mobile Technology, and Integration Technology at PG&E, <b>Mary Muse, PG&amp;E</b>	<b>Adjoin at 3:00 p.m.</b>
1:00- 5:00 p.m.		<b>Case Study:</b> OMS-AMR Integration Using MultiSpeak at San Bernard Electric Coop, <b>Doug Lambert, SBEC</b>	
5:00- 6:00 p.m.		<b>Technology Roundtable:</b> Latest Innovations in Integration and BPM Technologies, <b>Brian Adams, TIBCO</b> <b>Mohammad Ketabchi, SAVVION</b> <b>Omid Razavi, CORDYS</b>	
		Hosted Social Hour	
		<b>Presentation:</b> IEC 61968-9--Standardizing the Information Exchanges in Meter-Related Business Processes, <b>Scott Neumann, UISOL</b>	
7:00- 9:00 p.m.		<b>Presentation:</b> Challenges of Transmission Model Exchange, <b>Jay Britton, AREVA-TD</b>	
		<b>Presentation:</b> Leveraging the Semantic Wave and Semantic Technologies for Business Integration <b>Scott Neumann, UISOL</b>	

# UIC2007: 4TH ANNUAL UTILITY INTEGRATION CONFERENCE

SEPTEMBER 11 – 12, 2007

## CONFERENCE TARGET AUDIENCE

The subjects covered in this conference are of broad interest to all those involved with improving Key Performance Indicators of companies in the utility industry. You will benefit from attending this conference if you are from an electric or gas utility or an independent system operator (ISO) with responsibilities or involvement in the items mentioned below:

### UTILITY OPERATIONS

- Business Transformation
- Business Process Improvement
- Business Process Modeling
- Process Process Redesign
- Performance Measurement and Management
- Compliance Management

### UTILITY IT INFRASTRUCTURE

- Enterprise Application Integration (EAI)
- B2B Integration
- Business Process Management/Workflow
- Business Intelligence
- Enterprise Data Management
- Implementation of Utility Industry Standards such as Common Information Model (CIM) and MultiSpeak

This conference will also be of interest to companies and consultants that assist the utility industry in implementing integration solutions.

## UIC2007 ADVISORY BOARD

Category	#	Last Name	First Name	Title	Company
Utilities/ISOs	1	Brooks	Richard	Architect	ISO New England
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	3	Jones	Jim	Chief Information Officer	Great River Energy
	4	Schinski	Jim	Chief Information Officer	Midwest ISO
	5	Steven	Alain	Executive Advisor	PJM
	6	Tamby	Jeyant	Director	Electric Reliability Council of Texas (ERCOT)
	7	Vaahedi	Ebrahim	Chief Information Officer	British Columbia Transmission Corporation (BCTC)
	8	Villalobos	Enrique	Architect	San Diego Gas and Electric
Industry Associations	9	Becker	Dave	Manager	EPRI
	10	Saint	Bob	Principal Engineer	National Rural Electric Cooperative Association (NRECA)
Integration Standard Groups	11	Congeleton	Greg	Chairman	CIM Users Group/TVA
	12	Neumann	Scott	US Chairman	IEC TC57
Integration Platform Companies	13	Adams	Brian	Energy Industry Lead	TIBCO
	14	Ketabchi	Mohammad	Chairman	SAWION
	15	Razavi	Omid	Senior Vice President	CORDYS
Application Companies	16	Britton	Jay	Architect	AREVA-TD
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Analysts	18	Teubner	Colin	Analyst	Forrester Research



# UIC2007: 4TH ANNUAL UTILITY INTEGRATION CONFERENCE

SEPTEMBER 11 – 12, 2007

## PROGRAM AGENDA

TUESDAY, SEPTEMBER 11, 2007

**Conference Chairman:** *Ali Vojdani, Ph.D., President UISOL*

**Registration/Continental Breakfast:** 7:30 – 8:00 a.m.

**Conference Timing:** 8:00 a.m. – 5:00 p.m.

### **Chair Address: The Business Case for Business Process Management**

- What is BPM?
- Who is doing it in the utility industry?
- What type of results are they getting?
- How can you justify the business case for BPM?
- How can you measure and realize the return on investment in BPM?

**Ali Vojdani, President, UISOL**

### **Case Study: Business Transformation and Enterprise Process Management at PG&E**

- An overview of PG&E Business Transformation Initiative
- Improving business processes, focusing on the enterprise effort
- Changing the culture to support new processes
- Current status of the initiative

**Tara Agid, Operating Model Lead, PG&E**

### **Advanced Meter Infrastructure (AMI) Integration at SDG&E**

- Unique integration problems posed by AMI initiatives
- SDG&E's strategy, approach, and lessons learned
- Recommended implementation roadmap

**Enrique Villalobos, IT Architect, SDG&E**

### **Lessons from Business Process Analysis (BPA) in the CAISO Market Redesign and Technology Upgrade (MRTU) Program**

- Early BPA efforts at CAISO
- The BPA opportunity with MRTU
- Lessons Learned from the MRTU experience
- Current state of BPA at CAISO

**Walter Johnson, Principal for Technology Strategies, CAISO**

### **Getting Ready for CAISO Market Redesign and Technology Upgrade (MRTU)**

- Impact of MRTU on market participants
- Preparation steps for market readiness
- Rounding up the right resources
- Lessons learned

**David Tucker, Architect**

**Western Area Power Administration (WAPA)**

### **SOA and Integration Lifecycle Quality: It's About Building Trust**

- Anticipated business agility and reuse benefits through SOA
- Critical quality pain points and enablers for migrating to SOA
- Continuous Lifecycle testing practices at design, integration, runtime and change phases
- Customer examples of SOA Quality best practices

**John Michelsen, Founder and Chief Architect, iTKO LISA**

### **Exposing Real-Time SCADA Information Via a Web Service at TVA**

- Benefits of making SCADA data available to business applications
- Benefits of making SCADA data available in near real-time through standard web services
- How TVA exposed 50,000 SCADA data points every 10 seconds
- Examples of .NET applications that were built to present information to system operators

**Ken Newberry, Manager, Operations Integration Architecture TVA**

### **Automating IT User Access Control Processes at PG&E**

- Standardizing and streamlining processes to decrease risk and achieve operational efficiencies
- Implementing a standard user management platform to increase security and automate compliance
- Providing identity and access management as an enterprise IT service

**Jim Porter, Senior Project Manager, PG&E**

### **SOA, Process Integration, and Integration Governance at Semptra**

- Laying an SOA foundation
- Challenges deploying secure and reliable processes across a mixed-platform environment
- Creating an integration governance model for the enterprise

**Joe Tellez, Project Manager, Semptra**

### **Automating Processing of Excavation Requests Using GIS, Mobile Technology, and Integration Technology at PG&E**

- Moving from a paper-based system to an electronic process
- Providing tablets, GPS units, antennas and cellular modem aircards to each locator
- Phased, system-wide rollout
- Providing support for the application

**Mary Muse, Gas Engineer, PG&E**

### **OMS-AMR Integration Using MultiSpeak at San Bernard Electric Coop**

- The drivers for OMS-AMR integration
- The advantages of the OMS-AMR integration
- Cost savings estimate
- Experience with MultiSpeak
- OMS-SCADA Integration

**Doug Lambert, IT Division Manager San Bernard Electric Coop**

### **Technology Roundtable: Latest Innovations in Integration and BPM Technologies**

- Brian Adams, Energy Industry Lead, TIBCO
- Mohammad Ketabchi, Founder and Chairman, SAVVION
- Omid Razavi, Senior VP, CORDYS

5:00 – 6:00 p.m.

Hosted Social Hour



(Agenda Continued on Next Page)

# UIC2007: 4TH ANNUAL UTILITY INTEGRATION CONFERENCE

SEPTEMBER 11 – 12, 2007

## TUESDAY, SEPTEMBER 11, 2007 (CONTINUED)

**Advanced Topics: 7:00 – 9:00 p.m.**

**Presentation: IEC 61968-9--Standardizing the Information Exchanges in Meter-related Business Processes**

- Scope of IEC 61968-9
- Status of the draft international standard
- How it can benefit the AMI initiatives

**Scott Neumann, CTO, UISOL**

**Challenges of Transmission Model Exchange**

- Current practice for modeling of an interconnection when there are many independent data sources
- The increasing importance of model quality to deregulated grid planning and operations
- New CIM standards for improving cooperative model maintenance
- Emerging concept – an independent transmission modeling application
- The role of an independent modeling application in enterprise integration

**Jay Britton, Architect, AREVA-TD**

**Presentation: Leveraging the Semantic Wave and Semantic Technologies for Business Integration**

- What is the 'Semantic Wave'?
- What makes semantic models different?
- What are the key semantic technologies?
- How can semantic technologies be applied to enable interoperability?

**Scott Neumann, CTO, UISOL**

## WEDNESDAY, SEPTEMBER 12, 2007

**Continental Breakfast: 7:30 – 8:00 a.m.**

**Conference Timing: 8:00 a.m – 3:00 p.m.**

**Standards Roundtable: Experience with Integration Standards**

- Bob Saint, Principal Engineer, NRECA
- Dave Becker, Manager, EPRI
- Scott Neumann, CTO, UISOL

**Presentation: Enterprise Architecture Standards (EAS) of the ISO/RTO Council**

- The ISO/RTO Enterprise Architecture Framework
- The EAS Technical Reference Architecture
- Application Services that are contained in version 1.0 of the EAS Standards (e.g. Security Constrained Economic Dispatch and Business Activity Monitoring)
- Compliance requirements
- Relationship of EAS to IEC, Cigre and VLPGO
- Standards development priorities for 2007 (e.g. Demand Response, Outage Scheduler, SCUC, Settlement, etc.)

**Dick Brooks, ISO-New England and EAS Project Director**

**The New Cigre Working Group D2.24 on Future EMS/MMS Architectures**

- Objectives and historical background
- How does it relate to previous standardization initiatives?
- Scope and task forces
- Schedule and Deliverables
- Relationship with IEC TC-57 Standards

**Alain Steven, Executive Advisor, PJM**

**Integration Challenges of PJM Advanced Control Center project**



- Overview of PJM Energy Management and Market Systems configuration - Current issues and challenges
- Objectives of the Advanced Control Center Project (AC2)
- System overview, scope and time-line
- Architecture Description, including alignment with industry standardization initiatives

**Tom O'Brien, General Manager, Reliability Services, Advanced Control Center Program, PJM**

**Challenges of Integration in the Texas Nodal Program**



- Modeling the nodal business processes
- Leveraging CIM in integration design
- Building an integration factory
- Designing automated integration testing processes
- Project status and lessons learned to date

**Jeyant Tamby, Director, ERCOT**

**Experience with Integration at Midwest ISO—Addressing the Performance, Resilience, and Maintenance Issues**



- History of integration at Midwest ISO
- Addressing the performance issues
- Addressing the resilience issues
- Addressing the interface software maintenance issues
- Current challenges

**Jay Bonnet, Director, Manager, Midwest ISO**

**EMS integration at British Columbia Transmission Corporation (BCTC)**



- Implementing an SOA to integrate 15 external systems with a new EMS
- Use of CIM and IEC message standards
- Service granularity and design
- Integration challenges and innovative solutions

**Vidya Vankalaya, Architect, Lucas Malesku, BCTC**

**BPM Best Practices & Case Studies from Other Industries**

- BPM lessons learned in other industries
- Case studies and examples
- Horizontal processes ripe for improvement
- What utilities can learn from elsewhere

**Colin Teubner, Analyst, Forrester Research**

**Panel Discussion: How to Get Started with BPM**

- Conference Speakers (TBD)

**Moderated by: Ali Vojdani, UISOL**

**PRE-CONFERENCE WORKSHOP**  
**Transforming Utility Performance and Compliance through**  
**Business Process Management (BPM)**  
**Presented by UISOL**

**Monday, September 10, 2007**

**PROGRAM AGENDA**

**Registration and Continental Breakfast: 7:30 – 8:00 a.m.**

**Workshop Timing: 8:00 a.m. – 5:00 p.m.**

**Group Luncheon: 12:00 – 1:00 p.m.**

**Instructors**

- Ali Vojdani: President, UISOL
- Mark Triplett: COO, UISOL
- Murray Nixon: Vice President, UISOL

This workshop will show how progressive companies are transforming their performance and compliance by implementing Business Process Management (BPM).

Many utilities have deployed solutions for better managing individual processes such as metering, billing, or customer service. But very few utilities are efficiently managing their end-to-end business processes such as Service Provisioning, Measure-Bill-Collect, or Outage Management. These end-to-end processes cut across multiple departments and computer systems and typically are not adequately documented, understood, optimized, or automated.

BPM is a discipline employing methods and tools to effectively manage organization activities and processes end-to-end. It can help companies improve performance and compliance by defining, standardizing, managing, measuring, and continuously improving business processes.

There is significant excitement about BPM's potential for improving productivity, visibility, and agility. There are also now many credible case studies supporting the benefits of BPM.

This course presents an overview of BPM concepts and tools along with real-life examples of their successful implementations by leading utilities and Independent System Operators (ISOs). It shows what BPM is, what it isn't, and what you need to know to make the business case for BPM and successfully implement it in your company.

**Workshop Topics**

- Business Drivers for Transforming Performance and Compliance
  - Need for documented, consistent, and repeatable processes
  - Ability to control and manage business processes
  - Ability to measure and improve performance
  - Ability to enforce and demonstrate compliance with rules and regulations
- Three Levels of Performance: Organization, Process, Job/Performer
- Utility Performance Metrics
- Major Utility Computer Applications
- Major Utility Business Processes
- Trouble Shooting, Measuring and Benchmarking Business Processes
- Business Process Management Definition, Terminology, and Useful Reference Material
- Modern Tools for Business Process Management
- Prioritizing the Business Improvement Initiatives
- Three Dimensions of Business Change Solutions: People, Process, Technology
- A Four Step Process for Planning a BPM Project
- Managing the Process Dimension of Change:
  - Optimizing processes redesign through modeling tools that allow rapid prototyping and simulation
  - Defining the process and sub-process metrics
  - Building an electronic process repository

## PRE-CONFERENCE WORKSHOP (CONTINUED)

# Transforming Utility Performance and Compliance through Business Process Management (BPM) Presented by UISOL

- Managing the Technology Dimension of Change:
  - Managing business processes using a modern BPM tool
  - Building an Information Bus for effective information distribution
  - Instrumentation of business processes by building Performance Metrics Dashboards
  - Using the IEC Common Information Model (CIM) & NRECA MultiSpeak to build an enterprise information model
- Managing the People Dimension of Change:
  - Enabling change by implementing Kotter's eight stage process
  - Designing and executing an effective communications plan
  - Designing and delivering an effective training plan
  - Realigning jobs and reward systems with organization and process metrics
- Initiating and Executing BPM Projects Using Best Practices
- Real-life Examples of Applying BPM to Improve Utility Business Processes
- BPM in Other Industries
- Critical Success Factors for BPM Implementations
- The Natural Marriage Between BPM and Service Oriented Architecture (SOA)
- Governance of Business Processes/Services and IT Services
- Building a BPM Center of Excellence
- Building the Business Case for BPM
- Measuring and Realizing the Benefits of BPM

## WORKSHOP INSTRUCTORS

**Ali Vojdani** is the **President** of **UISOL**. He has over 27 years of experience in the application of IT in the utility industry as part of his professional career at UISOL, Vitria Technology, Perot Systems, EPRI, PG&E, and McGill University. He has been involved in numerous business integration projects in US, Canada, UK, and Australia. His work on improving resource scheduling at PG&E became the finalist of the 1997 prestigious Frantz Edelman award for the best management science application world-wide. Dr. Vojdani has a Ph.D. degree in electrical engineering and has authored over 60 technical publications.

**Mark Triplett** is the **Chief Operating Officer** at **UISOL**. He has over twenty years of experience in business operations management in the areas of software development, enterprise application integration, manufacturing, energy consulting, telecommunications network management, and Local Exchange Carrier operations. Mark is actively engaged with UISOL client projects. He has most recently been supporting the Western Area Power Administration's (WAPA) transition to the new California Independent System Operator (CAISO) Market Redesign Technology Upgrade (MRTU).

**Murray Nixon** is a **Vice President** at **UISOL**. She has over 26 years of experience in utility industry process improvement, transformation, and human capital strategic planning. Prior to UISOL she held a number of management and leadership positions at Duke Energy Corporation. Her last position at Duke was the start up of a new engineering and technical services support organization that provided process, technical and system improvement and integration services to all regulated and non-regulated generating assets. Earlier she worked on the merger between Duke Energy and Cinergy, and the implementation of the California ISO.

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Utility Integration Solutions, Inc. ([www.UISOL.com](http://www.UISOL.com)) is a boutique business integration consultancy solely focused on implementing systems integration and process improvement solutions for utilities. It serves leading utilities such as British Columbia Transmission Corporation (BCTC), California Energy Commission (CEC), California Independent System Operator (CAISO), Electric Reliability Center of Texas (ERCOT), ISO New England (ISO-NE), NRECA, Pacific Gas and Electric (PG&E), San Diego Gas and Electric (SDG&E), Silicon Valley Power (SVP), and Western Area Power Administration (WAPA).

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The Power of Now® TIBCO Software Inc. (NASDAQ:TIBX) is a leading business integration and process management software company that enables real-time business. Real-Time Business is about helping companies become more cost-effective, more agile and more efficient. TIBCO has delivered the value of Real-Time Business, what TIBCO calls The Power of Now, to over 2,000 customers around the world and in a wide variety of industries.

## PROCEEDINGS

The proceedings of the Conference and workshop will be published and one copy will be distributed to each registrant at the conference. Extra copies of the composite proceedings will be available at \$395.00 each.

## CONFERENCE LOCATION

A room block has been reserved at the Hyatt Regency Houston, 1200 Louisiana Street, Houston, Texas, USA 77002 for the nights of September 9-12, 2007. The rate is \$179 single or double occupancy, plus applicable tax. Please call 713-654-1234 for reservations and mention the EUCI Conference to get the group rate. Make your reservations prior to August 17, 2007. Reservations after this date will be on a space available basis and **cannot be guaranteed at the conference rate.**

## ENERGIZE WEEKLY

When you sign up to "Energize Weekly" you will receive a new conference presentation each week via email on a relevant industry topic. The presentations are selected from a massive library of over 1000 current presentations that EUCI has gathered during its 20 years organizing conferences.

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#### Register 3, Send 4th Free!!

Any organization wishing to send multiple attendees to these conferences may send 1 FREE for every 3 delegates registered. Please note that all registrations must be made at the same time to qualify.

All cancellations received on or before August 10, 2007 will be subject to a \$195 processing fee. Written cancellations received after this date will create a credit of the tuition (less processing fee) good toward any other EUCI conference or publication. This credit will be good for six months. In case of conference cancellation, Electric Utility Consultants' liability is limited to refund of the conference registration fee only.

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Discounted Registration for Attending UIC2007 Conference and Workshop: \$2095, **Early Bird Before August 31, 2007: \$1895**

UIC 2007 Conference Only: \$1495, **Early Bird Before August 31, 2007: \$1295**

I am unable to attend, but please send me a copy of the conference proceedings for \$395. (add \$50 for international shipping).

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