JORD

Joint Operational Reference Data Project
enhancing the
PCA Reference Data Service (RDS) Operation
in partnership with FIATECH

Delivering *core authoritative*
ISO15926 compliance needs.

Ian Glendinning

PCA Owner-Operator Forum

BP Houston - 21st March 2013

JORD Update - Agenda

- **PCA, Fiatech, iRING, JORD Context**
- **ISO-15926 / iRING / RDS Basics**
- **JORD Objectives and Project Scoping / Phasing**
- **Successful deliveries achieved in Phase 1**
- Specific focus on "Compliance" related deliverables
  - Mapping Methodology – How to use 15926 compliantly
  - Compliance Specification – What it means to be compliant
  - (Validation Procedures - How we verify, test, validate and certify compliance)
- Specific focus on "interim" RDS capabilities in progress
- **Overall project status and Phase 2 Plans.**
- Engagement with JORD & PCA RDS
  - Capital projects & collaborative development initiatives
  - Other information standards
  - Prioritizing efforts (key data, mapping, existing model learnings, ...)

Primary focus on ISO15926 & Reference Data since 1996

Developing PCA RDL(Library) and

Operating PCA RDS (System) throughout this period, with

Fully operational PCA RDS (System & Services) since 2008

Involving many collaborations ….

POSC Caesar Association Fiatech™

PCA & Fiatech Element 9 & Members Collaboration on ISO15926

2006 / "Wilmington" / 2007 / 2008 / 2009 …

ADI, IDS-ADI, Matrix Projects, Camelot, *Avalon*, Proteus, iRINGTools

As well as PCA's own member projects - created major challenges to PCA RDS, which *JORD* was created to address:

- **All Reference Data published as resolvable / queryable web references (EndPoint).**

- **Quality manageable and scalable content and services. (inc. reduced dependence on key expert resources.)**

- **Clarity on compliance and validation of usage.**

- **Sustainable value-adding services business model**

POSC Caesar Association   Fiatech™

JORD Joint Operational Reference Data *Project* (since May 2011)

enhancing the PCA Reference Data Service (RDS) Operation

in partnership with Fiatech

delivering scalable, sustainable, authoritative, core, operational
ISO15926 Reference Data and Compliance needs.

Further agreed (since October 2012)
All PCA & Fiatech ISO15926 interoperability activities

Endorse the common iRING branding :   **iRING**

And the common communication channel : **iRINGToday.com**
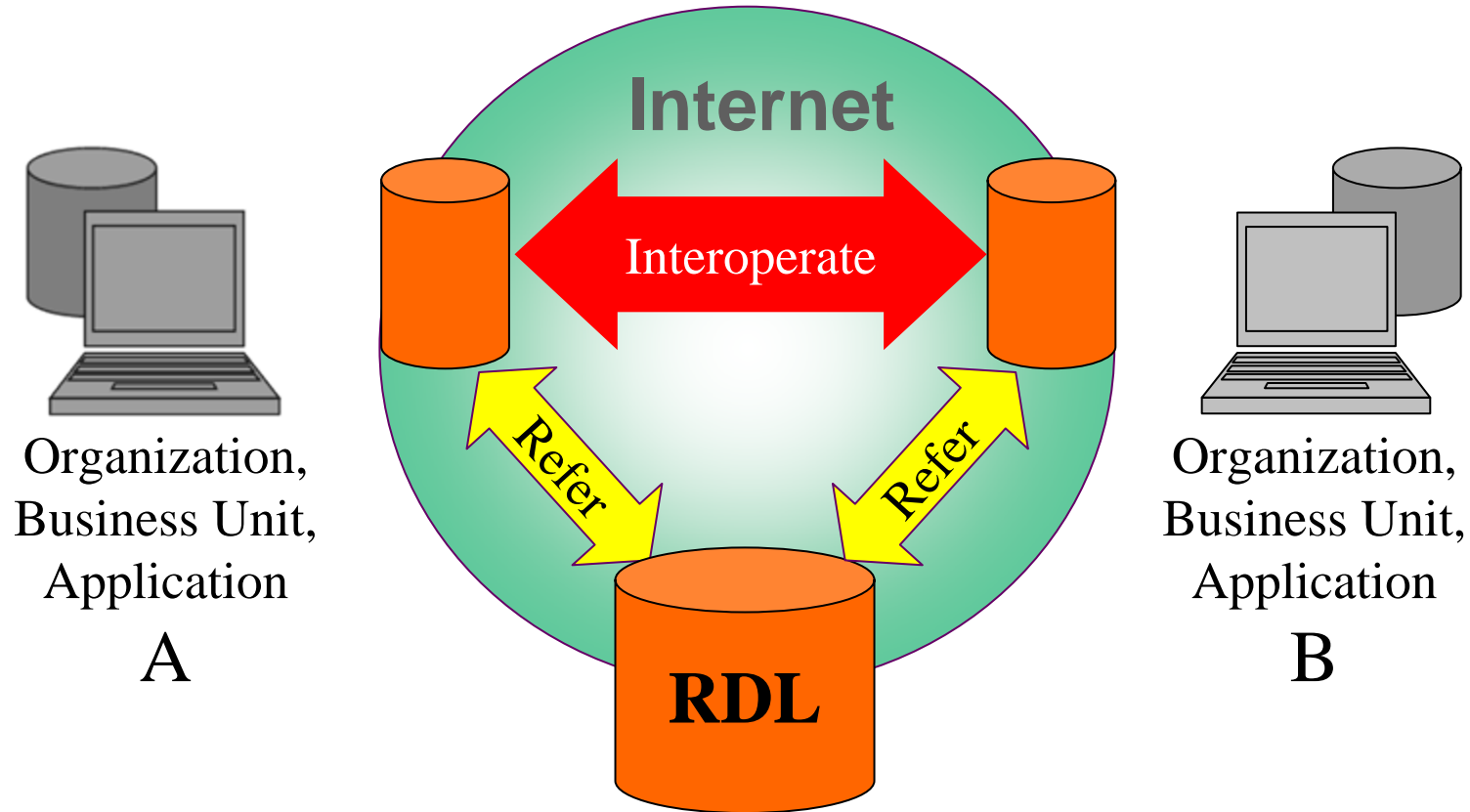
iRING

The jointly agreed branding for all PCA & FIATECH ISO15926-based interoperability initiatives.

The brand is now associated with the whole technology-neutral interoperability solution architecture defined by use of ISO15926 Reference Data, (*not limited* to iRINGTools or any specific implementation technologies).
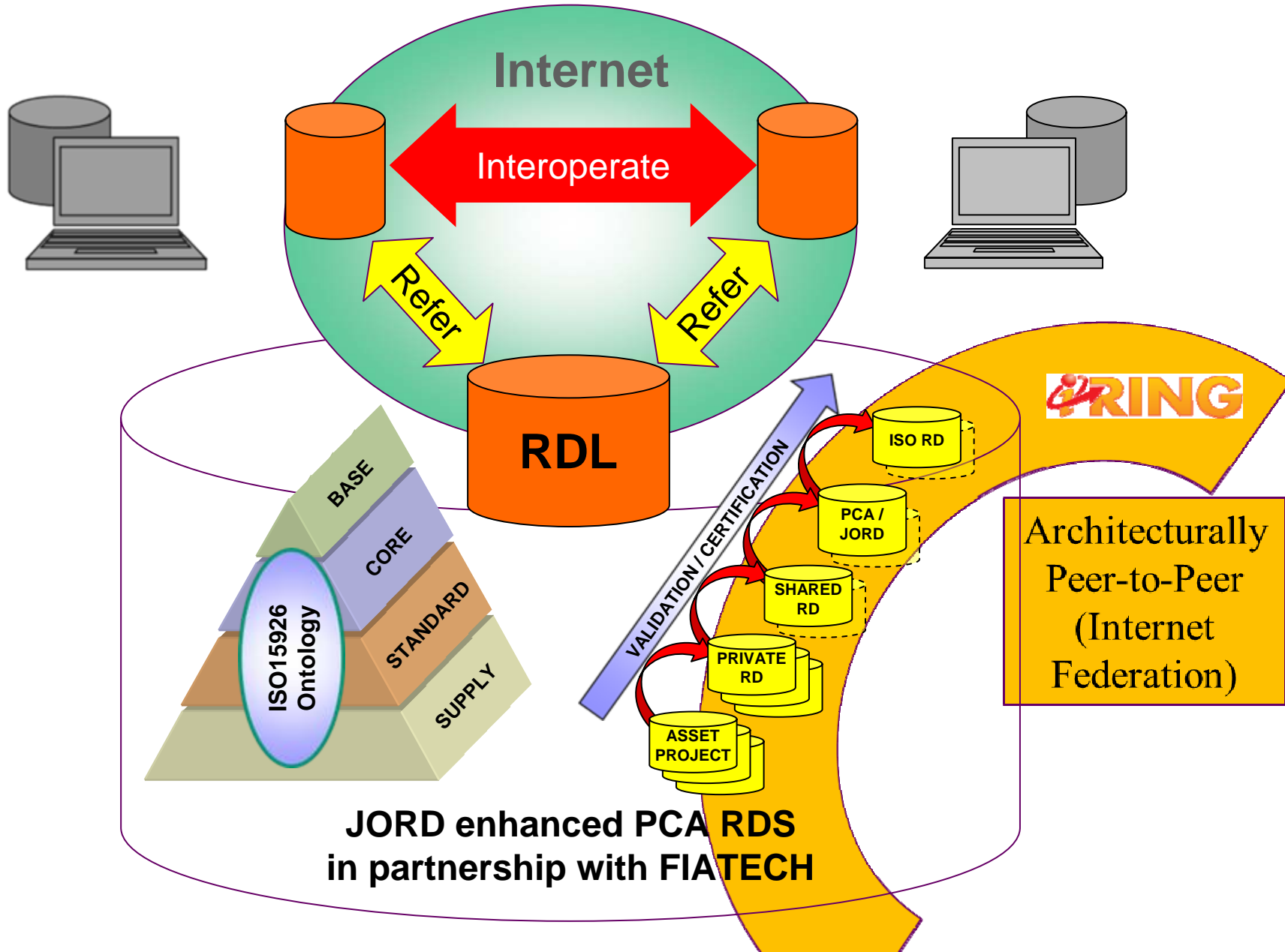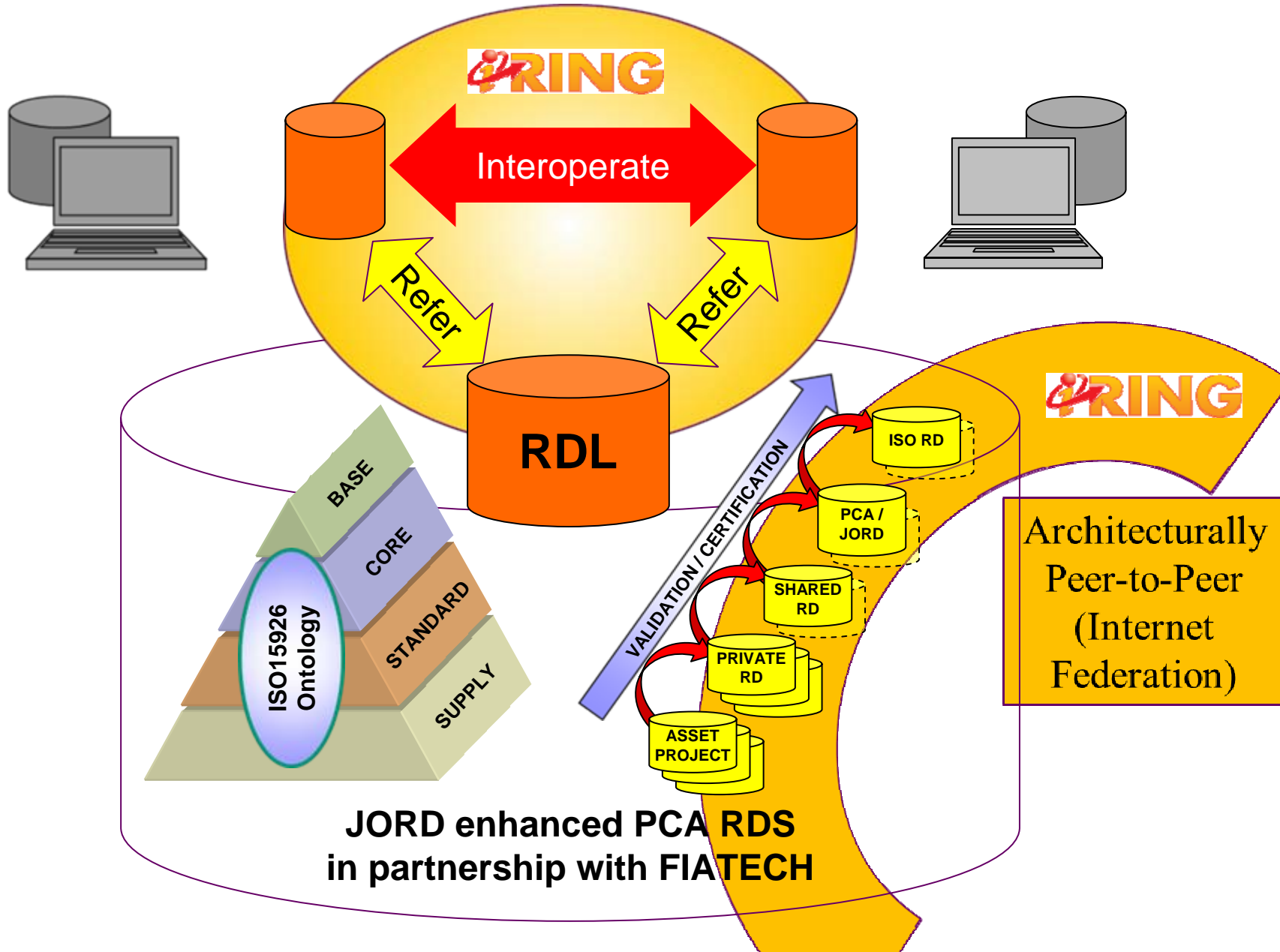
iRINGToday.com

Is the agreed market communications channel associated with iRING and ISO15926 interoperability generally,
And being *non-exclusive*,
welcomes association with the ISO15926 initiatives of any other collaborating organizations and ISO workgroups.
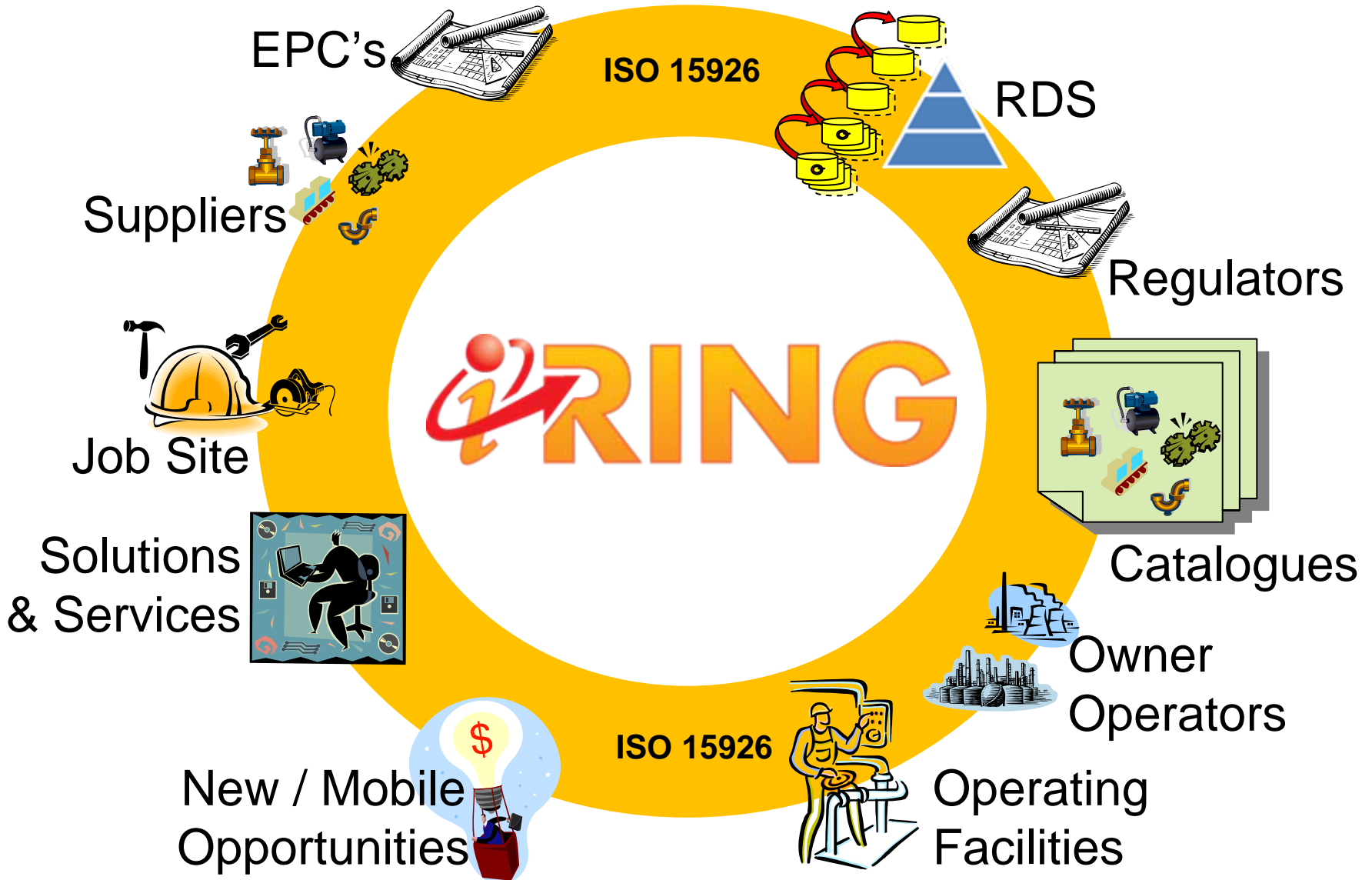
ISO15926 *at its simplest* …

Using *standard shared references* & sharing references used, reduces business ambiguity & reduces mapping overheads. **Makes interoperability easier and reduces risk & cost**

Reducing ambiguity and reducing mapping overheads … Makes interoperability easier and reduces risk & cost

• **Direct-cost-and-time-savings** in reducing effort in transferring & mapping data across business interfaces and in simply finding & accessing information necessary to do your business.

• **Risk-and-cost-reductions** in the quality and ambiguity of information which otherwise lead to sub-optimal business operations, failure to satisfy regulators or, in the worst case, loss of health, safety & environmental integrity.

• **Freedom & flexibility** to take advantage of platform-independent, technology-neutral, collaborative business processes, flexible business partnering, and different subcontracting arrangements across your geographically distributed, even remote & inhospitable, evolving business operations and supply-chains.

Know your own _specific_ business case & scope priorities

JORD Project Scoping

A - Compliance, Validation & Methodology
B - Services Platform & Publishing Tools
C - Training Resources
D - Services Organization & Business Resources
(O – Operational Support)
(P – Project Admin)

JORD Project Phasing

Phase 1 Technical Enhancements & "*Fixes*" (*May 2011 to July 2012*)
(*Fixes - known issues, known solutions, known resources*)
Phase 2 *Scalable* Platform & Organization (*Up to 2 years*)
Phase 3 *Sustainable* Business Services Operation (*Thereafter*)

Ultimate aim - Scalable & Sustainable ?

Really about credibility and dependability:

Care not to be megalomaniac - focussing on the *authoritative core of the federated whole*, not attempting management control of all reference data for every industrial use.

Having a business model and funding for self-sustaining operation.
Infrastructure for 24x7x365 operation & growing, federated content,
Organization & governance model for long-term viability,
Critical paths not dependent on a few specialists, etc.

   Professional business arrangements
   on which industrial users can rely

JORD *Core* Services – Not-for-Profit Operation – PCA RDS enhanced in partnership with FIATECH

Read / Export Content	Free to anyone.	Primary Service. All references resolvable to immutably-unique content, all readable, exportable. Supported formats include Browser UI, MDB, SQL, Excel, HTML, XML and RDF/OWL/SPARQL. Copyright & IPR licensing apply.
Core Content Mgmt & Validation	Available to *charter* Project Subscribers & Sponsors & to Fee-paying service users.	Maintenance and fixes of core content only and testing of proposed changes, etc. (for *new* domain content, see below).
Support for Users, Projects & SIG's		Maintenance of core procedures and support requests concerning use of core content and processes (For *new* content processing, see below.)
Create / Read / Export new ID's	Available to *charter* Project Subscribers & Sponsors & to Fee-paying service users. (who are also Certified)	Registered users to the management services are free to generate new lifecycle-immutable Global ID's for content in locally or remotely managed WIP Libraries / Sandboxes, etc.
Content Write		Certified users will be able to write content directly (with appropriate meta-data controls on provenance & quality) Partitions of federated WIP /Sandbox content become effectively hosted and publicly accessible.
New Content & Standardization	Available as fee-paying value-adding services. (Per project / per scope.)	Estimated cost per value-added scope - Price list / rates intended. Will arise from both Commercial Projects and Collaborative "SIG's".
Certification of Users, Org's, Tools & Interfaces		Estimated cost per value-added scope - Price list / rates intended. Organized around Compliance Checklist with scopes per BIDG or other transaction sets. (*Economic self-certifying* components, as well as services.)
Training & Related Consulting		Estimated cost per scope - Price list / rates development possible. (*Note that these are services related only to providing and using the core RDS Operations content and procedures. Additional services are supported by commercial consultants in content creation, interoperation and integration solution planning and implementation.*)

Plus, operational services, business, marketing and back-office functions supporting *core* services.
(Other than core 15926 technical & coordination functions –
– infrastructure and substrate technologies & specialist services are competitively outsourced.)

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Service Band	Services	Support
Free & Open Services	Basic Read & Query	Service Support Only
Subscription Services	Extended Read & Query	General service, technical & content usage Q&A support.
Fee-based Value-adding Services	All other update, content management, compliance validation, standardization, training, consultancy services	Specific SLA's per priced service.

| Training & Related Consulting | | Estimated cost per scope - Price list / rates development possible. *(Note that these are services related only to providing and using the core RDS Operations content and procedures. Additional services are supported by commercial consultants in content creation, interoperation and integration solution planning and implementation.)* |

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Phase 1 *Technical Fixes* Success

Compliance:

- Mapping Methodology – Issued – (*and* good MMT SIG agreement)
- Compliance Specification – Issued – (*and* customers already using checklist to assess their own compliance, performing gap-analyses, requesting PCA assessment of their compliance, etc.)
- (*Validation Procedures – In Phase 2 per plan*)
- ID Specification – Issued (*and* subject to much review & refinement.)

PCA RDS Platform Enhancement:

- Triple-Store EndPoint – Live and supported (and being used)
- Sandbox Hosting – Live and supported (and being used)
- On commercial ISP's/Hosts/Cloud **with full PCA control**.

Business Model Development: – Common iRING branding agreement, using iRINGToday channel for market & business-case resources.

Phase 2 "Scalable Platform & Organization"

Continue ongoing activities:

- Continue to align PCA & Fiatech coordination with iRING & JORD

- Address *additional* business benefit of compliance levels.

- Ongoing live support, maintenance & enhancement for working use of Methodology, Compliance, Endpoints & Sandboxes.

- Shift our focus from technical "fixes" to business services operational and market support organization.

The rest of Phase 2 scope:

- Overall scope defined and agreed with participants, per original project definition confirmed in 3Q12 update. (Planning >> next >>)

- Additional funding *will* be needed to achieve full scope.
(Ph1 800K sought, 435K raised and used, Ph2 *min* 2.2m ~ 900K committed. Consolidated now on annual basis for ongoing planning.)

Phase 2 – "Scalable Platform & Organization" (#1)

- Target Completion June 2014
- Target Deliverable Milestones in 2013 include:
- A - Compliance, Methodology & Validation scope
  - Validation Procedures (for RDL & Business Interfaces)
  - Core Template Pattern RDL content for Pattern Mapping Methodology.
  - [Business Interface scoping element (BIDG) of Compliance Spec.]
- B - Platform & Tools scope
  - Scalable & reliable technical infrastructure & business substrate
  - Requirements gathering / workshops for tools
  - Enhanced RDL Management Tool to replace legacy tool.
    - **Immediate "interim" enhancements using new PCA capability**
    - Production platform & tools procurement
  - New Interface Pattern Mapping Tool (embodying methodology & content)
  - Other validation tools (later)

Phase 2 – "Scalable Platform & Organization" (#2)

- C - Training Resources scope
  - Train the trainer focus. Opportunistic and customer project driven in 2013 (15926/iRING/RDS approach, Business case development, 15926 modelling)

- D - Business Resources scope
  - Business Plan (for sustainable Phase 3 business operation)
    - Overall marketing strategy & business implementation plan.
  - Staff / contractor resources and operating procedures (per business plan)
  - Marketing Resources
    - iRINGToday channel and content (Business case success stories, Business value-add of increasing Compliance Levels, JORD milestone achievements, FAQ's, etc.)
    - GoToMarket contract services, campaigns, business plan development
  - Service Sales and Finance Resources
    - Service descriptions and price lists, T's&C's, SLA's, Customer accounting

- **OVERALL Now – Plan & estimates based on the above outline, prioritizing existing funding / identifying necessary additional funding. Actively progressing specific actions where noted above.**

You need the JORD Project …

- **You need the benefits of**
  ***iRING* - ISO15926 Reference-Data-Based Interoperability.**
  You need the *core* JORD deliverables and service enhancements.
  We all need the *authoritative & coordinated* clarity on the status
  of all other *iRING* (ISO15926) resources.

… so the JORD Project also needs you

- **JORD still requires additional funding and resources to deliver**
  the remaining Phase 2 scope (*including* operational support).

  - With thanks and acknowledgements to Charter Members: Sponsors
    - EPIM, RosEnergoAtom, Black&Veatch, CCC, Hatch & VNIIAES;
    - Supplementary Subscribers Woodside, Dow, Bechtel & Emerson

  More information - https://www.posccaesar.org/wiki/FiatechJord

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    Ray Topping / FIATECH topping@fiatech.com

POSC Caesar Association + ISO15926 + Fiatech = iRING

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