

REQUEST FOR RECORDS DISPOSITION AUTHORITY		JOB NUMBER <i>71-305-02-2</i>	
To: NATIONAL ARCHIVES & RECORDS ADMINISTRATION 8601 ADELPHI ROAD COLLEGE PARK, MD 20740-6001		Date received <i>7-29-02</i>	
1. FROM (Agency or establishment) Bonneville Power Administration		NOTIFICATION TO AGENCY In accordance with the provisions of 44 U.S.C. 3303a, the disposition request, including amendments, is approved except for items that may be marked "disposition not approved" or "withdrawn" in column 10.	
2. MAJOR SUBDIVISION Information Systems			
3. MINOR SUBDIVISION Information Services			
4. NAME OF PERSON WITH WHOM TO CONFER Mary Rose Kerg	5. TELEPHONE NUMBER 503-230-5456	DATE <i>2-21-03</i>	ARCHIVIST OF THE UNITED STATES <i>J. W. Carl</i>
6. AGENCY CERTIFICATION I hereby certify that I am authorized to act for this agency in matters pertaining to the disposition of its records and that the records proposed for disposal on the attached <u> <i>b</i> </u> page(s) are not needed now for the business for this agency or will not be needed after the retention periods specified; and that written concurrence from the General Accounting Office, under the provisions of Title 8 of the GAO Manual for Guidance of Federal Agencies, <input checked="" type="checkbox"/> is not required <input type="checkbox"/> is attached; or <input type="checkbox"/> has been requested.			
DATE July 19, 2002	SIGNATURE OF AGENCY REPRESENTATIVE <i>Mary Rose Kerg</i>		TITLE Records Officer
7. ITEM NO.	8. DESCRIPTION OF ITEM AND PROPOSED DISPOSITION	9. GRS OR SUPERSEDED JOB CITATION	10. ACTION TAKEN (NARA USE ONLY)
PC PC-11 PC-11-11 PC-12 PC-12-11 PC-12-12 PC-13 PC-14 PC-14-11 PC-14-12 PC-15 PC-15-11 PC-15-12 PC-15-13 PC-15-14 PC-16	Project Coordination (Efficiencies Program) Projects, Efficiency Program Projects, Efficiency Program Communications Optimization and Efficiency Improvement Near-Real Time Optimization Columbia Vista Generation Management System Information Factory Data Warehouse Enterprise Application Integration System Streamlining Load Forecasting Revenue Forecasting Meters Analysis GENCO (Generation Company) Information Management Transmission Scheduling System <i>Transaction</i> <i>modified by agency</i> <i>11/20/02 tes</i>		
<i>cc Agency, NR, NRIS</i>			

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FILE GUIDE AND RETENTION SCHEDULE: PBL - GENERATION SUPPLY
New Chapter: July 10, 2002

FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, & DISPOSITION	OFFICE OF RECORD/ORIGIN
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PC	Project Coordination (Efficiencies Program)	PGM
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Material relating to the updating and integration of a set of systems and process for the forecasting, marketing, and scheduling for power products which is required to meet the corporate level requirements of monitoring revenue process, business risk measurement and management, and data accessibility.

Data may be recorded on various media including paper, film, tape, disk, or CD ROM. The official copy is media neutral and may be recorded on paper, film, tape, disk or CD Rom.

Disposition: In accordance with instructions for specific material described by the following related subjects.

PC-11	Projects, Efficiency Program	PGM
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Records accumulated by individual projects that relate to Efficiencies Program overall activities rather than the functions of each individual project. These materials relate to coordinating the cohesive strategy to produce an updated and integrated set of systems and processes for the forecasting, marketing, and scheduling for power systems and/or products. This set of systems and processes is required to meet the corporate level requirements of monitoring revenue process, business risk measurement and management, and data accessibility. File contents would include all material generated for this program that are in accordance with the program's scope. Individual project-specific sub-agreements are filed separately.

Retention Schedule:
In Office: Active + 1 year Records Storage: 3 years, then destroy.

PC-11-11	Projects, Efficiency Program Communications	PGM
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Tools such as newsletters, videos, surveys, and presentations that disseminate information among Transmission Business Line (TBL), public interest groups, and/or Power Business Line (PBL).

Retention Schedule:
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See Section 800 8 in the BPA Records Manual for definitions of KEY terms

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, & DISPOSITION	OFFICE OF RECORD/ORIGIN
PC-12	<p>Optimization and Efficiency Improvement</p> <p>Material related to Bonneville Power Administration's (BPA) work with the U.S. Army Corp of Engineers (COE) and the Bureau of Reclamation (Reclamation) to implement the Federal Columbia River Power System (FCRPS) Asset Management Strategy, whose overall goal is to maximize the value of the FCRPS.</p> <p>The main project is divided into three separate subprojects. Subprojects are interconnected, but the majority of work can be completed independently and implemented in phases. The three subprojects are:</p> <ul style="list-style-type: none"> • Integrated Modeling, Scheduling, and Operation Project; • Data Systems and Plant Improvements Project; and • Research and Plant additions that improve Plant Efficiency. <p><i>Retention Schedule:</i> <i>In Office: Active + 1 year Records Storage: 3 years, then destroy.</i></p>	PGM
PC-12-11	<p>Near-Real Time Optimization</p> <p>Material related to the development, management, implementation and review of the Near-Real Time Optimization (NRTO) Project. The NRTO is a single computer application, which will serve as a tool to evaluate the distribution of generation over the Federal hydrosystem on a "within-hour" basis. It will evaluate the generation pattern over the system as a whole and also over the units at individual projects. In addition, the COE and Reclamation Project Operators will also use a form of the NRTO at the plants. Materials include budget management documents, spreadsheets, actual or projected timelines, scopes, charters, etc.</p> <p><i>Retention Schedule:</i> <i>In Office: Active + 1 year Records Storage: 3 years, then destroy.</i></p>	PGM
PC-12-12	<p>Columbia Vista</p> <p>Material related to the development, management, implementation and review of the Columbia Vista (CV) hydro system-planning model. CV is a decision support software system that models the FCRPS. This software will perform required hydro regulations necessary for planning and operating the FCRPS. Materials include budget management documents, spreadsheets, actual or projected timelines, scopes, charters, etc.</p> <p><i>Retention Schedule:</i> <i>In Office: Active + 1 year Records Storage: 3 years, then destroy.</i></p>	PGM

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FILE CODE	RECORDS SERIES, TITLE, DESCRIPTION, & DISPOSITION	OFFICE OF RECORD/ORIGIN
PC-13	<p>Generation Management System Material related to the development, management, implementation and review of the Generation Management System (GMS). The GMS is a combination of hardware and computer software that will enable Duty Schedulers to manage FRCPS generation resources, optimize operations, respond to dynamic schedules, participate in the Interconnection Operations Services (IOS) market, and implement the Slice contract in Real-Time while maintaining the integrity and reliability of the power system. Materials include budget management documents, spreadsheets, actual or projected timelines, scopes, charters, etc.</p> <p><i>Retention Schedule: In Office: Active + 1 year Records Storage: 3 years, then destroy.</i></p>	PGM
PC-14	<p>Information Factory Material related to the development, management, implementation and review of the Information Factory (IF). IF is a Power Business Line (PBL)-wide data factory to resolve data interface issues internal and external to PBL. It encompasses the entire range of detailed business data for the PBL as well as providing any necessary interfacing with all non-PBL systems and information required by PBL. Materials include budget management documents, spreadsheets, actual or projected timelines, scopes, charters, etc.</p> <p><i>Retention Schedule: In Office: Active + 1 year Records Storage: 3 years, then destroy.</i></p>	PGM
PC-14-11	<p>Data Warehouse Material related to the development, management, implementation and review of the Data Warehouse (DW). DW is a computerized system used for assessing, querying, and analyzing information from several PBL resources. Assessed through BPA's intranet, it provides a single point of interface to PBL processes, the Bonneville Enterprise System (BES), and the Corporate Data Warehouse. Materials include budget management documents, spreadsheets, actual or projected timelines, scopes, charters, etc.</p> <p><i>Retention Schedule: In Office: Active + 1 year Records Storage: 3 years, then destroy.</i></p>	PGM

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PC-14-12	<p>Enterprise Application Integration Material related to the development, management, implementation and review of the Enterprise Application Integration (EAI) provides a seamless integration of applications for the rapid movement of information across BPA's computerized networks. Materials include budget management documents, spreadsheets, actual or projected timelines, scopes, charters, etc.</p> <p><i>Retention Schedule:</i> <i>In Office: Active + 1 year Records Storage: 3 years, then destroy.</i></p>	PGM
PC-15	<p>System Streamlining Material related to the development, management, implementation and review of the Stream Streamlining project. The Stream Streamlining produces more efficient computerized system processes, an integrated scheduling software package, and an interacted load-forecasting package, which can be effectively utilized by numerous functional groups. Materials include budget management documents, spreadsheets, actual or projected timelines, scopes, charters, etc.</p> <p><i>Retention Schedule:</i> <i>In Office: Active + 1 year Records Storage: 3 years, then destroy.</i></p>	PGM
PC-15-11	<p>Load Forecasting Material related to the development, management, implementation and review of the Load Forecasting (LF). LF is a computer software project that identifies, analyzes, and recommends load forecast organizational, system, and business process improvement options for the short-, mid-, and long-term. Materials include budget management documents, spreadsheets, actual or projected timelines, scopes, charters, etc.</p> <p><i>Retention Schedule:</i> <i>In Office: Active + 1 year Records Storage: 3 years, then destroy.</i></p>	PGM

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RECORDS SERIES, TITLE, DESCRIPTION, & DISPOSITION

OFFICE OF
RECORD/ORIGIN

PC-15-12	<p>Revenue Forecasting</p> <p>Material related to the development, management, implementation and review of the Revenue Forecasting (RF). The RF project performs processes, systems, and organizational analysis through computerized software to map, measure, identify, and implement improvements to the process of predicting future PBL revenues from power and ancillary service contracts. Materials include budget management documents, spreadsheets, actual or projected timelines, scopes, charters, etc.</p> <p><i>Retention Schedule:</i> <i>In Office: Active + 1 year Records Storage: 3 years, then destroy.</i></p>	PGM
PC-15-13	<p>Meters Analysis</p> <p>Material related to the development, management, implementation and review of the Meters Analysis (MA). The MA project will perform processes, systems, and organizational analysis through computerized software to map, measures identify, and implement improvements to the processes and systems used for managing and using meter data within the PBL. Materials include budget management documents, spreadsheets, actual or projected timelines, scopes, charters, etc.</p> <p><i>Retention Schedule:</i> <i>In Office: Active + 1 year Records Storage: 3 years, then destroy.</i></p>	PGM
PC-15-14	<p>GENCO (Generation Company) Information Management</p> <p>Material related to the development, management, implementation and review of the GENCO Information Management (GIM). The GIM project will determine and implement PBL requirements for overall integrated business information management, analysis, and reporting. Materials include budget management documents, spreadsheets, actual or projected timelines, scopes, charters, etc.</p> <p><i>Retention Schedule:</i> <i>In Office: Active + 1 year Records Storage: 3 years, then destroy.</i></p>	PGM

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RECORDS SERIES, TITLE, DESCRIPTION, & DISPOSITION

OFFICE OF
RECORD/ORIGIN

PC-16

Transaction
~~Transmission~~ Scheduling System

PGM

Material related to the development, management, implementation and review of the ~~Transmission~~ *Transaction* Scheduling System (TSS). The TSS project is a fully integrated computer system that performs PBL scheduling functions from schedule entry through After-the-Fact Report Generation. It facilitates the entire power/transmission transaction process from the moment the contract is signed until it is billed. Materials include budget management documents, spreadsheets, actual or projected timelines, scopes, charters, etc.

Retention Schedule:***In Office: Active + 1 year Records Storage: 3 years, then destroy.*****Electronic Mail and Word Processing System Copies**

Electronic copies or records that are created on electronic systems and used solely to generate a recordkeeping copy of the records covered by the other items on this schedule. Also includes electronic copies of records created on electronic mail and word processing systems that are maintained for updating, revision, and dissemination.

- (a) Copies that have no further administrative value after the recordkeeping copy is made.
 - 1. Copies maintained by individuals in personal files or other personal directories on hard disk or network drives, and copies on shared network drives that are used only to produce the recordkeeping copy.

Destroy/delete within 180 days after the recordkeeping copy has been produced.

- 2. Copies maintained by individuals in personal electronic mail systems.

Electronic mail messages will be destroy automatically when 90 days old.

- (b) Copies used for dissemination, revision, or updating that are maintained in addition to the recordkeeping copy.

Destroy/delete when dissemination, revision, or updating is completed

See Section 800.8 in the BPA Records Manual for definitions of KEY terms

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