GlencolS – Interoperability through Reference Data



ISO15926 Reference Data & the JORD Project (Joint Operational Reference Data)







ISO15926 Reference Data & JORD - Agenda

Some essential background

- •Understanding the scope of Reference Data
- History of the PCA RDS and Sponsorship
- Collaboration with FIATECH & increasing demand for RDS

The JORD Project (Joint Operational Reference Data where joint = PCA & FIATECH ... & ? ...)

•Aims & Status

Scope & (some) Technical

Business Model

Synopsis:



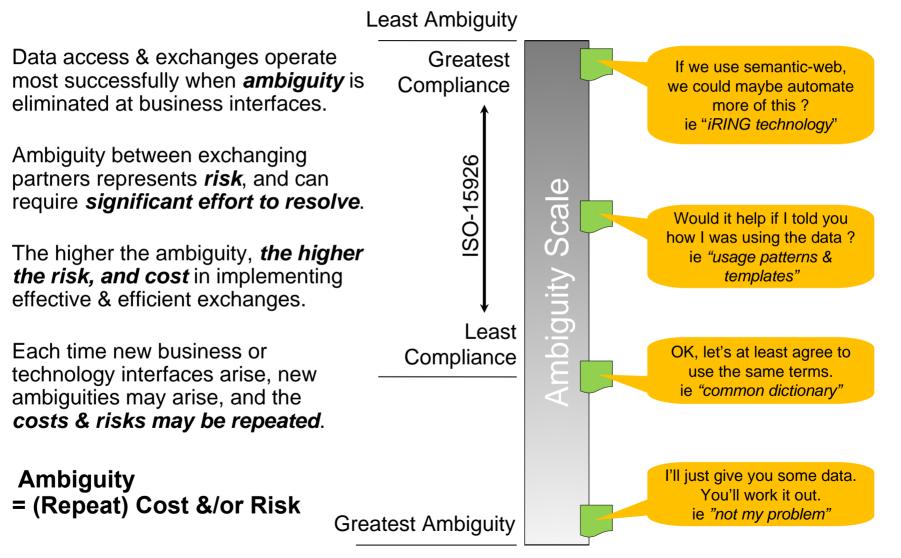
Use of ISO15926 to achieve integration and interoperation between organizations, systems and applications depends entirely on shared reference data defining both terminology and business usage. POSC Caesar (PCA) has been developing and managing Reference Data System and Services (RDS) continuously since it created ISO15926 almost 15 years ago. In the last 5 years, largely driven by collaboration with FIATECH and initiatives such as ADI, IDS, Avalon, Proteus and iRING, demand for ISO15926 and reference data has grown immensely. This goes beyond the original Oil & Gas and Norwegian industry focus of PCA. Nevertheless, funding of RDS to date has been by a few key Norwegian sponsors over and above PCA Membership subscriptions (primarily Norwegian Oil Industry Association, Det Norsk Veritas, Norwegian Defence, and Norwegian Research Organization). The Joint Operational Reference Data (JORD) Project aims to deliver enhanced RDS with a globally sustainable and scalable business model, with development funding shared across a wider range of industrial sponsors and the operation sustained by subscription services offered to all industrial users.





ISO15926 Reference Data

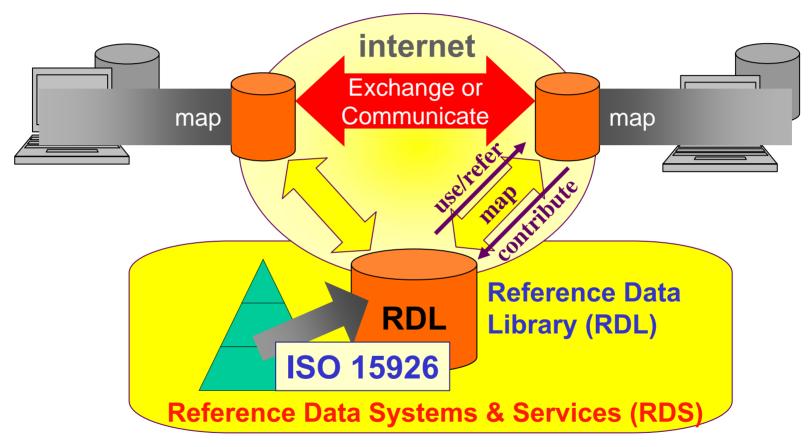
Reducing Ambiguity ?



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ISO15926 interoperability at its simplest



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

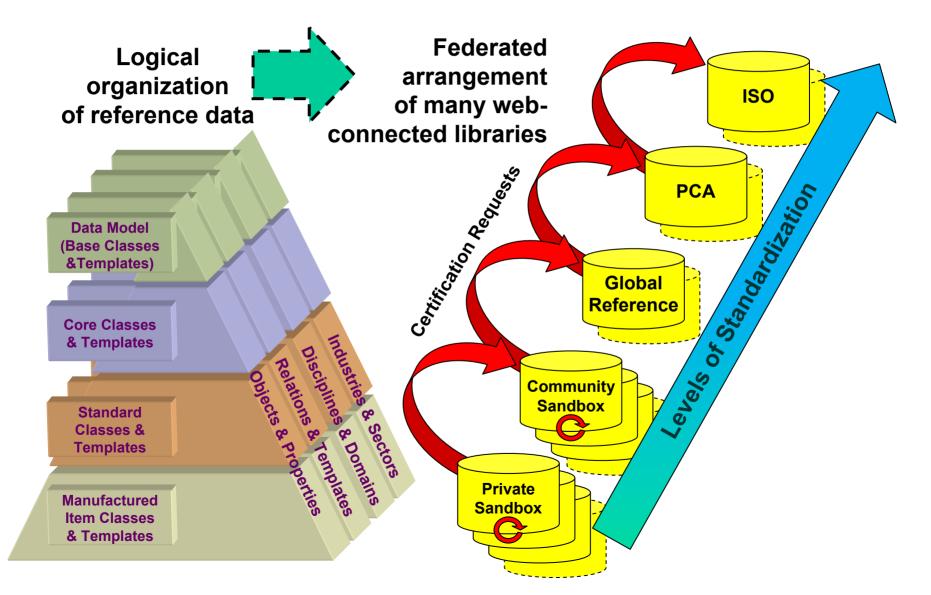


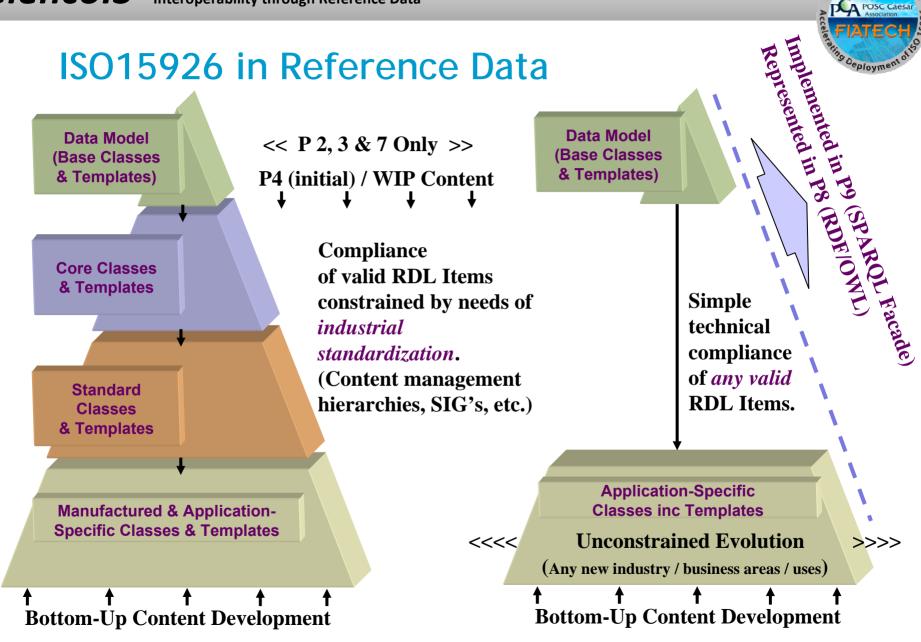
ISO 15926 Integration of life-cycle data for procession plants *including* oil and gas production facilities.

- ISO 15926 1: Overview and fundamental principles. IS ed. 1 published in June 04
- ISO 15926 2: *Data model.* IS ed. 1 published in December 03
- ISO 15926 3: Ontology for geometry and topology. TS ed. 1 published in April 09
- ISO 15926 4: Initial reference data. TS ed. 1 published in October 07
- ISO 15926 6: Scope and methodology for developing additional reference data CD/TS proposal ready for ballot in 2011.
- ISO 15926 7: *Template Methodology.* Final TS sent to ISO for publication in 2010
- ISO 15926 8: OWL Representation. Final TS sent to ISO for publication in 2010
- ISO 15926 9: Implementation methods for the integration of distributed systems Façade implementation. TS balloting planned in 2011
- ISO 15926 10: Abstract Test Methods. TS balloting planned in 2011
- ISO 15926 11: Simplified Industrial Usage. Under development, based on existing draft industrial usage best practices
- ISO 15926-5 has been replaced by an annex to ISO TC184/SC4: Procedure for development and maintenance of reference data in database format



Federated RDL across many domains



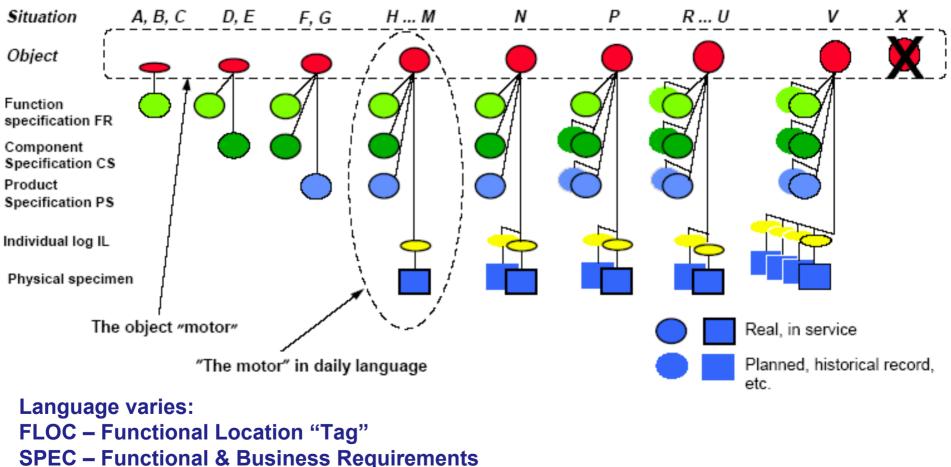


Example - not reinventing proven standards The Life Cycle According to IEC 61346-4 (KKS)

gent Data

A POSC Caes

mvolq



- **MODEL Available Product Specification**
- **ASSET Realized, Serialized Individual**



History of PCA RDS & Sponsorship & History of PCA / FIATECH Collaboration



PCA and ISO15926 Reference Data

POSC-Caesar

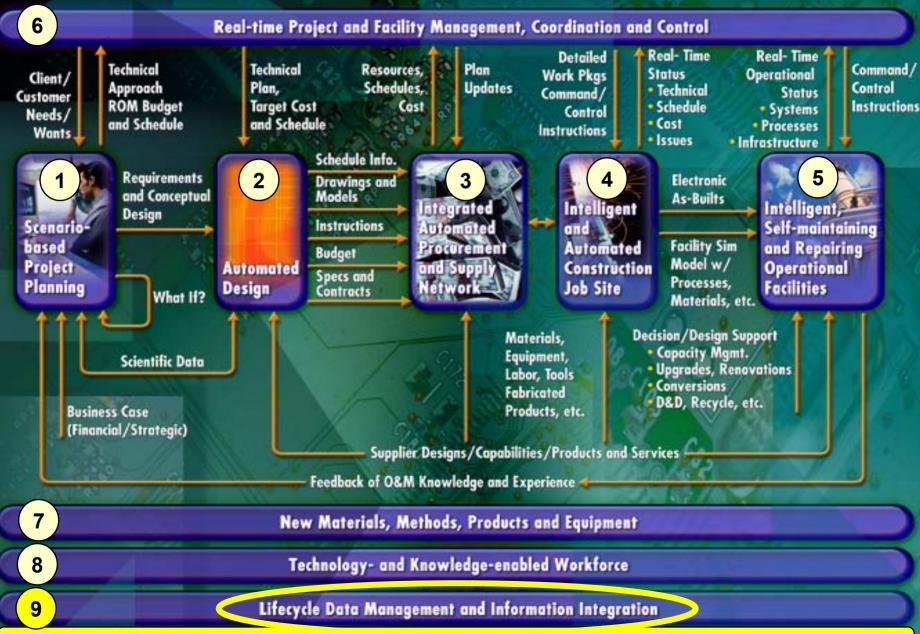
- 1993 to 1995 began as the Caesar project of POSC in 1993 and became PCA, a member association, in 1995 collaborating with PISTEP, USPI, EPISTLE & STEP (ISO10303) AP221 and STEPLib.
- 1996 to 1997 initiated ISO15926 (Integration of life-cycle data for process plants including oil & gas facilities.)
- 1998 to 2009 established and continuously developed and operated the existing PCA RDL (Library) RDS (System) primarily sponsored by Norwegian Research Council, Norwegian Defense, Norwegian Oil Industry Association, and Det Norsk Veritas (as well as content created by member projects).
- Q1 2009 declared live with RDS (System and Services) providing support for RDL users with defined SLA (Service Level Agreements).

PCA is open for collaboration & has several collaborations with

FIATECH OpenO&M

..... Specifically focussing on FIATECH collaboration here >>

FIATECH Capital Projects Technology Roadmap Vision



Technology & Application Independent Foundation for Interoperability >>> ISO15926



PCA and FIATECH Collaboration

FIATECH

- 2000 Arose out of US CII in 2000 an industry consortium that provides global leadership in identifying and accelerating the development, demonstration and deployment of fully *integrated and automated technologies* to deliver the highest business value throughout the life cycle of *all types of capital projects*
- 2000 Had an interest in ISO15926 from the start, with the focus (above) on deployment and exploitation, rather than ISO standardization.
- 2005 Member (DuPont) "Wilmington" meeting fixed FIATECH intentions to adopt ISO15926 as primary component of Element 9.
- 2006 Initiated the ADI (Accelerating Deployment of ISO15926) project.
- 2006 ADI participants start to collaborate with members of PCA's IDS (Intelligent Data Sets) project (*naturally, no formal PCA / FIATECH oversight.*)
- 2007 Multiple (17) IDS-ADI joint "Matrix" projects arise from joint workshop.



IDS-ADI "Matrix" Projects (2007)

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PCA and FIATECH Collaboration

- 2007 to Present Matrix 123 continues as *Proteus* initiative Multiple SW vendors collaborating to create standard XML schema interfaces for P&ID and 3D Model exchanges, using Reference Data with increasing 15926 compliance. Most participants also now part of *Geometry SIG*.
- 2007 to Present Matrix 8 becomes the Camelot project, which is followed by the Avalon project, which spins-off the *iRING* initiative, aiming to achieving full part 7, 8 & 9 compliant use of ISO15926 and Reference Data. iRING continues and a new vendor *iRING Interfaces Project* (IIP) is underway in 2011.
- 2007 to Present Great *increase in numbers* of companies and projects actively using and attempting to use ISO15926 and Reference Data. Great *widening in the global range of industries* actively participating – Oil & Gas, Upstream & Downstream, Chemical process, Food & Beverage, Power, Generation including Nuclear Power, Utility distribution, General buildings and infrastructure *Exponential growth in demand ... and expectations*.
- Q1 2009 Avalon (iRING) issues a *challenge* to PCA concerning the capability of the existing PCA RDS to support current and future demands.
- Q2 2009 PCA Board initiates an RDS enhancement initiative
 Q3 2009 FIATECH Element 9 initiates an RDS enhancement initiative
 Q4 2009 PCA & FIATECH Boards agree to develop a joint project



PCA & FIATECH JORD Project (Joint Operational Reference Data)



JORD Objectives

• Scalable:

- Technical infrastructure for 24x7x365 operation, ever-increasing content
- Critical path no longer dependent on a few specialists

Robust & Sustainable:

- Business model and funding for self-sustaining operation
- RDS Publishing technology fixes / enhancements.
- Governance model for long-term viability

• Validated:

- Content validated as consistent
- Implementations validated and certified as compliant

• Adoption:

• An organization to enable broad uptake of ISO 15926

JORD - Status

- Existing PCA & FIATECH *Memorandum of Understanding* (MoU).
- 2006 to 2009 joint IDS-ADI, Matrix, Proteus, Camelot, Avalon projects, *continuing in iRING and SIG's*
 - Greater demand for ISO15926 and reference data use in more industries
 - Greater demand for reference data quality
 - Greater demand for operational services supporting reference data
 - Greater demand for coordination of reference data processes (to leverage lifecycle value of many individual project investments) (to clarify compliance and usage)

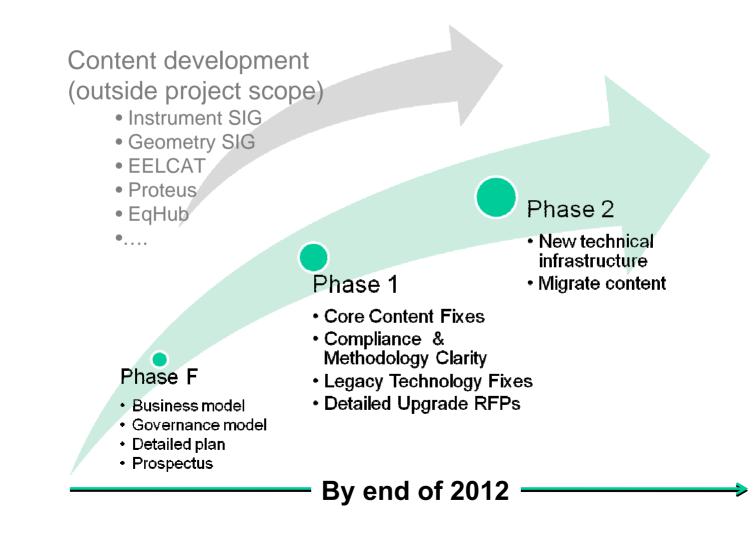
• 2009 *commitment* to create enhanced operational Reference Data Services

- Sustainable and scalable enhancements to the existing PCA RDS
- Q1 2010 PCA and FIATECH announce the JORD Project
- Mar Aug 2010 JORD Front End phase creates the *definition* of operational RD services and scalable and sustainable business model, and definition of the project to deliver it. Agreed by Steering Group.
- Sep Oct 2010 Plan agreed with both PCA & FIATECH Boards for circulation to members. Prospectus created to attract JORD funding. (Invitation to provide funding closes end Feb 2011)





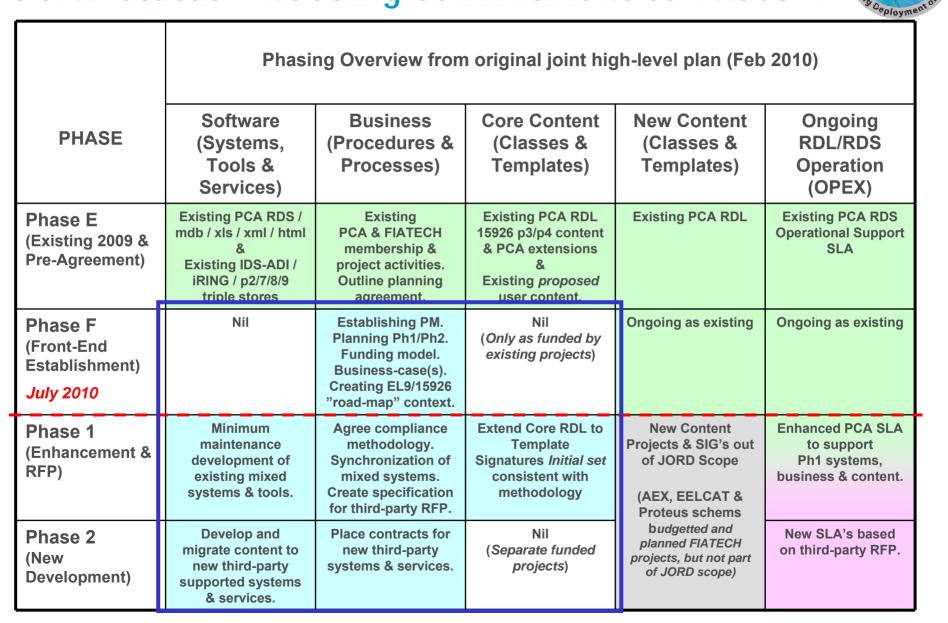
JORD - Project Deliverables



JORD Status - Needing commitment to Phase 1

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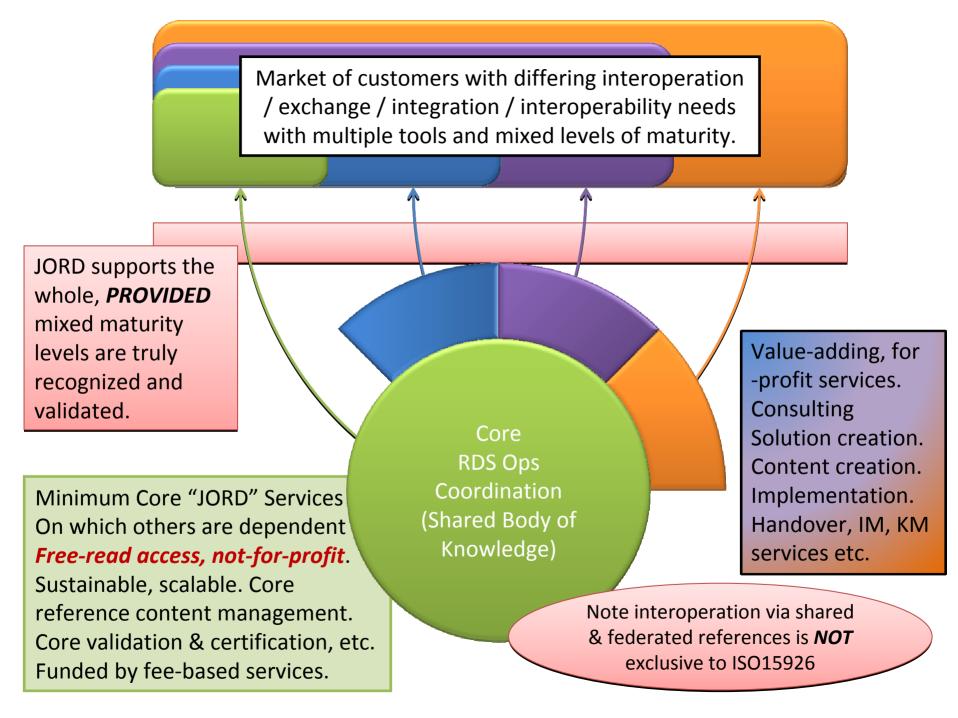
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JORD Deliverable	e – Defined Core Services	
Read / Export Content	Free to anyone.	Primary Service. All references resolvable to unique content, all readable, exportable (Supported formats include Browser UI, MDB, Excel, HTML, XML and RDF/OWL.) Copyright & licensing apply.
Core Content Mgmt & Validation	Available to initial Subscribers & Sponsors & to Fee-paying service users.	Maintenance and fixes of core content only and testing of proposed changes, etc. (for <i>new</i> 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 <i>new</i> content processing, see below.)
Create / Read / Export new ID's	Available to initial Subscribers & Sponsors & to Fee-paying service users.	Registered subscribers to the management services are free to generate new Global ID's for content in their locally managed Libraries / Sandboxes, etc.
Content Write	(who are also Certified)	Once subscribers achieve a level of certification, they will be able to write content directly (with appropriate meta-data controls on provenance & quality)
New Content & Standardization	Available as fee-paying value-adding services. (Per project / per scope.)	Estimated cost per scope - Price list / rates development possible. Will arise from both Commercial Projects and Collaborative "SIG's".
Certification of Users, Org's,Tools & Interfaces	(comproject, per scoper)	Estimated cost per scope - Price list / rates development possible. Organized around Compliance Checklist with scopes per BIDG or other transaction sets. (Free & self-certifying components)
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 support services, business and back-office functions. Other than core 15926 technical & coordination functions – all infrastructure and substrate technologies & services competitively outsourced.



GlencolS – Interoperability through Reference Data

JORD - Planning Schedule from Phase F

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1B3 Specification for New Technology Phase 2	nology & Tool Fixes (RDF / OWL / Triple Store)	
	ement to Substrate / Infrastructure / SLA's	
1B4 Phase 2 Planning Review (with Scope 1A)	r New Technology Phase 2	
	g Review (with Scope 1A)	

Note - Phase 1 has two scopes 1A (technology-neutral) and 1B (Part 8/9 technology-specific) *in parallel*, for distinct resource and funding priorities.



JORD - Key Technical Scoping Items

Technical – Consolidate core compliance and usage methodology.

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- (Based on existing PCA & FIATECH IDS/ADI guideline documents.)
- (Consolidate, clarify & formalize authority on compliance.)
- (Technical, but implementation-technology-neutral.)

Technical – Consolidate core content (supporting the methodology)

- (Core Templates consistent with methodology & compliance rules.)
- (Technical, but implementation-technology-neutral.)

• Technical – Fix and support mixed content publishing systems.

- (Specific tools and technologies.)
- (Plus develop specification and ITB / RFP for *future* upgrade needs.)

(Additional technical detail in the project definition.)

COMPLIANCE - Technical Aspects

N OF LEVELS IN PROPOSED OR PCA/JORD COMPLIANCE N Modelling & Mapping - PART 7 Semantic Precision	EXISTING IDS-ADI COMPLIANCE GUIDELINE Axes (para 4.1 to be updated) 4.1.1 (ie according to IDS-ADI Industrial Usage Procedure, and now ISO NWI-Part11)	MATURITY CHECKLIST OPTIONS (Brief designation only. Refer to relevant guideline paragraphs.) DICTIONARY&TYPING LEVEL - Identification, Specialization & Classification template signatures only. SHORT-CUT RELATIONS LEVEL - As Dictionary Level plus CoRwS or other (eg Gellish) "Short-Cut" template signatures.
	AND	FULL ONTOLOGY LEVEL - Any / all valid <i>template signatures</i> supported.
Implementation-	4.1.2	Implicit / document / formatted / tabular / spreadsheet / non-XML schema.
Representation Technology		Explicit Proprietary XML Schema
liconnology		RDL Registered XML Schema
		PART 8 RDF/OWL Representation
	AND	
Implementation -	4.1.1 / 4.1.2	RD URI's resolved and self-contained in schema representation.
Referencing Technology		Dependency on RD URI's being resolvable
	AND	
Implementation -	4.1.2	File Exchange only
Interface Technology		Specific API or Query other than Part 9 / SPARQL
		Part 9 SPARQL Façade
	AND	

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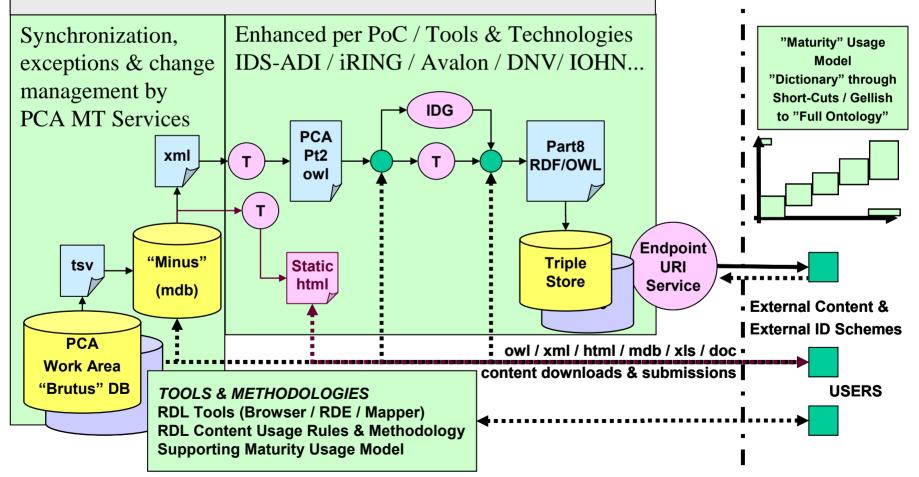


COMPLIANCE - Business Capability

Business	Industrial Standardization Level	4.1.4	Sandbox Level (Community or individual organization with no externally certified management.)						
			Industry Level (Global certifying authority other than PCA/JORD)						
			PCA/JORD Level						
			ISO Level						
		AND							
	Domain / Payload	BIDG	Explicit Scope (Per BIDG or otherwise declared use case.)						
	Subject-Matter Scope	AND							
	Change Management <i>Meta-Data Scope</i>	4.1.3	Identity - all data elements & sets identfiable / explicitly addressable						
			Version - identification of succeeding / superceding versions of data elements & sets explicit						
			Status - business status explicitly attributed / associated with each identified & versioned data element & set.						
		AND							
	Change Management <i>Functional Capability</i>	4.1.3	Export - Component interface publishes or permits read / query of internal content						
			Import - Component interface accepts write to internal content, or reads external content.						
			Seed - Component populates empty instance with imported content losslessly						
			Consolidate - Component populates existing instance with new imported content losslessly, correctly handing versions and consolidating duplicates.						
			Reconcile - Component maintains reconcilliation of external identifiers when updating existing instance internally.						

JORD - Publishing Technology Legacy

Phase 1 – Fix & manage legacy / hybrid situation. Phase 2 – Migrate to Avalon / iRING architecture and retire legacy.







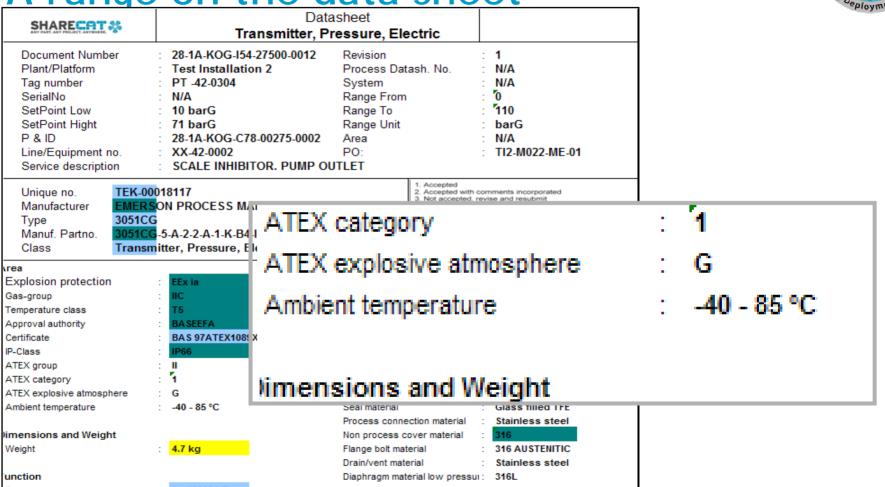
ID's & Triples / Relationships & Mappings

- ID's (URI's) are fundamental to the Reference Data architecture and
- Fundamentally all mappings and all relationships are *Triples*.

ID#1 (URI)	Relationship ID (URI)	ID#2 (URI)
<myobject> (URI) "MyPump101"</myobject>	<is a=""> (<i>Classification</i> relationship URI)</is>	<rdl class=""> (RDL Class URI) Centrifugal Pump</rdl>
<my or="" string="" symbol=""> (URI) " Центробежный насос" (?)</my>	<is a="" for="" name=""> (<i>Identification</i> relationship URI)</is>	<rdl class=""> (RDL Class URI) Centrifugal Pump</rdl>
<myclass> (URI) "MyCatalogueXYZPumpType"</myclass>	<is a="" of="" subclass=""> (Specialization relationship URI)</is>	<rdl class=""> (RDL Class URI) Centrifugal Pump</rdl>

These are indicative only. In practice these are "proto-templates" in Part 7 terms (one for each Part 2 relationship entity). Everything else is built from these.

A range on the data sheet

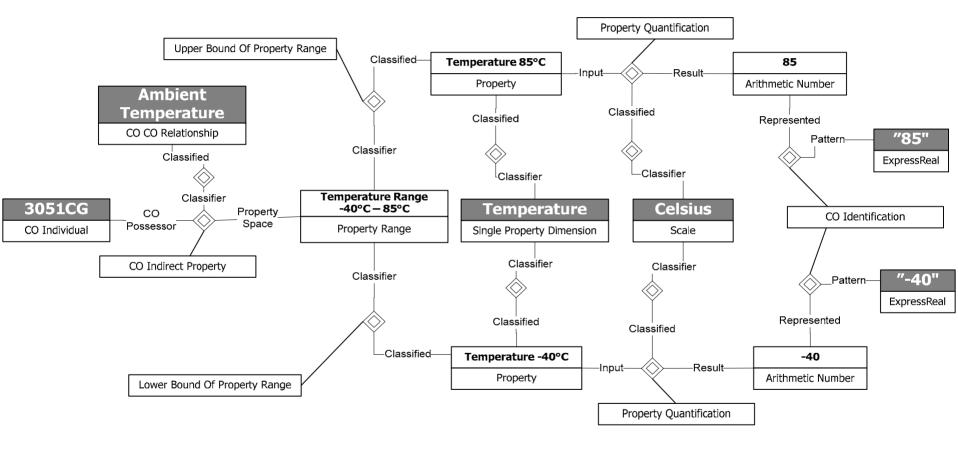


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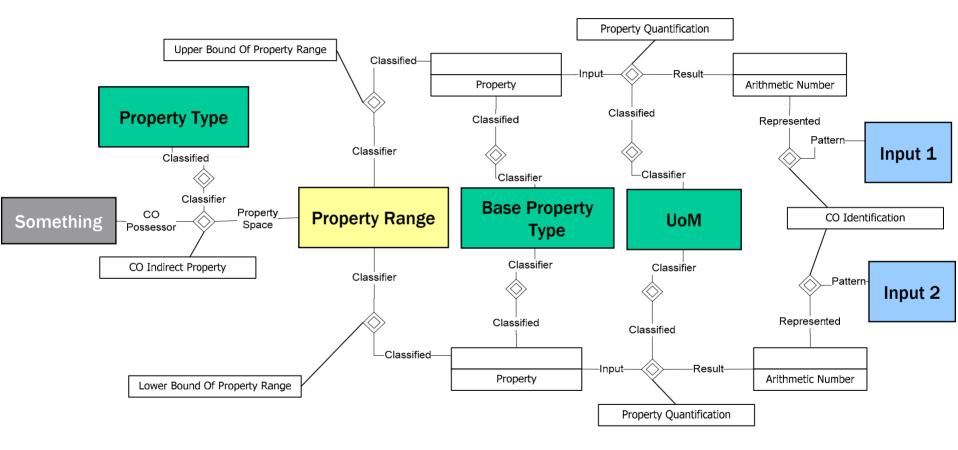
Model: Ambient Temperature Range



3051CG ambient temperature: -40°C – 85°C



ISO 15926 Property Range Template



'Something' has 'Property Type' with 'Property Range' of 'Base Property Type' defined by 'Input 1' and 'Input 2' with 'UoM'

	I er	npia	ate signa	ature ma	oping intern	ace /	vviza	Scoll ymer
	Select (RDL	Class or) Project Data	Select from standard / customised list of RDL Instance	Template Class	Select from standard / customised list of RDL Instance	Select from standard / customised list of RDL Instance		
Temp. Inst. #			Property Type	Property Range	Base Property Type	UoM	Input 1	Input 2
#nnn	305	1CG	Ambient Temperature	(Created by the system)	Temperature	С	-40	85
		and Par	populate t 2 (or ever	their signat n Part 7). Th	dy exists, to sel ure Without his is being upg emplates in the	ever se graded t	eing	S

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And note that the method can apply to any data representation.

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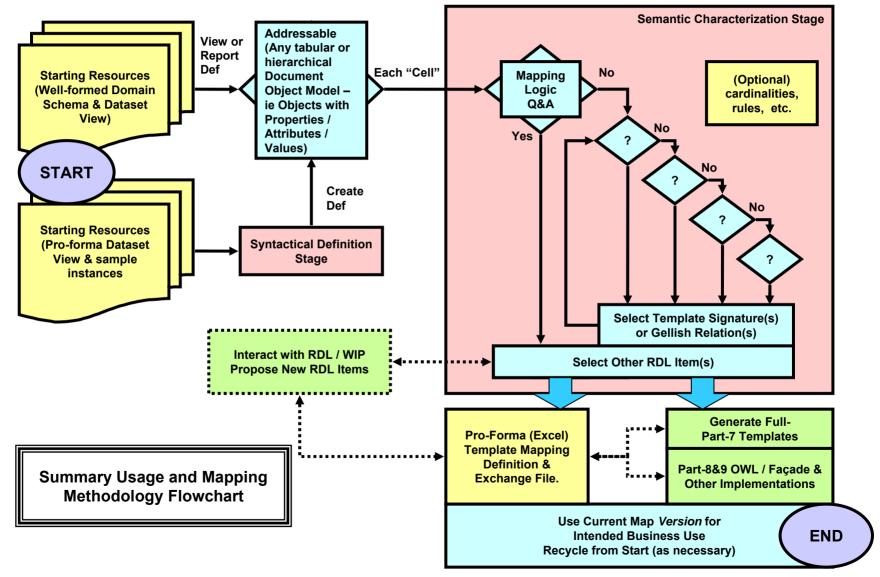
JORD - Core Methodology



- Compliance Checklist v7 (.XLS) applies. Read with these notes ...
- This checklist is derived from *existing* IDS-ADI Compliance Guideline, created in 2006 and updated during 2007, 2008 & 2009.
- The first axis "Part 7 Semantic Precision" is derived from *existing* IDS-ADI Usage and Mapping (Characterisation) Methodology, which is itself consolidated from 2006 PCA IDS Methodology and earlier EPISTLE / PCA / PISTEP / USPI best-practices, with updates as recent as 2010 EqHub project experience. (For this procedure as a *Workflow* see over)
- This is just "Two Pages" the devil is in the detail the document behind this will be updated and consolidated as Phase 1
- NOTE "Maturity" aspect. The overall technology-neutral process is solid, satisfying a wide range of needs. The focus is *the business domain user*. Collecting FAQ's would be useful in establishing explanatory updates needed in the formal documents.

GlencolS – Interoperability through Reference Data

JORD - Methodology as Workflow



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JORD - Usage and Mapping *Q&A Logic*

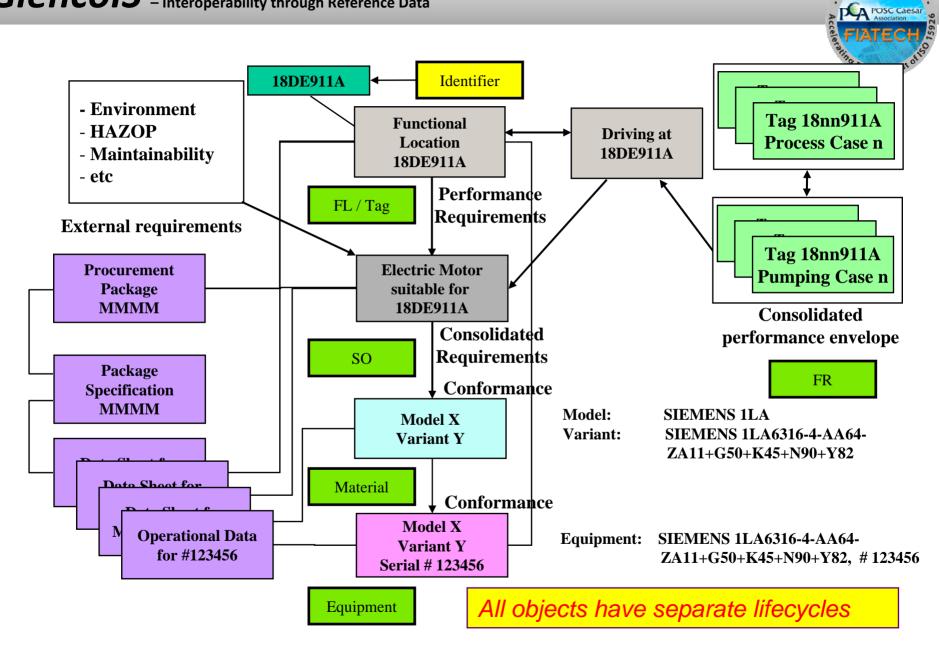
• Key items to note Bearing in mind we are establishing the intended *technology-neutral* semantics of the business user ... these need to be understood by anyone commenting on the validity of the procedure (*but ignored by anyone actually using it*). (Implementors have separate, independent choices to make – on orthogonal axes in the compliance guideline.)

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- Class-of-Class, Class and Individual (Generic Modeling) structures ... and the IEC61346 (Engineering) guidelines ... the so-called "4-level architecture". Refer to separate presentation / tutorial sessions on the usage and mapping methodology.
- Note in the methodology workflow process, the interaction with the RDL is two-way Using RDL Items which exist in the library (as Template Signatures and Role Fillers), but also proposing new related RDL Items, whether in local RDL's or in the public library. The core methodology is fundamentally dependent on core content existing in the RDL – hence the second core technical scope item *Core Content*.

GlencolS – Interoperability through Reference Data



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JORD - Initial Project Funding ~ \$1.5m

		SERVICES / BENEFITS								
SERVICE BAND	COSTS (US Dollars)	Content Read Access	Basic Core Support Services	Additional Support or Fee-Based Core Services	Operational Management Committee Representation.					
General Public	None	Free / Unlimited	None	None	None					
Base Subscriber (Annual)	OO Org = 25K / year Large Org = 10K / year Small Org = 5K / year Reducing after 3 rd year – possibly minimal registration or zero in sustainable case	Free / Unlimited	40 hours included per year in first 3 years. (Normal support to fee- based value-adding services thereafter.)	None. (Fee-based value-adding services.)	None. (Membership voting rights only.)					
Supplementary Initial Subscriber (Annual)	OO Org = 50K / year Other Org = 25K / year <i>Discontinued after 3rd</i> <i>year.</i>	Free / Unlimited	40 hours included per year in first 3 years. (Normal support to fee- based value-adding services thereafter.)	Additional 40 hours included per year in first 3 years. (Fee-based value-adding services beyond this.)	Representation per subscription year.					
Full JORD Sponsor (Contract)	OO Org = 250K USD lump sum (or 100K annually for 3 years) Other Org = 100K USD lump sum (or 40K annually for 3 years)	Free / Unlimited	40 hours included per year for 3 years sponsorship contract plus 2 further years. (Normal support to fee- based value-adding services thereafter.)	Additional 80 hours included per year for 3 years sponsorship contract plus 2 further years. (Fee-based value-adding services beyond this.)	Representation for 3 years sponsorship contract plus 2 further years.					



Why Participate?

- If you plan to use ISO 15926, you need a scalable and sustainable Reference Data Service
- You could wait for others to fund it and build it
 - or you could help have it built now, the way you need it.
- Once the Reference Data Service is in place, each of us gets 100% of the benefit ...
 - ... but none of us will have paid more than a fraction of the cost.
- The broader we share the cost, the faster we each start to see benefits
- Let's capitalize on the momentum that has built

Conclusions



• Significance of ISO15926 Reference Data

Any ISO15926 use is *dependent* on shared Reference Data

• Joint Operational Reference Data (JORD) Project

Growing demand for Reference Data demands enhanced global, scalable, sustainable RDS ... JORD is the project to deliver this ... JORD project requires initial funding

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See PCA at www.posccaesar.org & FIATECH at www.fiatech.org



