



**WEBREGISTRY  
ASP QUICK START GUIDE v1.1**

**NORTH AMERICAN ENERGY STANDARDS BOARD**

MARCH 2012

**PROPRIETARY AND CONFIDENTIAL**

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## 1. Introduction

Open Access Technology International, Inc. (OATI) webRegistry will serve as the central repository for information required to support commercial, scheduling, and transmission management operations in North America. OATI webRegistry is a web-based system that allows industry participants to register and maintain company information used in business operations. In addition, companies can register new data and modify existing data that are used in transmission and scheduling procedures.

The North American Energy Standards Board (NAESB) has provided the requirements for OATI webRegistry.

OATI has developed the webRegistry software system to perform NAESB Electric Industry Registry functions. Beyond the software development and maintenance, OATI is also responsible for the webRegistry system administration functions.

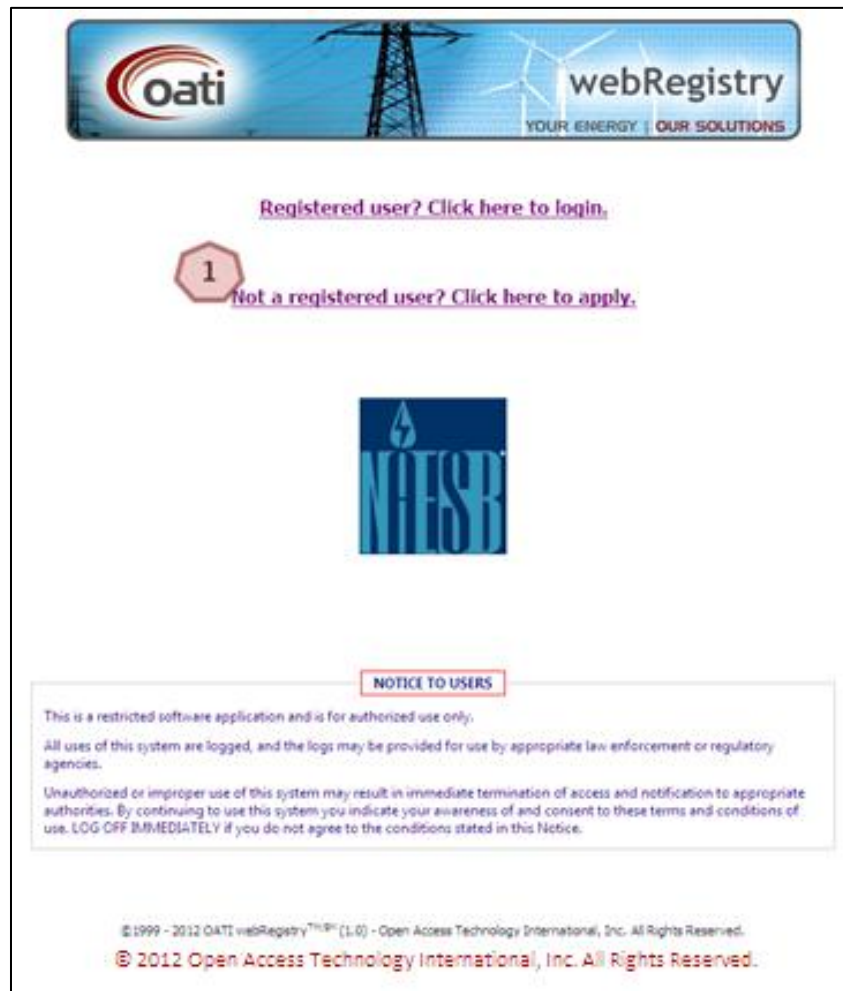
This document is intended to assist the role of a Transmission Service Provider (TSP) in how to use webRegistry.

For more information about the application process, please see the “Application Quick Start Guide,” available where documentation is available. If an application has not been completed, please see the “Application Quick Start Guide.” Once an application has been submitted and approved, please reference this document.

For additional training, please contact [support@oati.net](mailto:support@oati.net).

## 2. Applying for webRegistry Access

To apply for webRegistry access, go to [www.naesbwry.oati.com](http://www.naesbwry.oati.com). The following screen will open.



**1** Click on the “Not a registered user? Click here to apply.” link. The Application for Registration will open.

The screenshot shows a web form titled "Application for Registration" with a blue header. The form is divided into several sections: "Entity Details", "Applicant Details", "Manager Details", "Applicant's Purpose", "Terms and Conditions", and a submission area. Red callout boxes with numbers 1 through 8 point to specific fields: 1 points to the "Long Name" field; 2 points to the "First Name" field in the Applicant Details section; 3 points to the "First Name" field in the Manager Details section; 4 points to the "Applicant's Purpose" text area; 5 points to the "Terms and Conditions" text area; 6 points to the "I accept the terms and conditions" checkbox; 7 points to the "Print Terms and Conditions" button; and 8 points to the "Submit Application" button. The form includes various input fields for text, email, phone, and dropdown menus for state/province and country. A copyright notice at the bottom reads "© 2012 Open Access Technology International, Inc. All Rights Reserved."

**1** **Enter Entity Details.** Information with an asterisk (\*) is required. Enter information about your company, including the long name, the Registered Entity Code, and address. If you do not know your Registered Entity Code, but have previously registered with the NERC TSIN Registry, visit <http://reg.tsin.com/query/default.asp> and search for your company's name. Note: Selecting "Starts With" under Advanced Search options will ease your search.

**2** **Enter Applicant's Details.** Enter details about the person completing this application. This will be the person who is using OATI webRegistry, and entering information in the system. The "User Name" field will become the user's User Name when they are approved to access the system.

**3** **Enter Manager's Details.** Enter information of the applicant's manager.

**4** **Enter the Applicant's Purpose.** This is not a required field. To complete this field, however, enter the company or applicant's reason for applying to the webRegistry. This information will assist NAESB in reviewing the application.

**5** **Terms and Conditions.** Terms and conditions must be reviewed and accepted in order to submit your application.



Click in this box to accept the terms and conditions.



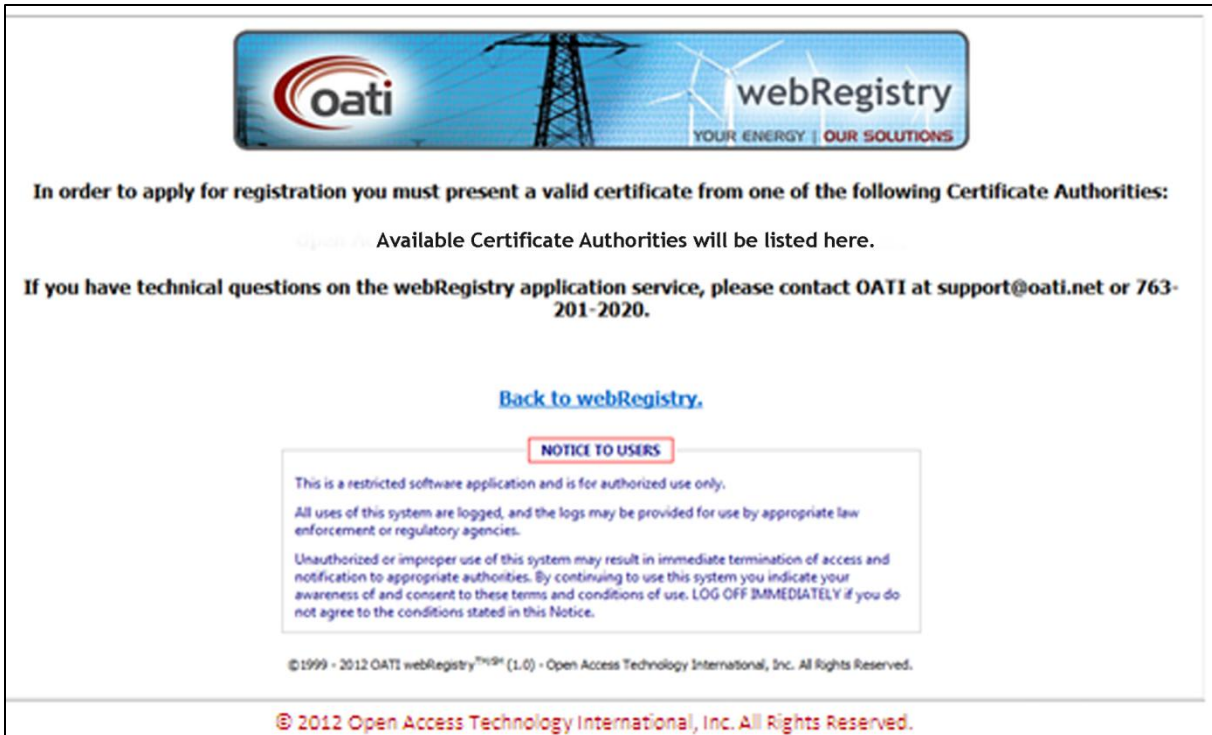
Click on the “Print Terms and Conditions” button to print the terms and conditions for review, if desired.



Click on the “Submit Application” button to submit your application. The application will be sent to NAESB and be pending NAESB approval.

Please remember:

- An asterisk (\*) means the field is required. Applications cannot be submitted with information missing from fields that are indicated with an asterisk (\*).
- Applications will not be able to be submitted until the “I accept the terms and conditions stated above” box is checked. Once this box is checked, the “Submit Application” button will be able to be clicked.
- Once an application is submitted, NAESB will need to approve it before further registration of data can take place.
- If you do not have a valid Digital Certificate, the following page will display.



**In order to apply for registration you must present a valid certificate from one of the following Certificate Authorities:**

Available Certificate Authorities will be listed here.

**If you have technical questions on the webRegistry application service, please contact OATI at support@oati.net or 763-201-2020.**

[Back to webRegistry.](#)

**NOTICE TO USERS**

This is a restricted software application and is for authorized use only.

All uses of this system are logged, and the logs may be provided for use by appropriate law enforcement or regulatory agencies.

Unauthorized or improper use of this system may result in immediate termination of access and notification to appropriate authorities. By continuing to use this system you indicate your awareness of and consent to these terms and conditions of use. LOG OFF IMMEDIATELY if you do not agree to the conditions stated in this Notice.

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### 3. Initial Registration of an ASP

Once an application has been approved, the user will receive two emails. One email will have the User Name and a hyperlink to webRegistry. The other email will contain the initial temporary password to log into the system.

Upon first login to the webRegistry using the initial password, the user will be prompted to change the password. Instructions on updating a password will appear on the display and can be found in the Administration portion of this training document on page 27.

Once the user changes their password, the Registration Steps page will open.



Thank you for applying for webRegistry services. Please complete and submit your registration by following the below steps.

Step	Description
1	Open the Entity Registration from the Entities menu option
2	Complete the Entity Registration form and verify the information is correct.
3	At least one code-role must be registered. Click on the Add Entity Code-Role button.
4	The Entity Code-Role Registration display will open.
5	Complete the Entity Code-Role Registration form.
6	Submit the Entity Code-Role Registration form by clicking on the Enter button.
7	Confirm the prompt to continue.
8	The Entity Registration form will now have an associated Entity Code (Role).
9	Click on the Modify button to submit the registration for approval.
10	Your entity registration has now been submitted to the North American Energy Standards Board for review.

02/13/2012 14:26:55 EPT Page 1 of 1 Records 1-10 of 10

**Warning:** Your application for registration has not been submitted to the North American Energy Standards Board because it is incomplete.

Please direct all questions pertaining to approval to the North American Energy Standards Board at the following:  
**Phone:** 713-356-0060  
**Email:** naesb@naesb.org

Please direct any technical issues to OATI Support:  
**Phone:** 763-201-2020  
**Email:** support@oati.net

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1

Navigate to Entities >> Entity Registration. The Entity Registration page will open.

1 **Verify Entity information.** Click on the “Everything” tab to display all information needed. Some of these fields will be populated with information provided in the user’s application. However, the user can modify or remove this information as needed.

2 **Enter an identifier.** This includes either the DUNS Number or GLN.

3 **Verify the Entity’s location information.**

4 **Enter any affiliates, if applicable.**

5 **Verify contact information.**

6 **Click on the “Load from TSIN” button** to load Entity information from the TSIN Registry. The system will search the TSIN database based on the Entity Code currently provided on the Entry page. Users will need to verify the information is correct.

7 Click on the “Add Entity Code-Role” button to add the Code-Role. Note: Registration of an Entity’s Code-Role is required for initial registration to proceed. The Entity Code-Role Registration page will open.

8 Submission of application is not permitted until the Entity’s Role is registered in the system. Click “Add Entity Code-Role” to register this information in a new page.

1 Select the Entity Role from the dropdown. Select ASP.

2 Enter the Entity Role-Code. This is a unique alpha numeric code that is generated by the user.

3 Enter at least one contact. A 24-hour contact is required.

4 Select the type of application you will be registering from the dropdown. Multiple applications can be selected by clicking on the “+” button to the right of the row.

5 Select the Service you will be registering. The Service dropdown will be populated based on your Application selection.

6 When registering a new Application, do not select an option from Load from ASP. The field should remain “Select if applicable.”

7 Enter the URL for the Application/Service you are registering. Once an ASP is fully registered, other Entities will be able to populate their registration of Code-Role with this URL by selecting the correct Application/Service/ASP combination.

8 Click on the “Load from TSIN” button to load Entity Role-Code data from the TSIN Registry. The system will search the TSIN database based on the Entity Code-Role and the Entity Type provided on the Entry page. Information will need to be verified for accuracy before it can be loaded into webRegistry.

9 Click on the “Enter” button to submit the Code-Role. Upon the user confirming the submittal, the user is returned to the Entity Registration Page.

Please remember: The earliest Effective Date a Role can have is the date registration is being performed. If registering today, entering a date earlier than today’s date will result in a validation error.

OATI Entity Registration

NERC ID: Entity Code: TV Record ID: Entity Type: Please select one...  
Entity Name: Tagging Vendor  
Entity URL:   
Entity Predecessor: Select if applicable...  
Effective Date: 02/17/2012 01/01/3000  
Entity Code (Role):

Identifiers Locations Affiliates Contacts Everything

Identifiers

Type	Identifier
DUNS	1123581321

Locations

Type	Address	City	State	Country	Postal
Headquarter	123 ASP Lane N.	Minneapolis	MN	United States	55418

Affiliates

Contacts

Type	User	Name	Phone	E-mail
24 Hour	Select if applicable...	Jane Doe	(763)201-2020	Jane.Doe@oati.net

1  
Load From TSIN Submit Close

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1

Once information is verified, click on the “Submit” button. Click “OK” to confirm the submission and the information will then be sent for approvals.

The user will receive email notification once the registration has been approved by NAESB and/or the North American Electric Reliability Corporation (NERC).

Note: Upon next log in to webRegistry, the user will be prompted to make the initial payment.

Thank you for applying for webRegistry services. Please complete and submit your registration by following the below steps.

Step	Description
✓ 1	Open the Entity Registration from the Entities menu option
✓ 2	Complete the Entity Registration form and verify the information is correct.
✓ 3	At least one code-role must be registered. Click on the Add Entity Code-Role button.
✓ 4	The Entity Code-Role Registration display will open.
✓ 5	Complete the Entity Code-Role Registration form.
✓ 6	Submit the Entity Code-Role Registration form by clicking on the Enter button.
✓ 7	Confirm the prompt to continue.
✓ 8	The Entity Registration form will now have an associated Entity Code (Role).
✓ 9	Click on the Submit button to submit the registration for approval.
✓ 10	Your entity registration has now been submitted to the North American Energy Standards Board for review.

02/20/2012 12:11:07 EPT Page 1 of 1 Records 1-10 of 10

You have submitted for approval your registration of Entity "TEAC" and the PSE Code-Role "TEAC".  
You will be notified via email as soon as your registration is properly approved by NAESB and NERC. Thank you for your Registration.

Please direct all questions pertaining to approval to the North American Energy Standards Board at the following:  
**Phone:** 713-356-0060  
**Email:** naesb@naesb.org

Please direct any technical issues to OATI Support:  
**Phone:** 763-201-2020  
**Email:** support@oati.net

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1

Verify that steps 1-10 have been checked and log out of the system. The user will receive an email notice when initial registration has been approved.

Upon login to webRegistry after approval of initial registration information, the user will be presented with the following display in order to make payment on annual registration dues.

One or more Entity Code-Roles have payment due.  
Please provide payment for the below Code-Roles.  
Failure to do so before the due date will result in the  
Code-Role being removed from the registry.

Entity TV      Payment Type Credit Card

Entity Code Role	Subscription	Status	Remaining Days	Start	End	Amount
<input checked="" type="checkbox"/> TASP (ASP)	Initial	Payment Due	30	02/20/2012	02/18/2013	250.00

Total Amount 250.00

Notes

Name on Credit Card Jane Doe  
Street Address 123 ASP Lane  
City Minneapolis  
State Minnesota  
ZipCode 55418  
Credit Card Type Visa  
Credit Card Number 4111111111111111  
Expiration Date 03 / 2015  
Security Code 000  
E-mail Address Jane.Doe@oati.net

Enter    Apply Coupon    Close

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- 1 Select the payment type from the dropdown. In most cases, select Credit Card.
- 2 Click on the corresponding box of which payment you would like to make. Note: Annual dues are assessed on number of Code-Roles registered in the webRegistry system.
- 3 Enter the appropriate payment information in the corresponding fields.
- 4 Click on the “Enter” button to submit the payment. An email receipt will be sent to the email address provided.

## 4. Entering and Modifying Entity Code-Role

Once an Entity has been registered and approved in webRegistry, an Entity may enter additional Code-Roles or modify their additional Code-Role. This section will detail how to enter and modify Code-Roles. For this training, we will use a new Application Service Provider.



1 To enter or modify an Application Service Provider, navigate to Entities >> Entity Code-Role. The Entity Code-Role display will open. Information on this display includes the Entity Code and the Effective Start and Stop dates of the Code-Role.

Entity	Code	Role	Long Name	NERC ID	Tagging ID	Balancing Area	Reliability Area	Region	Market Area	Entity Type	Interconnection	Contacts	Certificates	Effective Date		A
Tagging Vendor	TAGV	ASP	Tagging Vendor	100041	100105		N/A	N/A	N/A	N/A		...		02/20/2012	01/01/3000	A

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1 Clicking on the “Close” button will close the display. No modifications will be made to the Code-Role.

2 Clicking on the link under the “Code” column will open the Entity Code-Role Entry page. Modifications to an Entity’s existing Code-Role can be made from this page.

3 To create a new Code-Role, in this case, an Application Service provider, click on the “New Entity Code-Role” button. The Entity Code-Role Entry page will open.

The screenshot shows the 'oati Entity Code-Role Entry' form. It is divided into several sections, each highlighted with a red box and a numbered callout (1-10).  
Section 1: NERC ID 100041, Tagging ID 100105, Entity TV (Tagging Vendor), Long Name Tagging Vendor, Entity Role ASP.  
Section 2: Entity Role Code TAGA, Effective Date 02/20/2012 to 01/01/3000, Approval Status Approved, Approval Timestamp 02/20/2012 10:36:00.  
Section 3: Contacts table with columns Type, User, Name, Phone, E-mail. One contact is listed: Jane Doe, (763)201-2020, Jane.Doe@oati.net.  
Section 4: Applications table with columns Application, Service, Load from ASP, URL. Four entries are listed: E-Tag, Tag Agent URL, Select if applicable..., www.ASPTagAgent.net; E-Tag, Tag Approval URL, Select if applicable..., www.ASPTagApproval.net; E-Tag, Tag Authority URL, Select if applicable..., www.ASPTagAuthority.net; E-Tag, Tag Forwarding URL, Select if applicable..., www.ASPTagForwarding.net.  
Section 5: Buttons for Load From TSIN, Modify, Copy, Close, and Terminate.







1 Information contained in this section is pre-populated based on registered information. However, information can be modified if needed.

2 Enter the Entity Role-Code in this field. This code must be unique.

3 By default, the Effective Start Date will be the date this form is completed. The Effective End Date will be 01/01/3000. Dates can be modified manually, or by using the calendar button.

4 Select the Contact Type from the first dropdown. Based on the user selection, subsequent fields in this section will be populated. Information provided in this section includes the name of the Contact, Phone Number, and E-mail address. A 24-hour contact is required.

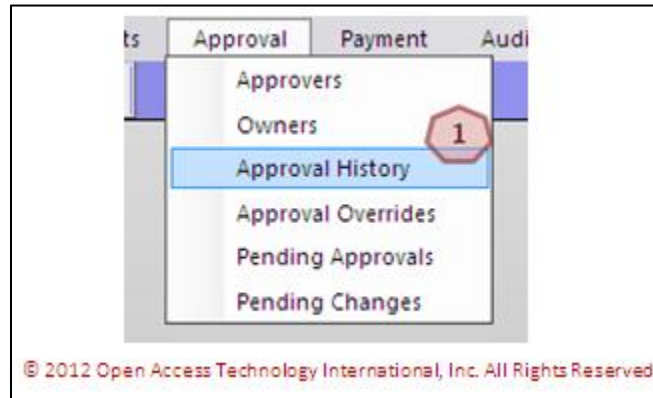


-  5 Every Entity Code-Role will have an application section. If an application applies to the Entity, the Entity can enter it in the Application section. Application Service Providers will enter their Application information in this section, and when another Entity loads the ASP's URL, the system looks at the ASP selected in the "Load from ASP" dropdown, and populates the URL based on the Application/Service/ASP combination.
-  6 Click the "Load from TSIN" button to load Entity Code-Role data from the TSIN Registry. The system will search the TSIN database based on the Entity Code-Role and Entity Type provided on the Entry page. Information will need to be verified for accuracy before it can be loaded into webRegistry.
-  7 Click the "Modify" button to submit the Code-Role changes for approval. Approval will be needed for new Code-Roles and modifications to existing Code-Roles.
-  8 Enter a new Code (see step 2 above) and use the "Copy" button to create a new Code-Role.
-  9 Click the "Close" button to close the display. The new Entity Code-Role will not be saved or created.
-  10 To terminate the Code-Role before the effective date, click the "Terminate" button.

## 5. Approvals

### 5.1 Approval History

Approval History displays the record of submittals and approvals in webRegistry. Information provided includes the timestamp of the submittal, timestamp of the approval, and if the submittal was approved or denied. Submittals that are approved will be highlighted in gray, while denied submittals are color-coded in red.



**1** To view Approval History, navigate to Approval >> Approval History. The Approval History display will open.

Submittal						Value		Effective Date		Approval						
Timestamp	User	Entity	Object	Name	Event Type	Attribute	Old	New	Start	Stop	Object	Entity	User	Timestamp	Status	Notes
02/08/2012 09:39:25	PSERAdmin	PSER	Source/Sink	Source Point 1	New				02/08/2012	01/01/3000	PSE	PSER	PSERAdmin	02/08/2012 09:39:25	Approved	Appro.
02/08/2012 09:39:25	PSERAdmin	PSER	Source/Sink	Source Point 1	New				02/08/2012	01/01/3000	BA	SEPE	MeredithS	02/08/2012 09:41:24	Approved	
02/08/2012 09:39:55	PSERAdmin	PSER	Source/Sink	Sink Point 1	New				02/08/2012	01/01/3000	PSE	PSER	PSERAdmin	02/08/2012 09:39:55	Approved	Appro.
02/08/2012 09:39:55	PSERAdmin	PSER	Source/Sink	Sink Point 1	New				02/08/2012	01/01/3000	BA	SEPE	MeredithS	02/08/2012 09:41:30	Approved	
02/08/2012 09:40:18	PSERAdmin	PSER	Source/Sink	Sink Point 2	New				02/08/2012	01/01/3000	PSE	PSER	PSERAdmin	02/08/2012 09:40:18	Approved	Appro.
02/08/2012 09:40:18	PSERAdmin	PSER	Source/Sink	Sink Point 2	New				02/08/2012	01/01/3000	BA	SEPE	MeredithS	02/08/2012 09:41:34	Approved	
02/08/2012 09:40:41	PSERAdmin	PSER	Source/Sink	Source Point 2	New				02/08/2012	01/01/3000	PSE	PSER	PSERAdmin	02/08/2012 09:40:41	Approved	Appro.
02/08/2012 09:40:41	PSERAdmin	PSER	Source/Sink	Source Point 2	New				02/08/2012	01/01/3000	BA	SEPE			Pending	

**1** Click the link under the “Name” column. Details about the object will display.

**2** To view information about the approval, hover over the link under the “Notes” column. Information about the approval will display.

**3** Click the “Close” button to close the display.

## 5.2 Pending Changes



1 To view pending changes, navigate to Approval >> Pending Changes. The Pending Changes display will open.

A screenshot of the 'Pending Changes' display. The window title is 'Pending Changes' and the subtitle is 'Submittal Timestamp: Today (02/08/2012)'. The table below shows a list of submittals with columns for Submittal (Timestamp, User, Entity, Object, Name, Event Type, Attribute) and Approval (Value, Effective Date, Object, Entity, Contacts, Remaining Days, User, Timestamp, Status, Note). A red circle with the number '1' is placed over the 'Name' column of the first row. At the bottom, there is a 'Page 1 of 1' indicator and a 'Close' button, with a red circle and the number '2' placed over the 'Close' button. The copyright notice '© 2012 Open Access Technology International, Inc. All Rights Reserved.' is at the bottom.

Submittal							Value		Effective Date		Approval							
Timestamp	User	Entity	Object	Name	Event Type	Attribute	Old	New	Start	Stop	Object	Entity	Contacts	Remaining Days	User	Timestamp	Status	Note
02/08/2012 09:40:41	PSERAdmin	PSER	Source/Sink	<a href="#">Source Fork</a>	New				02/08/2012	01/01/3000	BA	SEPE	SEPE...	7			Pending	
02/08/2012 10:51:40	PSERAdmin	PSER	PSE	TEST01	New				02/09/2012	01/01/3000	NAESB			7			Pending	
02/08/2012 10:51:40	PSERAdmin	PSER	PSE	TEST01	New				02/09/2012	01/01/3000	ERO		NER...	7			Pending	

1 Click the link under the “Name” column. Details about the object will display.

2 Click on the “Close” button to close the display.

## 6. Payment



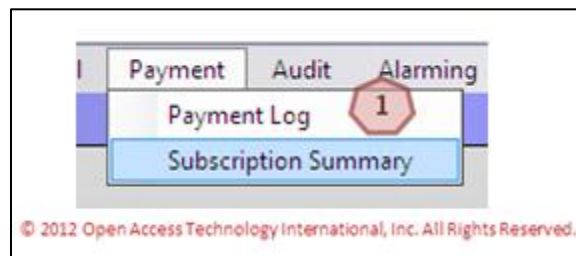
1 To view the Payment Log, navigate to Payment >> Payment Log. The Payment Log display will open.

Payment										Coupon			
ID	Entity Code-Role	Start Date	Stop Date	Timestamp	Method	Amount	Transaction ID	Authorizaton Code	Notes	Code	Issuing Entity	Deferred Payment	Status
3858	PSE (PSE)	02/13/2012	02/11/2013	2012-02-13 21:39:28.420	CREDIT	250.00	E35E1E5957F4	010101					

Page 1 of 1  
Record 1 of 1  
Close

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1 Click on the “Close” button to close the display.



1 To view the Subscription Summary, navigate to Payment >> Subscription Summary. The Subscription Summary display will open.

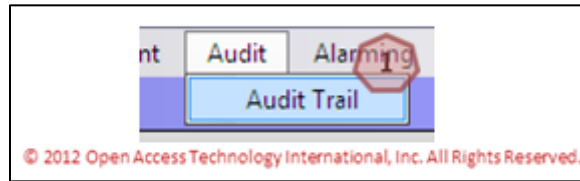
Entity Code-Role	Current Subscription			Next Payment		
	Start	End	Status	Due Date	Remaining Days	Required Amount
PSE (PSE)	02/13/2012	02/11/2013	Normal	03/14/2013	395	100.00

Page 1 of 1  
Record 1 of 1  
Close

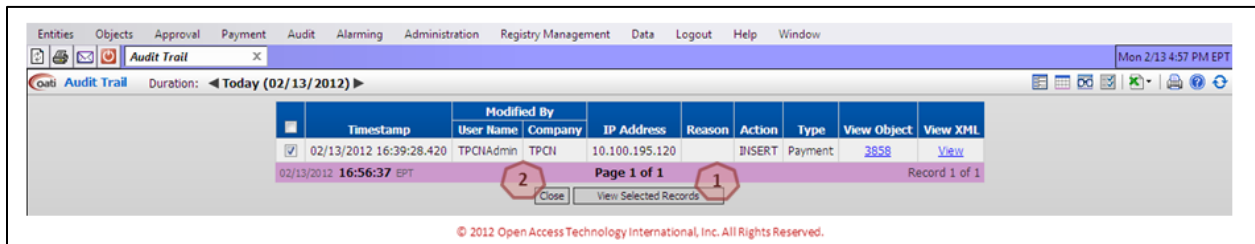
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1 Click on the “Close” button to close the display.

## 7. Audit Trail



1 To view the Audit Trail, navigate to Audit >> Audit Trail. The Audit Trail display will open.

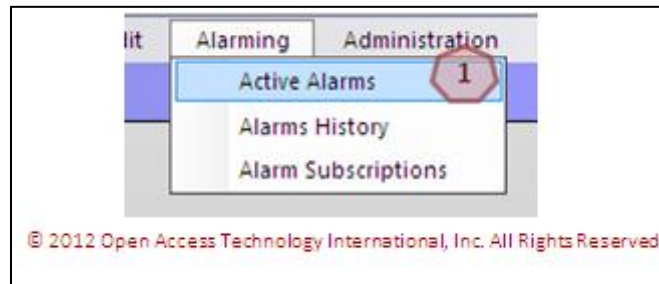


1 To view a selected record, click on the corresponding box to the record you wish to view. Click on the “View Selected Records” button to view the selected records in more detail.

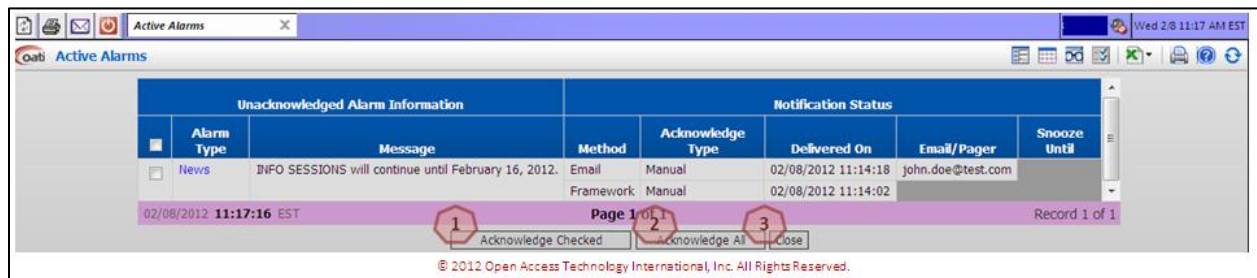
2 Click on the “Close” button to close the display.

## 8. Alarming

### 8.1 Active Alarms



**1** To view Active Alarms, navigate to Alarming >> Active Alarms. The Active Alarms display will open.



**1** Click on the corresponding box to the left of the Alarm Type to check an alarm. Click the “Acknowledged Checked” button to acknowledge checked alarms.

**2** Click on the “Acknowledge All” button to acknowledge all alarms. Alarms will not need to be checked when using this function.

**3** Click the “Close” button to close the display. No alarms will be acknowledged.

### 8.2 Alarms History



1 To view Alarms History, navigate to Alarming >> Alarms History. The Alarms History display will open.



1 Click the “Close” button to close the display.

### 8.3 Alarm Subscriptions



1 To view Alarm Subscriptions, navigate to Alarming >> Alarm Subscriptions. The Alarm Subscriptions page will open.



1 Click on the link under the “Alarm Type” column. This will open the Alarm Subscription Entry page, where modifications can be made.

2 Click “Delete” to delete a selected Alarm Subscription. A selected Alarm Subscription will have a checkmark in the box. To select an Alarm Subscription, click on the box to the left of the Alarm Type.

3 Click the “Delete All” button to delete all Alarm Subscriptions.

4 Click on the “Close” button to close the display.

5 Click on the “New Subscription” button to create a new subscription. The Alarm Subscriptions Entry page will open.

The screenshot shows the 'oati Alarm Subscription Entry' window. It contains several sections: 'Alarm' with a dropdown menu set to 'Approval Action Needed' (callout 1); 'Description' with the text 'Approval Action Needed'; 'Delivery Selection' with a radio button for 'One time delivery only:' (callout 2), an 'Email' checkbox checked with the address 'john.doe@test.com', and a 'Pager' checkbox; 'Additional forms of delivery:' with a radio button for 'Alarming - Requires manual acknowledgement.' (callout 3), and sub-sections for 'Instant Popup' (checked), 'Framework' (checked with 'Action Needed' and 'Indicator Text'), 'Envelope Tray' (unchecked), and 'Sound' (unchecked with 'Select a Sound' dropdown); and a radio button for 'Notification - Auto Acknowledged. Notification is delivered only once.' At the bottom are 'Enter', 'Delete', and 'Close' buttons (callouts 4 and 5). A copyright notice at the bottom reads: '© 2012 Open Access Technology International, Inc. All Rights Reserved.'

1 Select the alarm from the Alarm dropdown. Alarms include “Approval Action Needed” and “Object Expiration.”

2 Determine delivery selection for one-time delivery only. Select email or pager notification. To select the type of delivery, click in the corresponding box and enter the appropriate information in the field.

3 Determine additional forms of delivery. This includes the choice of manual or auto-acknowledgement of alarms, as well as the delivery. Delivery methods include sound and pop-up features.

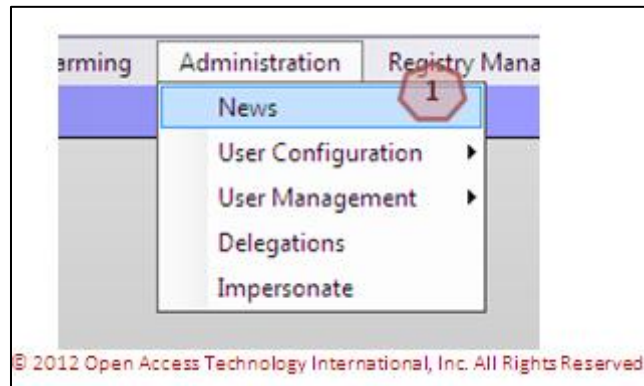
4 Click the “Enter” button to create and save the Alarm Subscription.

5 Click the “Close” button to close the display. No subscriptions will be created or saved.

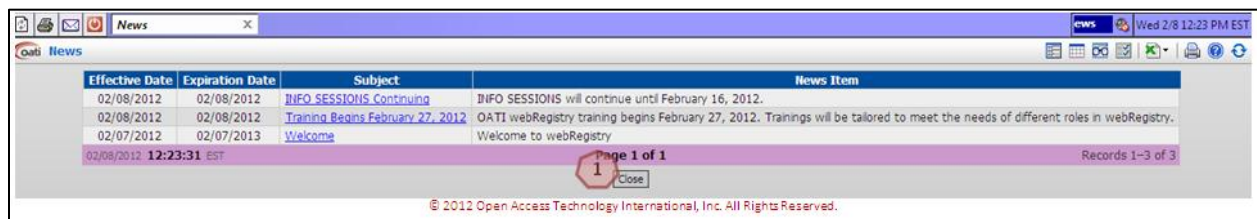


## 9. Administration

### 9.1 News

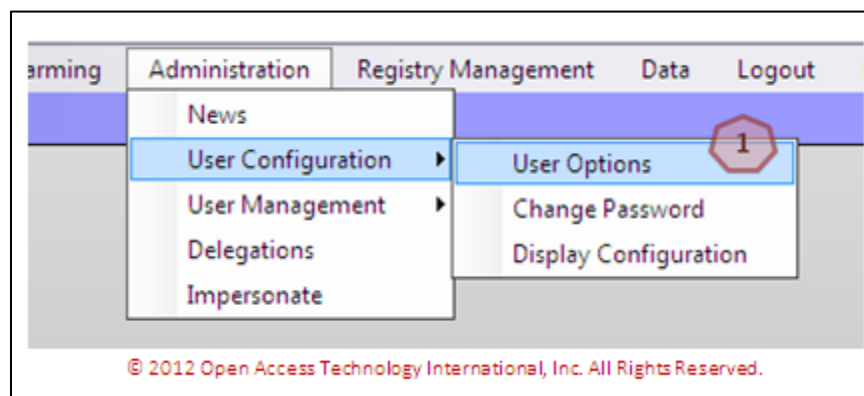


1 To view webRegistry news, navigate to Administration >> News. The News display will open.



1 Click the “Close” button to close the display.

### 9.2 User Options



1 To select User Options, navigate to Administration >> User Configuration >> User Options. The User Options page will open. These preferences will only change in this Users' account.

**Oati User Options**

Company PSER  
User Name PSERAdmin  
Name Doe, John  
Security Role Entity Admin  
Phone (763) 201-2000  
Email nong.lor@oati.net  
Password Expire Date 08/05/2012 ( in 179 day(s) )  
Page Size 30  
TimeZone Eastern Standard Time (EST)  
Menu Style  Web  
(Menus will expand automatically when cursor hovers over them)  
 Application  
(Menus will expand only when clicked on)  
Default Reason for Change MP Request  
Save Change Password Close

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- 1 Information in this section will be pre-populated based on User Account information.
- 2 Select the preferred Page Size. The default is 30, and is recommended for optimal load time. Page Size is the amount of data lines that are displayed on a Summary page.
- 3 Select the Time Zone from the dropdown. This field will control the clock on the upper-right hand corner of the application, as well as timestamps throughout the application.
- 4 Select a preferred Menu Style by clicking in the corresponding button. A Web menu style will allow menus to expand when a cursor hovers over the menu. An Application style will require the user to click on the menu to expand.
- 5 Select a “Default Reason for Change” from the dropdown. This will pre-populate a selected “Reason for Change” each time it is required in the system.
- 6 Click the “Save” button to save the configurations. A prompt will display.



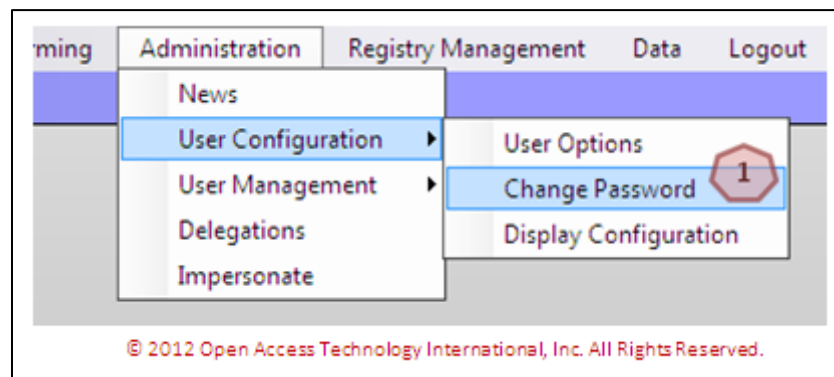
1 Click the “Save Only” button to save the configurations. Change will be available the next time the user logs in to webRegistry.

2 Click the “Save & Restart” button to save the configurations and be automatically logged out and logged back in to the system. Changes will be available immediately.

3 Click the “Cancel” button to cancel any changes. Changes will not take place.

7 Click the “Close” button to close the display. Changes will not be made or saved.

### 9.3 Changing a Password



1 To change a password, navigate to Administration >> User Configuration >> Change Password. The Change Password display will open.

The screenshot shows the PSERAdmin interface for password management. At the top, it says "PSERAdmin". Below this is a large box containing password criteria, numbered 1 through 6. Below the criteria is a form with three input fields: "Enter old password" (2), "Enter new password" (3), and "Retype new password" (4). At the bottom of the form are "Submit" (5) and "Cancel" (6) buttons. A copyright notice at the bottom reads: "© 2012 Open Access Technology International, Inc. All Rights Reserved."

**PSERAdmin**

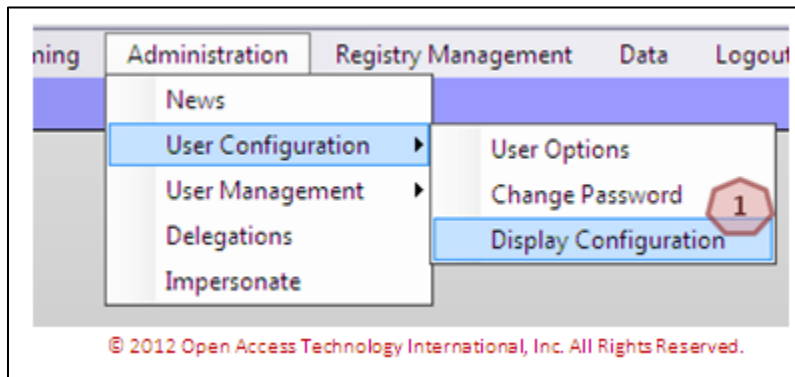
1- Passwords will contain a minimum of 8 and a maximum of 30 characters.  
2- Each password must contain three out of the four character types:  
    Lower case letters: a-z  
    Upper case letters: A-Z  
    Numbers: 0-9  
    Special characters: `~!@\$%^()\_+~=[\]{};:;,./<>?  
3- Blank spaces are not valid character type.  
4- Do not use the following special characters:  
    Quote, Double Quote, Pound, Star, Ampersand, BackSlash, Vertical Bar  
5- Be advised that you may not reuse passwords for a period of one year (365 days).  
6- Consecutive passwords may not be similar.  
    Similarity is verified by the match of any case-insensitive consecutive 3-character substring  
    in the new password with any case-insensitive consecutive 3-character substring in the previous password.  
    For example:  
    password abc123DEF\$%  
    is similar to password ABC456def#\*  
    similar to xyz456ABC#\*  
    however dissimilar to xyz456pqr#\*

Enter old password 2  
Enter new password 3  
Retype new password 4  
5 Submit 6 Cancel

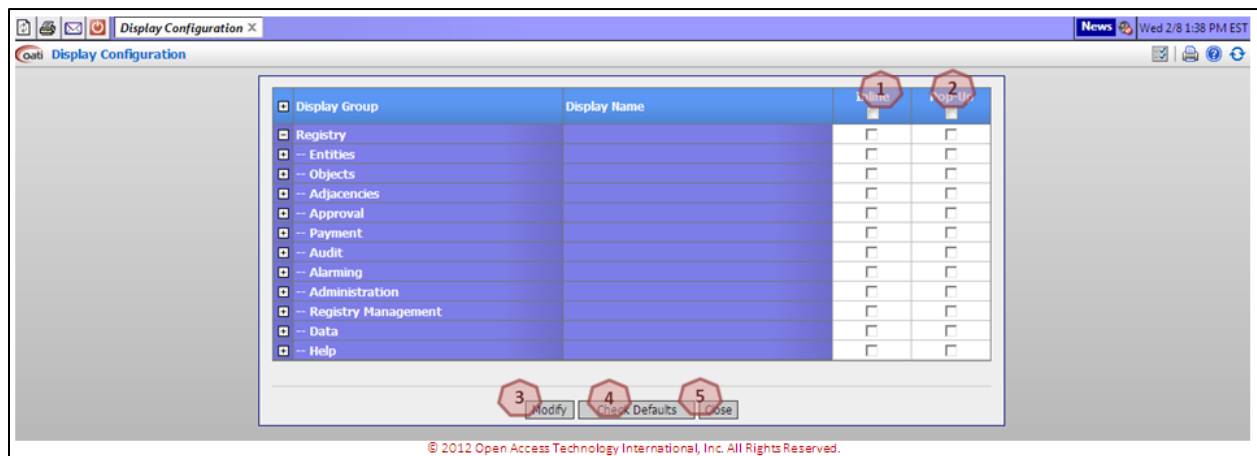
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- 1 Please review the password criteria for assistance with password changes.
- 2 Enter the old password in this field.
- 3 Enter the new password in this field.
- 4 Re-enter the new password in this field.
- 5 Click the “Submit” button to submit the new password.
- 6 Click the “Cancel” button to cancel the change. The password will not change.

## 9.4 Display Configurations



1 To configure display settings, navigate to Administration >> User Configuration >> Display Configuration. The Display Configuration page will open.



1 Select from the boxes in the “Inline” column to have the corresponding display view in a new tab.

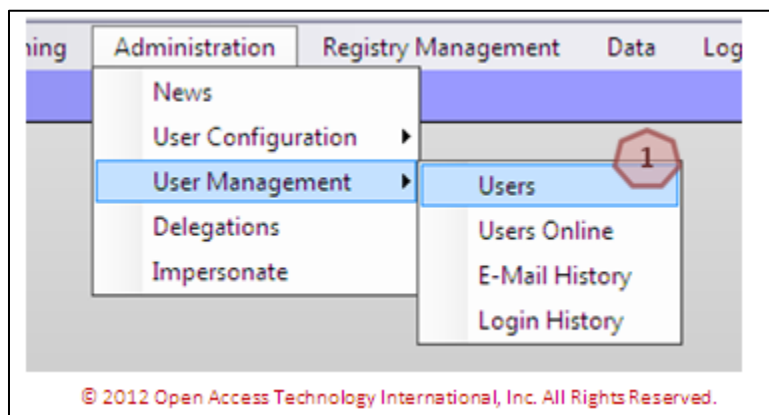
2 Select from the boxes in the “Pop-Up” column to have the corresponding display view in a separate window.

3 Click the “Modify” button to make and save the changes.



- 1 Click the “Save Only” button to save the configurations. Change will be available the next time the user logs in to webRegistry.
- 2 Click the “Save & Restart” button to save the configurations and be automatically logged out and logged back in to the system. Changes will be available immediately.
- 3 Click the “Cancel” button to cancel any changes. Changes will not take place.
- 4 Click the “Check Defaults” button to select the default configuration choices.
- 5 Click the “Close” button to close the display. Changes will not be saved.

## 9.5 Creating a New User



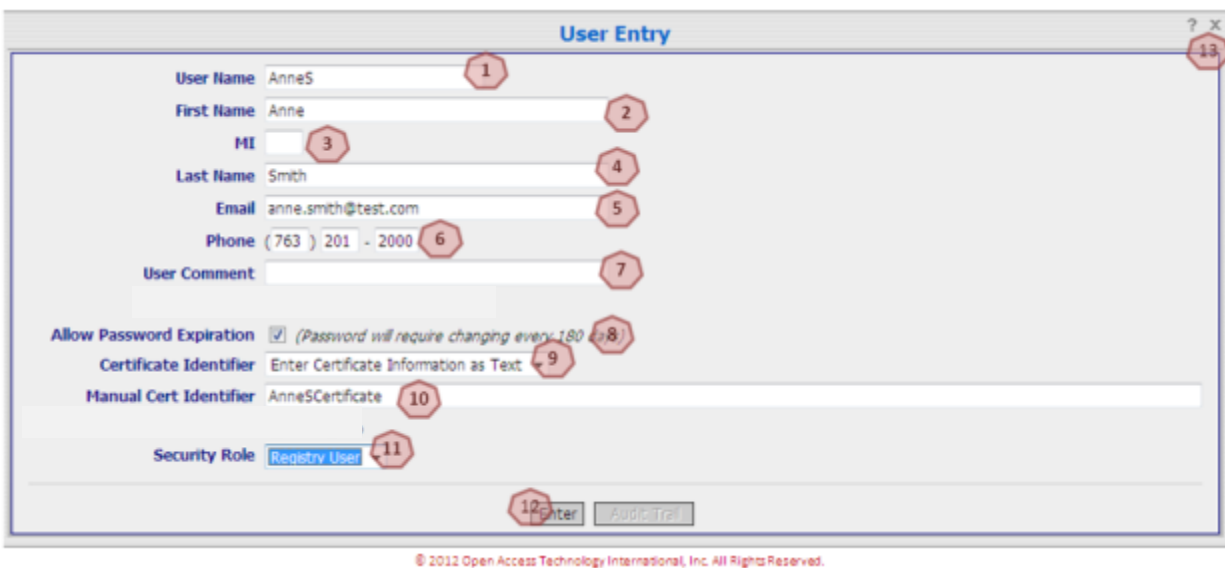
- 1 To create new users, navigate to Administration >> User Management >> Users. The Users display will open.



1 Click on the link under the “User Name” column to view the details of the User. Administrator users can make modifications from this display.

2 Click on the “Close” button to close the display.

3 Click on the “New User” button to create a new user. The User Entry page will open. Only Administrator users can create additional users.



1 Enter the User Name in this field.

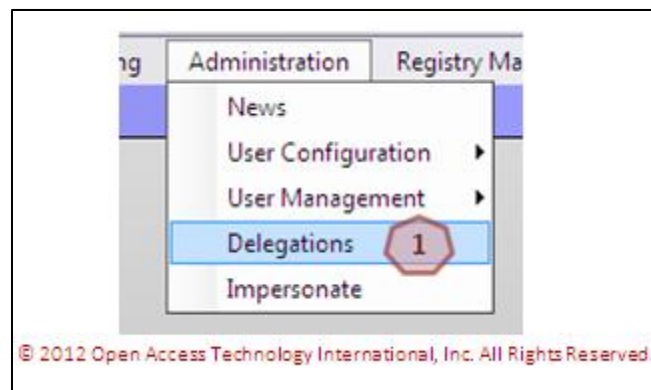
2 Enter the first name of the user in this field.

3 Enter the middle initial of the user in this field (optional).

4 Enter the last name of the user in this field.

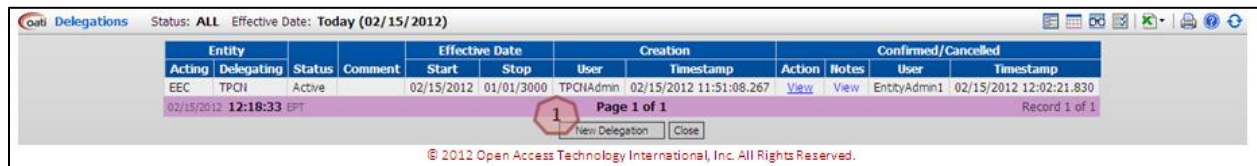
- 5 Enter the email address of the user in this field.
- 6 Enter the phone number of the user in this field.
- 7 Enter a comment about the user in this field (optional).
- 8 By default, passwords will expire. A password that will expire will have a checkmark in the box.
- 9 Select the Digital Certificate of the user from the dropdown.
- 10 If a Digital Certificate needs to be entered manually, enter the Digital Certificate information in this field.
- 11 Select the Security Role of the user from the dropdown. Security Roles include Entity Administrator and Registry User. An Entity Administrator will have permission to create and edit data in the system. A Registry user has permission to view data, but cannot modify it.
- 12 Click the “Enter” button to create and save the new user.
- 13 Click the “X” to close the display. Changes will not be saved and the user will not be created.

## 9.6 Delegation





- 1 To specify a delegation, navigate to Administration >> Delegations. The Delegation display will open.

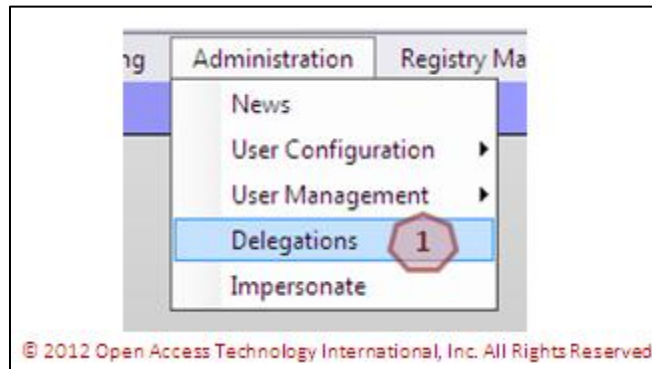


- 1 Click on the “New Delegation” button. The Delegation Entry page will open.

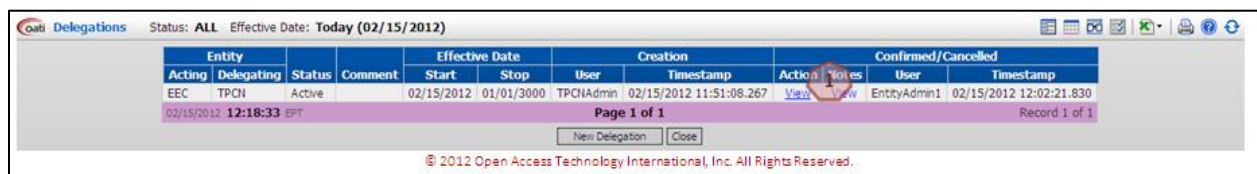


- 1 The Delegating Entity will be pre-populated with the user’s Entity name.
- 2 Select the company to delegate data management authority to from the Acting Entity dropdown.
- 3 Enter a comment about the delegation in this field.
- 4 By default, the Effective Start Date will be the date the form is completed. The default Effective End Date will be 01/01/3000. Dates can be modified manually, or by using the calendar button.
- 5 Click the “Enter” button to create and save the delegation.

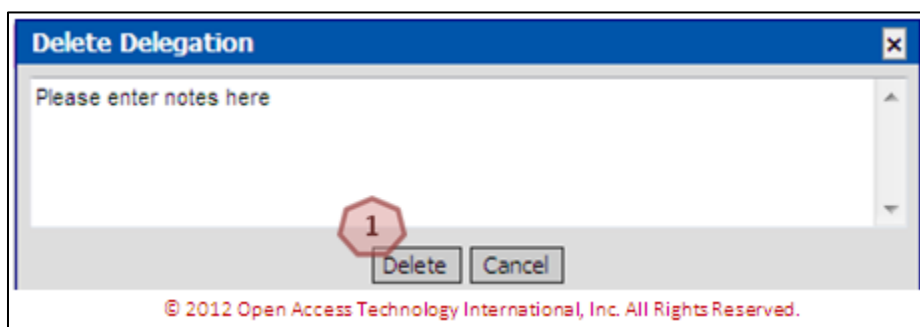
- 6 Click the “X” to close the display. The Delegation will not be created or saved.



- 1 To remove or confirm a delegation, navigate to Administration >> Delegations. The Delegations Summary page will open.



- 1 Click on the “View” link under the “Action” column to take action on the delegation. The Confirm Delegation or Delete Delegation display will open depending on the available action.



- 1 Click on the “Delete” button to end the delegation. The “Confirm” button and “Deny” button will be available depending on the available action. Clicking the “Confirm” button

will accept the delegation responsibilities. Clicking the “Deny” button will reject the delegation request.

## 10. Registry Management

### 10.1 Delta Publications



1 To access the Registry Delta Publication, navigate to Registry Management >> Delta Publications. The Delta Publications display will open.

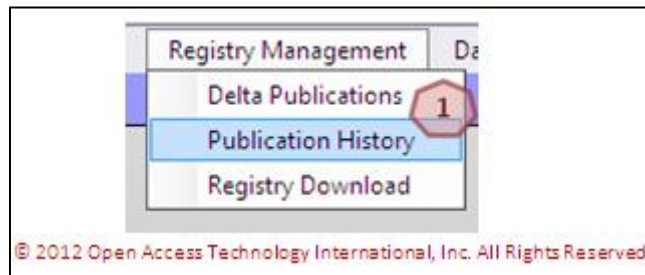
A screenshot of the 'Delta Publications' web application. The browser title bar shows 'Delta Publications' and the address bar shows 'Changed Publication: ACTIVE - 154\_20120208\_U (02/08/2012) Original Publication: ACTIVE - 147\_20120206\_S (02/06/2012)'. The main content area displays a table with columns for Object, Name, Changes, Attribute, Value (Old, New), and Publication (Changed, Original). The table lists various entities and their changes, such as 'BA SEPE Added', 'Control Zone BPAT Added', 'Entity EXRU Added', etc. At the bottom of the table, it says 'Page 1 of 1' and 'Records 1-25 of 25'. A 'Close' button is visible at the bottom center. A copyright notice is at the bottom: '© 2012 Open Access Technology International, Inc. All Rights Reserved.'

Object	Name	Changes	Attribute	Value		Publication	
				Old	New	Changed	Original
BA	SEPE	Added			154_20120208_U	147_20120206_S	
BA	SPC	Added			154_20120208_U	147_20120206_S	
Control Zone	BPAT	Added			154_20120208_U	147_20120206_S	
Control Zone	SEPE	Added			154_20120208_U	147_20120206_S	
Control Zone	SPC	Added			154_20120208_U	147_20120206_S	
Entity	EXRU	Added			154_20120208_U	147_20120206_S	
Entity	NAESB	Modified	NERC ID	1111	100000	154_20120208_U	147_20120206_S
		Modified	Record ID		100001	154_20120208_U	147_20120206_S
Entity	HOLJ	Added			154_20120208_U	147_20120206_S	
Entity	OATI	Modified	NERC ID	583	154_20120208_U	147_20120206_S	
		Modified	Record ID		100000	154_20120208_U	147_20120206_S
Entity	PSER	Added			154_20120208_U	147_20120206_S	
Entity	SEPE	Added			154_20120208_U	147_20120206_S	
POR/POD	BDPS	Added			154_20120208_U	147_20120206_S	
POR/POD	CCHS	Added			154_20120208_U	147_20120206_S	
POR/POD	JFHS	Added			154_20120208_U	147_20120206_S	
POR/POD	MH.115	Added			154_20120208_U	147_20120206_S	
POR/POD	MH.230	Added			154_20120208_U	147_20120206_S	
POR/POD	PPQA	Added			154_20120208_U	147_20120206_S	
POR/POD	WAUE	Added			154_20120208_U	147_20120206_S	
PSE	PSER01	Added			154_20120208_U	147_20120206_S	
Source/Sink	Sink Point 1	Added			154_20120208_U	147_20120206_S	
Source/Sink	Sink Point 2	Added			154_20120208_U	147_20120206_S	
Source/Sink	Source Point 1	Added			154_20120208_U	147_20120206_S	
TSP	EXRU	Added			154_20120208_U	147_20120206_S	
TSP	HOL3	Added			154_20120208_U	147_20120206_S	
TSP	SPC	Added			154_20120208_U	147_20120206_S	

1 Click the "Close" button to close the display.

2 Click on the Changed Publication field to review comparisons of different reports.

## 10.2 Publication History



1 To access the Publication History, navigate to Registry Management >> Publication History. The Publication History page will display.

A screenshot of the "Publication History" page. The page title is "Publication History" and the effective date is "ALL". The table below lists publication records with columns for ID, Code, Effective Date, Method, Version, Notes, Changes, User, Timestamp, Published, and File Format (MDB, CSV, XML). A red callout box with the number "1" points to the "Notes" column, and another red callout box with the number "2" points to the "View" link under the File Format columns. At the bottom of the table, there is a "Page 1 of 1" indicator and a "Close" button, with a red callout box with the number "3" pointing to it. The copyright notice "© 2012 Open Access Technology International, Inc. All Rights Reserved." is at the bottom.

ID	Code	Effective Date	Method	Version	Notes	Changes	User	Timestamp	Published	File Format
146	146_20120206_U	02/06/2012	Unscheduled	ARCHIVE		<a href="#">Changes</a>	DaniePS	02/06/2012 11:56:22	Yes	<a href="#">View</a> <a href="#">View</a> <a href="#">View</a>
147	147_20120206_S	02/06/2012	Scheduled	ACTIVE		<a href="#">Changes</a>	System	02/07/2012 00:00:02	Yes	<a href="#">View</a> <a href="#">View</a> <a href="#">View</a>
148	148_20120207_S	02/07/2012	Scheduled	ARCHIVE		<a href="#">Changes</a>	System	02/07/2012 00:00:03	Yes	<a href="#">View</a> <a href="#">View</a> <a href="#">View</a>
149	149_20120208_S	02/08/2012	Scheduled	ARCHIVE	<a href="#">View</a>	<a href="#">Changes</a>	System	02/08/2012 00:00:02	Yes	<a href="#">View</a> <a href="#">View</a> <a href="#">View</a>
150	150_20120208_U	02/08/2012	Unscheduled	ARCHIVE		<a href="#">Changes</a>	NongL	02/08/2012 14:39:00	Yes	<a href="#">View</a> <a href="#">View</a> <a href="#">View</a>
151	151_20120208_U	02/08/2012	Unscheduled	ARCHIVE		<a href="#">Changes</a>	DaniePS	02/08/2012 15:08:22	Yes	<a href="#">View</a> <a href="#">View</a> <a href="#">View</a>
152	152_20120208_U	02/08/2012	Unscheduled	ARCHIVE	<a href="#">View</a>	<a href="#">Changes</a>	NongL	02/08/2012 15:18:15	Yes	<a href="#">View</a> <a href="#">View</a> <a href="#">View</a>
153	153_20120208_U	02/08/2012	Unscheduled	ARCHIVE		<a href="#">Changes</a>	DaniePS	02/08/2012 15:19:06	Yes	<a href="#">View</a> <a href="#">View</a> <a href="#">View</a>
154	154_20120208_U	02/08/2012	Unscheduled	ACTIVE		<a href="#">Changes</a>	DaniePS	02/08/2012 15:38:19	Yes	<a href="#">View</a> <a href="#">View</a> <a href="#">View</a>

1 Hover over links in the "Notes" column, or click the link under the "Changes" column to view more information about the webRegistry Publication.

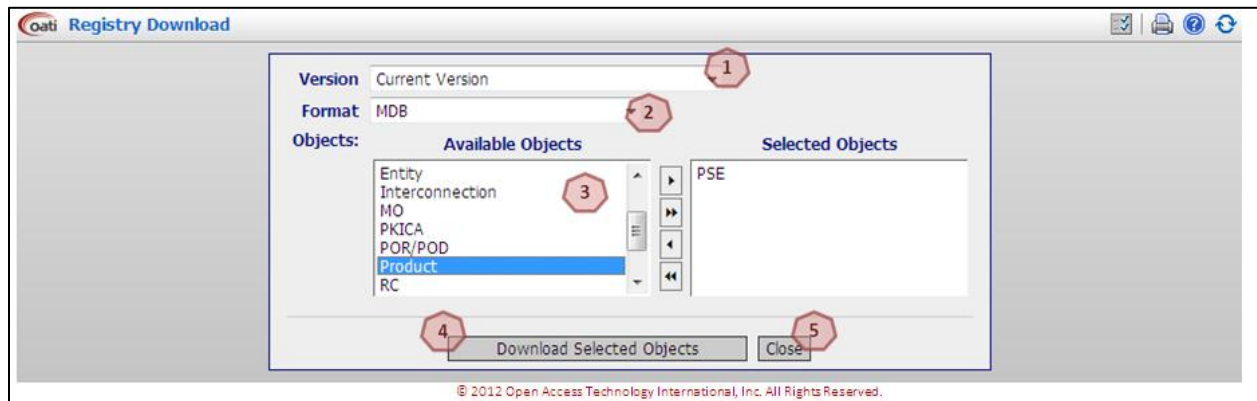
2 Click on the "View" link under the File Format columns to view the webRegistry Publication.

3 Click the "Close" button to close the display.

## 10.3 Registry Download



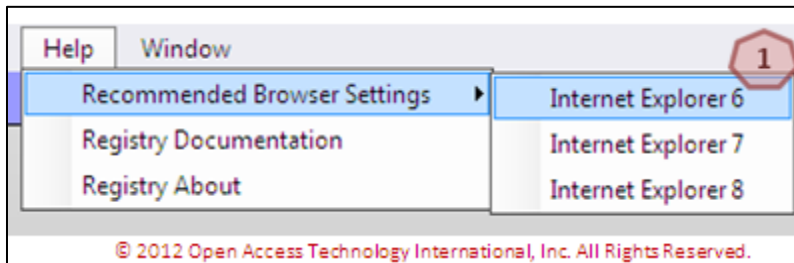
- 1 To download webRegistry Publications, navigate to Registry Management >> Registry Download. The Registry Download page will open.



- 1 Select the webRegistry Publication version from the dropdown.
- 2 Select the file format from the dropdown.
- 3 Select the Objects to include in the download. To select, either double-click on the object, or use the arrows.
- 4 Click the “Download Selected Objects” to begin the download.
- 5 Click on the “Close” button to close the display. No download will take place.

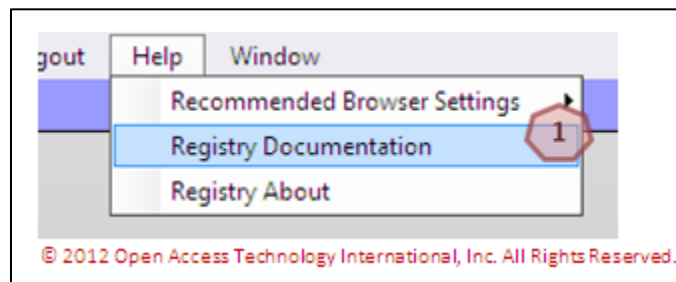
## 11. Help

### 11.1 Recommended Browser Settings



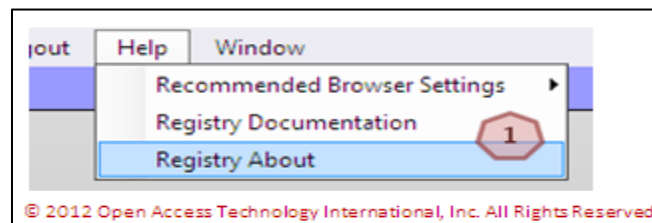
1 To find information on the recommended browser settings, navigate to Help >> Recommended Browser Settings >> selected IE. Documentation on how to best set up browser settings for that IE version will open.

### 11.2 Registry Documentation



1 To find Quick Start Guides, navigate to Help >> Registry Documentation. The webRegistry Documentation display will open. Documentation will be available for download from this page.

### 11.3 About



1 To view contact information, navigate to Help >> Registry About. Please contact support@oati.net with any questions.