



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

**NORTH AMERICAN ENERGY STANDARDS BOARD**

MARCH 2012

**PROPRIETARY AND CONFIDENTIAL**

## **TRADE SECRET**

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## Table of Contents

<b>1. INTRODUCTION</b>	<b>4</b>
<b>2. APPLYING FOR WEBREGISTRY ACCESS</b>	<b>5</b>
<b>3. INITIAL REGISTRATION OF A BA</b>	<b>8</b>
<b>4. ENTERING A NEW ENTITY CODE-ROLE</b>	<b>14</b>
<b>5. CONTROL ZONES</b>	<b>17</b>
5.1 ENTERING A NEW CONTROL ZONE	17
<b>6. SOURCE/SINK POINTS</b>	<b>19</b>
6.1 ENTERING A NEW SOURCE/SINK POINT	20
6.2 UPLOADING SOURCE/SINK POINTS FROM A CSV FILE	21
<b>7. APPROVALS</b>	<b>23</b>
7.1 APPROVAL HISTORY	23
7.2 PENDING CHANGES	24
<b>8. PAYMENT</b>	<b>25</b>
<b>9. AUDIT TRAIL</b>	<b>26</b>
<b>10. ALARMING</b>	<b>27</b>
10.1 ACTIVE ALARMS	27
10.2 ALARMS HISTORY	27
10.3 ALARM SUBSCRIPTIONS	28
<b>11. ADMINISTRATION</b>	<b>30</b>
11.1 NEWS	30
11.2 USER OPTIONS	30
11.3 CHANGING A PASSWORD	32
11.4 DISPLAY CONFIGURATIONS	34
11.5 CREATING A NEW USER	35
<b>12. DELEGATION</b>	<b>38</b>
<b>13. REGISTRY MANAGEMENT</b>	<b>41</b>
13.1 DELTA PUBLICATIONS	41
13.2 PUBLICATION HISTORY	42
13.3 REGISTRY DOWNLOAD	42
<b>14. DATA</b>	<b>44</b>
14.1 BALANCING AUTHORITY DATA	44
14.2 SOURCE/SINK POINT DATA	44
<b>15. HELP</b>	<b>46</b>
15.1 RECOMMENDED BROWSER SETTINGS	46
15.2 REGISTRY DOCUMENTATION	46
15.3 ABOUT	46

## 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.

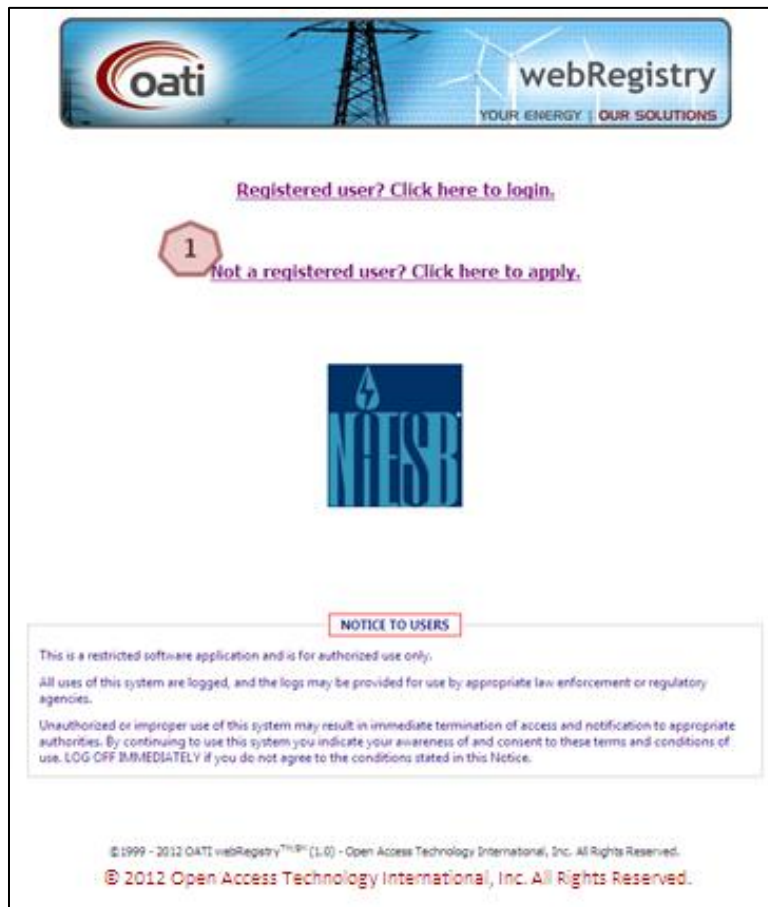
OATI has developed the webRegistry software system to perform NAESB Electric Industry Registry functions. Beyond the software development and maintenance, OATI is also responsible for the webRegistry system administration functions.

This document is intended to assist the role of Balancing Authority (BA) in how to use webRegistry.

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 the following sections and fields:

- Entity Details (1):** Long Name\* (Test Entity Company No. 1), Entity Code\* (TECN), Address 1\* (3660 Technology Drive NE), Address 2, City\* (Minneapolis), State/Province\* (Minnesota), Zip Code\* (55418), Country\* (United States).
- Applicant Details (2):** First Name\* (Anne), Middle Initial, Last Name\* (Smith), Title, Email\* (ne.smith@tecn.com), Phone\* (763.201.2020), User Name\* (AnneS).
- Manager Details (3):** First Name\* (Marie), Middle Initial, Last Name\* (Anderson), Title, Email\* (m.anderson@tecn.com), Phone\* (763.201.2020).
- Applicant's Purpose (4):** A text area with the prompt "Please enter your reason for applying and any additional notes." and a note "\* = required field".
- Terms and Conditions (5):** A text area with the prompt "Terms and Conditions that must be accepted in order to submit your application."
- Acceptance (6):** A checkbox labeled "I accept the terms and conditions stated above."
- Buttons (7, 8):** "Print Terms and Conditions" and "Submit Application".

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1 Enter Entity Details. Information with an asterisk (\*) is required. Enter information about your company, including the long name, NERC Entity Code, and address. If you do not know your NERC 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.

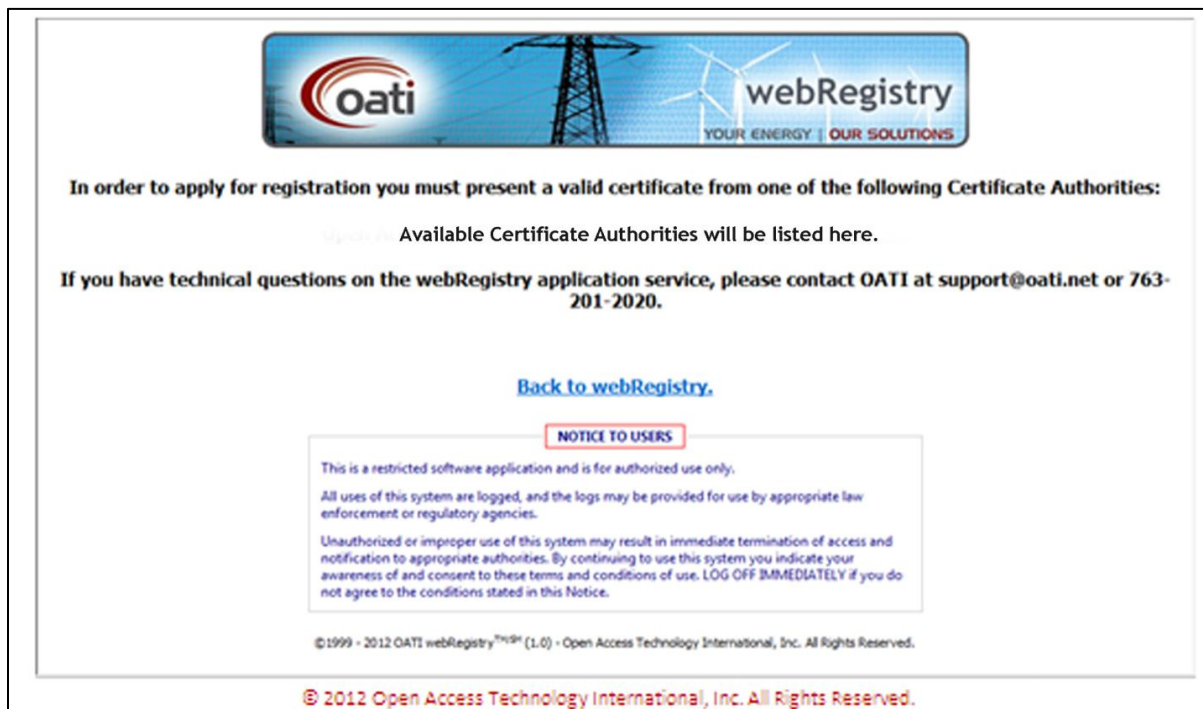
6 Click in this box to accept the terms and conditions.

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

8 Click on the “Submit Application” button to submit your application. The application will be sent to NAESB and will 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 a BA

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 and on page 32.

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.

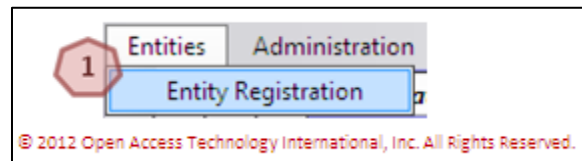
02/13/2012 14:26:55 EPT Page 1 of 1 Records 1-10 of 10

**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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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 Verify the Entity's information in this section.
- 2 Select the Entity Role from the dropdown. Select BA.
- 3 Enter the Entity Role Code in this field. This is a unique alpha numeric code that is generated by the user.
- 4 Select the Reliability Region to which the entity belongs from the dropdown.
- 5 Select the Interconnection from the dropdown.
- 6 Select the Market Area from the dropdown.
- 7 Select the Reliability Area from the dropdown.
- 8 Enter at least one contact. A 24-hour contact is required.
- 9 Select or enter service URL for a tagging or OASIS service if applicable. If the Application Service Provider (ASP) is registered in webRegistry, the user can select the ASP from the "Load from ASP" dropdown to load the URL.

If ASP is not desired, all fields of this section of the form should read “Select if Applicable” or remain blank.

**10** Click on 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 the Entity Type provided on the Entry page. Information will need to be verified for accuracy before it can be loaded in to webRegistry.

**11** 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.

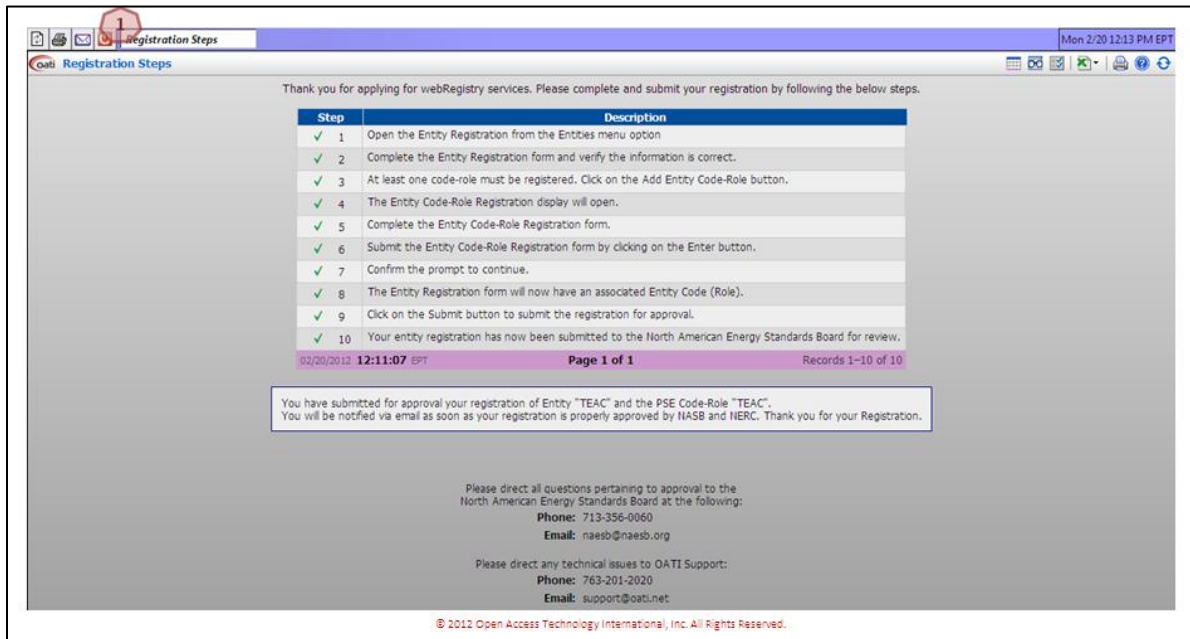
Please remember: The earliest Effective Date a Role can have is the date registration is being performed. If registering today, entering a date earlier than today’s date will result in a validation error.

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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.



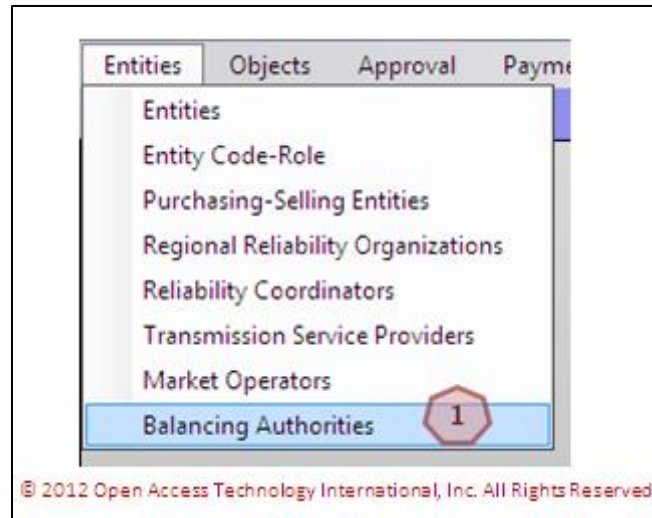
1 Verify that steps 1-10 have been checked and log out of the system. The user will receive an email notice when initial registration has been approved.

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

- 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 a New Entity Code-Role

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



1 To enter a new Balancing Authority, navigate to Entities >> Balancing Authorities. The Balancing Authorities display will open. Information on this display includes the Entity Code and the Effective Start and Stop dates of the Code-Role.

The screenshot shows the 'Balancing Authorities' table with the following data:

Entity	Code	Long Name	NERC ID	Tagging ID	Balancing Area	Reliability Area	Reliability Region	Market Area	Interconnection	Contacts	Effective Date		App St
											Start	Stop	
Erika's Electric Company Numero Dos	EB	Erika's Electric Company Numero Dos	100019	100063	EREB	N/A	TRRO	TMO	N/A	...	02/13/2012	01/01/3000	App
Test BA Company No. 1	BA	Test BA Company No. 1	100036	100097	BA	QUSL	TRRO	TMO	WESTERN INTERCONNECTION	...	02/15/2012	01/01/3000	App
Test Company	TBA	Test Company	100015	100053	TBA	N/A	N/A	N/A	N/A	...	02/11/2012	01/01/3000	App

Annotations in the screenshot include a red circle with '1' around the 'Close' button at the bottom, a red circle with '2' around the 'Code' column header, and a red circle with '3' around the 'Page 1 of 1' indicator.

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, a Balancing Authority, click on the “New BA” button. The Entity Code-Role Entry page will open.

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 Select the Reliability Region to which the Entity Code-Role belongs from the dropdown.

4 Select the Interconnection from the dropdown.

5 Select the Market Area from the dropdown.

6 Select the Reliability Area from the dropdown.

7 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.

8 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.

9

Select or enter service URL for a tagging or OASIS service if applicable. If the Application Service Provider (ASP) is registered in webRegistry, the user can select the ASP from the “Load from ASP” dropdown to load the URL.

If ASP is not desired, all fields of this section of the form should read “Select if Applicable” or remain blank.

10

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.

11

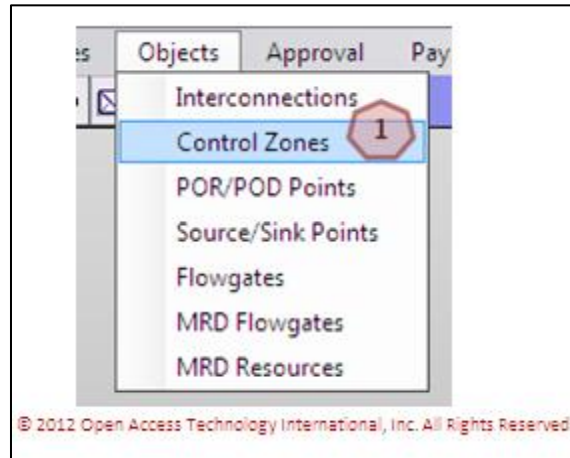
Click the “Enter” button to create and submit the new Entity Code-Role for approval.

12

Click the “Close” button to close the display. The new Entity Code-Role will not be saved or created.



## 5. Control Zones



1 To view and enter Control Zones, navigate to Objects >> Control Zones. The Control Zones display will open.

Control Zones	Balancing Area	Effective Date	Approval Status	Delegated	Acting User	Acting Entity
<a href="#">BA</a>	BA	02/15/2012 01/01/3000	Approved	No	N/A	N/A
<a href="#">BPAT</a> 2	BPAT	02/14/2012 01/01/3000	Approved	No	N/A	N/A
<a href="#">EREB</a>	EREB	02/13/2012 01/01/3000	Approved	No	N/A	N/A
<a href="#">ERET</a>	ERET	02/13/2012 01/01/3000	Approved	No	N/A	N/A
<a href="#">IOEA</a>	IOEA	02/13/2012 01/01/3000	Approved	No	N/A	N/A
<a href="#">QUSL</a>	QUSL	02/14/2012 01/01/3000	Approved	No	N/A	N/A
<a href="#">SWCO</a>	SWCO	02/12/2012 01/01/3000	Approved	No	N/A	N/A
<a href="#">SWCO Zone 1</a>	SWCO	02/12/2012 01/01/3000	Approved	No	N/A	N/A
<a href="#">SWCO Zone 2</a>	SWCO	02/12/2012 01/01/3000	Approved	No	N/A	N/A
<a href="#">TBA</a>	TBA	02/11/2012 01/01/3000	Approved	No	N/A	N/A

Page 1 of 1 Records 1-10 of 10  
 02/17/2012 10:47:21 EPT  
 New Control Zones Close 1

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

2 Click on the link under the “Control Zones” display to open the Control Zone Detail page. Modifications to Control Zones can be made from this display.

3 Click on the “New Control Zones” button. The Control Zone Entry page will open.

### 5.1 Entering a New Control Zone

A Control Zone with the same name as the Balancing Authority will automatically be created once a Balancing Authority is approved.

To enter a new Control Zone, click on the “New Control Zones” button on the Control Zones display. The Control Zone Entry page will open.

The screenshot shows a web form titled "Control Zone Entry" with a close button (X) and a help button (?). The form contains the following fields and buttons:

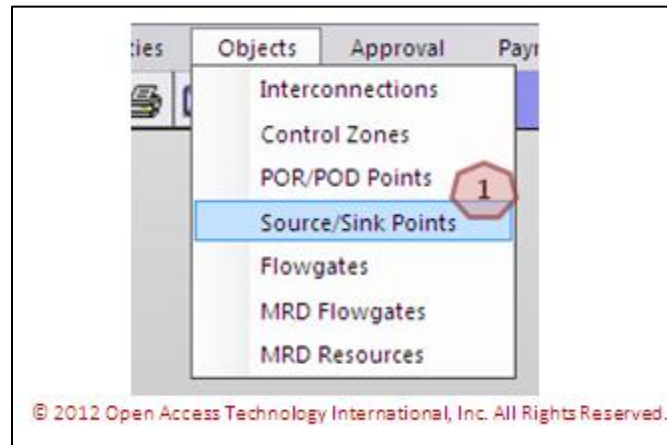
- Name:** A text input field containing "Control Zone 1", marked with a red callout '1'.
- Balancing Area:** A dropdown menu showing "BA", marked with a red callout '2'.
- Effective Date:** Two date input fields. The first contains "02/17/2012" and the second contains "01/01/3000". Both have calendar icons to their right, marked with a red callout '3'.
- Enter:** A button at the bottom of the form, marked with a red callout '4'.
- Close:** A close button (X) in the top right corner of the form, marked with a red callout '5'.

At the bottom of the form, there is a copyright notice: © 2012 Open Access Technology International, Inc. All Rights Reserved.

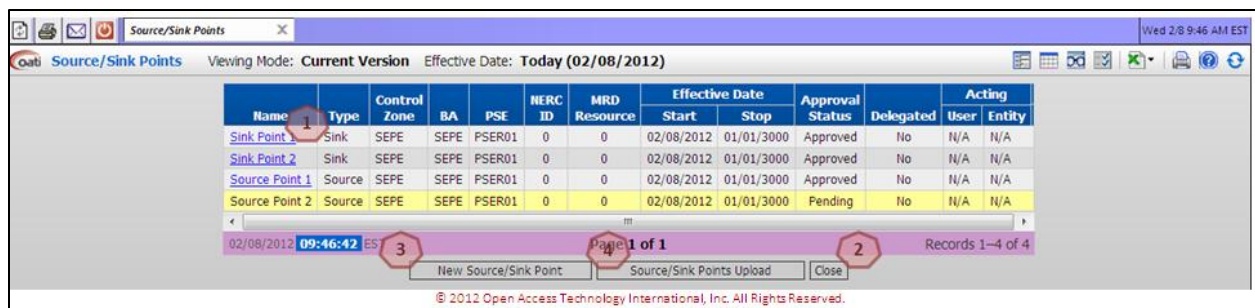
- 1 Enter the name of the Control Zone.
- 2 Select the Balancing Area from the dropdown.
- 3 By default, the Effective Start Date will be the date this form is completed. The Effective End Date will be 01/01/3000. Dates can be modified manually, or by using the calendar button.
- 4 Click on the "Enter" button to create and save the new Control Zone.
- 5 Click on the "X" to close the display. The Control Zone will not be created or saved.

## 6. Source/Sink Points

Once an Entity-Code Role has been created and approved, a BA may enter Source/Sink Points. Please coordinate with PSE/LSE/GSE to enter Source/Sink Points. Note: It is recommended that a BA register all Source/Sink Points within the BA's jurisdiction.



**1** To find and enter a new Source/Sink Points, navigate to Objects >> Source/Sink Points.



**1** Click on the link under the “Name” column to view the details of the Source/Sink Point.

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

**3** Click the “New Source/Sink Point” button to open the Source/Sink Point Entry page.

**4** Click on the “Source/Sink Points Upload” button to open the Source/Sink Points Upload CSV display.

## 6.1 Entering a New Source/Sink Point

To enter a new Source/Sink Point, click on the “New Source/Sink Point” button on the Source/Sink Points display. The Source/Sink Point Entry page will open. Coordinate with your PSE/LSE/GSE to ensure Source/Sink Points are not being dual-entered.

The screenshot shows a web form titled "Source/Sink Point Entry". The form contains the following fields and controls:

- Name:** Text input field containing "Power Seller Source Point 1" (callout 1).
- NERC ID:** Text input field containing "100018" (callout 2).
- Type:** Dropdown menu with "Source" selected (callout 3).
- PSE (GPE):** Dropdown menu with "SSPC" selected (callout 4).
- BA:** Dropdown menu with "QUSL" selected (callout 5).
- Control Zone:** Dropdown menu with "QUSL" selected (callout 6).
- MRD Resource ID:** Text input field containing "0000" (callout 7).
- Effective Date:** Two date input fields. The first contains "02/15/2012" and the second contains "01/01/3000". Both have calendar icons (callout 8).
- Buttons:** "Load From TSIN" (callout 9) and "Enter" (callout 10).
- Window Controls:** "?" and "X" icons in the top right corner (callout 11).

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- 1 Enter the name of the Source/Sink Point in this field.
- 2 The NERC ID will be populated based on the PSE.
- 3 Select the type of point from the dropdown.
- 4 Select the PSE from the dropdown.
- 5 Select the BA from the dropdown.
- 6 Select the Control Zone from the dropdown.
- 7 Enter the MRD Resource ID in this field, if applicable.
- 8 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.

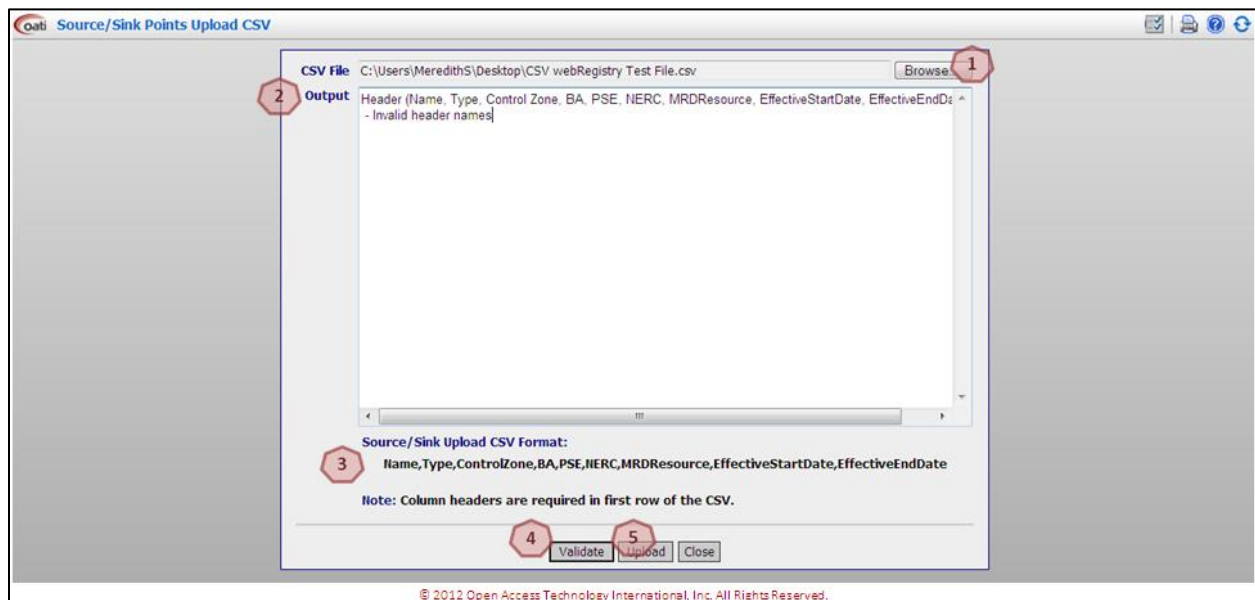
9 Click the “Load from TSIN” button to load information from the TSIN Registry. Information will need to be verified before it can be loaded into webRegistry.

10 Click the “Enter” button to create and save the Source/Sink Point. Source/Sink Points will need to be approved by the Balancing Authority for inclusion in webRegistry. Source/Sink Points entered by a Balancing Authority will not need additional approval.

11 Click on the “X” to close the display. No Source/Sink Points will be created or saved.

## 6.2 Uploading Source/Sink Points from a CSV File

To upload Source/Sink Points from a CSV file, click on the “Source/Sink Points Upload” button. The Source/Sink Points Upload CSV page will open.



1 Click the “Browse” button to search for the appropriate CSV File.

2 The output of the CSV File will display in this field. If a file has any errors, the error messages will be displayed in this field.

3 This section displays the CSV Upload Format and displays the column headers to be used on the upload file.

4

Click the “Validate” button to validate the CSV file. If a file contains errors, the error messages will be displayed in the “Output” field.

5

Click the “Upload” button to upload the selected file.

## 7. Approvals

### 7.1 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.

A screenshot of the 'Approval History' table in the webRegistry application. The table has columns for Submittal (Timestamp, User, Entity, Object, Name, Event Type, Attribute) and Approval (Value, Effective Date, Object, Entity, User, Timestamp, Status, Notes). The table contains several rows of data. Callout 1 points to a link in the 'Name' column. Callout 2 points to a link in the 'Notes' column. Callout 3 points to a 'Close' button at the bottom of the table. The table footer shows 'Page 1 of 1' and 'Records 1-8 of 8'. A copyright notice is visible at the bottom: '© 2012 Open Access Technology International, Inc. All Rights Reserved.'

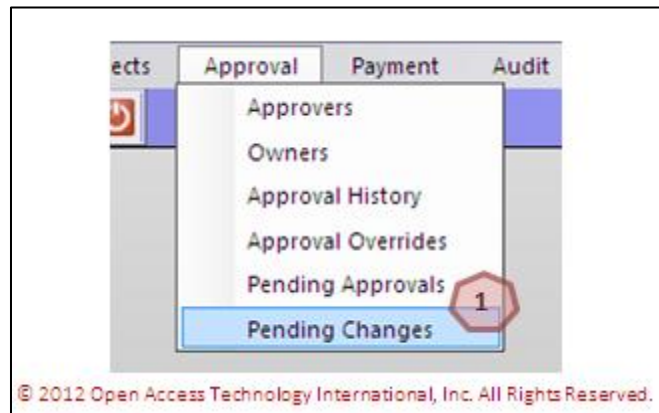
Submittal							Value		Effective Date		Approval					
Timestamp	User	Entity	Object	Name	Event Type	Attribute	Old	New	Start	Stop	Object	Entity	User	Timestamp	Status	Notes
02/08/2012 09:39:25	PSERAdmin	PSER	Source/Sink	<a href="#">Source Point 1</a>	New				02/08/2012	01/01/3000	PSE	PSER	PSERAdmin	02/08/2012 09:39:25	Approved	Appro.
02/08/2012 09:39:25	PSERAdmin	PSER	Source/Sink	<a href="#">Source Point 1</a>	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	<a href="#">Sink Point 1</a>	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	<a href="#">Sink Point 1</a>	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	<a href="#">Sink Point 2</a>	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	<a href="#">Sink Point 2</a>	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	<a href="#">Source Point 2</a>	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	<a href="#">Source Point 2</a>	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.

## 7.2 Pending Changes



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

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 Foin</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.

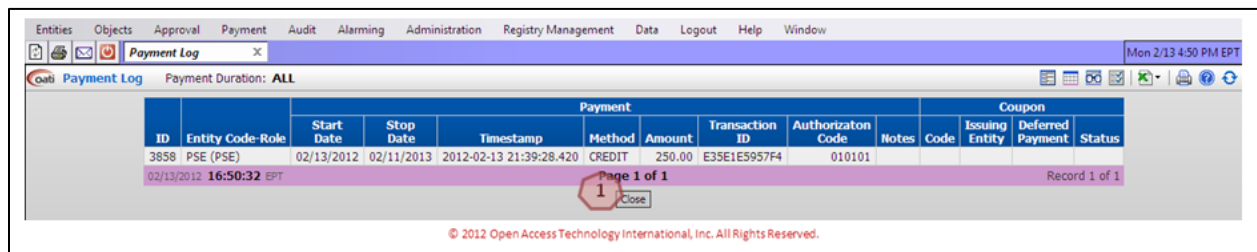
2 Click on the “Close” button to close the display.



## 8. Payment



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



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

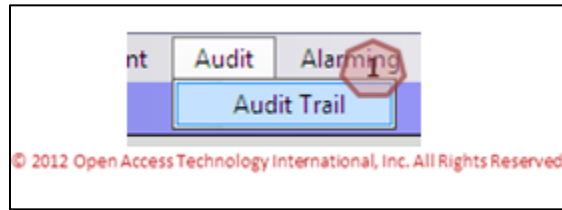


1 To view the Subscription Summary, navigate to Payment >> Subscription Summary. The Subscription Summary display will open.

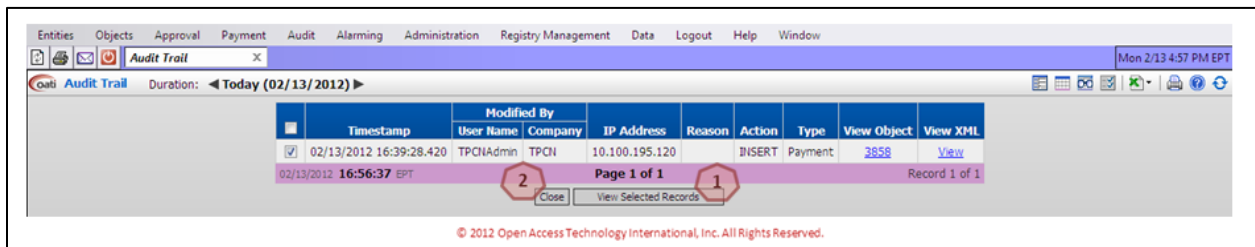


1 Click on the “Close” button to close the display.

## 9. 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.

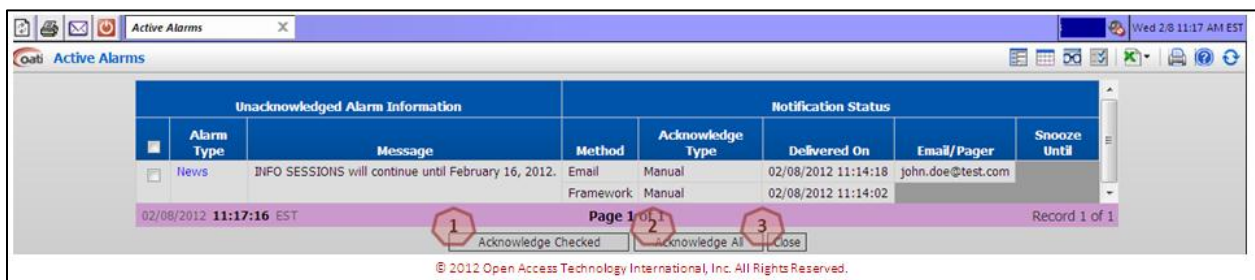
2 Click on the “Close” button to close the display.

## 10. Alarming

### 10.1 Active Alarms



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



1 Click the “Acknowledged Checked” button to acknowledge checked alarms. Click on the corresponding box to the left of the Alarm Type to check an alarm. A checked alarm will have a checkmark in the box.

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.

### 10.2 Alarms History

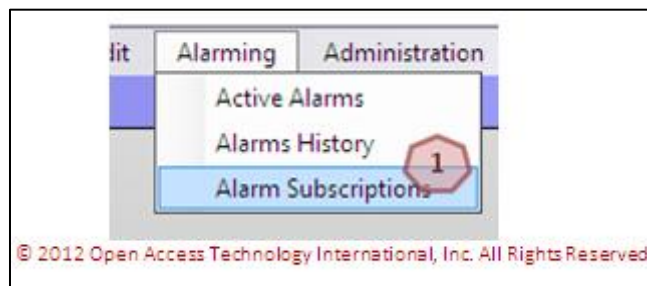


- 1 To view Alarms History, navigate to Alarming >> Alarms History. The Alarms History display will open.



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

### 10.3 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. The form contains the following elements with numbered callouts:

- 1**: Alarm dropdown menu showing 'Approval Action Needed'.
- 2**: Delivery Selection section with 'One time delivery only:' and checkboxes for 'Email' (checked, with 'john.doe@test.com' in the field) and 'Pager'.
- 3**: Additional forms of delivery section with radio buttons for 'Alarming - Requires manual acknowledgement.' (selected) and 'Notification - Auto Acknowledged. Notification is delivered only once.' Below are checkboxes for 'Instant Popup', 'Framework' (checked, with 'Action Needed' in a dropdown), 'Envelope Tray', and 'Sound' (with a 'Select a Sound' dropdown).
- 4**: 'Enter' button.
- 5**: 'Close' button.

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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.

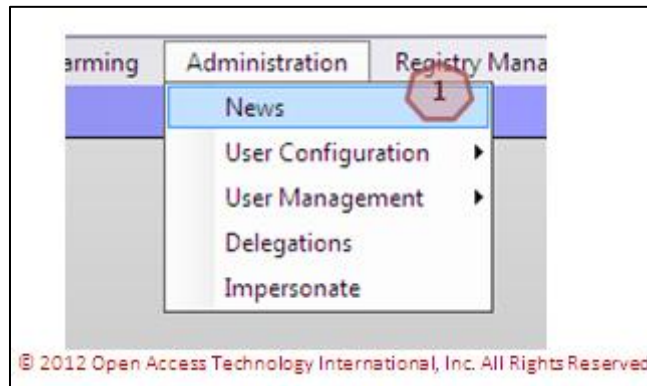
3 Determine additional forms of delivery. This includes the choice of manual or auto-acknowledgement of alarms, as well as the delivery. Delivery methods include sound and pop-up features.

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

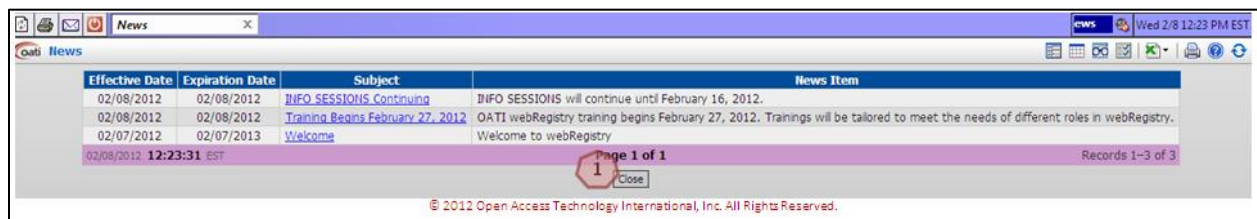
5 Click the “Close” button to close the display. No subscriptions will be created or saved.

## 11. Administration

### 11.1 News

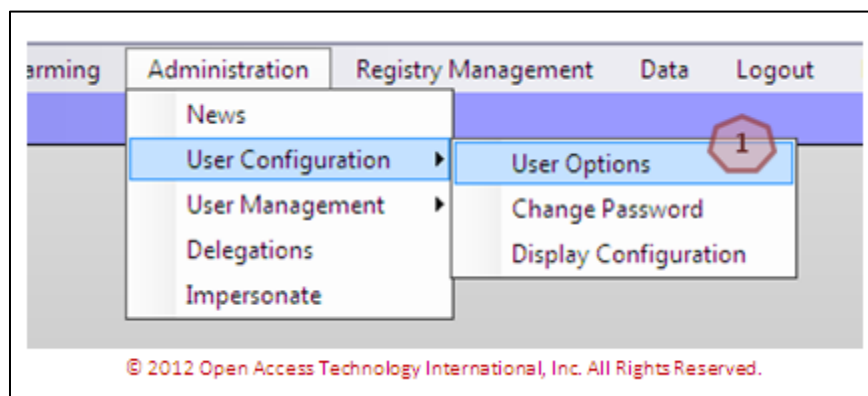


1 To view webRegistry news, navigate to Administration >> News. The News display will open.



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

### 11.2 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

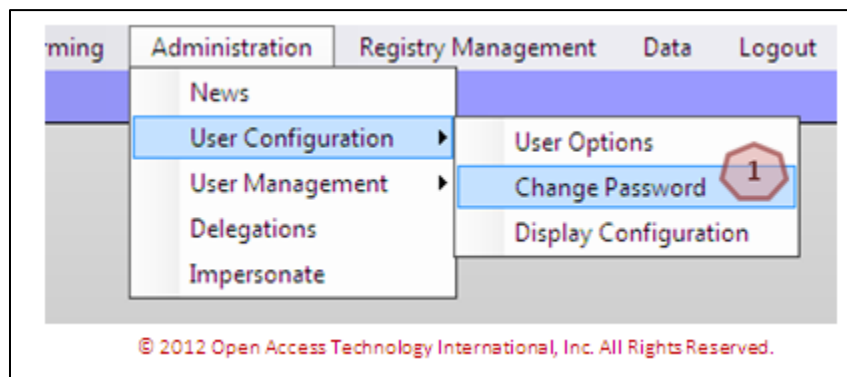
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- 1 Information in this section will be pre-populated based on User Account information.
- 2 Select the preferred Page Size. The default is 30, and is recommended for optimal load time. Page Size is the amount of data lines that are displayed on a 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.

### 11.3 Changing a Password



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



**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

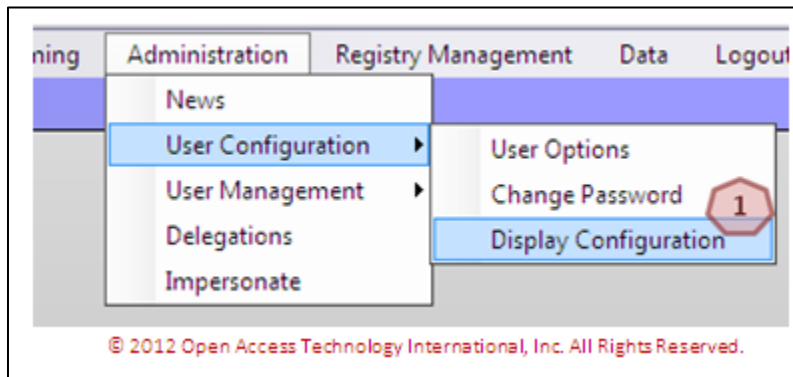
Enter new password

Retype new password

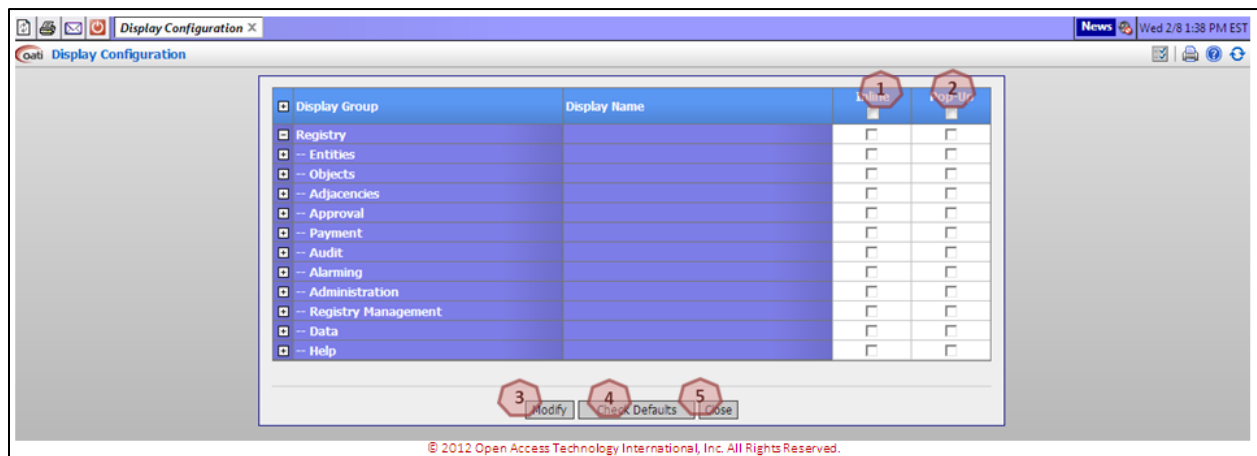
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- 1 Please review the password criteria for assistance with password changes.
- 2 Enter the old password in this field.
- 3 Enter the new password in this field.
- 4 Re-enter the new password in this field.
- 5 Click the “Submit” button to submit the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

## 11.4 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.

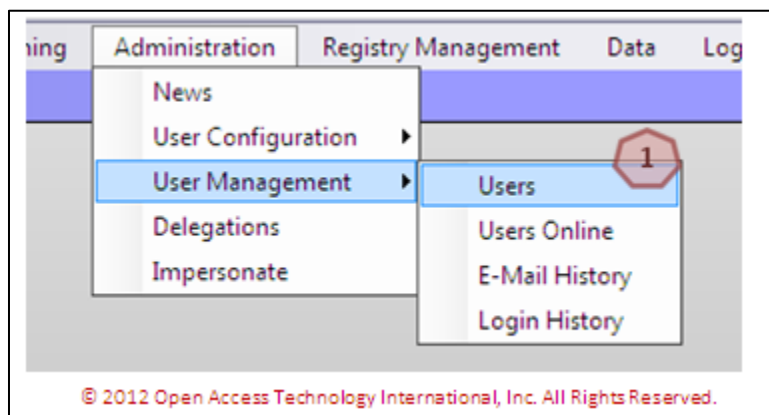
2 Select from the boxes in the “Pop-Up” column to have the corresponding display view in a separate window.

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.

## 11.5 Creating a New User



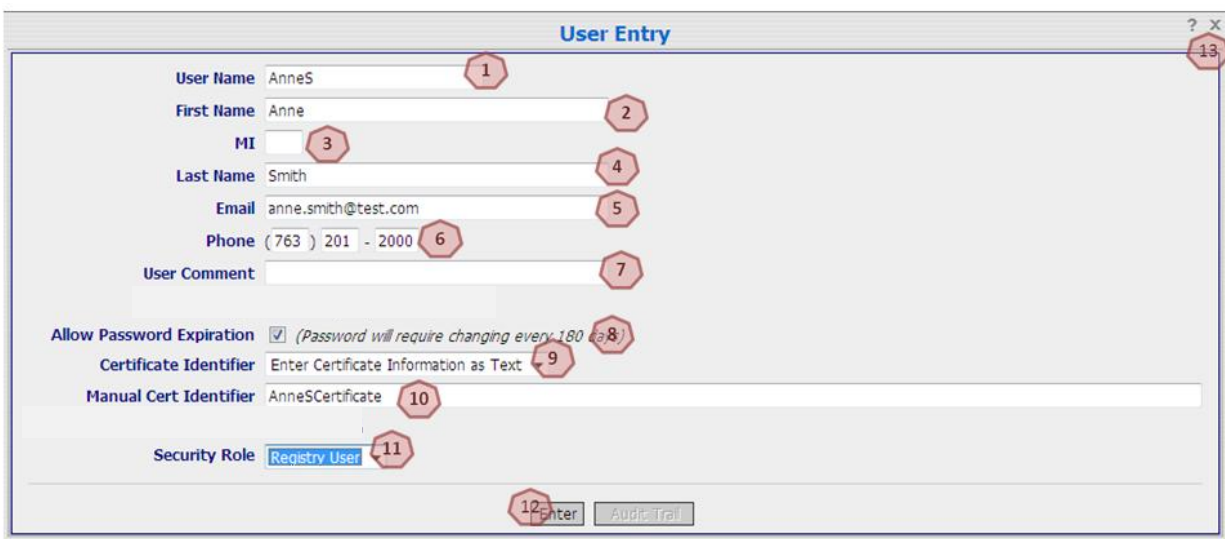
- 1 To create new users, navigate to Administration >> User Management >> Users. The Users display will open.



1 Click on the link under the “User Name” column to view 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.

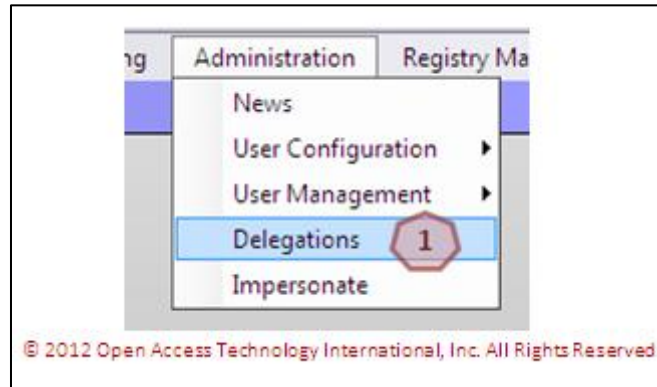
2 Enter the first name of the user in this field.

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

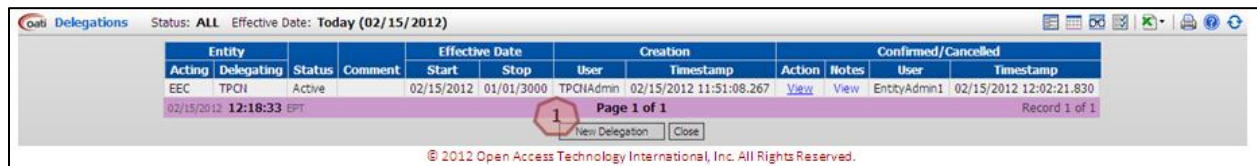
4 Enter the last name of the user in this field.

- 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. Available functionality in webRegistry will be dependent on the Security Role of the 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.

## 12. 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.

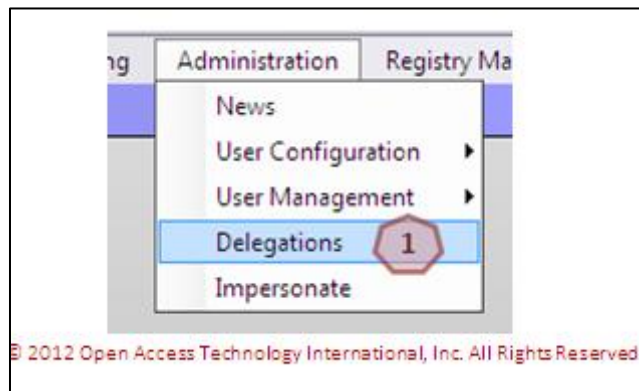
2 Select the company from the Acting Entity dropdown.

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.

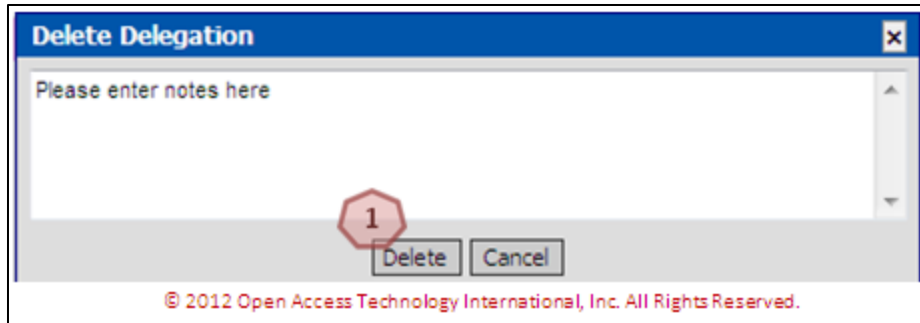


1 To remove or confirm a delegation, navigate to Administration >> Delegations. The Delegations Summary page will open.

A screenshot of the OATI Delegations Summary page. The page title is 'OATI Delegations' and the status is 'ALL'. The effective date is 'Today (02/15/2012)'. Below the title is a table with columns for Entity, Status, Comment, Effective Date, User, Creation, and Confirmed/Cancelled. The table contains one row of data. Below the table, there is a 'Page 1 of 1' indicator and a 'Record 1 of 1' indicator. There are also buttons for 'New Delegation' and 'Close'.

Entity		Status	Comment	Effective Date		Creation		Confirmed/Cancelled	
Acting	Delegating			Start	Stop	User	Timestamp	User	Timestamp
EEC	TPCN	Active		02/15/2012	01/01/3000	TPCNAdmin	02/15/2012 11:51:08.267	EntityAdmin1	02/15/2012 12:02:21.830

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



## 13. Registry Management

### 13.1 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 window title is 'Delta Publications'. The page header shows 'Changed Publication: ACTIVE - 134\_20120208\_U (02/08/2012)' and 'Original Publication: ACTIVE - 147\_20120206\_S (02/06/2012)'. The main content is a table with columns: Object, Name, Changes, Attribute, Value (Old, New), and Publication (Changed, Original). The table lists various entities and their changes. At the bottom of the table, there is a 'Close' button highlighted with a red circle containing the number '1'. The footer shows '© 2012 Open Access Technology International, Inc. All Rights Reserved.'

Object	Name	Changes	Attribute	Value		Publication	
				Old	New	Changed	Original
BA	<a href="#">SEPE</a>	Added			154_20120208_U	147_20120206_S	
BA	<a href="#">SPC</a>	Added			154_20120208_U	147_20120206_S	
Control Zone	<a href="#">BPAT</a>	Added			154_20120208_U	147_20120206_S	
Control Zone	<a href="#">SEPE</a>	Added			154_20120208_U	147_20120206_S	
Control Zone	<a href="#">SPC</a>	Added			154_20120208_U	147_20120206_S	
Entity	<a href="#">EXRU</a>	Added			154_20120208_U	147_20120206_S	
Entity	<a href="#">NAESB</a>	Modified	NERC ID	1111	100000	154_20120208_U	147_20120206_S
		Modified	Record ID		100001	154_20120208_U	147_20120206_S
Entity	<a href="#">HOLI</a>	Added			154_20120208_U	147_20120206_S	
Entity	<a href="#">OATI</a>	Modified	NERC ID		583	154_20120208_U	147_20120206_S
		Modified	Record ID		100000	154_20120208_U	147_20120206_S
Entity	<a href="#">PSEB</a>	Added			154_20120208_U	147_20120206_S	
Entity	<a href="#">SEPE</a>	Added			154_20120208_U	147_20120206_S	
POR/POD	<a href="#">BDPS</a>	Added			154_20120208_U	147_20120206_S	
POR/POD	<a href="#">CCHS</a>	Added			154_20120208_U	147_20120206_S	
POR/POD	<a href="#">JFHS</a>	Added			154_20120208_U	147_20120206_S	
POR/POD	<a href="#">MH_115</a>	Added			154_20120208_U	147_20120206_S	
POR/POD	<a href="#">MH_230</a>	Added			154_20120208_U	147_20120206_S	
POR/POD	<a href="#">PPOA</a>	Added			154_20120208_U	147_20120206_S	
POR/POD	<a href="#">WVAUE</a>	Added			154_20120208_U	147_20120206_S	
PSE	<a href="#">PSER01</a>	Added			154_20120208_U	147_20120206_S	
Source/Sink	<a href="#">Sink Point 1</a>	Added			154_20120208_U	147_20120206_S	
Source/Sink	<a href="#">Sink Point 2</a>	Added			154_20120208_U	147_20120206_S	
Source/Sink	<a href="#">Source Point 1</a>	Added			154_20120208_U	147_20120206_S	
TSP	<a href="#">EXRU</a>	Added			154_20120208_U	147_20120206_S	
TSP	<a href="#">HOLI3</a>	Added			154_20120208_U	147_20120206_S	
TSP	<a href="#">SPC</a>	Added			154_20120208_U	147_20120206_S	

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

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

## 13.2 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 set to "ALL". The table below lists various publications 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 "Changes" column. Another red callout box with the number "2" points to the "View" link under the "File Format" column. At the bottom of the table, there is a "Page 1 of 1" indicator and a "Close" button, with a red callout box and 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	MDB	CSV	XML
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="#">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="#">View</a>	<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.

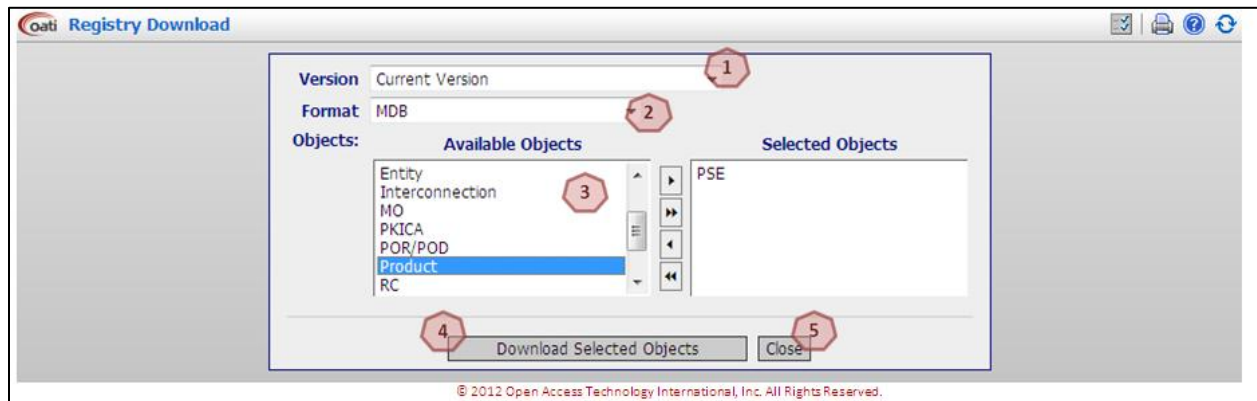
2 Click on the "View" link under the File Format columns to view the webRegistry Publication.

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

## 13.3 Registry Download



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

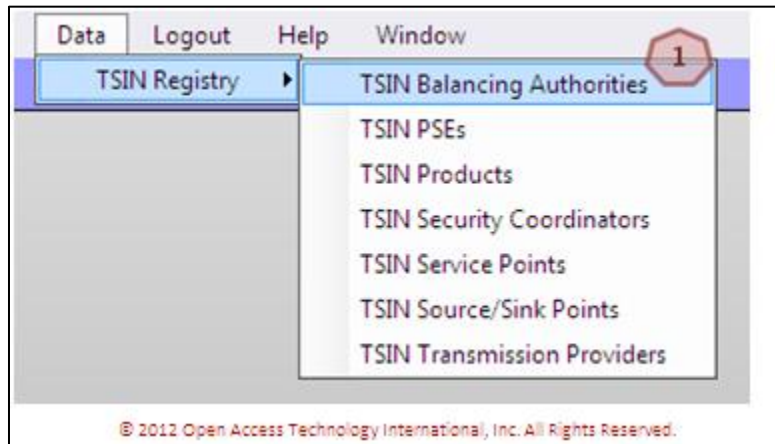


- 1 Select the webRegistry Publication version from the dropdown.
- 2 Select the file format from the dropdown.
- 3 Select the Objects to include in the download. To select, either double-click on the object, or use the arrows.
- 4 Click the “Download Selected Objects” to begin the download.
- 5 Click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

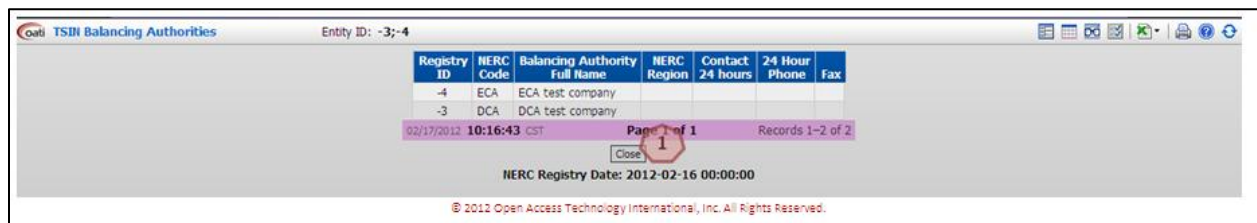
## 14. Data

Existing TSIN Data can be found in OATI webRegistry.

### 14.1 Balancing Authority Data

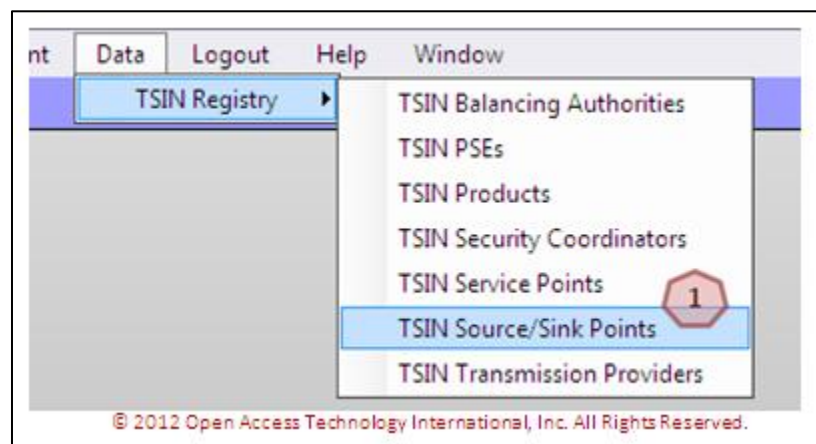


**1** To view existing Balancing Authorities in the TSIN Registry, navigate to Data >> TSIN Registry >> TSIN Balancing Authorities. The TSIN Balancing Authorities display will open.



**1** TSIN Registry Balancing Authority data will display. Click the “Close” button to close the display.

### 14.2 Source/Sink Point Data



1 To view TSIN Registry data of Source/Sink Points, navigate to Data >> TSIN Registry >> TSIN Source/Sink Points. The TSIN Source/Sink Point display will open.

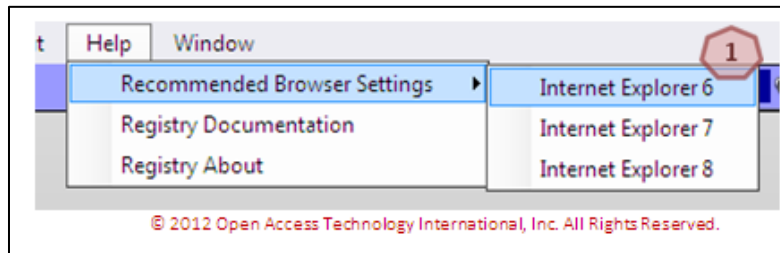
Registry ID	PSE Code	Source/Sink Point Name	Balancing Authority	Source Point	Sink Point
-5057	WTQA5	WTQA.Source5	WTQA	Yes	No
-5056	WTQA4	WTQA.Source4	WTQA	Yes	No
-5055	WTQA3	WTQA.Source3	WTQA	Yes	No
-5054	WTQA2	WTQA.Source2	WTQA	Yes	No
-5053	WTQA1	WTQA.Source1	WTQA	Yes	No
-5052	WTQA	WTQA.Source	WTQA	Yes	No
-5051	WTQA5	WTQA.Sink5	WTQA	No	Yes
-5050	WTQA4	WTQA.Sink4	WTQA	No	Yes
-5049	WTQA3	WTQA.Sink3	WTQA	No	Yes
-5048	WTQA2	WTQA.Sink2	WTQA	No	Yes
-5047	WTQA1	WTQA.Sink1	WTQA	No	Yes
-5046	WTQA	WTQA.Sink	WTQA	No	Yes
-5045	UPSE	UCA_Load	UCA	No	Yes
-5044	UPSE	UCA_Gen	UCA	Yes	No
-5043	TPSE	TCA_Load	TCA	No	Yes
-5042	TPSE	TCA_Gen	TCA	Yes	No
-5041	SPSE	SCA_Load	SCA	No	Yes
-5040	SPSE	SCA_Gen	SCA	Yes	No
-5039	RPSE	RCA_Load	RCA	No	Yes
-5038	RPSE	RCA_Gen	RCA	Yes	No
-5037	QPSE	QCA_Load	QCA	No	Yes
-5036	QPSE	QCA_Gen	QCA	Yes	No
-5035	QASW	QASW.SOURCE1	QASW	Yes	No
-5034	QANE	QANE.SINK1	QANE	No	Yes
-5033	QABA	QABA.Source1	QABA	Yes	No
-5032	QABA	QABA.Sink1	QABA	No	Yes
-5031	QABA	QABA.SYS	QABA	Yes	Yes
-5030	QABA	QABA.Load	QABA	No	Yes
-5029	QABA	QABA.IPP	QABA	Yes	Yes
-5028	PPSE	PCA_Load	PCA	No	Yes

02/09/2012 12:12:12 CST Page 1 of 299 Records 1-30 of 8944  
 IERC Registry Date: 2012-02-08 00:00:00  
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1 TSIN Registry Source/Sink Point data will display. Click the “Close” button to close the display.

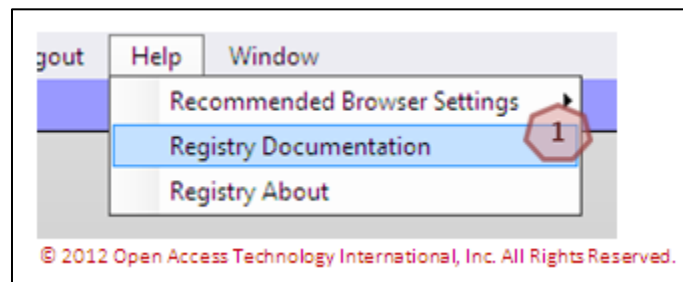
## 15. Help

### 15.1 Recommended Browser Settings



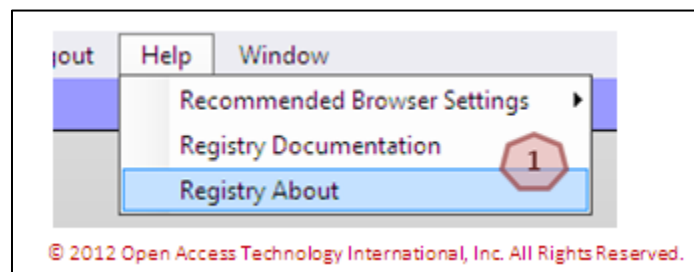
**1** To find information on the recommended browser settings, navigate to Help >> Recommended Browser Settings >> selected IE. Documentation on how to best set up browser settings for that IE version will open.

### 15.2 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.

### 15.3 About



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