WEBREGISTRY
RRO QUICK START GUIDE v1.1

NORTH AMERICAN ENERGY STANDARDS BOARD

MARCH 2012

PROPRIETARY AND CONFIDENTIAL

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Table of Contents

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.

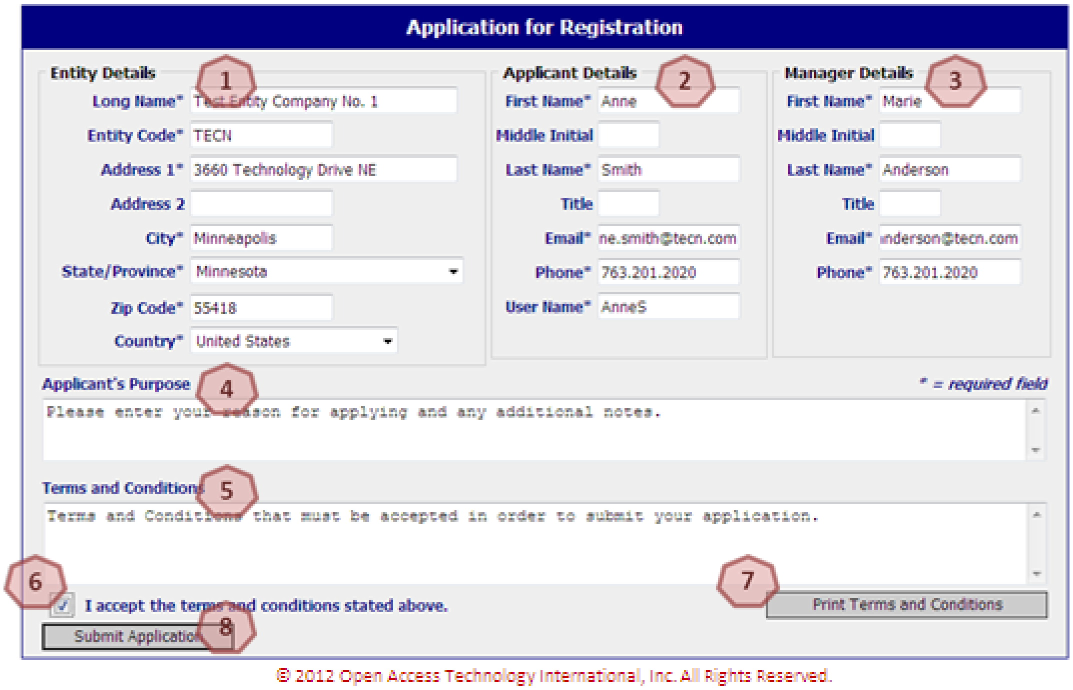
This document is intended to assist the role of Regional Reliability Organization (RRO) in how to use webRegistry.

For additional training, please contact support@oati.net.

2. Applying for webRegistry Access

To apply for webRegistry access, go to 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.



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.

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 be pending NAESB approval.

Please remember:

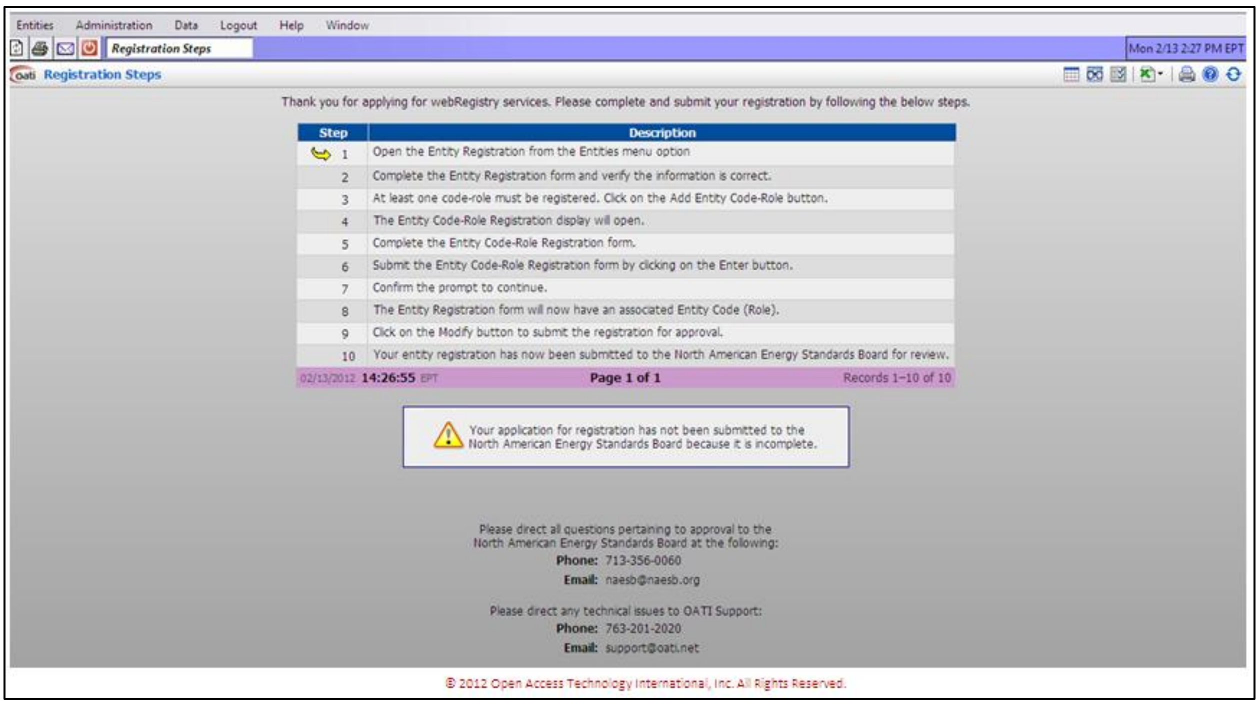
- An asterisk (*) means the field is required. Applications cannot be submitted with information missing from fields that are indicated with an asterisk (*).
- Applications will not be able to be submitted until the "I accept the terms and conditions stated above" box is checked. Once this box is checked, 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.

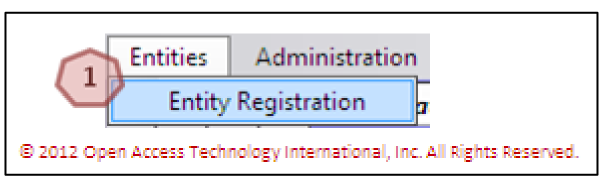
3. Initial Registration of an RRO

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.

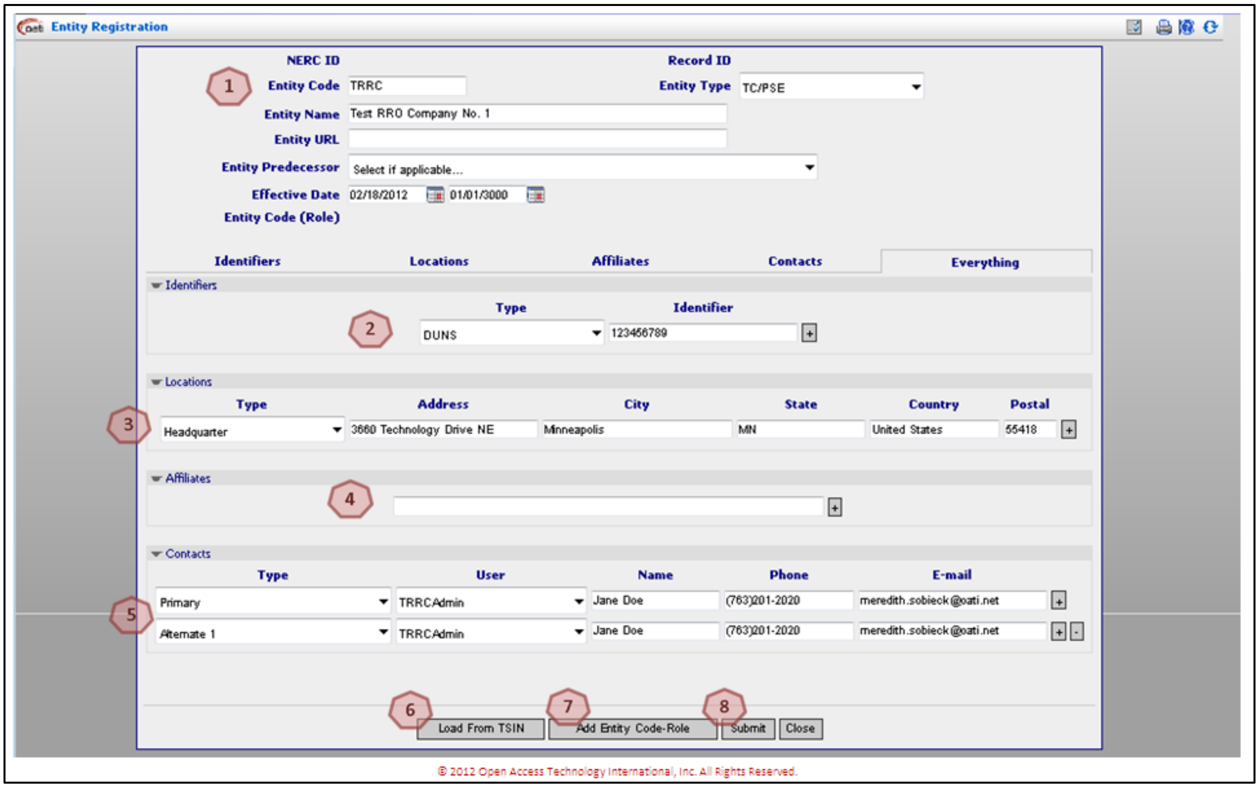
Upon first login to the webRegistry using the initial password, the user will be prompted to change the password. Instructions on updating a password will appear on the display and can be found in the Administration portion of this training document on page 26.

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





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.

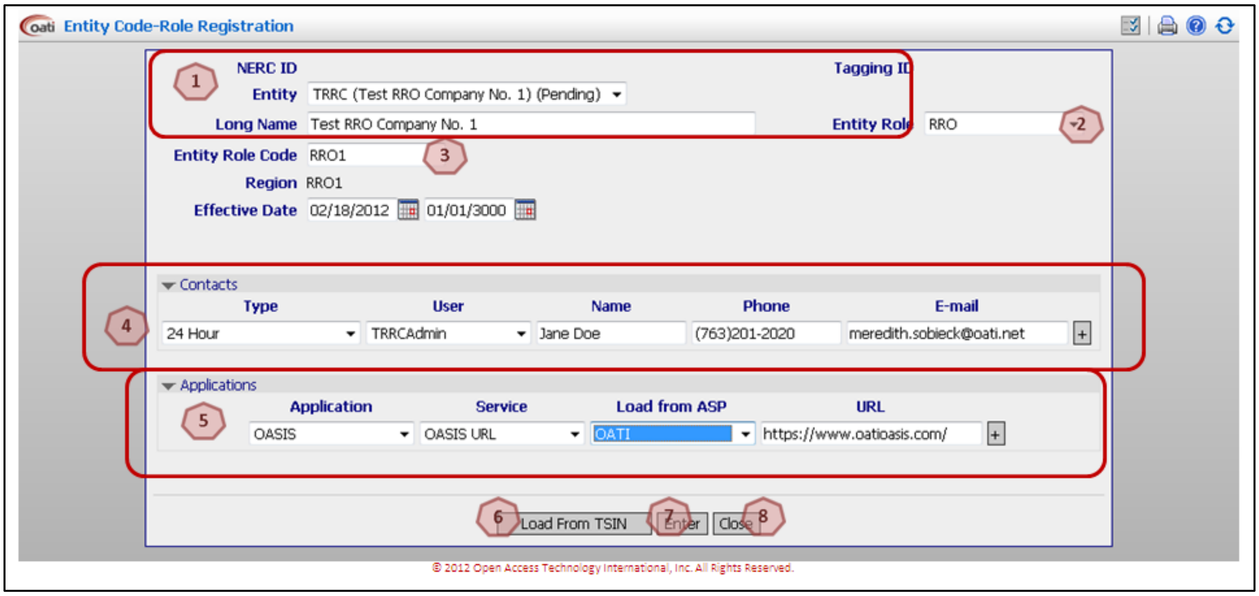
4 Enter any affiliates, if applicable.

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 Verify Entity information in this section.

2 Select the Entity Role from the dropdown. Select RRO.

3 Enter the Entity Role Code in this field. This is a unique alpha numeric code that is generated by the user.

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

5 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.

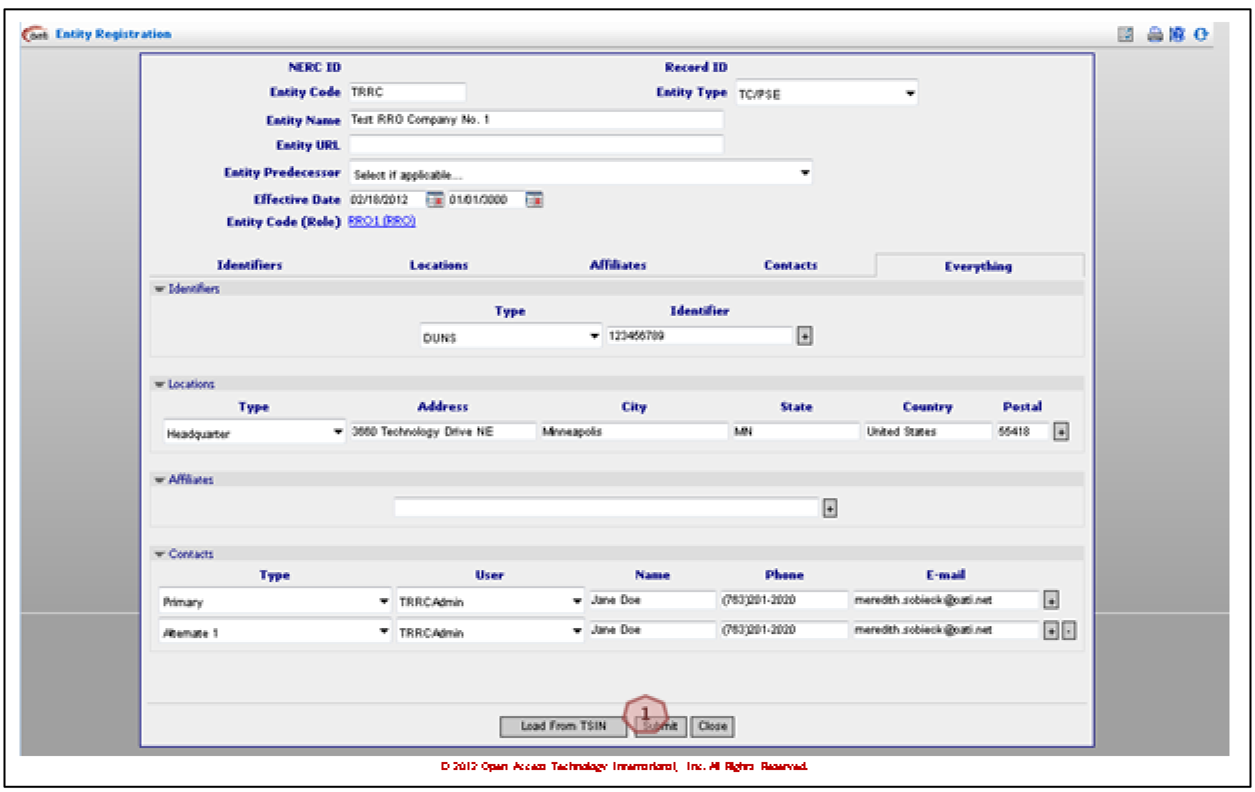
If an ASP is not desired, all fields of this section of the form should read “Select if Applicable” or remain blank.

6 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 into webRegistry.

7 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.

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

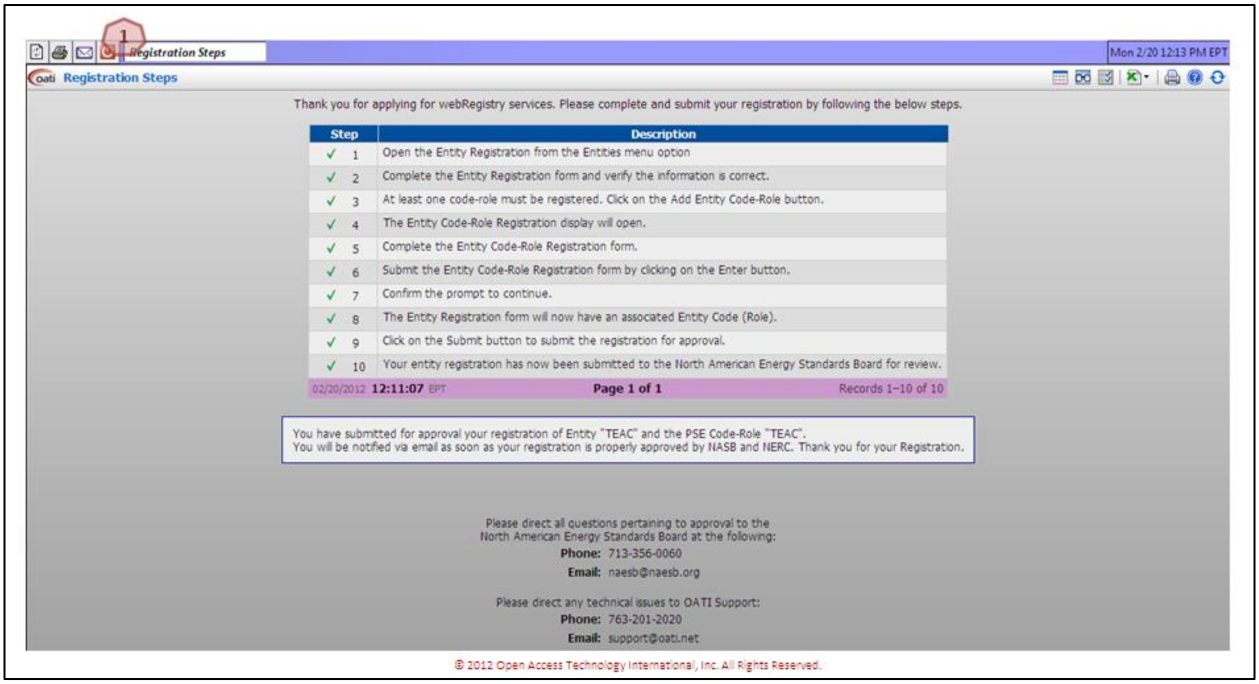
Please remember: The earliest Effective Date a Role can have is the date registration is being performed. If registering today, entering a date earlier than today's date will result in a validation error.



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.

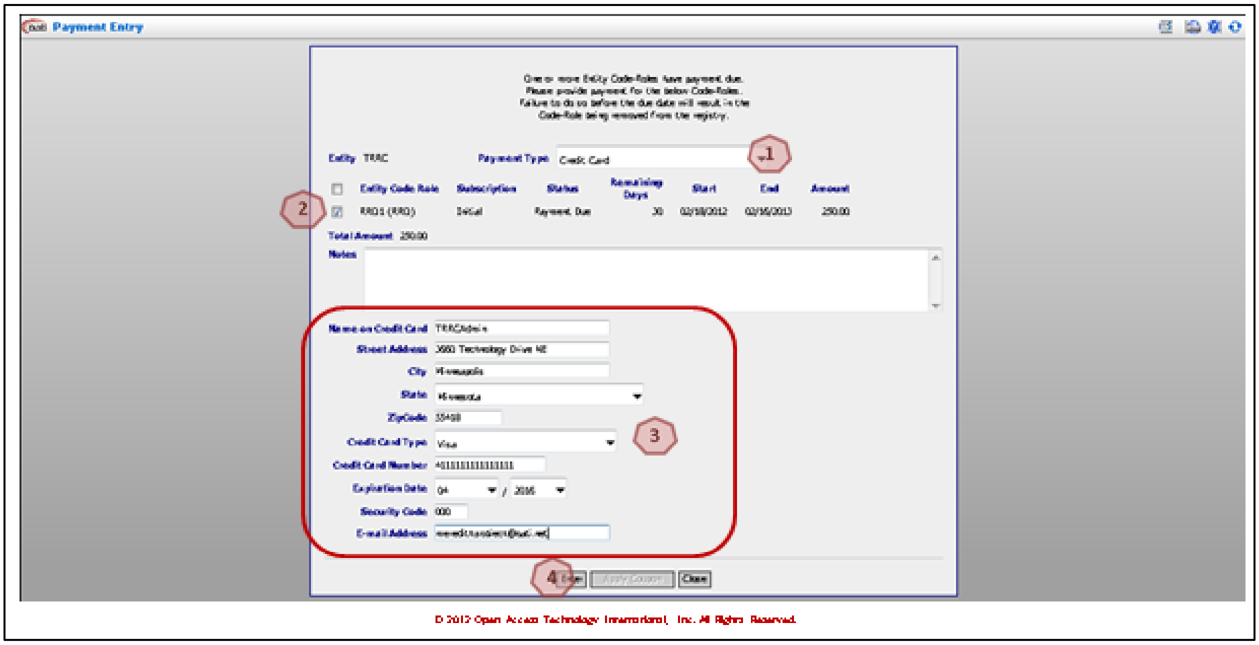
The user will receive email notification once the registration has been approved or denied by NAESB and/or the North American Electric Reliability Corporation (NERC).

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 following display in order to make payment on annual registration dues.



1 Select the payment type from the dropdown. In most cases, select Credit Card.

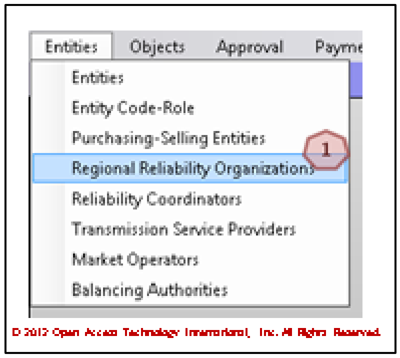
2 Click on the corresponding box of which payment you would like to make. Note: Annual dues are assessed on number of Code-Roles registered in the webRegistry system.

3 Enter the appropriate payment information in the corresponding fields.

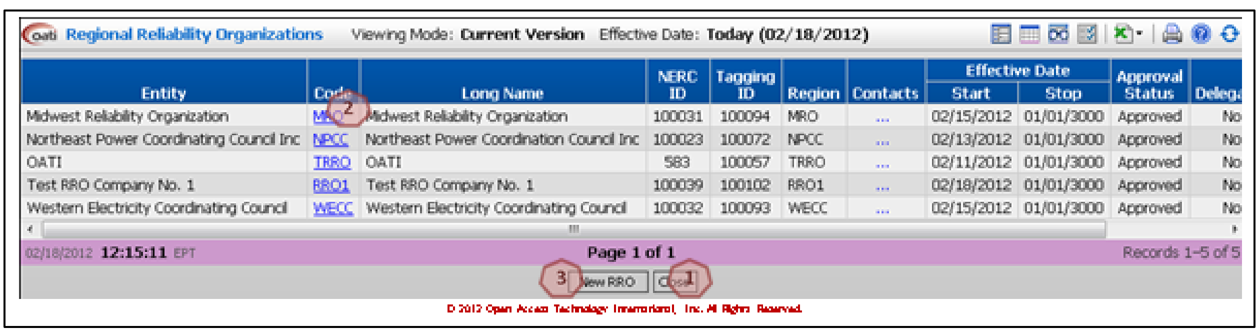
4 Click on the “Enter” button to submit the payment. An email receipt will be sent to the email address provided.

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 Regional Reliability Organization.



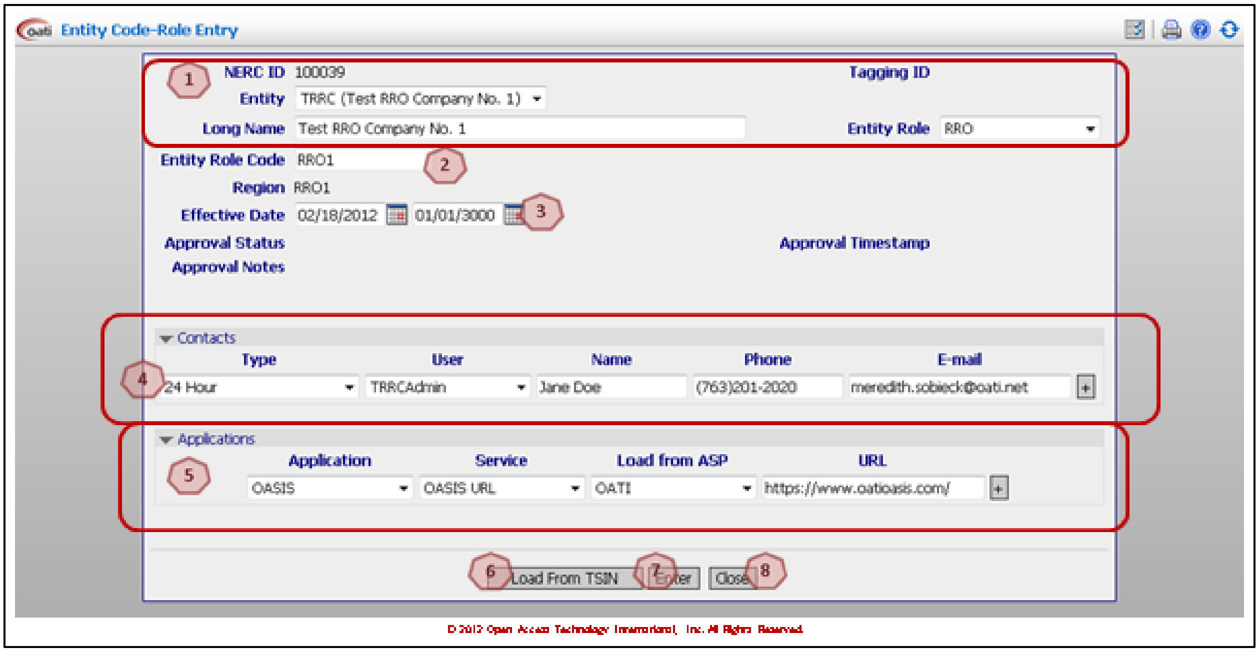
1 To enter a new Regional Reliability Organization, navigate to Entities >> Regional Reliability Organization. The Regional Reliability Organizations display will open. Information on this display includes the Entity Code and the Effective Start and Stop dates of the Code-Role.



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 Regional Reliability Organization, click on the “New RRO” 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 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 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 an ASP is not desired, all fields of this section of the form should read "Select if Applicable" or remain blank.

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.

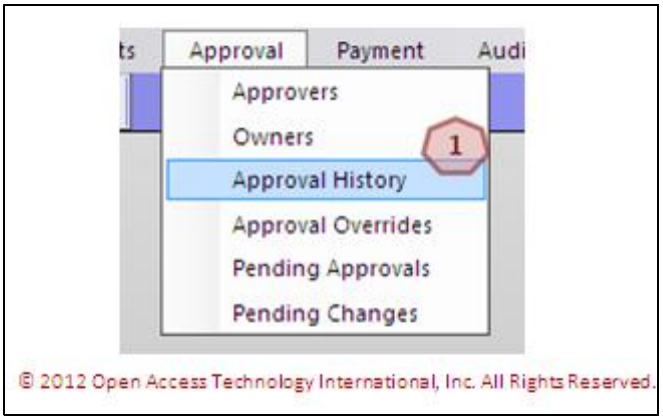
7 Click the “Enter” button to create and submit the new Entity Code-Role for approval.

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

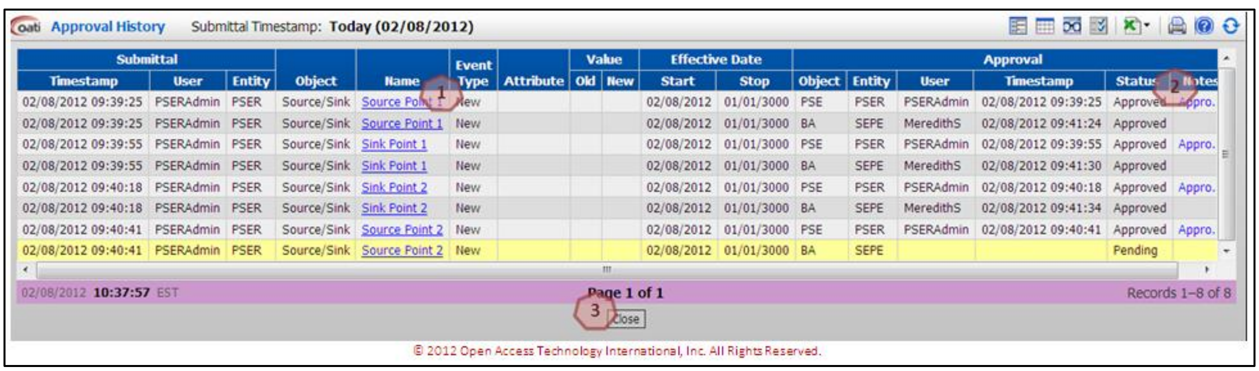
5. Approvals

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.



Approval History Submittal Timestamp: Today (02/08/2012)

Submittal Timestamp	Submittal User	Submittal Entity	Object	Name	Event Type	Attribute	Value Old	Value New	Effective Date Start	Effective Date Stop	Approval Object	Approval Entity	Approval User	Approval Timestamp	Approval Status	Approval 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	

02/08/2012 10:37:57 EST Page 1 of 1 Records 1–8 of 8

Close

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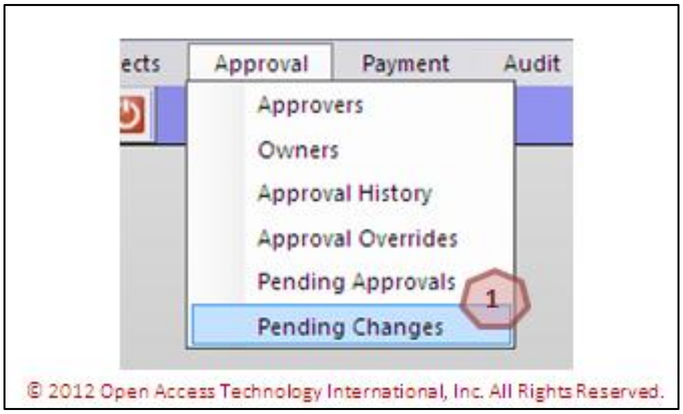
1 Click the link under the "Name" column. Details about the object will display.

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



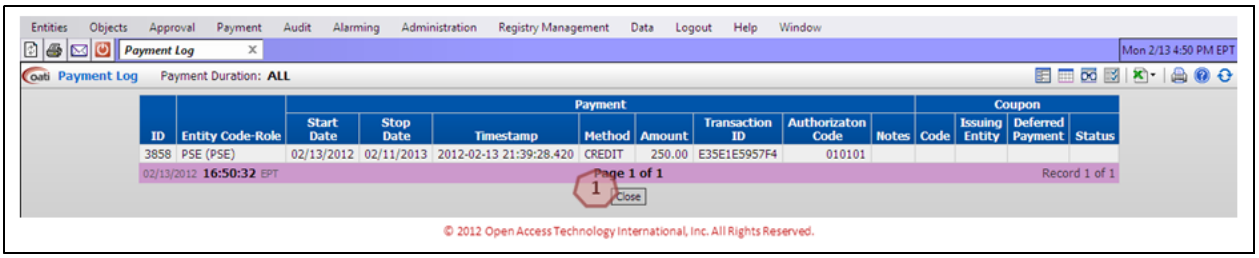
1 To view pending changes, navigate to Approval >> Pending Changes. The Pending Changes display will open.

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.



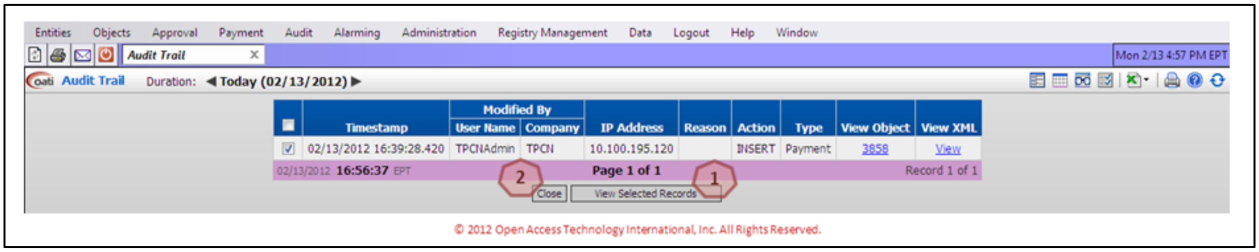
1 Click on the “Close” button to close the display.

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.

7. Audit Trail

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

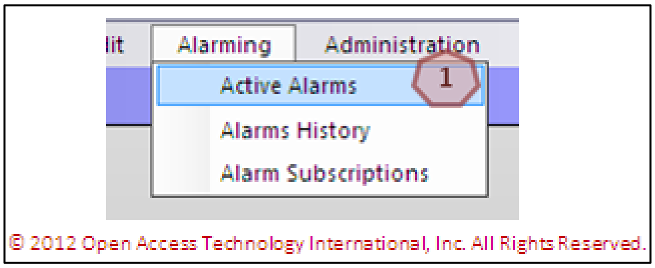


1 To view a selected record, click on the corresponding box to the record you wish to view. Click on the "View Selected Records" button to view the selected records in more detail.

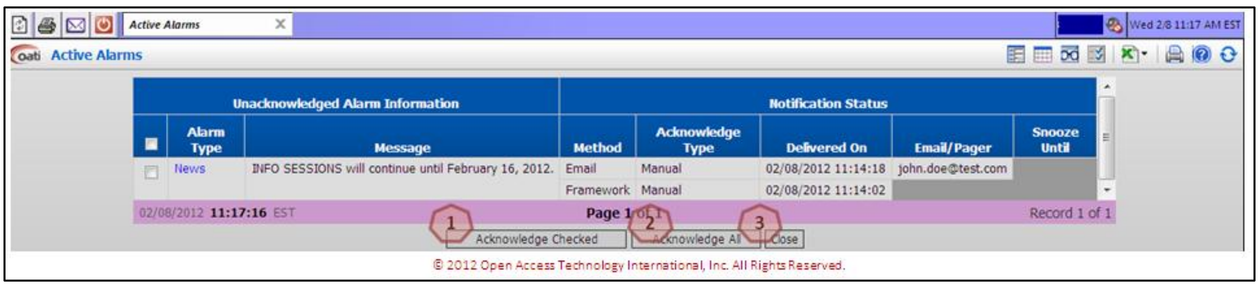
2 Click on the "Close" button to close the display.

8. Alarming

8.1 Active Alarms



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



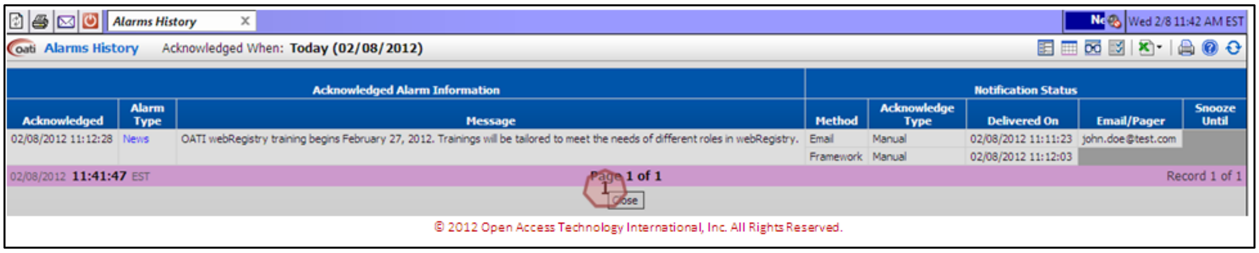
1 Click the "Acknowledged Checked" button to acknowledged checked alarms. Click on the corresponding box to the left of the Alarm Type to check an alarm. A checked alarm will have a checkmark in the box.

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.

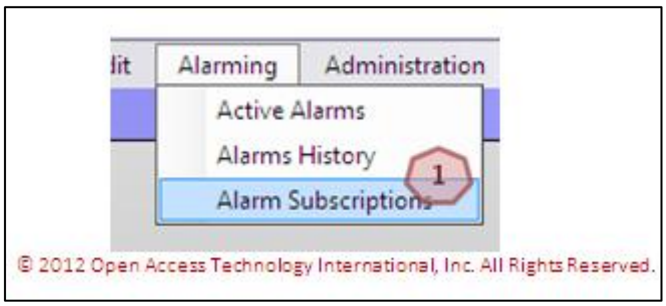
8.2 Alarms History

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.

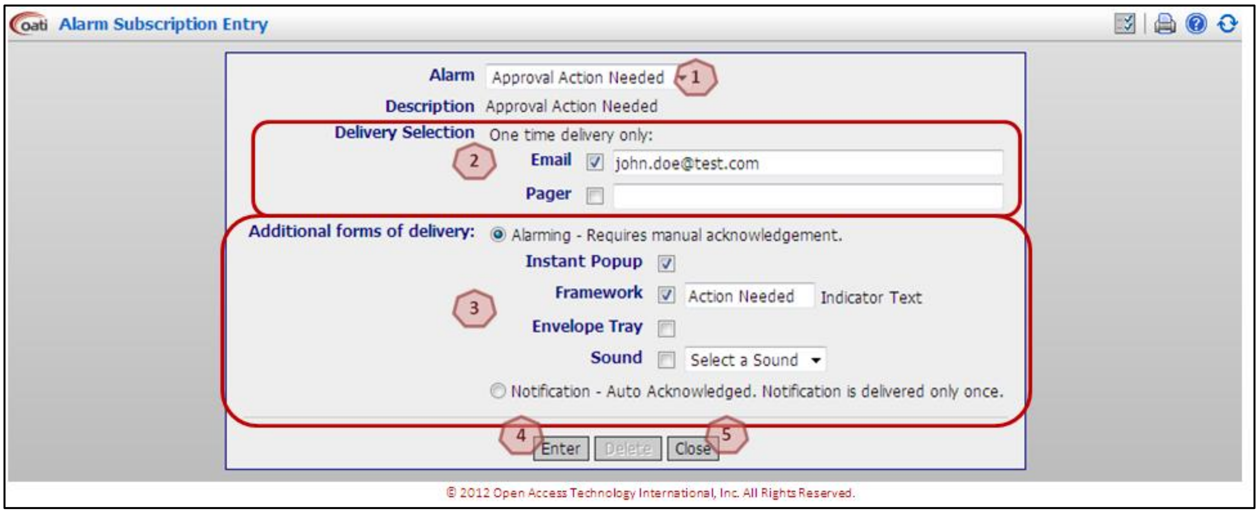
1 Click on the link under the “Alarm Type” column. This will open the Alarm Subscription Entry page, where modifications can be made.

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.



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.

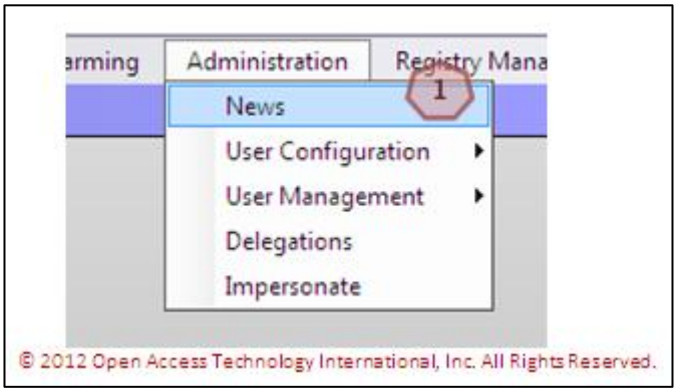
3 Determine additional forms of delivery. This includes the choice of manual or auto-acknowledgement of alarms, as well as the delivery. Delivery methods include sound and pop-up features.

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

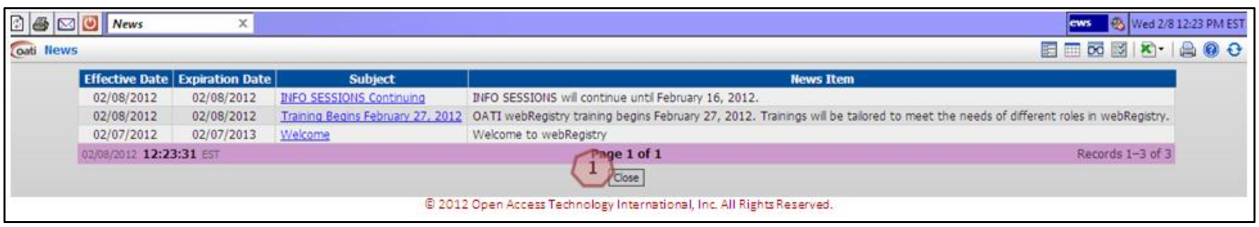
5 Click the “Close” button to close the display. No subscriptions will be created or saved.

9. Administration

9.1 News

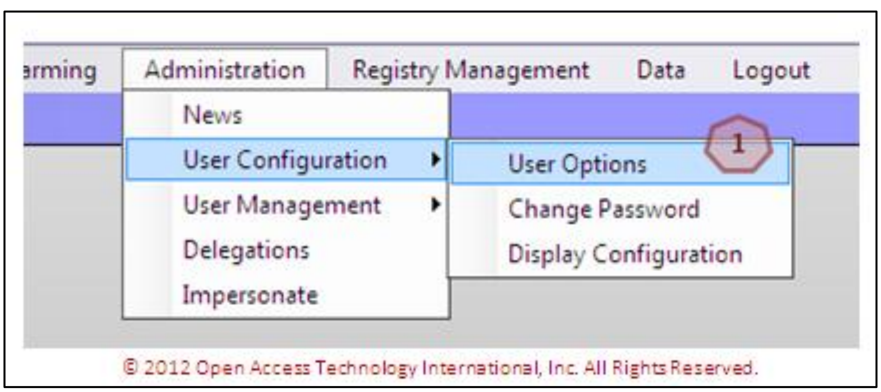


1 To view webRegistry news, navigate to Administration >> News. The News display will open.



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.

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.

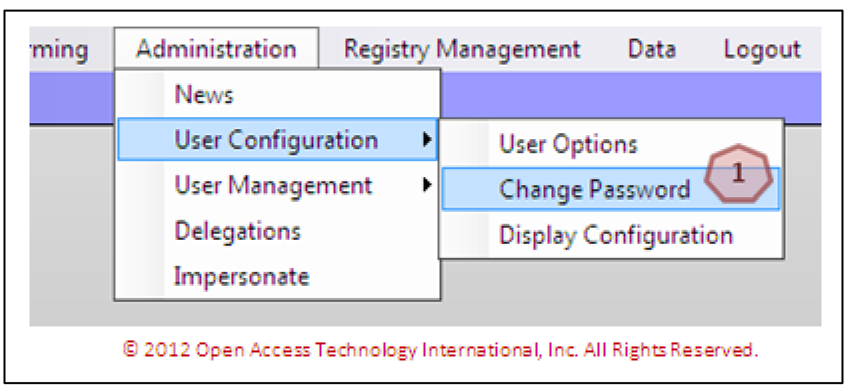
1 Click the "Save Only" button to save the configurations. Change will be available the next time the user logs in to webRegistry.

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.

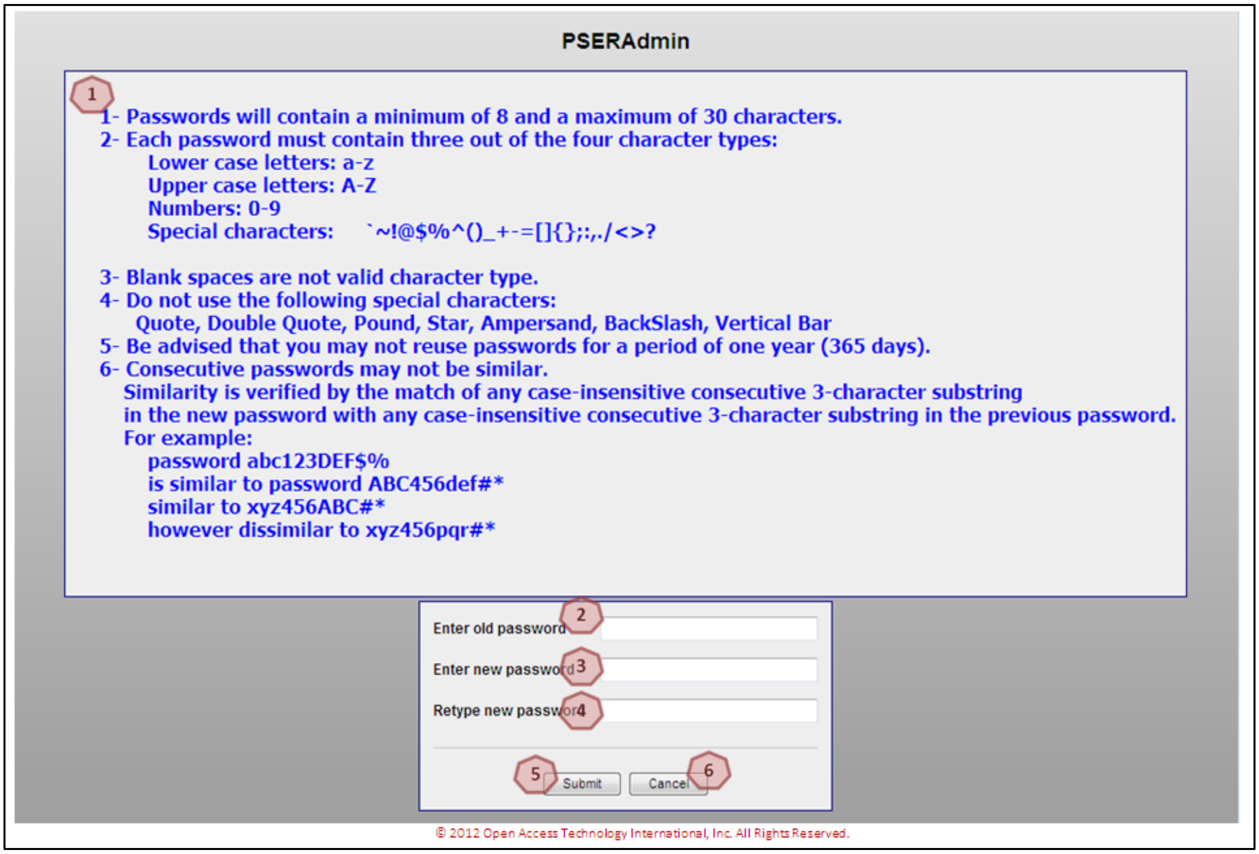
3 Click the "Cancel" button to cancel any changes. Changes will not take place.

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.



1 Please review the password criteria for assistance with password changes.

2 Enter the old password in this field.

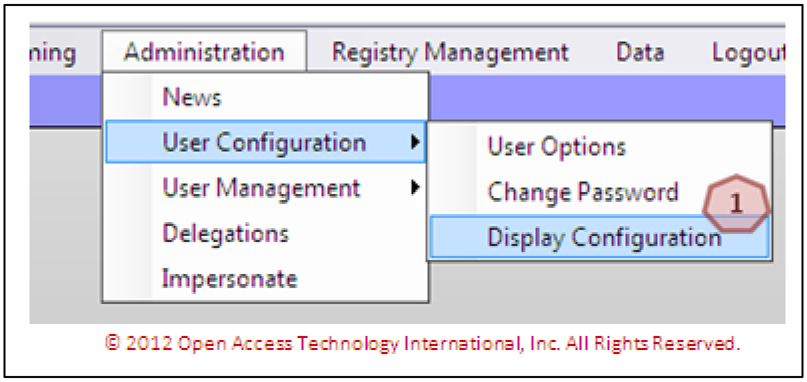
3 Enter the new password in this field.

4 Re-enter the new password in this field.

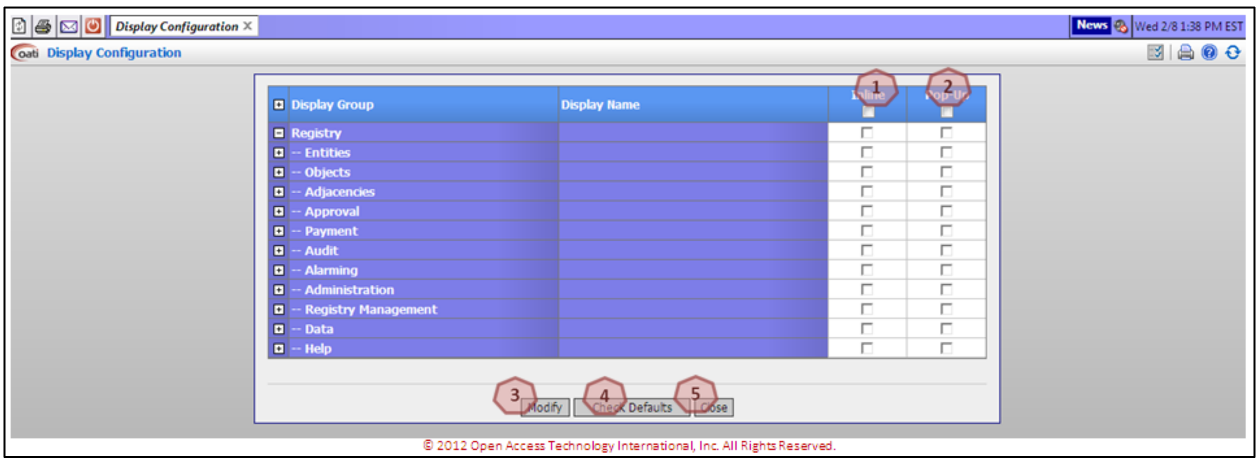
5 Click the “Submit” button to submit the new password.

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.

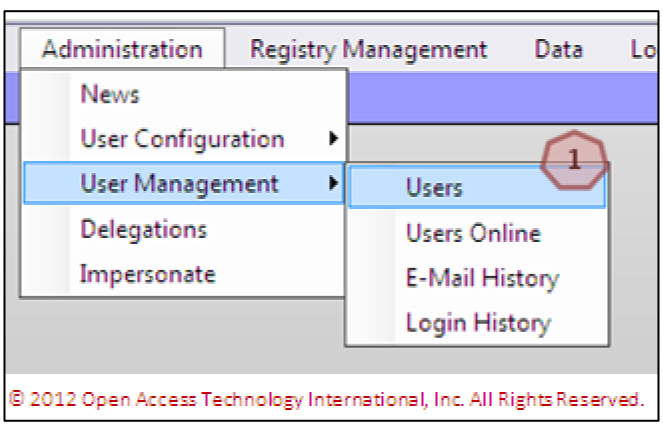
2 Click the “Save & Restart” button to save the configurations and be automatically logged out and logged back in to the system. Changes will be available immediately.

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

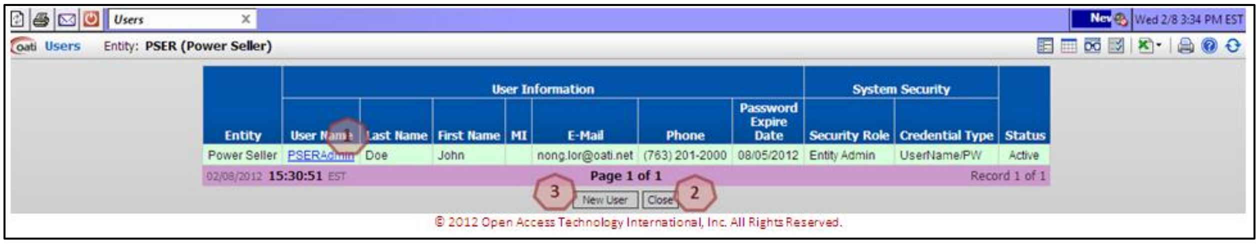
4 Click the “Check Defaults” button to select the default configuration choices.

5 Click the “Close” button to close the display. Changes will not be saved.

9.5 Creating a New User



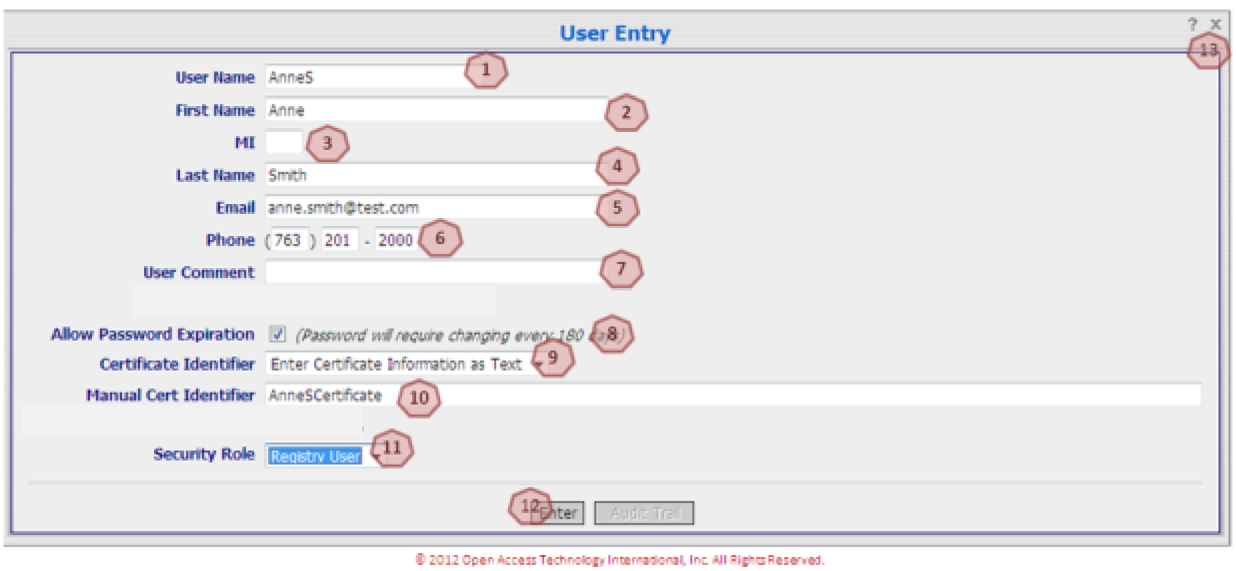
1 To create new users, navigate to Administration >> User Management >> Users. The Users display will open.



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.

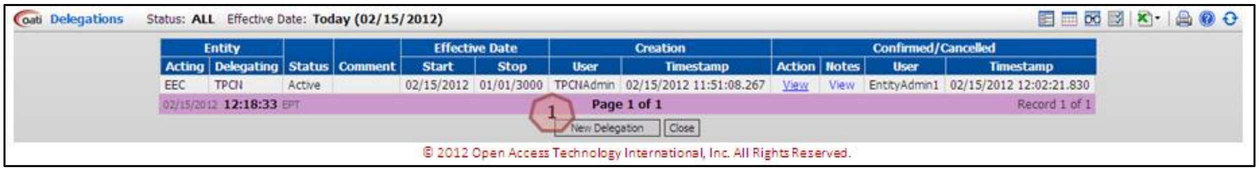
11 Select the Security Role of the user from the dropdown. Security Roles include Entity Administrator and Registry User. An Entity Administrator will have permission to create and edit data in the system. A Registry user has permission to view data, but cannot modify it.

12 Click the “Enter” button to create and save the new user.

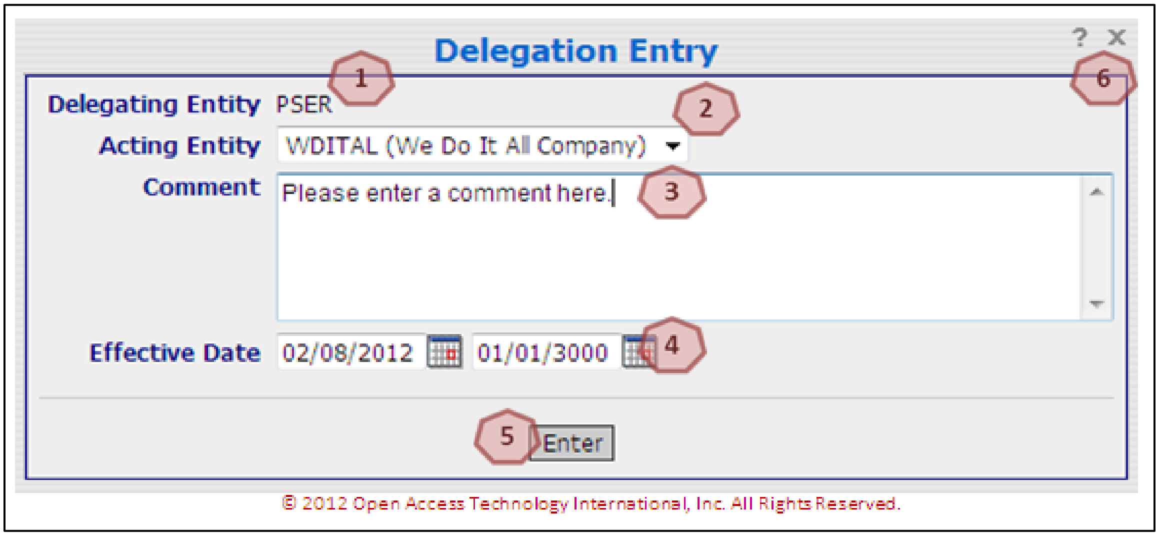
13 Click the “X” to close the display. Changes will not be saved and the user will not be created.

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.

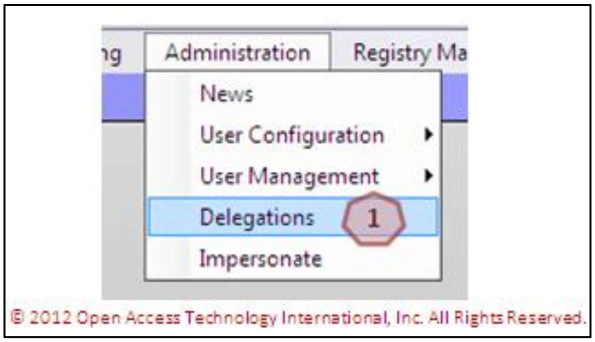
2 Select the company to delegate data management authority to from the Acting Entity dropdown.

3 Enter a comment about the delegation in this field.

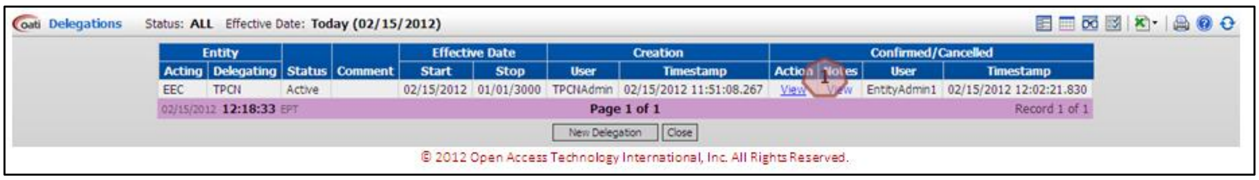
4 By default, the Effective Start Date will be the date the form is completed. The default Effective End Date will be 01/01/3000. Dates can be modified manually, or by using the calendar button.

5 Click the “Enter” button to create and save the delegation.

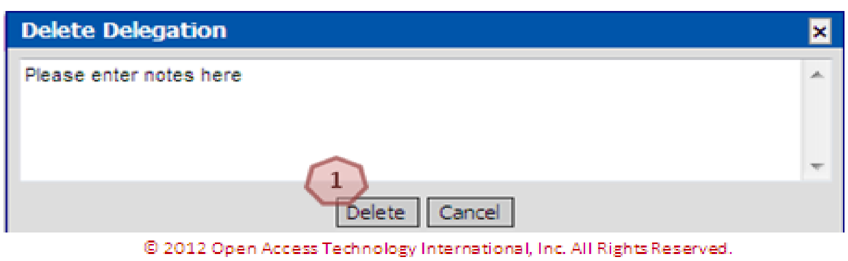
6 Click the “X” to close the display. The Delegation will not be created or saved.



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.

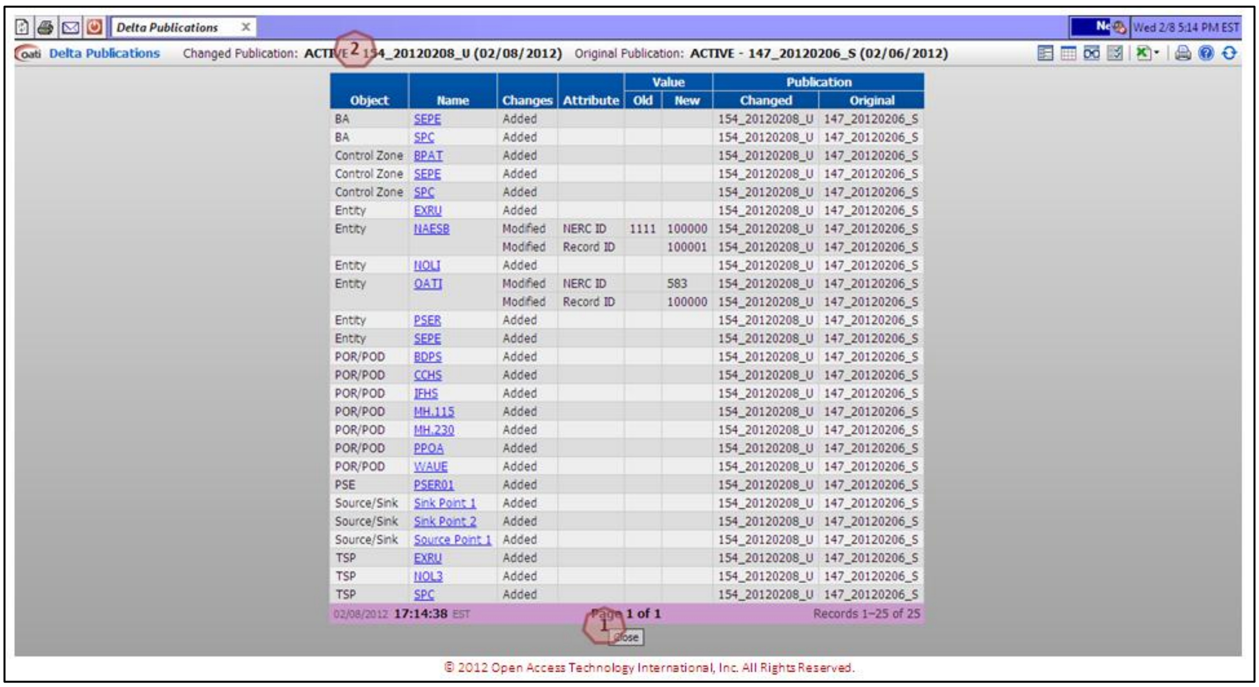


1 Click on the "Delete" button to end the delegation. The "Confirm" button and "Deny" button will be available depending on the available action. Clicking the "Confirm" button will accept the delegation responsibilities. Clicking the "Deny" button will reject the delegation request.

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.

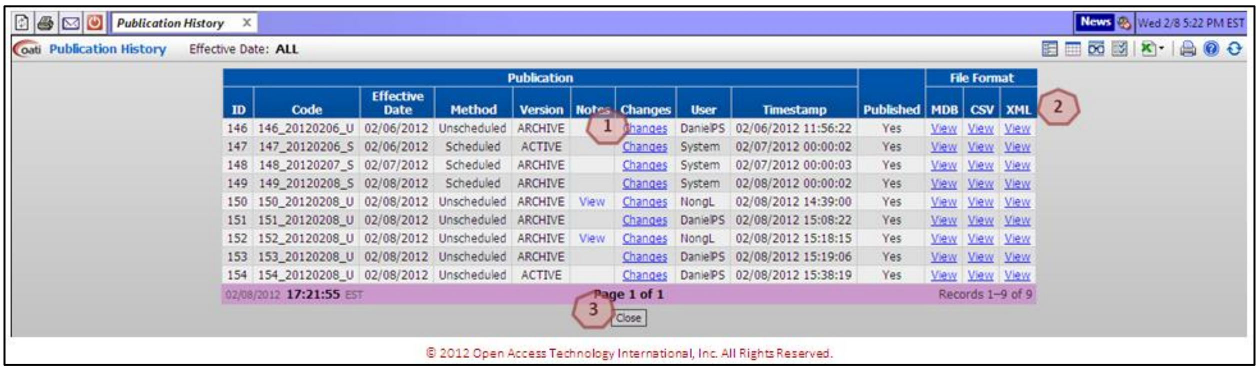


1 Click the “Close” button to close the display.

2 Click in 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.



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

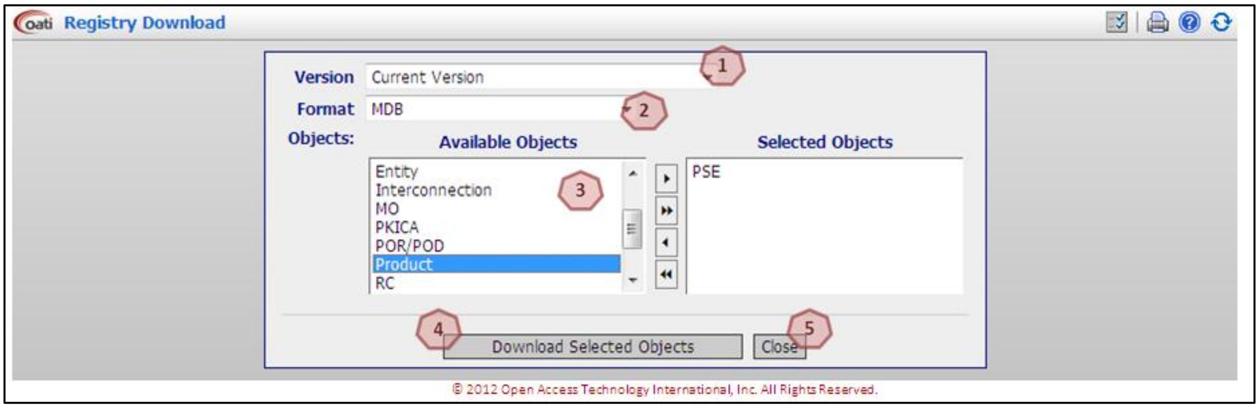
1 Hover over links in the “Notes” column, or click the link under the “Changes” column to view more information about the webRegistry Publication.

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.

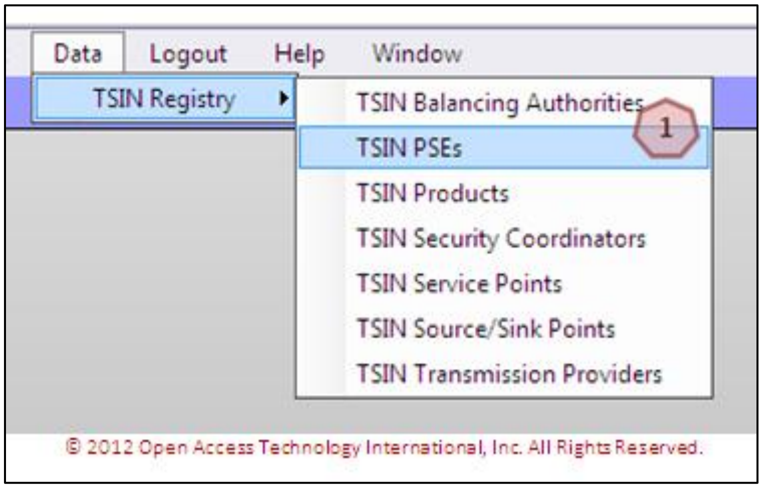
4 Click the "Download Selected Objects" to begin the download.

5 Click on the "Close" button to close the display. No download will take place.

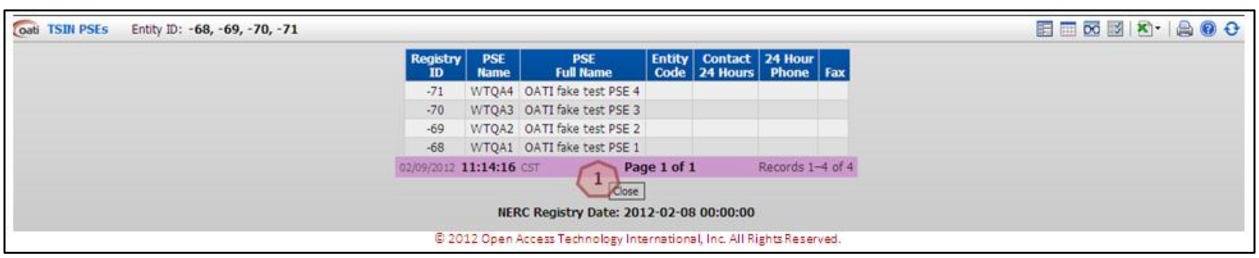
11. Data

Existing TSIN Data can be found in OATI webRegistry. For the purpose of this training, we will view PSE data.

11.1 PSE Data



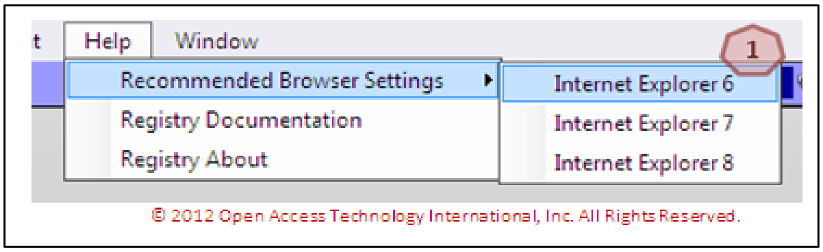
1 To view existing PSEs in the TSIN Registry, navigate to Data >> TSIN Registry >> TSIN PSEs. The TSIN PSEs display will open.



1 TSIN Registry PSE data will display. Click the "Close" button to close the display.

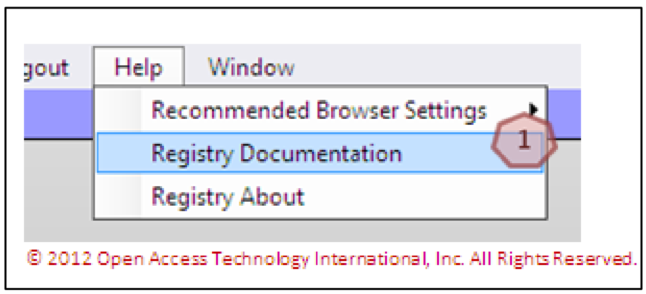
12. Help

12.1 Recommended Browser Settings



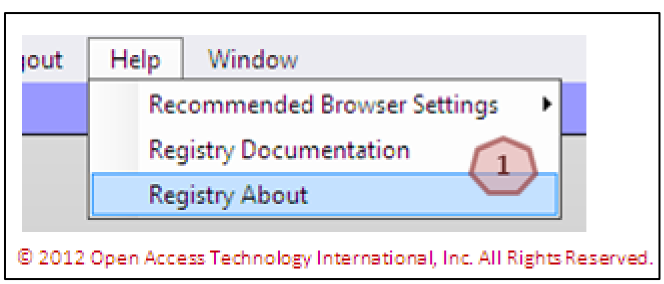
1 To find information on the recommended browser settings, navigate to Help >> Recommended Browser Settings >> selected IE. Documentation on how to best set up browser settings for that IE version will open.

12.2 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.

12.3 About



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

Filename: OATI webRegistry RE Quick Start Guide v1.1 JR 030212