

Electric Industry Registry OATI webRegistry™/SM Quick Start Guide v.2



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PROPRIETARY

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Background

Open Access Technology International, Inc. (OATI) developed and hosts the webRegistry system to perform the North American Energy Standards Board (NAESB) Electric Industry Registry (EIR) functions.

The EIR serves as the central repository for information required to support commercial, scheduling, and transmission management operations in North America. NAESB provided the requirements for the EIR.

webRegistry is a web-based system that allows industry participants to register and maintain their company information used by industry participants in business operations. In addition, companies can register new data and modify existing data that are used in transmission and scheduling procedures.

This Quick Start Guide describes how to complete the registration process in webRegistry. Additional guides on use of the system are available once registration is complete.

Introduction

Companies will need to register their Entity in webRegistry. A registering party will need to select an entity code. An entity code is a unique three or four digit alphanumeric identifier to identify a company in the registry. It will be beneficial to have certain information readily available when registering: the company's DUNS number and 24-hour contact information including phone number and email address. In addition, registering parties will need to know the role (e.g., PSE, BA, TSP) they want to register. Users will then need to select a separate three to six letter identifier for the particular role to form a Code-Role pair. Entities may register multiple Code-Roles in webRegistry. Quick Start guides are available for role-specific registration.

A digital certificate from a NAESB approved Certificate Authority (CA) is required to access the Application for Registration.



[Registered user? Click here to login.](#)

[Not a registered user? Click here to apply.](#)

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Note: If you already have a digital certificate you will not need to obtain an additional digital certificate in order to access the webRegistry system.

If you do not have a certificate, you can reserve an entity code for 60 days. After reserving your entity code, webRegistry provides links to Approved Certificate Authorities (ACA). If you click on “Not a registered user? Click here to apply.” you will be presented with a form where you will be able to reserve your entity code by supplying a code, entity name, and email address.



Entity Code

This is a unique character code created by the user. Only letters and numbers may be used.

The image shows a screenshot of the 'Entity Code Reservation' form. The form has a blue header with the title 'Entity Code Reservation' in white. Below the header, there are three input fields: 'Entity Code', 'Entity Name', and 'Email Address'. Each field has a white text box with a grey border. At the bottom of the form, there is a 'Submit Reservation' button with a black border and white text. In the bottom right corner of the form, there is a small copyright notice: '©2016 OATI, Inc.' A red line from the 'Entity Code' text box on the left points to the 'Entity Code' input field.



Your Entity Code of 9999 is now reserved for up to 60 days. You may use this Entity Code to acquire digital certificates. In order to apply for registration you must present a valid certificate from one of the following Certificate Authorities:

Open Access Technology International Inc - <http://www.oati.com>

Note: If you already have a digital certificate you will not need to obtain an additional digital certificate in order to access the webRegistry system.

If you have technical questions on the webRegistry application service, please contact OATI at support@oati.net or 763-201-2020. ©2016 OATI, Inc.

Upon obtaining your digital certificate you are ready to apply for registration in the webRegistry EIR.

Application

The first step in the registration process is filling out the application to register. *See example on next page.* When someone first visits webRegistry, they will view two links:

- 1.) "Registered user? Click here to login."
- 2.) "Not a registered user? Click here to apply."

Registered Users can click on the first link and log into the system. Non-registered users can click on the second link and fill out the Application for Registration. The Application for Registration includes limited information about the Entity and Applicant User.



[Registered user? Click here to login.](#)

[Not a registered user? Click here to apply.](#)

Note: If you already have a digital certificate you will not need to obtain an additional digital certificate in order to access the webRegistry system.



NOTICE TO USERS

This is a restricted software application that may contain U.S. Government Information 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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Information with an asterisk (*) is required.

- 1 Enter Entity Details. Enter information about your company, including the long name, Entity Code, and address.
- 2 Enter Applicant's Details. 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 Login ID when they are approved to access webRegistry.
- 3 Enter Manager's Details. Enter information for the Applicant's manager.
- 4 Enter the Applicant's Purpose. To complete this field, enter the Entity's or Applicant's reason for applying to webRegistry.
- 5 Read the Terms and Conditions. Terms and conditions must be reviewed and accepted in order to submit the application.
- 6 Check 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.

Note: This is optional.

Entity and Code-Role Registration

When the Application for Registration is approved, the user will receive two emails containing user credentials. The username will be the same as the username entered on the Application for Registration. The user will be an "Applicant User" and will have limited access to webRegistry.

The Applicant User can log into webRegistry with their login credentials and start completing the Initial Registration. Initial Registration includes submitting the Entity Registration Form and the Entity Code-Role Registration Form.

The Entity Registration Form includes some of the information entered in the Application for Registration. The Applicant User should complete the Entity Registration Form and create one Entity Code-Role.

- Click on the "Add Entity Code-Role" button to create the Code-Role. Initial Registration is completed only when both the Entity Registration and Entity Code-Role Registration Forms have been submitted for review.

Note: Both forms must be entered/submitted individually.

The screenshot shows the OATI Entity Registration web form. At the top, there are fields for NERC ID (FE), Entity Code (FE), Record ID, Entity Name (Training Electrical Company), Entity URL (www.trainingelectricalco.net), Entity Predecessor (Select if applicable...), Effective Date (04/26/2012), and Entity Code (Role). Below these are tabs for Identifiers, Locations, Affiliates, Contacts, and Everything. The Identifiers tab is active, showing a table with columns for Type (DUNS) and Identifier. The Locations tab is also active, showing a table with columns for Address (Headquarter), City (123 Training Lane), State (Minneapolis), Country (MN), and Postal (United States, 55418). The Affiliates and Contacts tabs are also visible. At the bottom, there are buttons for "Add Entity Code-Role", "Submit", and "Close". A copyright notice "©2016 OATI, Inc." is in the bottom right corner.

Optional information.

Opens all tabs at once for ease of navigation.

The Entity Code-Role Registration Form is where the user enters their first Code-Role. Additional Code-Roles may be entered after the initial registration has been approved. Click the “Enter” button to submit the Entity Code-Role Registration Form.

NERC ID		Tagging ID	
Entity	TEC, Inc. (Pending)	Entity Role	Please select one...
Long Name	Training Electrical Company		
Entity Role Code			
Effective Date	04/26/2012		01/01/3000

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

Applications			
Application	Service	Load from ASP	URL
Select if applicable...	Select if applicable...	Select if applicable...	www.trainingelectricalco.net

Enter Close ©2016 OATI, Inc.

Return to the Entity Registration Form, shown on page 6, and click the “Submit” button, displayed in the screenshot below.

Add Entity Code-Role Submit Close ©2016 OATI, Inc.

Once the Entity Registration is submitted, the user must log out and wait for an email to be sent to the user confirming approval of the registration. The user must then log back in and will be prompted for payment. Payment may only be made via credit card. Once payment is made, the registration process is completed, and will be published in the active registry after two business days. *See next page for Payment Entry display.*

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 TC

<input type="checkbox"/>	Entity Code Role	Subscription	Status	Remaining Days	Start	End	Amount
<input type="checkbox"/>	TBA3 (BA)	Initial	Payment Required	0	05/01/2013	04/30/2014	300.00

Total Amount 0

Notes

Name on Credit Card

Street Address

City

State

ZipCode

Credit Card Type

Credit Card Number

Expiration Date /

Security Code

Click the "Enter" button to submit the payment.