TRADE SECRET

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1. Introduction

The Electric Industry Registry (EIR) will serve as the central repository for information required to support commercial, scheduling, and transmission management operations in North America. The North American Energy Standards Board (NAESB) has provided the requirements for the EIR. Open Access Technology International, Inc. (OATI) has developed the webRegistry system to perform NAESB EIR functions. 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 User Guide describes the functionality of the system and how to enter and maintain data.
2. Dashboard and Graphical User Interface

Diverse functions and buttons are available throughout the webRegistry system. The system also includes options such as filtering capabilities and Column Configuration.

2.1 Functional Buttons

Application Options:

- Refresh active window. Clicking this button brings summary pages back to Page 1.
- Print active window using the browser default print options.
- Email OATI Help Desk.
- Log out of the webRegistry system.
- Brings up the associated Help Console page.

Summary Page Options:

- Filtering Options - Use the filtering options to search for specific data to be displayed in the summary table.
- Column Configuration - Use the column configuration to display or hide certain columns on summary pages and arrange the order of the columns.
- Display View - Save specific filtering options and column configurations as a “View” that can be accessed at any time. Views may be named, renamed, or deleted as appropriate.
- Options - Set individual settings for each display.
- Export to Excel - Click on this icon to export the summary results to a .csv file type or an .xls file type, which can be used in Microsoft Excel® or another spreadsheet program. The .xls file type will retain formatting.
- Refreshes the current display, keeping summary pages on the current page.
3. Entity Registration

Companies will need to register their Entity in webRegistry. A registering party will need to select an entity code. An entity code is a three or four alphanumeric characters unique 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 for. Users will then need to select a separate three to six alphanumeric character identifier for the particular role to form a code role pair. Entities may register multiple code roles in the registry. Quick Start guides are available for role-specific registration. Please refer to the corresponding Quick Start Guide for a step-by-step walkthrough of the registration process.

3.1 Application for Registration

The first step in the registration process is filling out the application to register. When someone first visits the webRegistry system, they will view two links: “Registered user? Click here to login” and “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 NAESB EIR system.
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.

![Application for Registration](image)

In order to complete the registration process in the NAESB EIR, you will need to obtain a digital certificate from one of the following NAESB Authorized Certificate Authorities:

- SSL.com - [https://www.ssl.com](https://www.ssl.com)

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

A digital certificate from a NAESB approved Certificate Authority (CA) is required to access the Application for Registration. If the user does not have a Digital Certificate, the user can reserve an entity code for 30 days allowing the user to then obtain a certificate from an approved CA.
3.2 Initial Registration

Once the Application for Registration is approved, the user will receive two emails containing their 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 the system with their login credentials and start filling out the Initial Registration. Initial Registration includes filling out the Entity Registration page and the Entity Code-Role page. Section 4 covers Entities and Entity Code-Roles in more detail.

The Entity Registration page will bring over some of the information entered in the Application for Registration. The Applicant User is to fill out the Entity Registration page 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 have been submitted for review. (Please Note: Both forms must be entered/submitted individually).

The Entity Code-Role Entry page is where the user enters their first Code-Role. Additional Code-Roles may be entered after the initial registration has been approved.

4. Entities Menu

The main administrative object within webRegistry is an entity. Entities may have multiple functions (or roles) in the registry. All operations allowed in webRegistry are performed by users operating as representatives of an entity that has been recognized and recorded in the system as a legitimate industry participant.
A user that has access to webRegistry must be assigned to one, and only one, entity. The scope of user functions in webRegistry (i.e., a set of user interface displays available to users, as well as actions that users are allowed to perform on those displays) is determined by the assigned user role.

4.1 Entities

Entities will be created when an application for registration is accepted. The details of an entity will be filled out during the Initial Registration process of an entity.

To locate Entities, navigate to Entities > Entities. To create a new entity, click on the “New Entity” button.

To get to the Entity Entry page, click on the Entity Code link in the Code column. Modifications to entities can be made from this page.

4.2 Entity Code-Role

Entities may have various functional roles in the electric utility industry. The following roles are supported in webRegistry:

**Operations Roles**

- Reliability Coordinator (RC)
- Balancing Authority (BA)
- Market Operator (MO)
- Transmission Service Provider (TSP)
Merchant Roles

- Purchasing Selling Entity (PSE)
- Load Serving Entity - implies PSE (LSE)
- Generation Serving Entity - implies PSE (GSE)

Additional Roles

- Registry Administrator (Reg Admin)
- NAESB
- Application Service Provider (ASP)
- Electric Reliability Organization (ERO)
- Regional Reliability Organization (RRO)
- PKI Certification Authority (PKICA)
- Observer (OBS)

Neither Entity Code-Role nor Entity Code is unique in webRegistry. It is possible for the same entity to register several identical roles, such as several PSE desks. It is also possible for an entity to register several different roles that have the same code, such as a BA role and PSE role that may share the same code. However, the combination of an Entity Role and Entity Code will be unique in webRegistry. An Entity cannot have two (2) BA roles with the same code.

A named Entity Role (i.e., the Entity Role/Code pair) represents a unique instance of a business unit in the electric utility industry with clearly defined operational responsibilities, object ownership, and approval rights.

Users in webRegistry are assigned to entities and can view data and perform data entry/modification functions for all roles/codes assigned to their entities.

To locate an Entity Code-Role, navigate to Entities > Entity Code-Role. To create a new entity Code-Role, click on the “New Entity Code-Role” button.
Roles may be added as needed by the industry through NAESB and the ERO. OATI webRegistry will be able to support the registration of any entity role defined in the NERC Functional model, once the attributes of such role are defined.

4.3 Purchasing-Selling Entities

The Purchasing-Selling Entity (PSE) display shows users the PSEs within the system. Information provided about the PSE includes the name, NERC ID, and approval status.

To locate Purchasing-Selling Entities, navigate to Entities > Purchasing-Selling Entities. To create a new PSE, click on the “New PSE” button.

4.4 Regional Reliability Organizations

The Regional Reliability Organizations (RRO) display shows users the RROs within the system. Information provided about the RRO includes the name, NERC ID, and approval status.
To locate Regional Reliability Organizations, navigate to Entities > Regional Reliability Organizations. To create a new RRO, click on the “New RRO” button.

4.5 Reliability Coordinators

The Reliability Coordinators (RCs) display shows users the RCs within the system. Information provided about the RC includes the name, NERC ID, and approval status.

To locate RCs, navigate to Entities > Reliability Coordinators. To create a new RC, click on the “New RC” button.

4.6 Transmission Service Providers

The Transmission Service Providers (TSPs) display shows users the TSPs within the system. Information provided about the TSP includes the name, NERC ID, and approval status.

To locate TSPs, navigate to Entities > Transmission Service Providers. To create a new TSP, click on the “New TSP” button.
4.7 Market Operators

The Market Operators (MOs) display shows users the MOs within the system. Information provided about the MO includes the name, NERC ID, and approval status.

To locate MOs, navigate to Entities > Market Operators. To create a new MO, click on the “New MO” button.

4.8 Balancing Authorities

The Balancing Authorities (BAs) display shows users the BAs within the system. Information provided about the BA includes the name, NERC ID, and approval status.

To locate BAs, navigate to Entities > Balancing Authorities. To create a new BA, click on the “New BA” button.

5. Objects Menu

5.1 Control Zones

Control Zones (sometimes referred to as Local Balancing Authority Areas or LBAs) are subsets of balancing areas that are used by reliability tools, such as the Interchange Distribution Calculator (IDC).
A Control Zone can only be registered by a BA within the territory of its operation. By default, each BA must register a Control Zone whose name is identical to the name of the parent BA. webRegistry will automatically create a matching Control Zone for each new balancing authority.

An Entity Administrator user for a BA entity code can register additional Control Zones as subsets of the balancing area, including associations with the parent balancing area.

An association of a Control Zone with source/sink points is established when a source/sink service point is defined in webRegistry.

To locate Control Zones, navigate to Objects > Control Zones. To create a new Control Zone, click on the “New Control Zone” button.

5.2 Flowgates

The Book of Flowgates (BOF) is an independent NERC system that allows users to define the composition of flowgates in the Eastern Interconnection for use in the IDC. BOF currently provides all capabilities required to create, validate, and maintain critical transmission interfaces that are monitored by Reliability Coordinators in IDC. This functionality will not be
duplicated in webRegistry. Flowgate management will continue to reside in the mission-critical BOF system.

OATI webRegistry will import the BOF data for presentation only. Each time a new BOF definition is exported to the IDC, a similar export will be provided to webRegistry.

The presentation of flowgate elements and filtering on the flowgate summary will be similar to what is currently provided in the BOF.

To locate Flowgates, navigate to Objects > Flowgates.

5.3 Interconnections

Three (3) synchronous interconnections will be modeled in webRegistry as base registry data and will be maintained by Registry Administrators. NAESB and ERO approvals will be required for interconnections.

To locate Interconnections, navigate to Objects > Interconnections.
5.4 POR/POD Points

An Entity Administrator user for a TSP entity code will be able to register POR/POD service points, including association with the parent TSP.

For each service point, users can specify the point name and role (POR, POD, or both). No approval is required for the service point registration.

To locate POR/POD points, navigate to Objects > POR/POD Points. To create a new POR/POD point, click on the “New POR/POD Point” button. Alternatively, to upload POR/POD points, click on the “POR/POD Points Upload” button.
5.5 Source/Sink Points

Source/sink and source/sink points can be registered in webRegistry by Entity Administrators of either BA or PSE entities.

Entity Administrators for PSE entities codes can register source/sink or source/sink points in webRegistry, including the associations with hosting Control Zones. The approval policy requires the corresponding BA to approve such registration.

Entity Administrators for the BA can register source/sink points in their Control Zones. When registering a source/sink point, the BA can select one or more PSE entity codes that will be allowed to use this service point as either the source or sink. No PSE approval of such registration will be required in the initial configuration of the approval policy.

After a source/sink point has been approved and registered in the system, both the PSE and the BA will be considered its dual owners. Both parties can perform modification and deactivation actions on the source/sink object. When such actions are taken by the PSE, a BA approval will be required.

Note: BA modifications or deactivations of source/sink objects require no additional approvals.

To locate Source/Sink Points, navigate to Objects > Source/Sink Points. To create a new source/sink point, click on the “New Source/Sink Point” button. Alternatively, to upload source/sink points, click on the “Source/Sink Points Upload” button.
5.6 MRD Flowgates

OATI webRegistry will provide the ability to record Market Re-Dispatch (MRD) objects, flowgates, and resources.

ERO entity administrators will be responsible for the management of MRD data in webRegistry. No approval will be required for MRD objects.

To locate MRD Flowgates, navigate to Objects > MRD Flowgates.

5.7 MRD Resources

OATI webRegistry will provide the ability to record MRD objects, flowgates and resources, in a manner consistent with how these objects are currently modeled in the existing TSIN Registry.

ERO entity administrators will be responsible for the management of MRD data in webRegistry. No approval will be required for MRD objects.

To locate MRD Resources, navigate to Objects > MRD Resources.

5.8 Pseudo-Ties

Pseudo Tie functionality allows webRegistry Entity System Administrators to register Pseudo-Tie Transactions between Source and Sink BAs and the affected TSPs. Pseudo-Ties can only be registered by an Entity that has registered a BA or PSE role-code.

To locate Pseudo-Ties, navigate to Objects > Pseudo-Ties.
6. Approval Menu

6.1 Approval Configurations

NAESB, ERO, and BA Entity Administrator users in the webRegistry system can construct how approvals are performed, including if an approval is necessary. These users can also arrange the approval period, reminder period, and the event type of the approval.

To locate Approval Configurations, navigate to Approval > Approval Configurations. To create a new approval configuration, click on the “New Approval Configuration” button.

6.2 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 have been approved will be highlighted in gray, while denied submittals are highlighted in red.

To locate Approval History, navigate to Approval > Approval History.
6.3 Approval Overrides

The Approval Overrides display indicates to Administrative users the approval overrides allowed in the system.

To locate Approval Overrides, navigate to Approval > Approval Overrides. To create a new approval override, click on the “New Approval Override” button.

6.4 Pending Approvals

Entity Administrator users that have approval rights will be notified via a system alarm of new/pending approvals requiring action. A reminder alarm can also be generated 12 hours prior to an approval deadline for pending changes still waiting for approval.
To locate Pending Approvals, navigate to Approval > Pending Approvals. To either approve changes or deny changes, check the checkboxes and click on the “Approve Checked” or “Deny Checked” buttons, respectively.
7. Payment Menu

The webRegistry system allows users to pay their annual dues directly through the system by using a major credit card.

Annual dues are based on the number of Code-Role instances registered by a given entity in webRegistry. After the initial registration, an entity will be given a grace period of thirty days, during which it is expected to fulfill its payment obligations. If a payment has not been posted during the grace period, an entity registration may be terminated and result in terminations to existing data object registrations.

Initial Registration of a Code-Role: $300.00 (USD)

Annual Renewal of a Code-Role: $200.00 (USD)

Late payment charges may be assessed on payments made after the due date, where applicable.

Only Entity Administrator Users can make payments in the system on behalf of its entity.

Annual Payments are due on the first of the month of the anniversary of the first Code-Role registration. If, after paying its annual dues, an entity registers additional Code-Roles, the additional dues for this Code-Role will be adjusted and an additional prorated payment will be requested.

Entity Administrators can pay for dues on the Payment Entry display by entering customary credit card information. Upon submission of payment, webRegistry will send an email receipt to the email address provided. The Payment Log display lists the entity’s payment history in the system. No other forms of payment are accepted.
### 7.1 Subscription Summary

The Subscription Summary display shows entities a summary of their subscriptions and when payments are due.
To locate Subscription Summary, navigate to Payment > Subscription Summary. To make a payment, click on the “New Payment” button.

![Subscription Summary Table](image)

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8. Audit Menu

8.1 Audit Trail

The webRegistry system will provide a comprehensive audit trail that will allow Users to track the creation and removal of objects, changes in object attributes, and approval actions taken by users. Each event will be time stamped and the identity of the responsible user retained. Various audit trail views can be generated in the system, enabling Registry Administrators to track the object’s lifecycle in the system.

In addition to the audit trail, most webRegistry summaries support the historical viewing of data objects as they were officially recorded in published registry versions. Users can select the version index in the summary display filter and view the object’s version that was included in a given registry publication.

To locate the audit trail, navigate to Audit > Audit Trail.
9. **Alarming Menu**

OATI webRegistry provides user-designed notification management. The system issues notification alarms to Users based on their roles. Users can individually select which of the role-specific alarms they would like to receive, and in what form. webRegistry supports different forms of notification delivery, and all issued notifications are recorded in the Audit Trail.

9.1 **Active Alarms**

The Active Alarms display indicates unacknowledged alarms for a given user. Bulk and individual alarm acknowledgment can be performed on this display.

To locate active alarms, navigate to Alarming > Active Alarms.

9.2 **Alarms History**

The Alarms History displays all alarms issued by webRegistry for a given user.
To locate alarms history, navigate to Alarming > Alarms History.

9.3 Alarm Subscriptions

The Alarm Subscriptions displays a list of a given user’s subscriptions. New subscriptions can be added or removed on this display.

To locate alarm subscriptions, navigate to Alarming > Alarm Subscriptions. To create a new subscription, click on the “New Subscription” button.
10. Administration Menu

10.1 News

The News display is a bulletin for webRegistry users. News items are posted by Registry Administrators and NAESB users. News items can include such topics as upcoming trainings, updates to the system, or any information to be disseminated to the large group of registered industry users.

10.2 User Configuration

The User Configuration display allows users to customize user options within the webRegistry system, including page size, menu options, and password changes.

10.2.1 User Options

The User Options page allows users to set personal User Account settings to be used for their account only. Users will be able to change their password at any time, determine a menu style for navigation of the menu options, and define the page size for each summary.

The user’s account information, as entered by the Company Administrator, will be displayed on this page. The password expiration date, including how many days left on the current password, will also be presented. Passwords are valid for 180 days. Users will receive email notifications prior to password expiration.

Page Size: Enter how many records to be displayed on summary pages. To decrease page load-time, use the default page size of 30 records.
**Menu Style:** Select whether to have menus expand automatically when the cursor hovers over them (Web) or to expand only when clicked on (Application).

**Default Reason for Change:** Every time a modification is made to an Entry page, the user making the modification will need to provide a “Reason for Change”. This option will control which “Reason for Change” is pre-selected throughout the system.

To locate User Options, navigate to Administration > User Configuration > User Options.

![User Options](image)

### 10.2.2 Change Password

Users can also change their passwords through the Change Password display. To locate this display, navigate to Administration > User Configuration > Change Password. Passwords can be changed at any time, but must be changed at least every 180 days. Password criteria is listed on this display.
10.2.3 Display Configuration

OATI webRegistry users can choose the display configuration of their preference. Display groups can be either set up as inline or pop-up.

To locate the display configuration, navigate to Administration > User Configuration > Display Configuration.
10.3 User Management

10.3.1 Users

All users must present a valid and unique PKI-compliant security certificate to access webRegistry. Certificates may not be linked to more than one user, and generic multi-user certificates are not supported or allowed.

Users’ ability to view and change data in webRegistry is derived from user roles assigned to them. The following user roles are supported in webRegistry:

- Entity Administrator
- Registry User

Entity Administrators will create new accounts for users in their entities and assign proper roles to them at creation. They will also perform payment of annual dues and have permissions to create, modify and remove the Entity’s data in the system. Registry Users have permission only to view an Entity’s data.

To locate users, navigate to Administration > User Management > Users.

10.3.2 Users Online

Administrator Users can view who is online in the webRegistry system from their company through the Users Online display.

To locate users online, navigate to Administration > User Management > Users Online.
10.4 Delegation

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

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

The Delegating Entity will be pre-populated with the user’s Entity name.
Select the company to delegate data management authority to from the Acting Entity dropdown.

Enter a comment about the delegation in this field.

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.

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

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

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

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.
To perform the data entry for a delegating entity, navigate to Administration > Impersonate. This will bring up the Impersonate Users display with a list of users from the delegating entity.

Click on the “Impersonate” link for an Entity Admin user from the delegating company.

When a user is impersonating a user, the user being impersonated will show up on the top right of the user’s screen. The acting user will be able to make changes to entity, role(s) and objects belonging to the entity of the user being impersonated.

Click on the “Impersonating” link on the top right of the screen to stop impersonating the user.
11. Registry Management Menu

11.1 Delta Publications

The Delta Publication display shows a summary of changes for a given publication. At the time of publication, the system compares the state of each published data record with its state in the previous publication and identifies the changes.

To locate Delta Publications page, navigate to Registry Management > Delta Publications. Use the filtering options to filter for one publication, and the page will display all changes associated with the publication.

11.2 Publication History

The Publication History display shows a summary of all registry publications (scheduled and unscheduled) along with links to corresponding data files.

To locate Publication History, navigate to Registry Management > Publication History.
To view the registry publication eXtensible Markup Language (XML) files, click on the “View XML” link next to the registry publication that the user would like to view the XML files for.

Click on the individual XML file links to see the data inside the XML files.

11.3 Registry Download

This display will allow users to download data files associated with Registry publications in XML format. Downloads in CSV or MDB are no longer available.

To locate the Registry Download, navigate to Registry Management > Registry Download. To download selected objects:

1. Select the registry publication version.

2. Select Format = “XML”.

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Click on the “Download Selected Objects” button.

A window will open with the available XML files to download:

1. The currently selected Publication Version, Effective Date, and file Download Format.
2. Click on the link associated to the file to download.
3. Click on the “Close” button to close the display. No download will take place.
4. Click on the “Refresh” button to refresh the contents on the display.
12. Help

12.1 webRegistry Online Help

For additional assistance with any display in the webRegistry system, click on the “webRegistry Online Help” link in the “Help” menu. The help console will offer topical information in a searchable format.

The question mark in the upper right hand corner of the display will also open the webRegistry Online Help console.

12.2 Recommended Browser Settings

OATI webRegistry supports Internet Explorer 11. Associated documentation guides a user through recommended browser settings for the corresponding Internet Explorer release.

To locate the recommended settings, navigate to Help > Recommended Browser Settings > Internet Explorer version.

12.3 Registry Documentation

OATI webRegistry includes related documentation to assist users with the system.

To locate documentation, navigate to Help > Registry Documentation.
13. Registry Publication Schedule

A pending registry is published at 12:00 AM CST and becomes effective at 12:00 AM CST the following day. For example, a pending registry published at 12:00 AM CST Tuesday becomes effective 12:00 AM CST Wednesday. There are a few exceptions:

1. A pending registry is never published on weekends (Saturday and Sunday). A pending registry is only published on weekdays (Monday through Friday). This means that a new registry never becomes effective on Sunday and Monday.

2. A pending registry never becomes active on a day that NAESB has registered in webRegistry as a holiday. However, a pending registry is published on a holiday. For example, Thanksgiving always falls during the work week on a Thursday. So, there will be no pending registry published at 12:00 AM on Wednesday to be effective 12:00 AM on Thursday. However, a pending registry will be published on 12:00 AM Thursday to be effective 12:00 AM Friday.

Note: Emergency publications are exempt from the above rules, and may be published at any time.